



Chris Briggs Consulting
Culture & Brand Aligned

Big picture, wood products, what is the market demanding?

Forestry Australia Conference 2025



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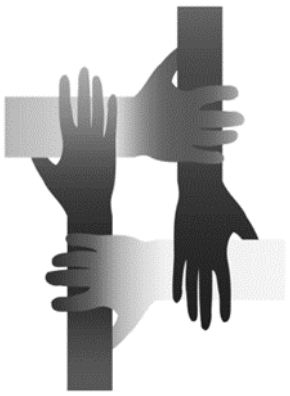
Outline of Today's Presentation

- What every market wants
- Market Mapping
- Knowing your customers' customers' customers
- Timber framing – demonstration of above & how steel is doing it better; the campaign objectives
- Conclusions – last thoughts & next steps

“Continued steel market share growth threatens the asset value of our whole supply chain and risks future forest valuations.”



What every market wants – Price is NOT #1

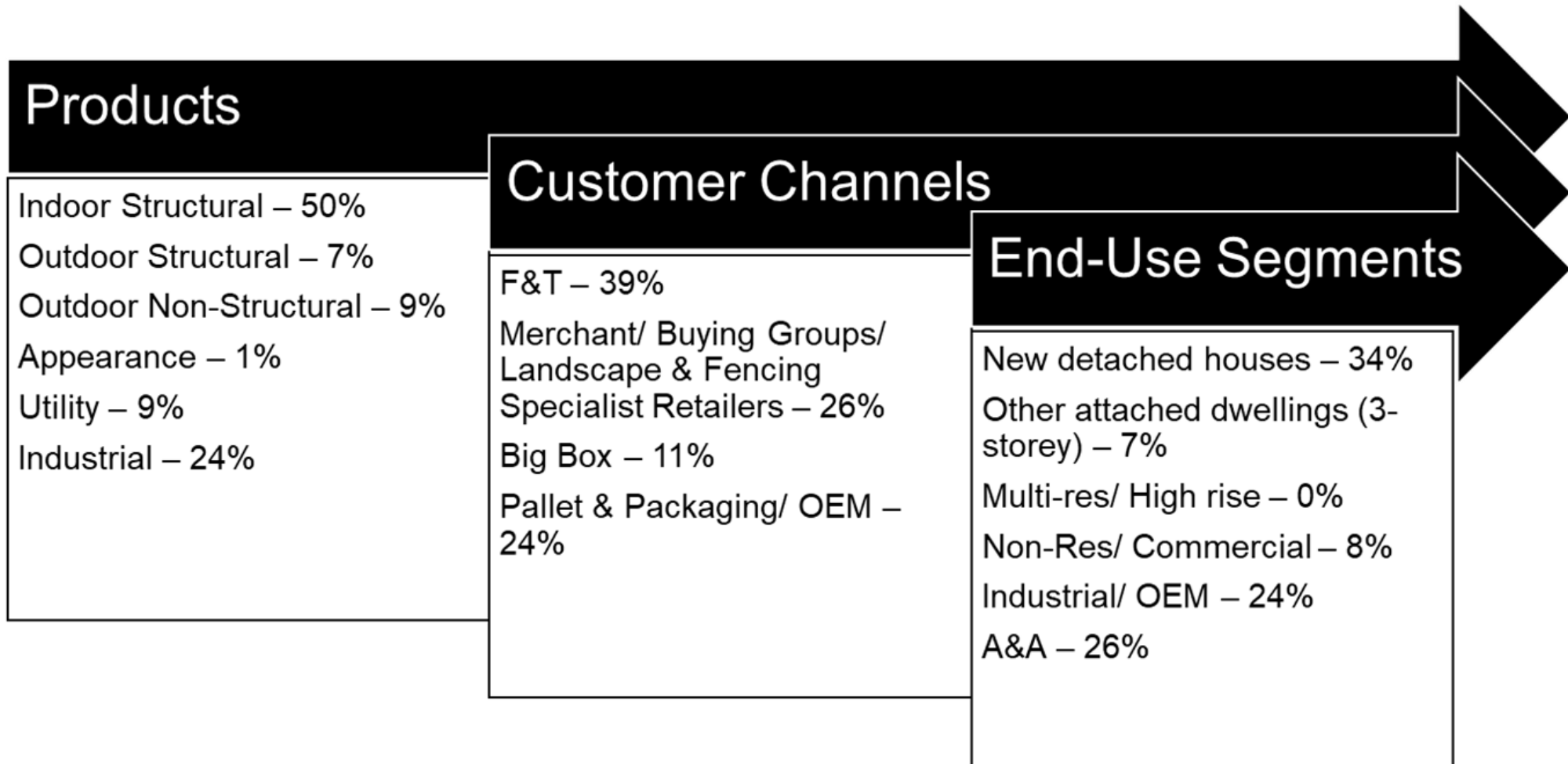
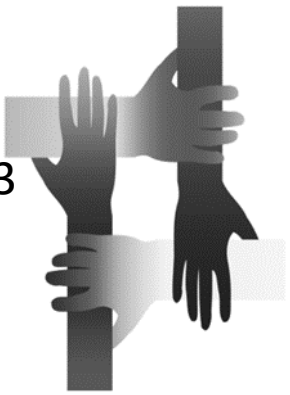


1. Product or service quality/ consistency
2. Reliable supply
3. Ease of doing business
4. Trust/ Relationship - access
5. Value for money

For B2B, consistency of performance today, along with innovation for future proofing, so you're viewed as long term player that will remain competitive

Market Mapping

Current Sawnwood Softwood Consumption – FY25 = Est 3.5m actual m³
2.7m m³ domestic; 0.8m m³ imported



Market Map - Timber Framing

FY25 = Est 1.8m actual m³; 1.4m m³ domestic; 0.4m m³ imported

Forest Owners' Product Sawlog

7.6 million m³ of log in
What's the sawlog spec?

Sawmillers' Product

Indoor Structural – 50%
1.8m m³

Customer Channels

F&T – 1.2m m³
Balance is stick – sold through
other customer types

Customers' Customer - Builders

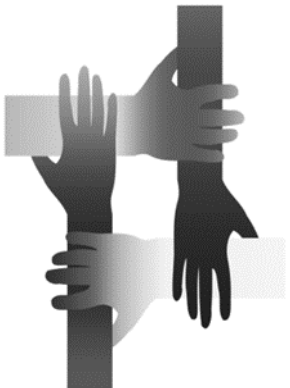
Top 100 builders account for
38% of new home builds on
average
D/B in WA; steel townhouses in
ACT

End-Use Segments

New detached houses – 1m m³
Balance is steel; Other major
segments – semi-attached & A&A

In B2B markets, it pays to know your customers' customers

- Forest growers, get to know fabricators
- Sawmillers, get to know home building companies
- Not about direct commercial relationship - understanding value additives & deterrents when using your direct customer's product
- Value discovery along our supply chain if we can learn to trust & collaborate more
- It informs service and product innovation opportunities
- It can suggest new business models to disrupt the market and leap ahead



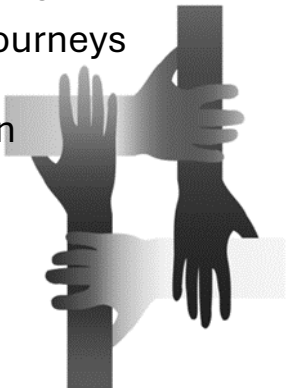
Understanding your Customers' Customer – some prompts to take home with you

- **Forest Grower – understand fabricators' drivers:**

- They're manufacturers – Efficiency; Cost of manufacture; Economies of scale
- Waste minimization
- Timber is half or less than (with scale) their finished product cost
- Range of sizes/ ownership models – they're not all the same
- Keeping up with new technology
- Growing requirements in OHS, ESG etc – more overheads
- Reliability of supply
- Consistency of product quality
- Price certainty
- Tenders for incremental timber supply don't work
- Shared understanding of current demand environment is important
- Raw material price certainty is key
- Who are the innovators & risk takers in this segment

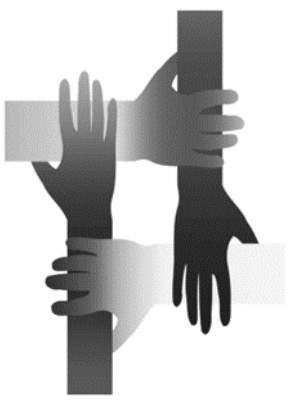
- **Sawmillers – understand home builder companies' drivers:**

- They're marketers, more than on the tools
- Supply & install is attractive
- They're in a cyclical market like you
- Trades and land availability keep them awake at night
- Red tape is enormous
- Compliance is becoming more onerous
- Building materials reliable supply is key
- They don't want call backs to site from inspectors or due to quality issues during construction
- A wide variety of size and ownership in home building companies
- Building materials price certainty is key
- Who are the innovators & risk takers in this segment
- They're focused on efficient builds and client journeys that create positive referrals
- Every design and build has some customization



Steel's (TrueCore) Success – Price is not #1

- Bluescope's strategic imperative to invest in framing market development as opposed to exporting low value
- Strong brand(s) and B2C marketing investment - TrueCore MDMs aren't price focused
- Strong product bundling (TrueCore & Colorbond) to builders that impact homeowner's choices - Colorbond is the demand pull for them (strong aesthetic consideration)
- Strong R&D & innovation – product, systems & informed by user-experience
- Their own industry standards to support market conversion
- Suggestion of green steel & strongly promoting recyclability
- Prefab supply and installation offer to builders
- Strong supply chain connectivity – monopolistic almost but coordinated
- Pick winners along the supply chain & sponsor them – fabricators, builders
- Incentives for builders to convert/ trial – point of differentiation for them in their marketing to consumers
- NXT Building Group – 100% steel - on acquisition quest along East Coast (#3 biggest detached builder FY25)
- They work across the whole supply chain – demand push/ demand pull



Renewable Timber Framing Campaign

- Focused on recruiting big builders (their CMOs) to adopt the key campaign messages – bulk of my time (funds only allowing 1 day per week)
- Big builders marketing timber framing achieves the consumer reach that TrueCore are, i.e. influence homeowners that steel is better
- Timber's unique value is our environmental credentials of renewability and carbon store value
- Successes to date
 - GJ Gardner design centre installation
 - Burbank Homes new homes consultants team training session
 - Henley new marketing campaign uses our key campaign messages
- Door open & positive discussions with Hickinbotham
- Another 4 big builder new targets this year to adopt the messages & put this content into their client journeys



Just 150 seconds to grow!

Did you know it only takes
150 seconds to grow the
structural timber needed
to construct an average
timber-framed home
in Australia?

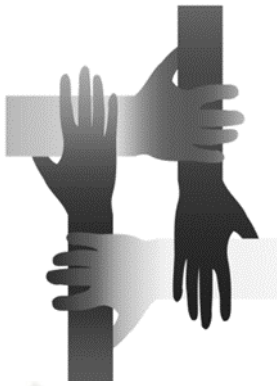


Every home can be a carbon offset

Every new, detached home
built with structural timber
in Australia has enough
carbon stored to offset
9 one-way Sydney to
Melbourne flights.



Putting myself into the mindset of home building company CMOs – show them RTF in client journey



Frame the sale with timber

Today's buyers care about what's behind their walls and want to know about timber framing's green credentials.



Walk through with purpose

Slab down. Frame up. It is the first time clients truly walk through their new home. So make that walk count.



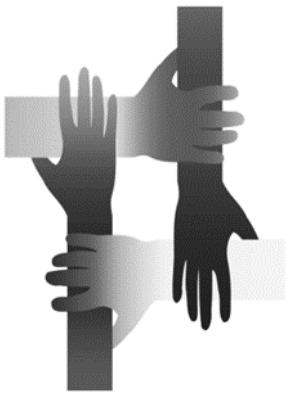
Handover with a carbon bonus

Keys in hand, dreams now unlocked. At handover, homeowners receive more than just a home, they receive a legacy.



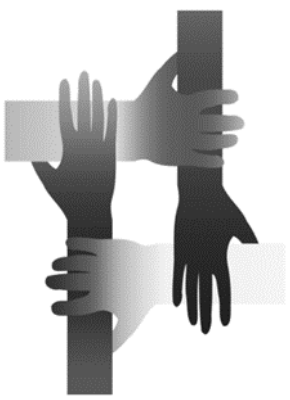


Timber Framing Campaign
Funding Partners FY26

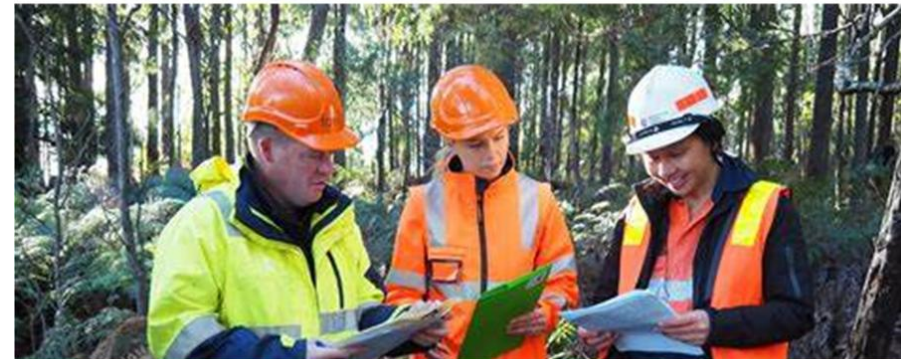


*Thank you for
your cumulative
investment of
approx. \$2m in
voluntary funds
for timber
framing
marketing since
2018.*

For our campaign to be successful into the future, we need forest growing companies to join us.



VOGUE



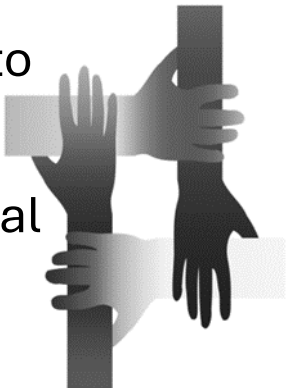
Foresters – From Forest to Frame
When forestry & housing work together



Timber framing captaincy & category management to survive & thrive

It's too risky to our whole supply chain not to collaborate

- Beating steel takes coordinated industry lobbying, advocacy, R&D, technical support and marketing
- Continued steel market share growth threatens the asset value of our whole supply chain and risks future forest valuations
- Update AS1684 timber framing code to industry owned and more efficient standard – underway but 3 years away (FFI)
- Research value chain analysis of timber framing v steel framing
- Invest in industry MDMs to work with builders on timber framing solutions – like Truecore has and other building materials companies
- Invest in ESG credentials related to timber framing for big builders – some are big enough to be required to do Climate Reporting
- Other joint collaborative product R&D – AFWI transformational research; FWPA incremental research



Conclusions and last thoughts

- A “whole of supply chain” & “whole of business” approach is required to defend and grow our end-use markets – that requires more knowledge & collaboration
- We’re the best environmental solution to building more homes (sooner) and to help meet net zero targets but do our target audiences agree?
- Continue or commence innovating our framing product category offering to benefit our customers’ customers
- Japan sees Australian forestry and construction industry as good investment – is this how timber framing survives?
- If you’re inspired to get more involved (and sign the cheques!) in the timber framing campaign, please contact me.



Christine Briggs

Timber Framing Campaign Manager - WoodSolutions

Please note that this is a part-time role so I may take a week to respond to some emails.

[Timber framing | WoodSolutions](#)

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What's Behind the Walls Matters
Build Trust with Sustainable Timber Framing.