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Magazine for WPA Members December 2018

Magazine



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- Lumber Panel: Prices, Tariffs, and Forecast for 2019
 with Brad Bower, Eagle Forest Products; Kelly DeLacy, Hampton Lumber; Tod
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For more information visit www.westernpallet.org

Western Pallet







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North American Softwood Prices

Softwood prices listed as of November 20, courtesy of NRCAN.

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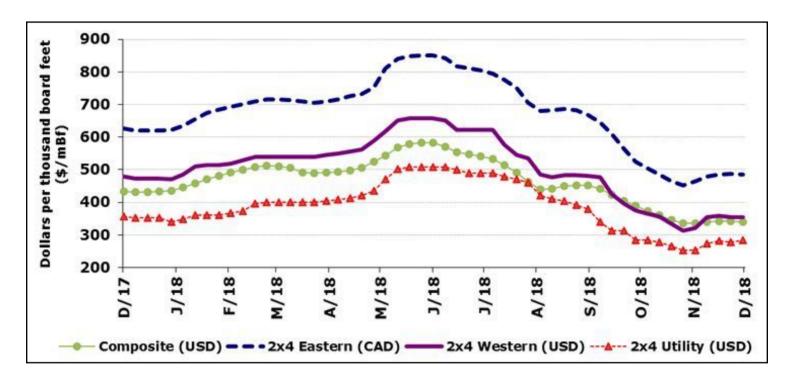
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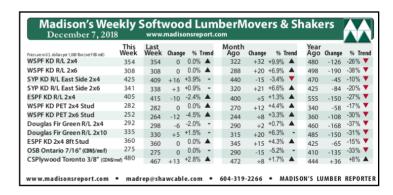
Wood-Mizer

North American Softwood Prices

Weekly softwood lumber prices to December 11, 2018 are shown below, sourced at http://www.nrcan.gc.ca/forests/industry/13309.



Madison's Weekly Softwood Lumber Movers and Shakers. Click on graph for expanded view.



WPA New Members

The Western Pallet Association is pleased to introduce the following new members:

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Rancho Las Palmas Then and Now



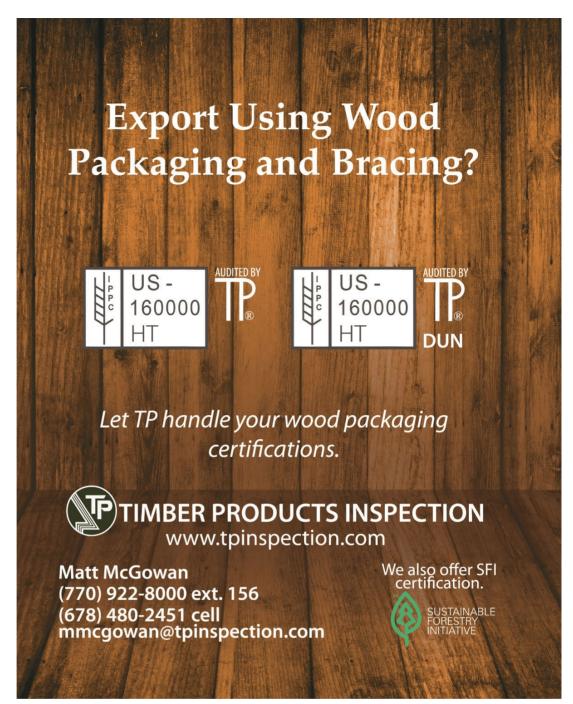
Like the Western Pallet Association, the Rancho is a legacy brand that has reinvented itself and remained relevant, while staying true to its roots. It remains a top resort destination in the desert. Rancho Las Palmas hosts the WPA Annual Meeting, January 18 - 22, 2019 in Rancho Mirage, California. Contemporary view of RLP at bottom right.

Hollywood stars, heads of state and tourists alike descended on the Palm Springs area back in the 1950s to stay at the storied Desert Air Hotel & Resort. Visionary Los Angeles architect H.L. "Hank" Gogerty had transformed 320 acres of barren desert into an ideal sanctuary, complete with a private airstrip. By day, resort guests splashed around in the sparkling pool and played polo on a nearby field while staying in surplus army barracks. When night came, the spirited Compass Room restaurant and bar was the place to see and be seen. The celebrity-laden crowd enjoyed a lively ambiance, strong cocktails and elegant cuisine.

"The Bob Cummings Show," a popular sitcom from 1955 to 1959, used the popular desert hangout as its backdrop. Rumors suggest the debonair actor piloted his unique Aerocar accompanied by such leading ladies as Marilyn Monroe and Lana Turner.

In the late 1970s, Desert Air made way for today's luxurious Omni Rancho Las Palmas Resort & Spa. Cary Grant, Roy Rogers, Dale Evans and Bob Hope all appeared at the resort's 1977 ground breaking. From its Rat Pack era beginnings to a stunning 21st-century renaissance, Rancho Las Palmas remains a timeless classic for today's discerning traveler.

(Source: RLP)





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Northwest Hardwoods, Inc. Names Nathan Jeppson as CEO / Chairman of the Board

Northwest Hardwoods Inc. (NWH) has named Nathan Jeppson as Chief Executive Officer and Chairman effective January 7, 2019, and will report directly to the Board of Directors of NWH. TJ Rosengarth will remain on the board of NWH to ensure a smooth transition for the business.

Nathan brings significant leadership experience to NWH, most recently serving as President of Shell Chemical LP and General Manager of a multi-billion-dollar division of Shell with leadership positions in a broad range of basic and intermediate chemicals. Previously, Nathan led Shell's synthetic alcohol and ethoxylates (surfactants) business. Prior to Shell, Nathan was promoted rapidly through the Dow Chemical Company and served in a variety of significant leadership positions across markets in North America, China, the Middle East, South East Asia, and Europe.

Nathan's strong general management capabilities are underpinned by significant successes across several businesses in designing and implementing business improvement initiatives, accelerating product innovation capabilities developing and top-level commercial talent. He has a demonstrated track commodity-oriented record of shifting businesses strategic marketing-led organizations focused on innovation and collaboration with customers globally.

"We are excited to have Nathan Jeppson join NWH as its CEO and for him to provide leadership to the number one global manufacturer of hardwood lumber," said Edmund Feeley, a NWH board director and partner at Littlejohn & Co. "Nathan's track record of success has been driven by his ability to develop and implement

innovative strategies for a range of complex businesses. He has remarkable business acumen, particularly in commercial areas including product innovation, customer development, and industrial marketing strategy and we are confident he will be a great complement to the NWH team."

Nathan has served as a director of Houston Habitat for Humanity and a mentor in Junior Achievement's Junior Business program. Nathan and his family will be relocating near NWH's corporate headquarters in Tacoma, WA.

TJ Rosengarth will be pursuing other opportunities outside the hardwood lumber industry. Mr. Feeley added, "On behalf of the board, I would like to thank TJ for his contributions toward making NWH the clear global leader in hardwood lumber over the last eight years and wish him all the best in his future endeavors."

About Northwest Hardwoods

Northwest Hardwoods, Inc. has approximately 1,800 employees and is the leading manufacturer of high-quality hardwood lumber in North America. It manufactures and sells 20 species of North American hardwood lumber, including Alder, Oak, Maple, Cherry, Yellow Poplar, and Walnut.

Operations include a network of sixteen primary sawmills, eight concentration yards, four remanufacturing service centers, and regional warehouse locations. For more information, please visit www.northwesthardwoods.com or call 253-348-2732.



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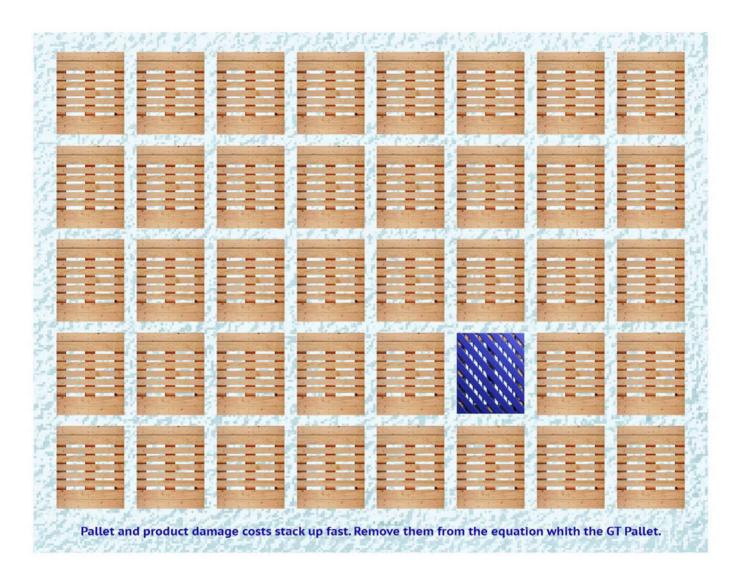


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Chamber of Commerce Foundation Features CHEP Circular Economy Messaging

A case study report published by the U.S. Chamber of Commerce Foundation offers insights into how to effectively communicate about the circular economy from a variety of perspectives—including business, academia, communications firms, trade associations, and nonprofits.

"Messaging the Circular Economy" includes input from a number of leading organizations, including Brambles and CHEP, Best Buy, IKEA, The Wharton School, Loyola University, and the World Business Council for Sustainable Development.

Suzanne Lindsay-Walker, director of sustainability for North America, Brambles



Wood pallet suppliers have their own compelling circular economy stories to tell. Get insights from the case study here.

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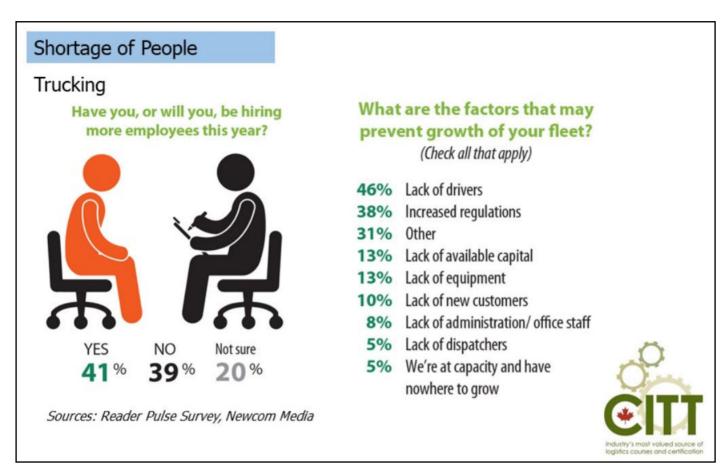
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Transportation Trends



Slides are from the Lou Smyrlis **Transportation Buying Trends** presentation at the Canadian Logistics Conference 2018.

Look for continued transportation cost and availability pressure in 2019, report experts. According to Lou Smyrlis, Newcom Trucking & Supply Chain Group, transportation volume growth will continue, especially in the first half of 2019. U.S. GDP is anticipated to grow by 2.4% for the year versus 2.8% in 2018. Growth will be tempered by ongoing international trade uncertainties and other geopolitical impacts.

"Total economic demand, especially in the industrial economy, is still growing, but not at the same frenetic pace we saw in the first half of 2018," Donald Broughton of Broughton Capital wrote recently.

November Spotlight

Spot market freight volume and rates slid in November for most equipment types. According to the DAT Freight Index, November volume was 2.5% lower month over month and 24% percent under last year's extraordinary seasonal mark.

Freight rates remained stable for vans while flatbed rates slipped 7 cents lower for the month, in a typical seasonal pattern.

Reefer cargo bucked trends by rebounding before Thanksgiving with an 8% increase in availability and a 2.5% bump in the average permile spot rate from October.

"Spot market volumes and rates are likely to rise through December, as e-commerce deliveries continue to ramp up," said DAT market analyst Peggy Dorf. "Retailers are offering nearly unlimited free shipping to online customers during the holiday season, boosting orders and adding to pressure on freight transportation and logistics."

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2019 WPA Annual Meeting January 18-22, 2019 Rancho Las Palmas Resort, Rancho Mirage, CA

Exhibit Cost

- · \$300 Until November 1st
- · \$400 After November 1st
- Exhibitors must be members of WPA with dues current agn up and pay for an exhibit the annual meeting registration fee online meeting registration opens October 1st. up and pay for an exhibit space, and pay

Exhibit space includes a skirted, 6' table arranged around the periphery of the meeting room. Additional amenities available through the Rancho Los Palvias Resort & Spa and are the responsibility of the Exhibitor.

Exhibit space is limited. Sign up for exhibit tables opens at 8:00 AM PDT on September 5, 2018.

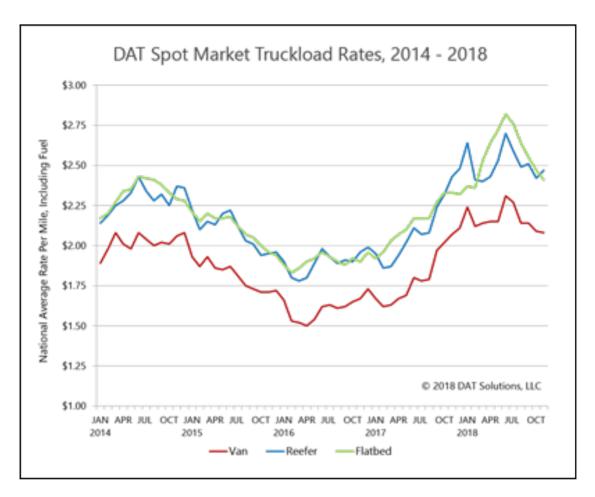
Exhibit Schedule

- Saturday, January 19th 5:00 6:30 PM Exhibit Showcase during WPA welcome reception
- Sunday, January 20th 7:00 8:00 AM Exhibit Showcase during WPA breakfast
- Sunday, January 20th 12 Noon 1:00 PM Exhibit Showcase during WPA lunch
- Monday January 21st- 8:00 AM 9:00 AM Exhibit Showcase during WPA breakfast

Set-up starts at 12:00 Noon, Saturday, January 19th, and should be ready by 5:00 PM, just in time for the welcome reception. Breakdown can start after 11:00 AM, Monday, January 21st, and completed by 2:00 PM.

Exhibitor signup only - does not include separate meeting registration open October 1, 2018.

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Spot market rates declined in November for dry van and flatbed equipment, while rates rose for refrigerated van trailers in advance of Thanksgiving, according to DAT Solutions, which maintains a rates database of \$57 billion in annual market transactions.

Capacity is slowly increasing

Capacity is gradually improving as small fleets become adjusted to electronic logging device (ELD) requirements and Hours of Service rules. The introduction of ELD requirements reportedly resulted in some older drivers leaving the industry rather than conforming to the changes. Driver recruitment has been aided by driver pay increases, although driver turnover remains high, especially for larger fleets.

The average U.S. truckdriver is 49 years old, seven years older than the overall average workerage. The average salary is about \$70,000, and there is a shortfall of about 63,000 drivers across the country. And of the hundreds of thousands of trucking jobs created in recent years, a large majority of them--at greater than a two to one ratio--are in fleets of 100 or fewer trucks. Most are aligning with fleets of six trucks or less.

"I've been talking about the driver shortage for almost 30 years," Smyrlis said recently at the Canadian Logistics Conference in Vancouver BC. "One of the very first stories I ever wrote was about the driver shortage. After 30 years I think we can be confident in saying that we are not going to solve it, at least not in the way we have been trying to solve it."

He questions whether we are putting our recruitment efforts in the right areas. In Canada, 32.5% of drivers are recent immigrants, with people of South Asian descent dominating that sector. Effectiveness in reaching out to this population would be aided by utilizing Punjabi or Hindi language platforms.

Smyrlis also pointed out the gender inequity of the driver base. "97% of truck drivers are male. Yet 49% of the working population is female. Does it make sense to continue on a path where we don't consider half the population (as part of the job candidate pool)? Can we really say we

Inefficiencies



Shippers apply charges and penalties of their own. In the past year, has a customer fined you for:

44% Lumper services
40% Late deliveries
36% Damaged/spoiled freight
8% No shows (rescheduling/cancelling)

8% Broken seals or packaging

4% Early deliveries





Source: Reader Pulse Survey, Newcom Media

While trucks are frequently detained by shippers, over 65% of carriers rarely or never collect detention fees.

have a driver shortage when we don't even attract half of the working population?"

Capacity is also being helped by the influx of new truck investment. New trucks have greater uptime, which can translate into 4% greater availability for service. Smyrlis cautioned, however, that new equipment investment isn't so much to expand the fleet size but to retire older equipment.

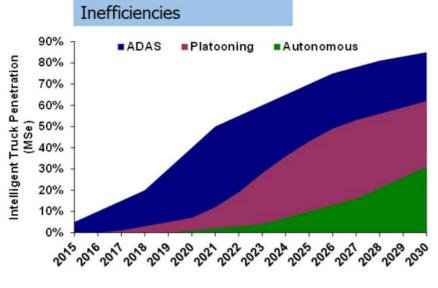
"Around 75% of Canadian trucking executives are saying they are ordering new equipment for 2019 but it is replacing aging equipment in their fleet," he commented. "In fact, if you look at the size of major fleets in the U.S., they are actually shrinking. They are getting smaller. The smaller U.S. fleets are getting larger, but they still don't have the capacity to counterbalance what the large guys have (lost)."

the issue of truck detention remains a significant issue. According to survey results, only 16% said they would always collect a truck detention fee. Another 42% said they would rarely collect a detention fee if their trucks were held up and almost a quarter said 'never.'

"It is pretty sobering that they (carriers) have to absorb those kinds of inefficiencies to their system," Smyrlis said. "Even more concerning was the fact that they were not only absorbing that kind of inefficiency, but they were also doing absolutely nothing about it."

Truck Tech Change

While Smyrlis hears a lot of skepticism about new technologies such as platooning (the linking of two or more trucks in convoy, using connectivity technology and automated driving support systems), driverless trucks and others



"We believe intelligent trucks – initially Advanced Driver Assistance Systems (ADAS) equipped tractors followed by platooning and eventually fully driverless trucks – would be ready to hit the roads starting now through 2020."

-- Morgan Stanley Research

Source: Morgan Stanley Research Estimates



Watch for new technologies such as Advanced Driver Assistance Systems (ADAS), platooning and eventually, driverless vehicles.

he cautions that some technologies in the recent past that were viewed with pessimism--such as satellite truck tracking, still ended up being adopted much more quickly than many would have thought.

"I think automation will come sooner than we think," Smyrlis said about transport technology adoption. "Because when we look at investment, and the increase in profitability that automation brings, we see some pretty high numbers. All that it takes is for one or two carriers to give it a try, and if they get a significant advantage, and then you see it catching on."

Many experts predict that autonomous driving features that improve driver safety will increasingly be adopted, even though the commercial usage of autonomous vehicles may be years away. Electric trucks are expected to be soon available for heavy-duty trucking, but only

for short hauls. Eric Fuller, president and CEO of U.S. Xpress, reported in one article that electric-powered trucks are "not ready to go that 500 miles we really need," but that could happen in five to 10 years.

One of the big changes in transportation will be in the area of data analysis. Data from ELDs will help transport providers identify patterns of delays, slow routes and other inefficiencies.

"ELDs, they're a very rich data source," Dean Croke, chief insight officer of FreightWaves, told AllTruckJobs.com. "If you said what was going to be the one big trend next year with ELDs, beyond the need to be compliant with the regulations for the old devices, I think it will be a lot of the people that have these devices will find ways to generate more insight from the data that comes off them. I think that's going to be the big change next year."

One Brand or Many

Do you have various regional operations or serve different product markets? With the announcement of Pooling Partners rebrand, it is useful to consider whether to have one brand or many. What's the best way forward for your business?

As companies grow, the are faced with branding decisions. Should they stick with a universal brand, or should they have specific brands that are uniquely connected to particular operations or segments? Faber Halbertsma Group, which in recent years presented a universal brand presence through Pooling Partners, recently announced that it is plotting a shift in direction.

"We are going back to the old company names: IPP, PAKi, PRS and individual production companies," reports the Poolingpartners.com website. "This means that the name, Pooling Partners, will be replaced by the names by which the individual companies used to be known in their own markets."

According to the company, it sees more opportunity for each Faber Halbertsma Group company to position itself using a distinct brand label, with a common look and feel to retain the solid back-up of the Faber Halbertsma Group.

"The rebranding is an investment in our future business and serves to build a strong platform to allow our businesses to thrive," it continues.

There are a lot of things to consider when considering an approach to branding. Robert Wallace of Scottsdale AZ-based Tallwave writes that if "you offer multiple products or services that appeal to distinctly different audiences, so much so that a given customer likely wouldn't even consider buying one product but would be very interested in another, then the individual brand approach might be more fitting."

For example, a pallet recycling company that is going to launch a retail wood pellet operation might not choose to create a completely new brand, as the target audience probably has had little or no understanding of the pallet company's

reputation. If the pallet recycler decides to launch a new pallet business due to a core shortage that is causing pain for its existing customers, however, it might make more sense to stick with its existing brand.

Some companies use a "masterbrand" and subbrand approach. Whatever the branding strategy employed, however, Wallace cautions that "it is important to ensure you carry the same vision and values through each of your separate offerings."

Faber Halbertsma Group states that the usage of the new brand names will begin to start immediately. By the end of March 2019, all the companies will use their new name.

The new brand names will be in most cases similar to those heritage brands used by the individual businesses prior to the introduction of Pooling Partners. The list of brand names includes:

FABER HALBERTSMA GROUP

IPP PAKi PRS FABER FRANCEPAL NAUS PASEC PACKAGING PARTNERS PHOENIX SATIM T&A



Contraload Launches New, Industry Leading IBC to European Pooling Market



Contraload (www.contraload.com), the European market leader in plastic pallet pooling, has announced the latest addition to its liquid container pooling range – Superior. Production began in November and Contraload is now offering these new state-of-the-art liquid bins to current and new clients.

Superior is the most hygienic and safe reusable IBCs on the market, ideal for high-value liquids as well as ingredients logistics. Its 70% folding ratio and easy stacking features will allow 182 empty bins to be transported in a standard European truck. It is water and dirt proof with a 100% safe, easy-to-clean design from base to lid make this bin ideal for pooling.

The double wall structure provides an exceptional strength and durable performance with a 1500kg unit load. Its standard 1200X1000 footprint in conjunction with 1000L capacity and rackability, make the bin usable for all companies in Europe.

Contraload has chosen not to offer its customers a wide variety of liners, glands, and valves. Instead, it offers expert advice on both filling and emptying, and simply supports its customers in buying directly from the liner producer. "To get the right liner in the Superior, we are partnering with a selection of liner producers in different countries, making sure customers get the best bag for the job. They can buy directly from the producer and keep prices low," says Ebo De Muinck, Product Manager Liquids at Contraload with over 20 years of experience in liquids.

"The new Superior is the best fluid bin available, and we are pleased to be able to offer it for pooling to Contraload clients, enabling them to enjoy its industry-leading benefits without need of purchase," states Jesse Sels, MD of Contraload. "This bin, in conjunction with our industry-leading pooling system, provides a best-in-class solution for industries such as food processing, ingredients, cosmetics and pharmaceutical. It is simply "Superior"."

Impact of Brexit on Timber Packaging & Pallets

Leading Irish pallet producer discusses the pallet impact of a "No Deal Brexit" (Reprinted with permission from the CJ SHEERAN newsletter)

CJ SHEERAN has for months been raising awareness on the vast impact a 'No Deal Brexit' will have on every business in Ireland that exports to and imports from or via the UK using wooden packaging and pallets. The UK Government has taken note of the widespread scope of this potential upheaval with the recent publication by **DEFRA** (Department Environment, Food and Rural Affairs) of a set of Technical Notes on the impact of a 'No Deal Brexit' and their Guidance Note entitled "Importing and exporting plants and plant products if there's no Brexit deal".

On March 29, 2019, the UK will become a Third Country. The EU requires that all imports from third countries that have wooden packaging material (WPM) must conform requirements of ISPM15 - the International Standard for Phytosanitary Materials. This is an international standard under the International Plant Protection Convention that countries must apply to reduce the risk of the introduction and spread of certain pests. ISPM15 requires WPM to be treated (typically using heat-treatment) and marked. WPM includes pallets, cases, crates, boxes, cable drums, spools and dunnage.

As indicated in the EU's technical notice on the topic, in the event of no deal, all WPM moving between the EU and the UK would need to be ISPM15 compliant. "This will impact all businesses in Ireland that use timber packaging and pallets for imports from and exports to the UK and also those using the UK as a landbridge the continent", says Ashleigh Doyle, Compliance Director at CJS. "The seriousness of this issue cannot be underestimated". On the import front, 850,000 trailers and containers come into Dublin Port every year from the UK.



With the vast majority of their contents palletized, this means that in the event of a no deal Brexit, all of these pallets will have to be heat-treated in compliance with ISPM15. If they are not, they cannot be permitted to enter Ireland. The same applies to exports.

CJ Sheeran's Directors have recently met with the Department of Agriculture, Food and the Marine (DAFM) to discuss ISPM15 and Brexit and to outline the urgency of the need to ensure that everyone is prepared for all eventualities and to keep customers and the industry up-to-date on developments. With the recent installation of additional kilns, CJS have significantly increased ISPM15 heat-treatment and kiln drying capacity to what is now the largest capacity in Ireland and the UK. "They said Brexit wouldn't happen, they said Trump wouldn't get elected, they said Slieve Bloom wouldn't win the hurling county final - but theyalldid", says Mark Sheeran, MD of CJS. "We're ready".



[Pictured above: Fergal Moran CJS, Seamus Dunne Forestry Inspectorate Senior Inspector, Mark Sheeran CJS, Ashleigh Doyle CJS, Colm Hayes DAFM Assistant Secretary General and Tom McDonald Forestry Inspectorate Regional Inspector]. Below: CJS now has the largest pallet HT capability in Ireleand and the UK.



France: Collaborative Online Pallet **Management Platform Looks to** Eliminate the Inefficiencies of Empty Pallet Transport

A new collaborative online pallet management platform, MagicPallet, was officially launched this month in France. Described as the first collaborative platform dedicated to the exchange of European pallets, the launch follows a one-month pilot phase that involved 15 companies. MagicPallet offers the potential to eliminate the inefficiencies of empty pallet returns associated with pallet exchange.

Pallet exchange impacts 38,000 carriers in France and 600,000 in Europe. The cost of pallet returns in France is 100 million € per year. "Until now, the principle was that carriers traveled long distances with empty pallets to bring them back to their customers, the shippers - for example, for an SME of 200 trucks, the cost of pallet returns is about 200 k € per year," stated Pierre-Edouard Robert, the founder of MagicPallet. "As far as the shippers are concerned, the pallets were not always returned on time by the carriers, they bought them urgently and at a high price."

MagicPallet is now available throughout France. The company plans to expand across Europe at a rate of two countries annually. It will start in Germany and Spain in the second half of 2019, followed by Italy, the United Kingdom, the Netherlands, and Poland.



The business is projecting a turnover of 650 k € at the end of 2019 and 3.8 M € by Year 3, with employment to increase to 12 people by the end of 2019, and 40 within three years.

The platform stands in contrast to proprietary pallet banking schemes offered by pallet companies in Europe such as PGS and Pooling Partners.



Upcoming Events

1/18/2019 - 1/22/2019 WPA Annual Meeting, Rancho Mirage, California www.westernpallet.org

3/13/2019 - 3/15/2019 NWPCA Annual Leadership Conference, San Diego, California. www.palletcentral.com

3/28/2019 - 3/29/2019 INDUSTRIAL PACK, Atlanta, Georgia. INDUSTRIALPACK2019

5/8/2019 - 5/9/2019, Global Softwood Log & Lumber Conference, Vancouver, BC. www.woodmarkets.com

5/27/2019 - 5/31/2019 LIGNA 2019, Hannover, Germany. www.ligna.de

6/7/2019 - 6/9/2019 CWPCA Annual General Meeting, Victoria, BC. www. canadianpallets.com.

In case you missed them... (Click on back issues to read or download)













