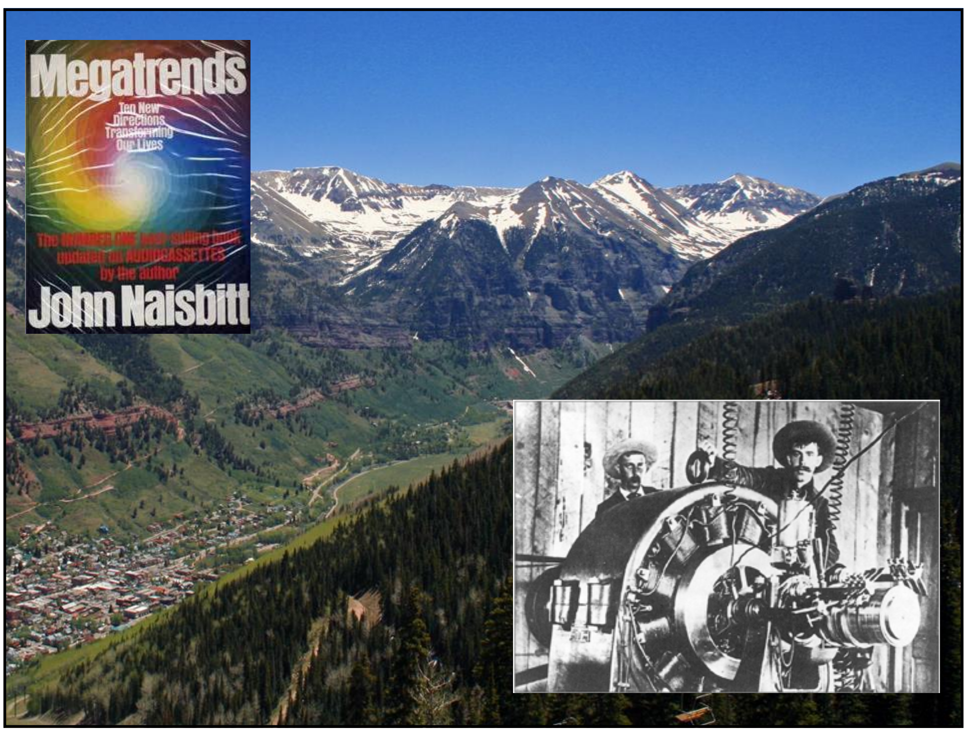
RMSCA

There's always a solution in steel.

Ten Macro Trends Impacting the Future of the Structural Steel Industry

October 22, 2015

John Cross, PE, LEED AP
Vice President



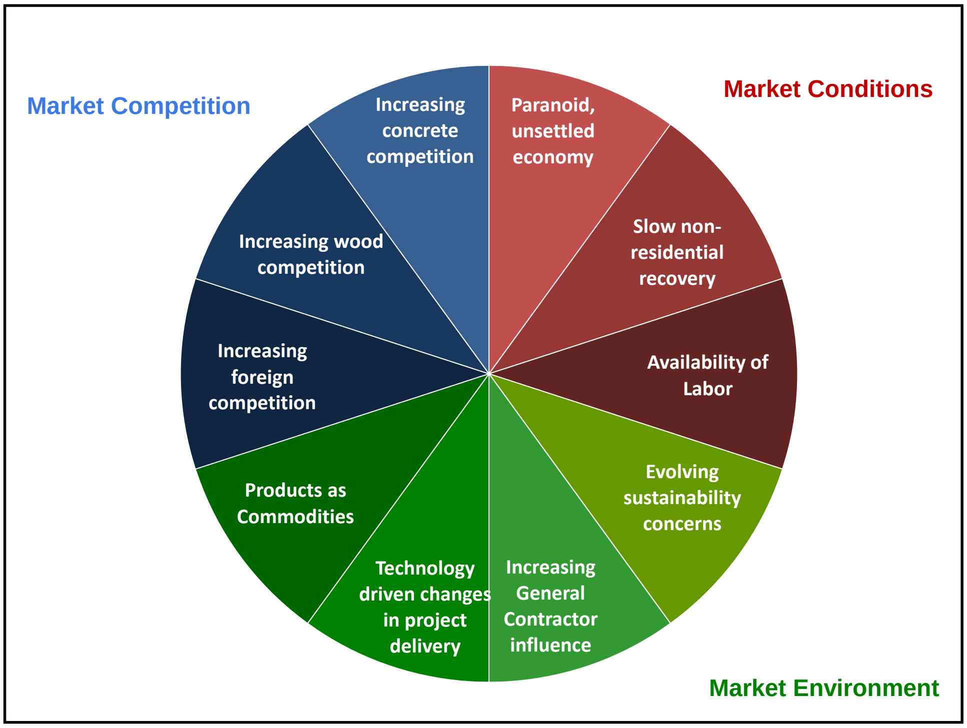
MEGATRENDS John Naisbitt 1982

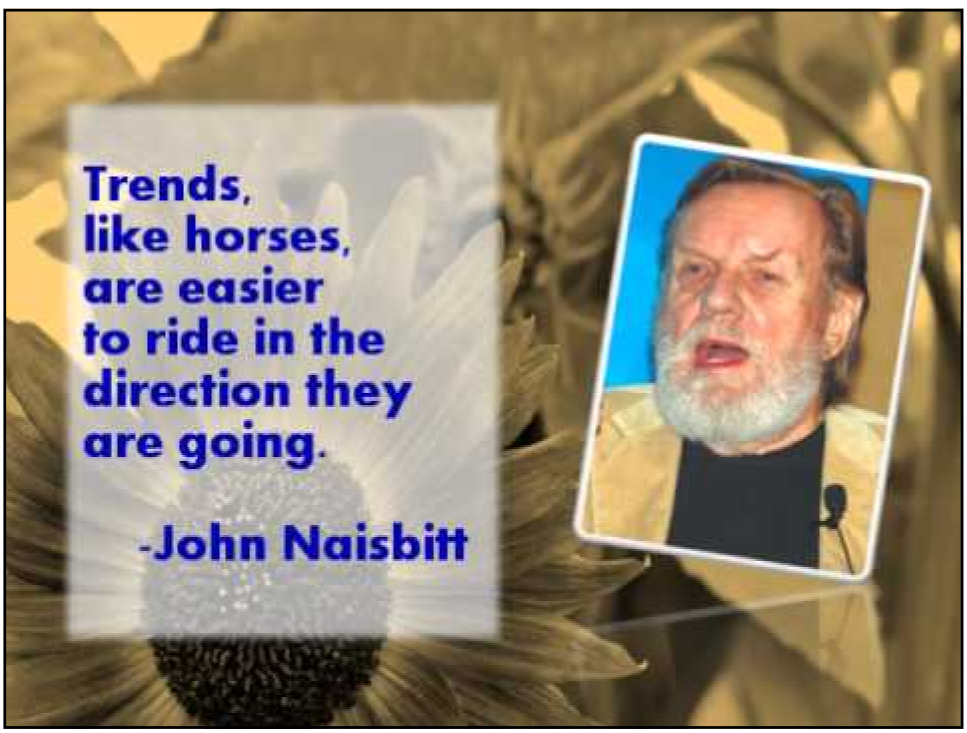
- Industrial Society → Information Society
- Forced Technology → High Tech/High Touch
- National Economy → World Economy
- Short Term → Long Term
- Centralization → Decentralization
- Institutional Help → Self Help
- Representative Democracy → Participatory Democracy
- Hierarchies → Networking
- North → South
- Either/Or → Multiple Options

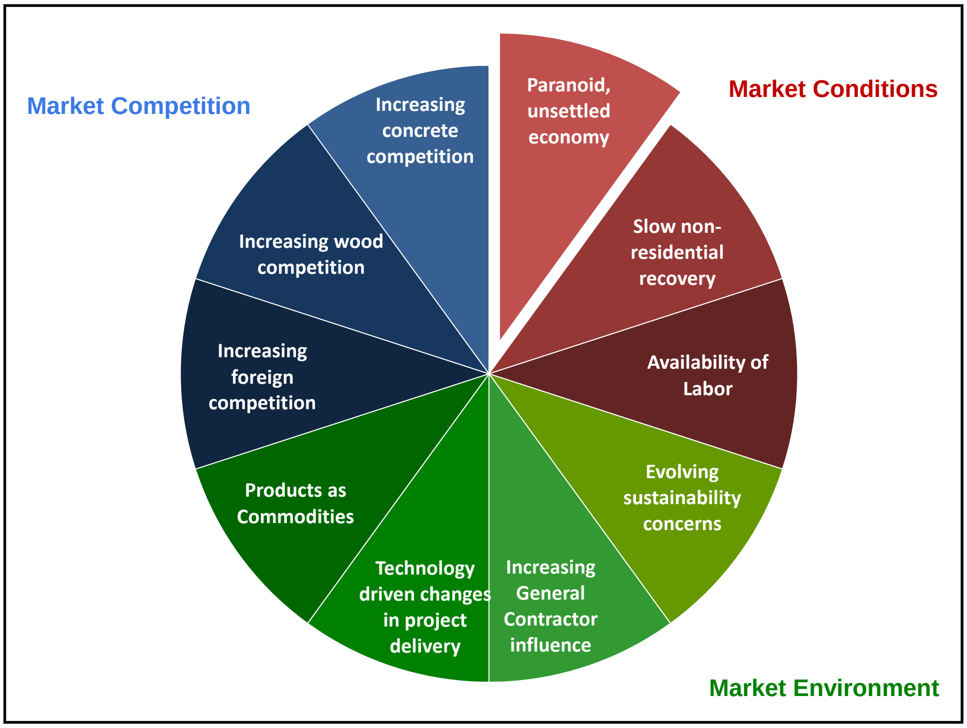
2

MiniTrends

Design and Construction Macro Trends

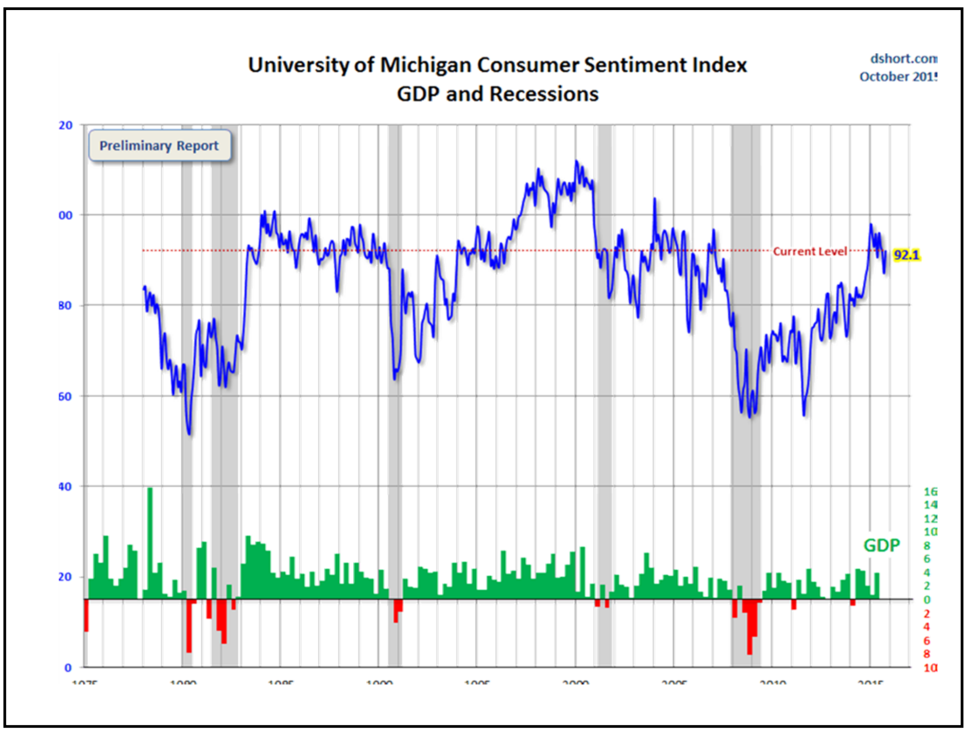

Market Competition
Market Conditions
Increasing concrete competition
Paranoid, unsettled economy
Slow non-residential recovery
Increasing wood competition
Increasing foreign competition
Availability of Labor
Evolving sustainability concerns
Products as Commodities
Technology driven changes in project delivery
Increasing General Contractor influence
Market Environment

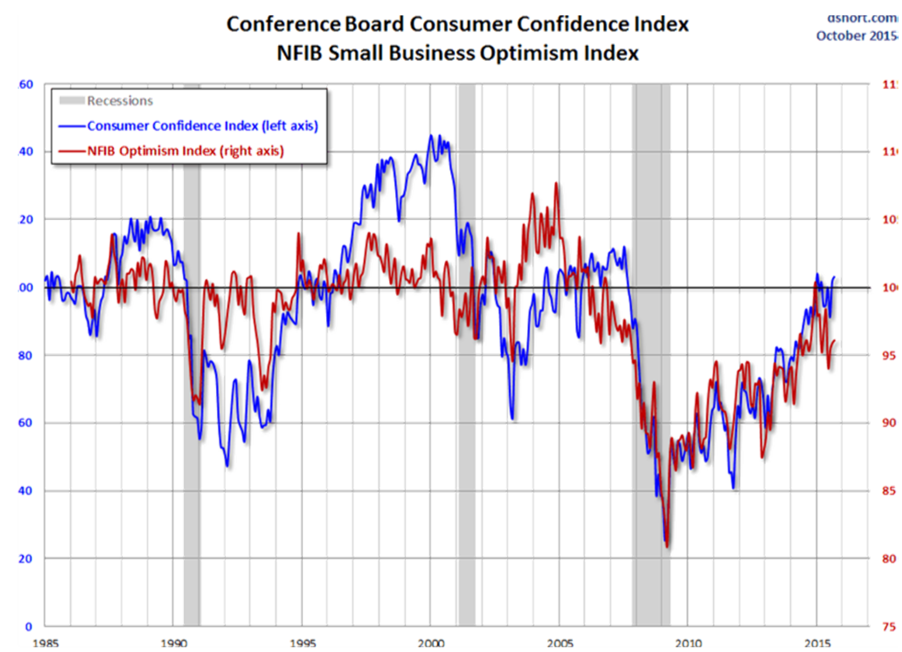

Trends,
like horses,
are easier
to ride in the
direction they
are going.
-John Naisbitt



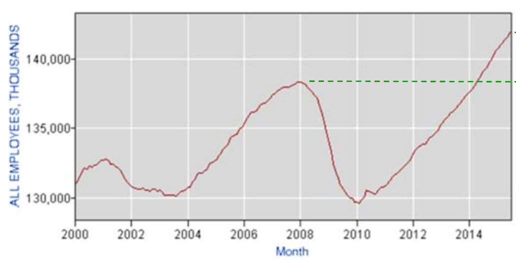
"In a Washington economic summit, a panel of three economists offered two dozen opinions about the direction of global economics."


The economy sent mixed signals today... bad, worse and apocalyptic.
Satan declares bankruptcy...Wall Street in panic.
Carol Simpson Cartoons © 2011


University of Michigan Consumer Sentiment Index
GDP and Recessions
dshort.com
October 2015
Preliminary Report
Current Level
92.1
GDP

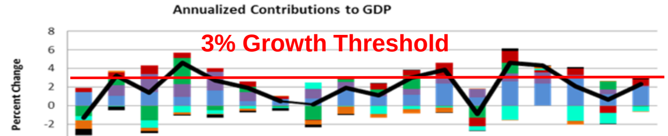


Macro Conditions

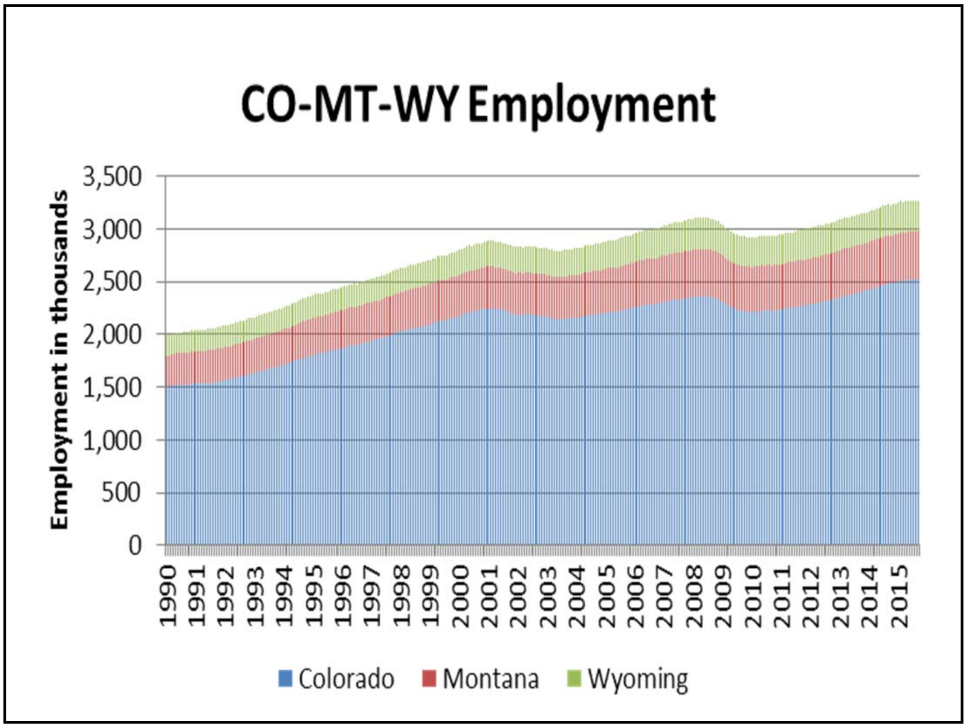


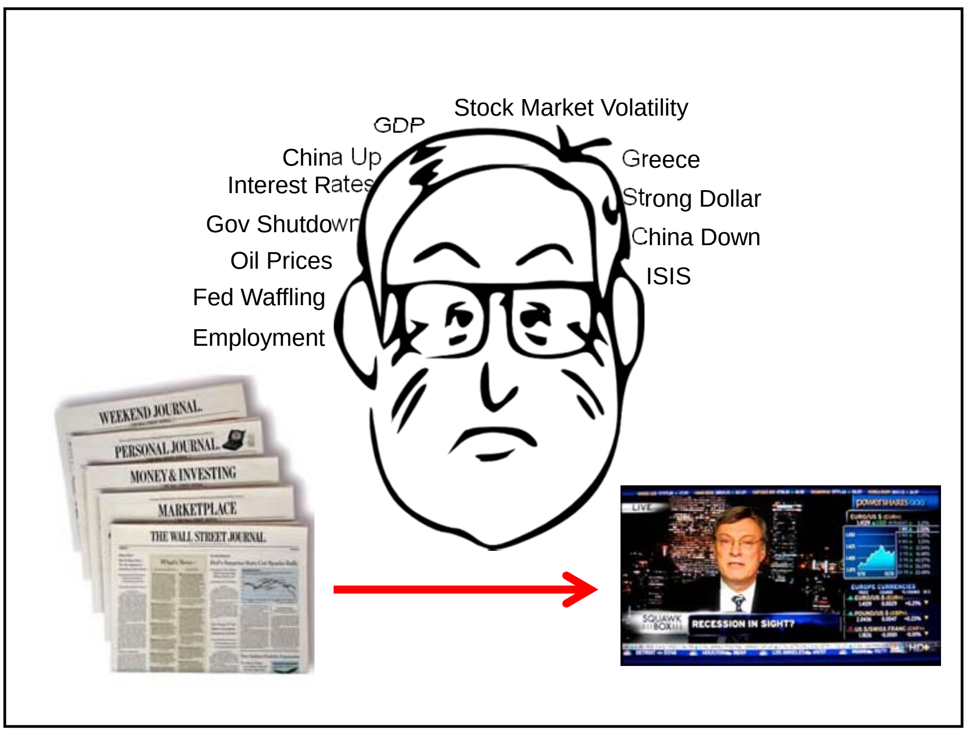
Employment has surpassed pre-recession levels, but the rate of growth is slower.

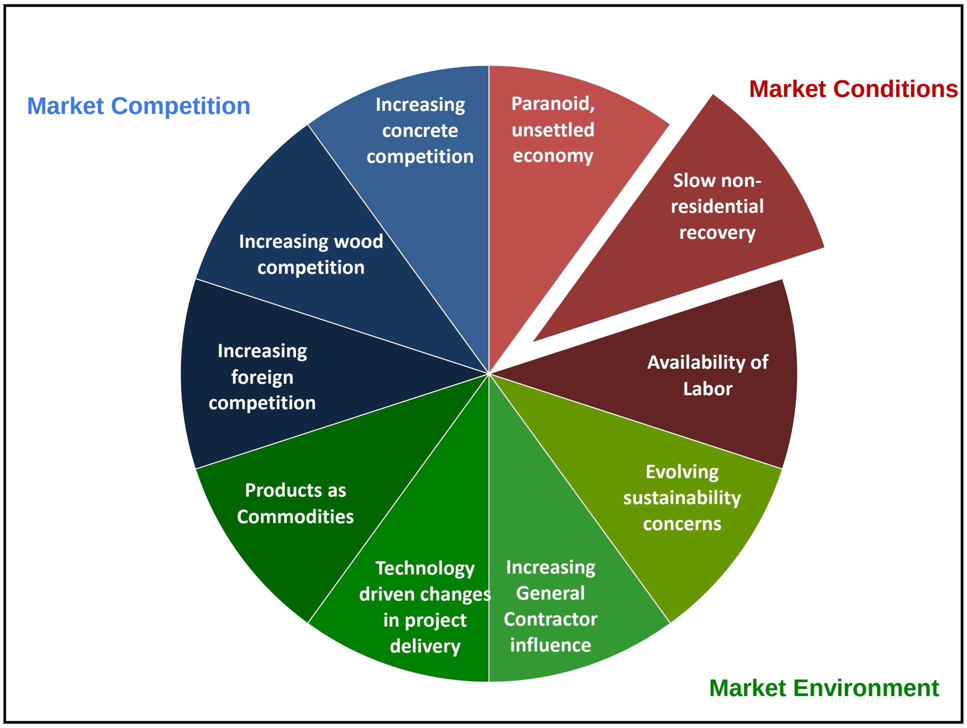
Annualized Contributions to GDP



	2011-1	2011-2	2011-3	2011-4	2012-1	2012-2	2012-3	2012-4	2013-1	2013-2	2013-3	2013-4	2014-1	2014-2	2014-3	2014-4	2015-1	2015-2
State & Local	-0.67	-0.41	-0.23	-0.1	-0.36	-0.14	-0.26	-0.3	-0.12	0.05	0.02	-0.01	-0.03	0.29	0.07	0.15	-0.09	0.21
Federal	-0.94	0.16	-0.29	-0.21	-0.03	-0.24	0.04	-0.45	-0.75	-0.43	-0.44	-0.49	0.02	-0.08	0.26	-0.41	0.08	-0.08
Imports	-0.46	-0.11	-0.82	-0.76	-0.4	-0.33	-0.1	0.65	-0.13	-0.89	-0.39	-0.16	-0.44	-1.52	0.15	-1.6	-1.12	-0.54
Exports	0.48	0.64	0.92	0.56	0.37	0.61	0.27	-0.07	0.12	0.64	0.55	1.42	-0.95	1.28	0.24	0.71	-0.81	0.67
Inventory Change	-1.06	0.72	-1.6	2.8	-0.53	0.56	-0.18	-1.54	0.28	0.38	1.48	-0.08	-1.29	1.12	-0.01	-0.03	0.87	-0.08
Fixed Investment	-0.05	1.16	1.96	1.36	2	0.98	0	1.03	0.77	0.4	0.59	0.79	0.91	0.87	1.23	0.39	0.52	0.14
Personal Consumption	1.42	1.03	1.42	0.94	1.63	0.45	0.72	0.78	1.74	0.96	1.17	2.36	0.85	2.6	2.34	2.86	1.19	1.99
Annualized Change in GDP	-1.28	3.19	1.36	4.59	2.68	1.89	0.49	0.1	1.91	1.11	2.98	3.83	-0.93	4.56	4.28	2.07	0.64	2.31

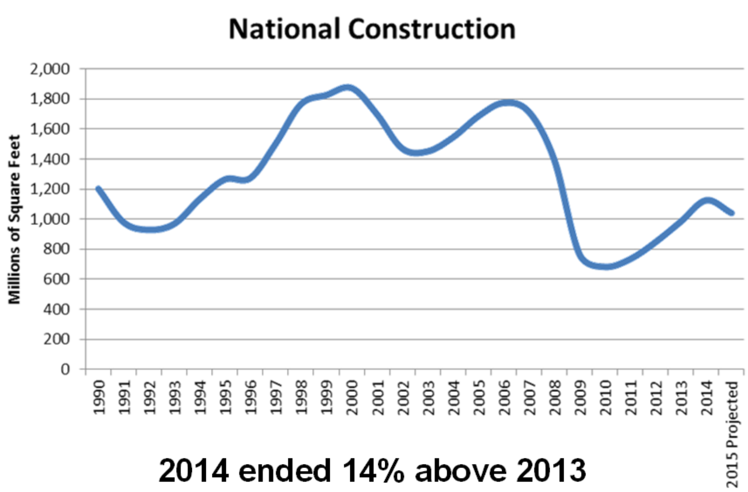

CO-MT-WY Employment
Employment in thousands
3,500
3,000
2,500
2,000
1,500
1,000
500
0
1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015
Colorado
Montana
Wyoming


Stock Market Volatility
GDP
China Up
Interest Rates
Gov Shutdown
Oil Prices
Fed Waffling
Employment
Greece
Strong Dollar
China Down
ISIS
WEEKEND JOURNAL.
PERSONAL JOURNAL.
MONEY & INVESTING
MARKETPLACE
THE WALL STREET JOURNAL.
LIVE
SQUAWK BOX
RECESSION IN SIGHT?



Building Construction Market

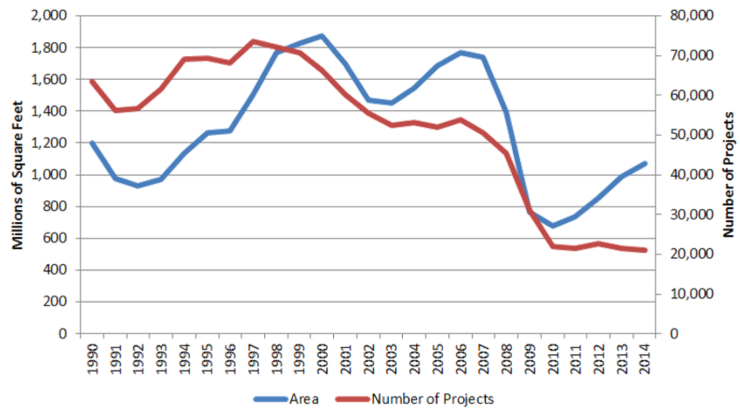
(Non-residential + residential > 4 stories)



2014 ended 14% above 2013
Still down 37% from peak of 2006/2007

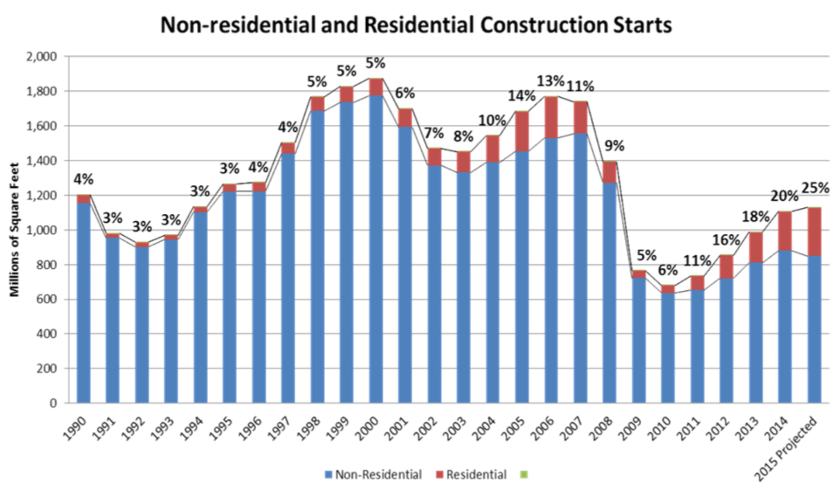
Building Construction Market

(Non-residential + residential > 4 stories)

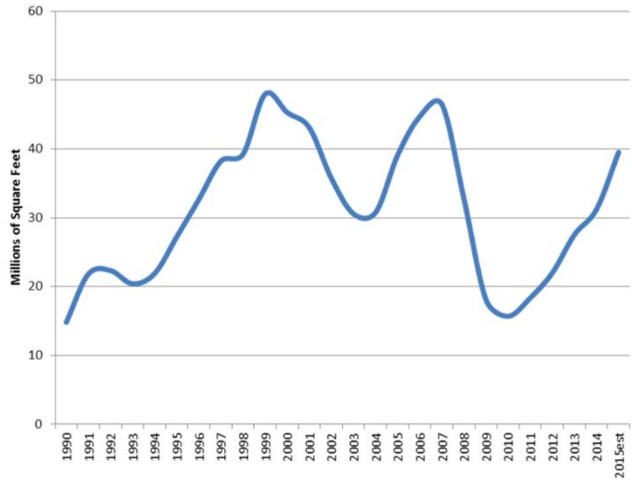


Square Footage expanding
Number of Projects flat

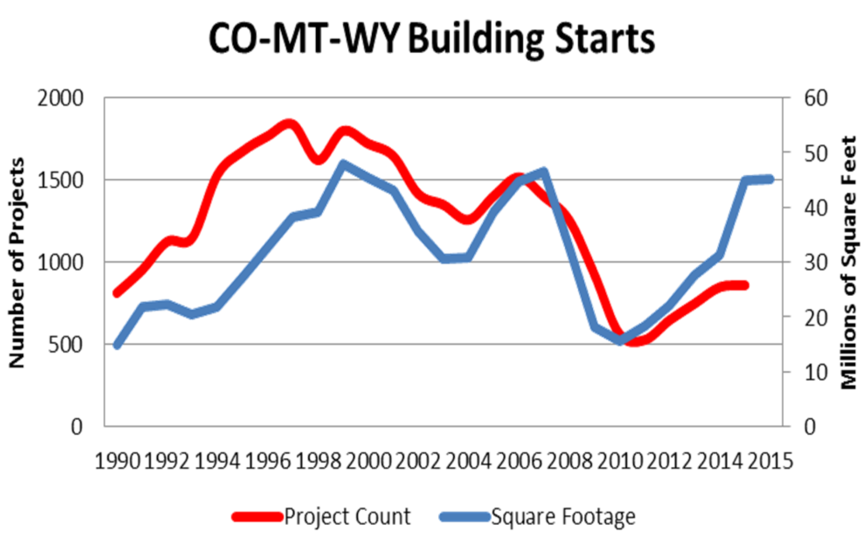
Slow Non-Residential Recovery

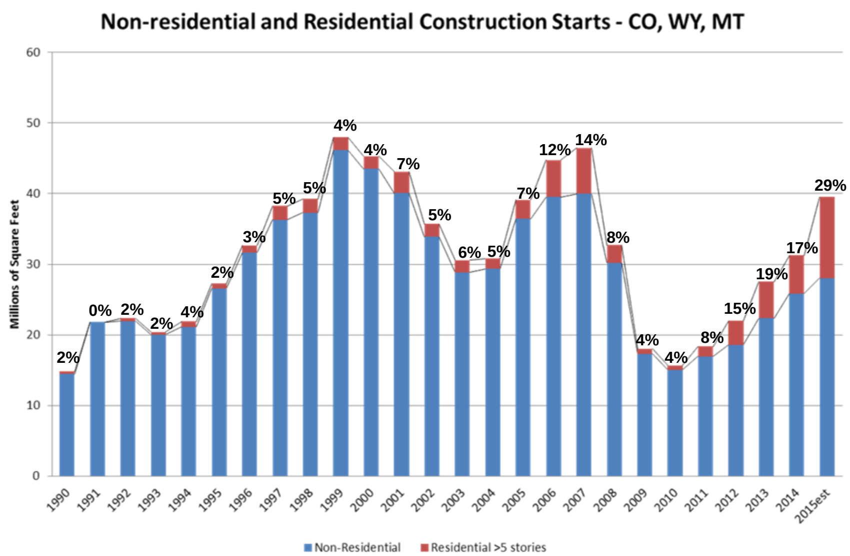


Starts – Colorado, Montana, Wyoming

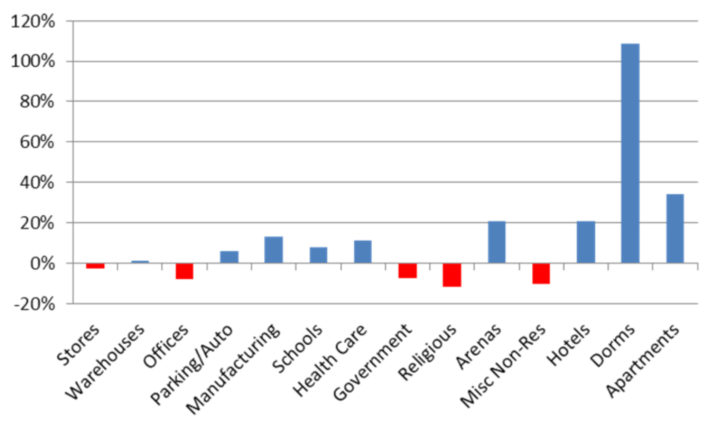


Regional Activity approaching Pre-recession Levels



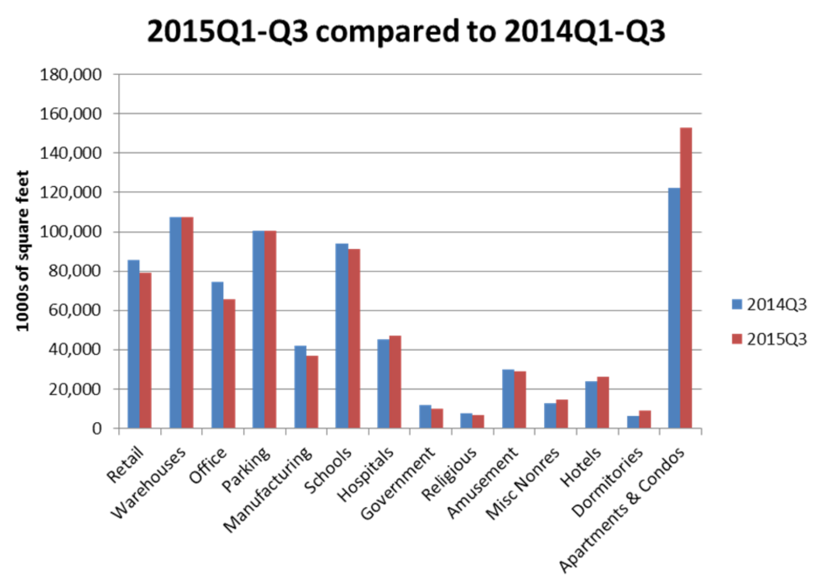


Building Construction

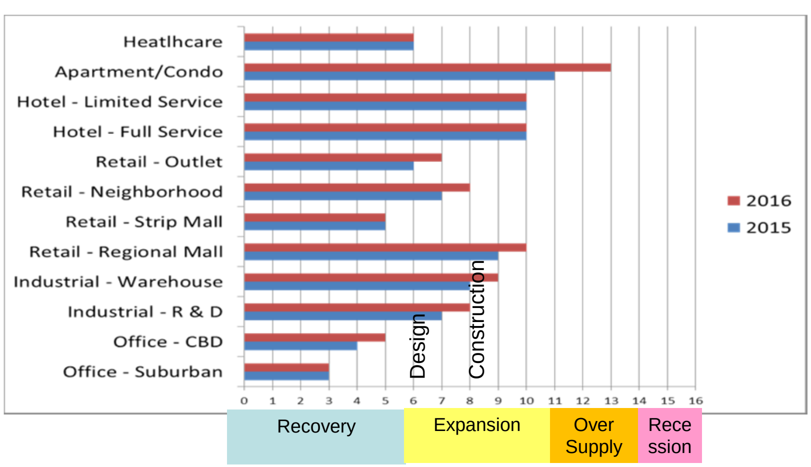


The greatest growth between 2014 and 2015 has been in apartments, dorms, hotels & arenas.

Building Construction

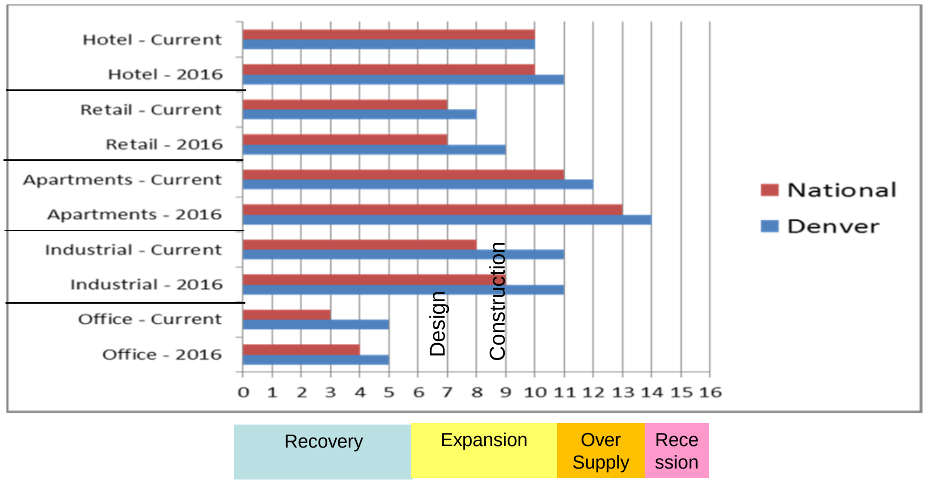


National Momentum



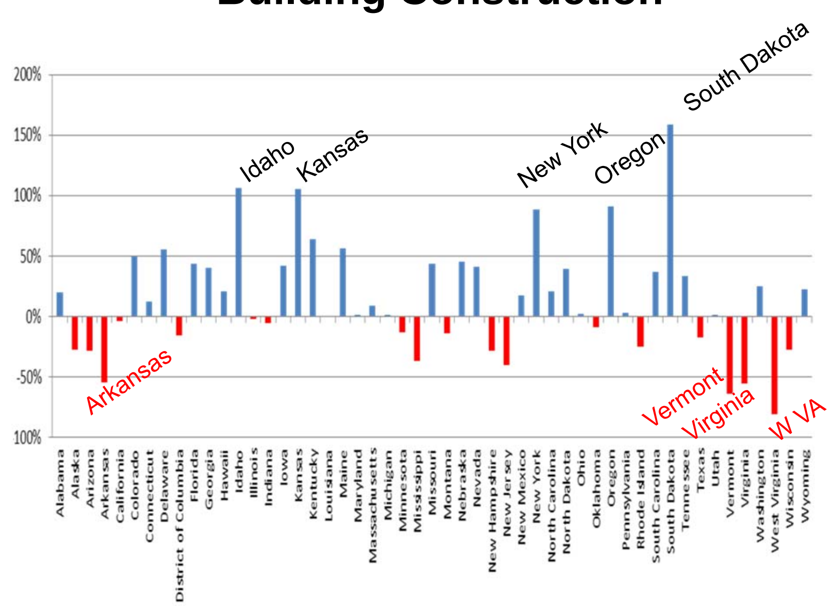
Momentum for apartments is teetering on over-supply

Denver Momentum

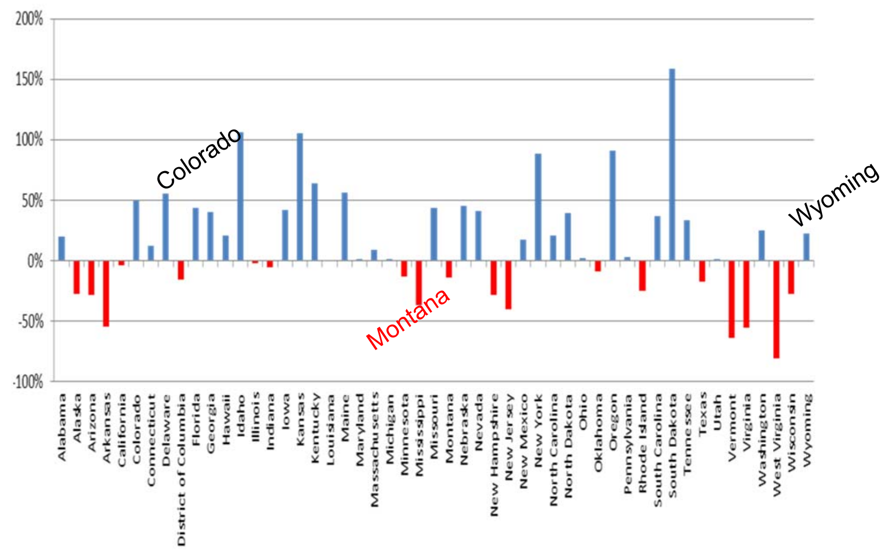


Momentum for apartments is teetering on over-supply

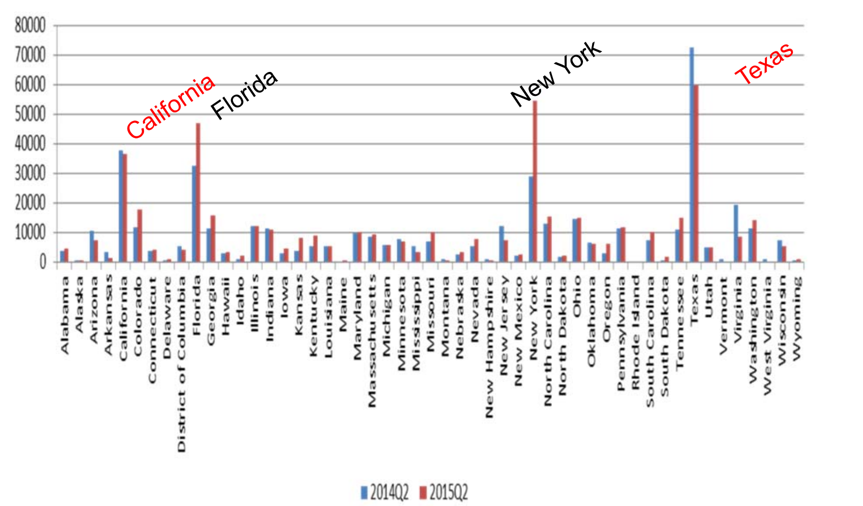
Building Construction



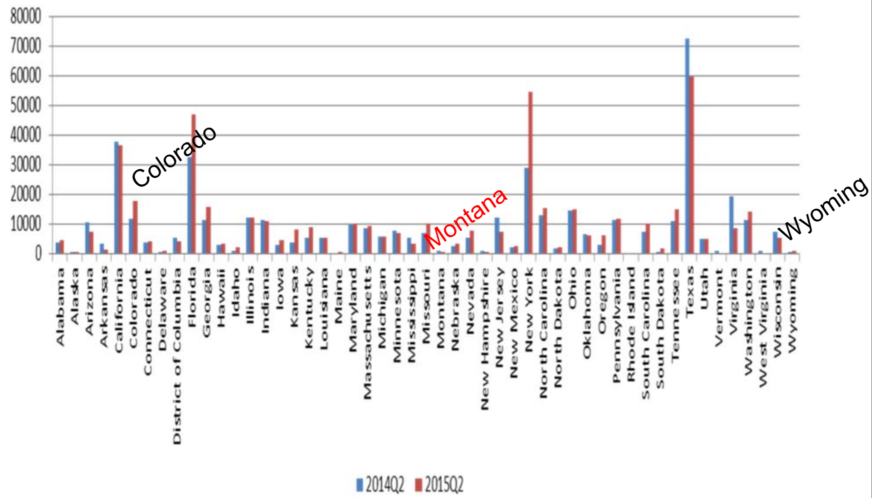
Building Construction



Building Construction

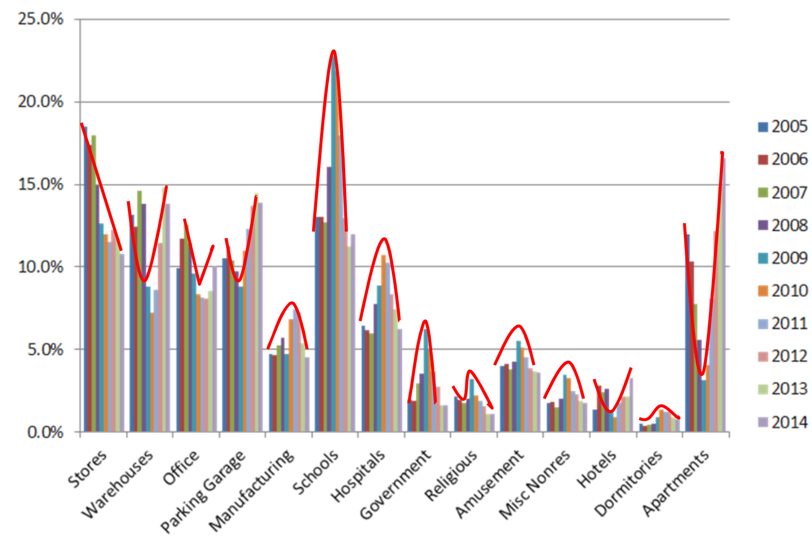


Building Construction

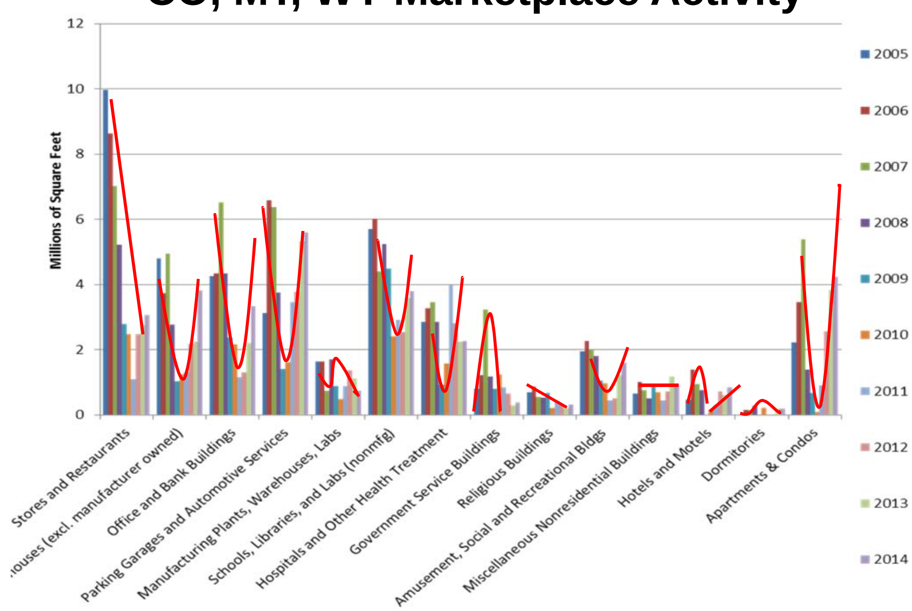


Regional Momentum

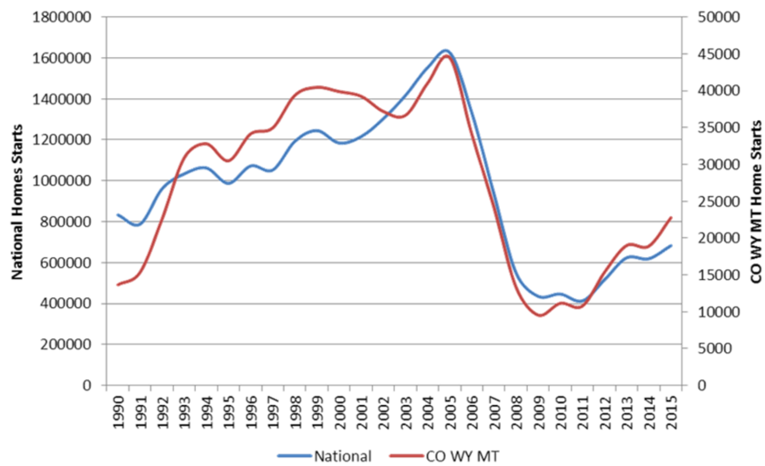
Uneven National Marketplace Activity



CO, MT, WY Marketplace Activity



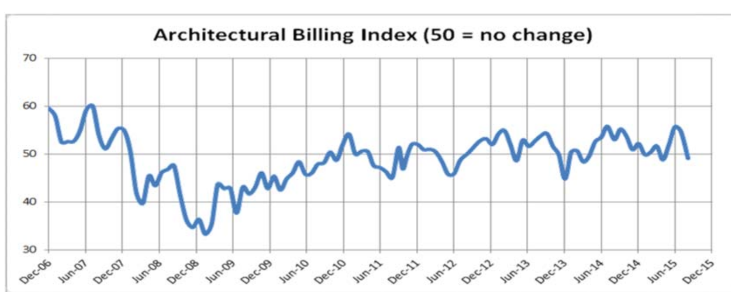
Single Family Construction



Market fell 75% from 2005 to 2010
Growth but still down 52% from peak

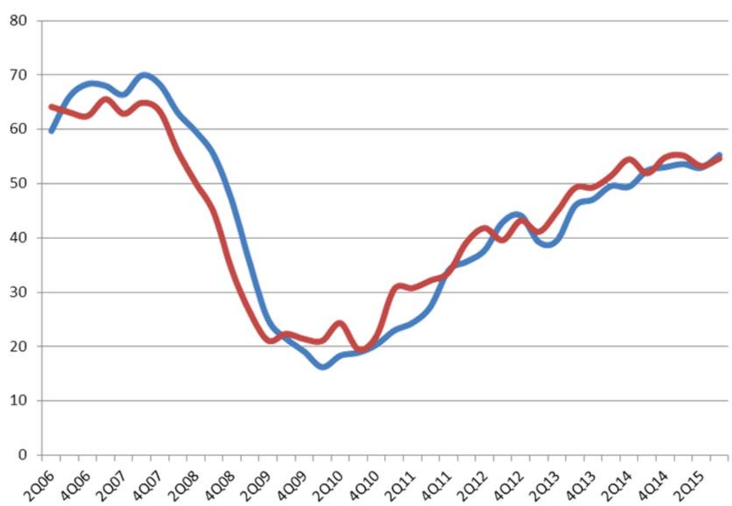
33

Market Indicators

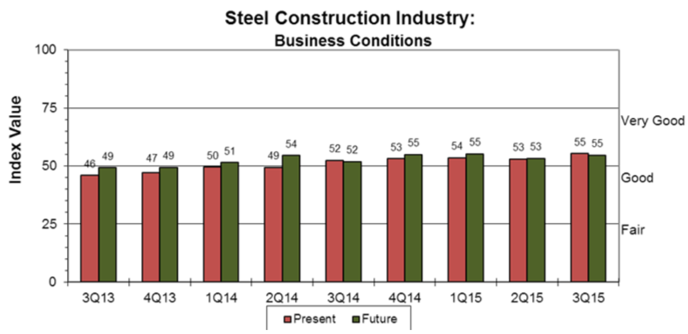


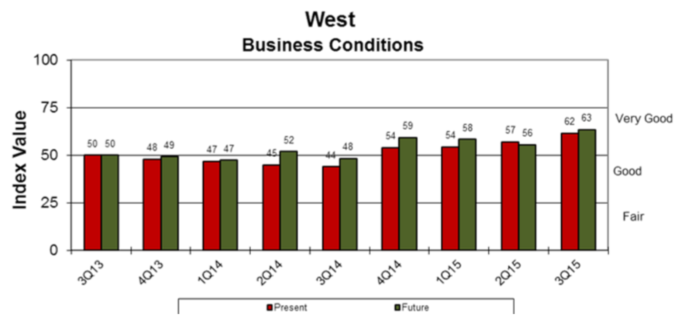
Dodge Monthly Construction Starts

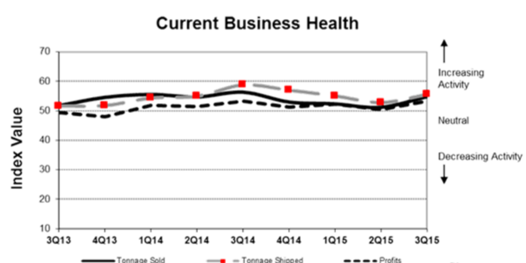
Fabricator Optimism

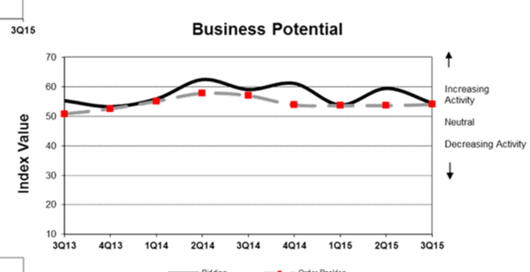


Red over Blue = Optimism
Blue over Red = Pessimism


Steel Construction Industry:
Business Conditions
Index Value
100
75
50
25
0
46 49
47 49
50 51
49 54
52 52
53 55
54 55
53 53
55 55
Very Good
Good
Fair
3Q13
4Q13
1Q14
2Q14
3Q14
4Q14
1Q15
2Q15
3Q15
Present
Future


West
Business Conditions
Index Value
100
75
50
25
0
50 50
48 49
47 47
45 52
44 48
54 59
54 58
57 56
62 63
Very Good
Good
Fair
3Q13
4Q13
1Q14
2Q14
3Q14
4Q14
1Q15
2Q15
3Q15
Present
Future


Current Business Health
Index Value
Increasing Activity
Neutral
Decreasing Activity
3Q13
4Q13
1Q14
2Q14
3Q14
4Q14
1Q15
2Q15
3Q15
Tonnage Sold
Tonnage Shipped
Profits


Business Potential
Index Value
Increasing Activity
Neutral
Decreasing Activity
3Q13
4Q13
1Q14
2Q14
3Q14
4Q14
1Q15
2Q15
3Q15
Bidding
Order Backlog

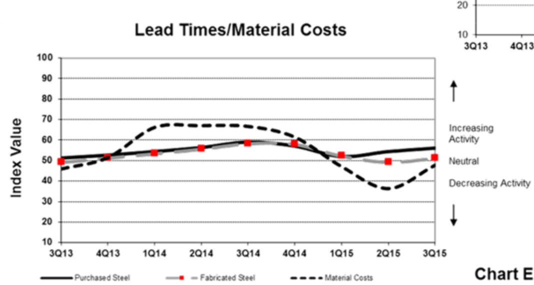
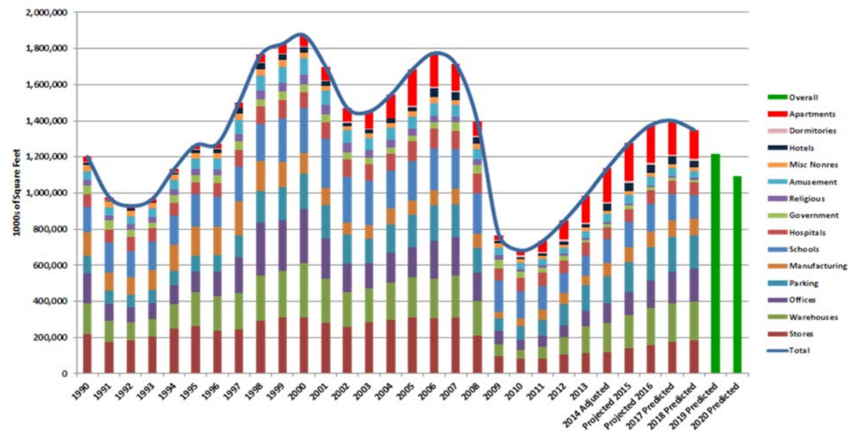

Lead Times/Material Costs
Index Value
Increasing Activity
Neutral
Decreasing Activity
3Q13
4Q13
1Q14
2Q14
3Q14
4Q14
1Q15
2Q15
3Q15
Purchased Steel
Fabricated Steel
Material Costs

Chart E

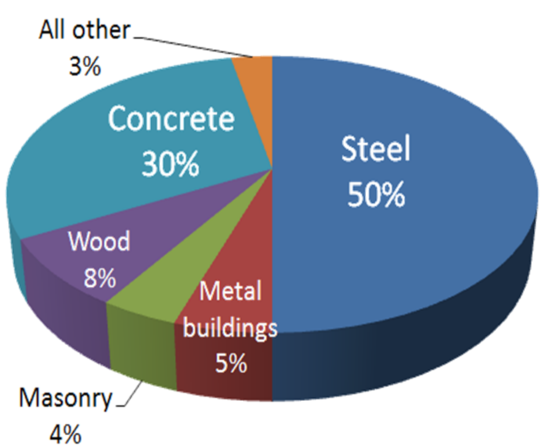
Building Market Projections



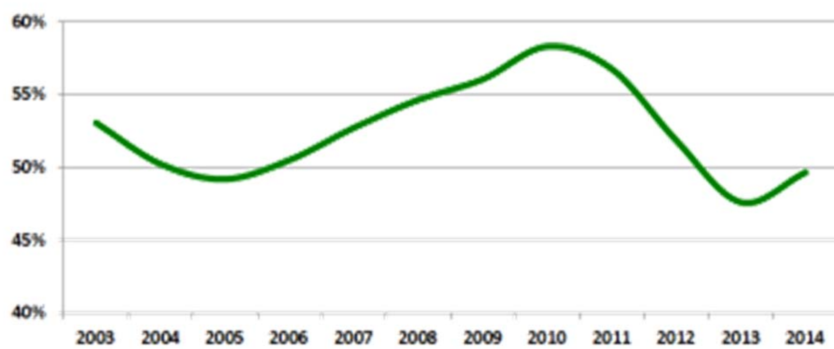
2015 increase of ~~10%~~ 5%
2016 increase of 5%
Peak in 2017 20% below 2006/2007

Structural Steel Market Share

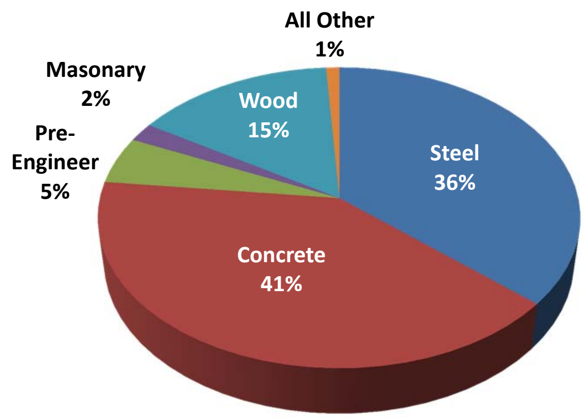
Y/E 2014



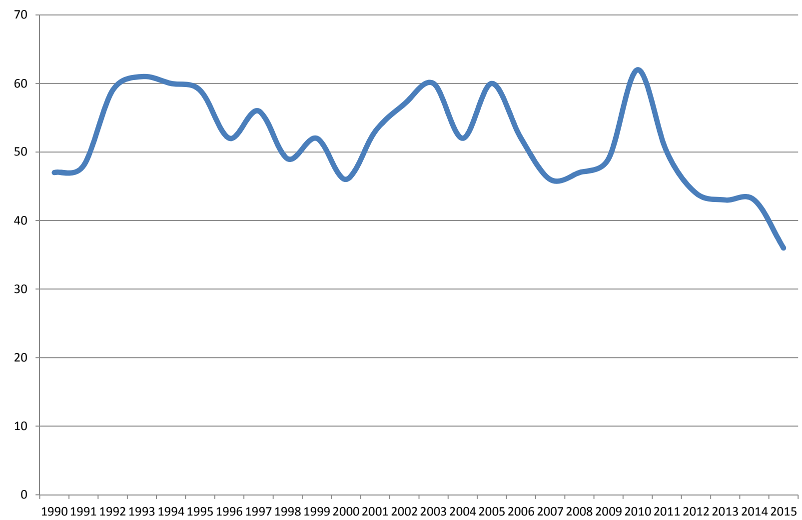
Structural Steel Market Share

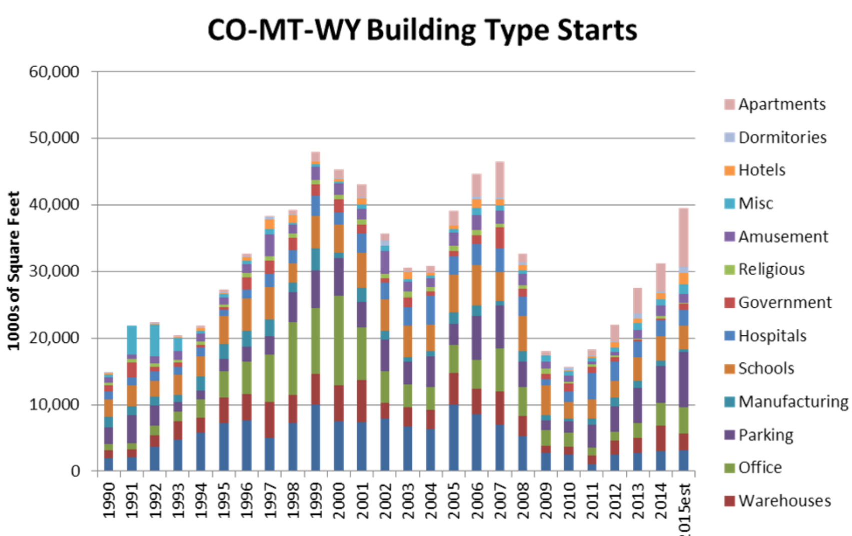


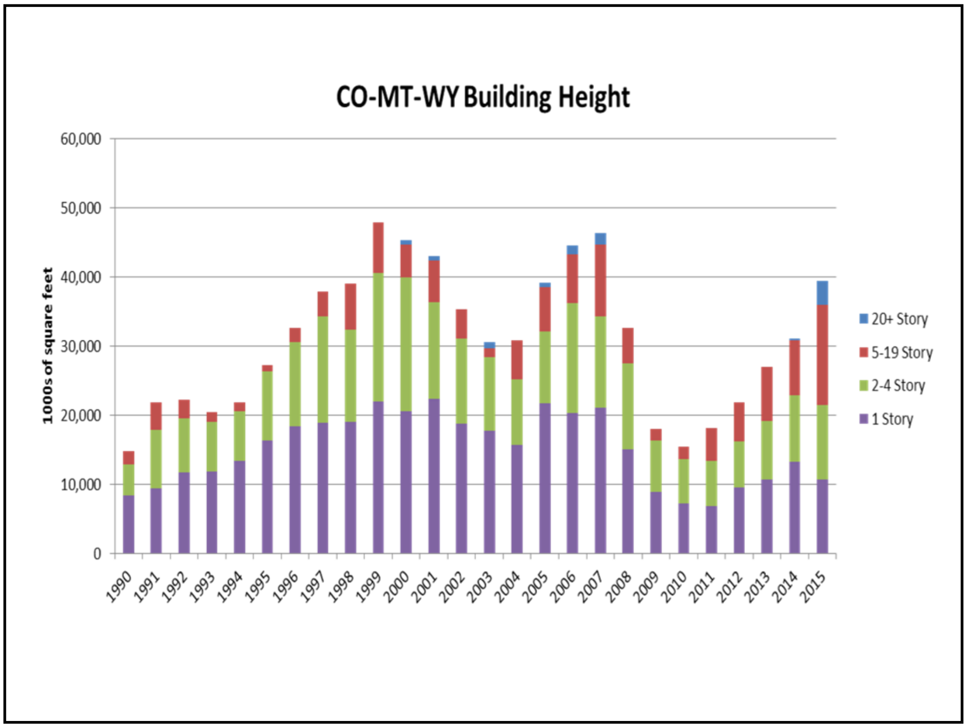
Market Share – CO-MT-WY

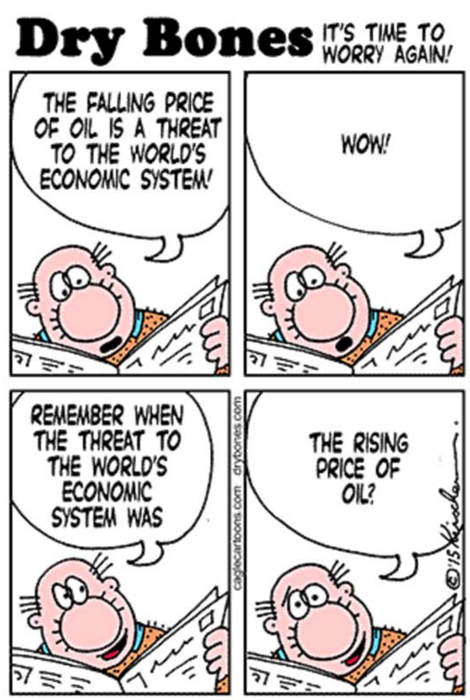


Structural Steel Share – CO-MT-WY

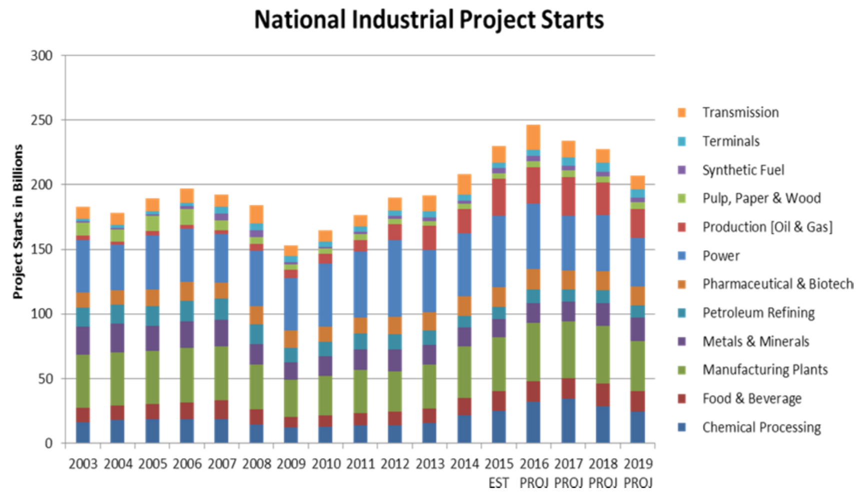





CO-MT-WY Building Height
60,000
50,000
40,000
30,000
20,000
10,000
0
1000s of square feet
1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015
20+ Story
5-19 Story
2-4 Story
1 Story

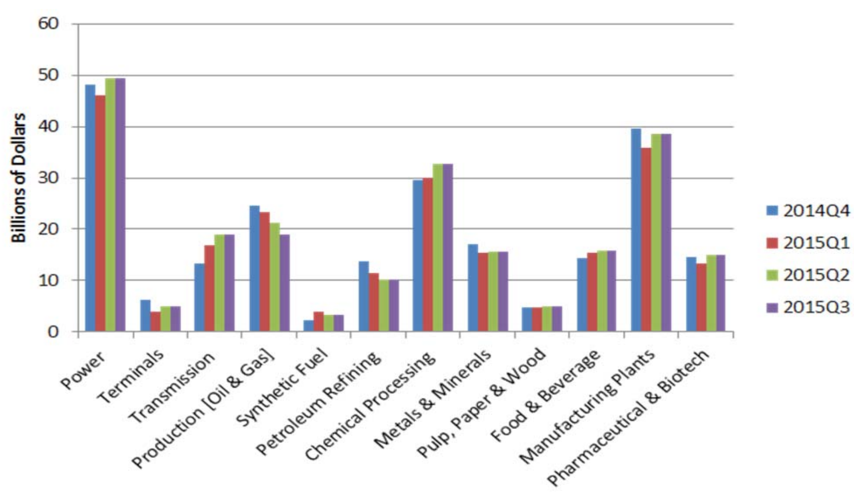

Dry Bones
IT'S TIME TO WORRY AGAIN!
THE FALLING PRICE OF OIL IS A THREAT TO THE WORLD'S ECONOMIC SYSTEM!
WOW!
REMEMBER WHEN THE THREAT TO THE WORLD'S ECONOMIC SYSTEM WAS
THE RISING PRICE OF OIL?
caglecartoons.com drybones.com

Industrial Construction Market

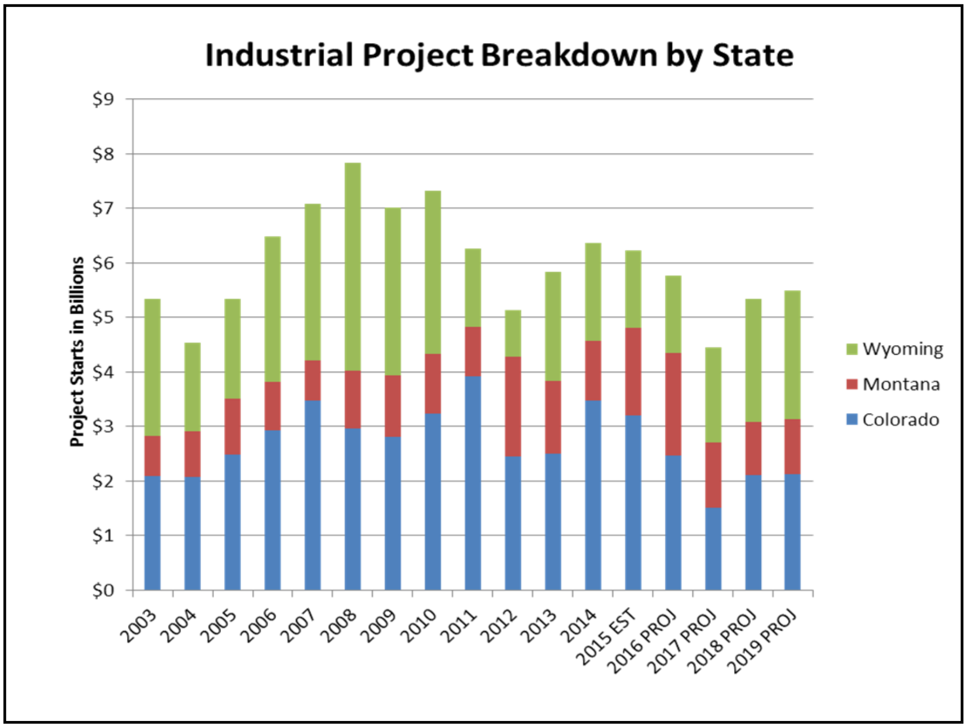


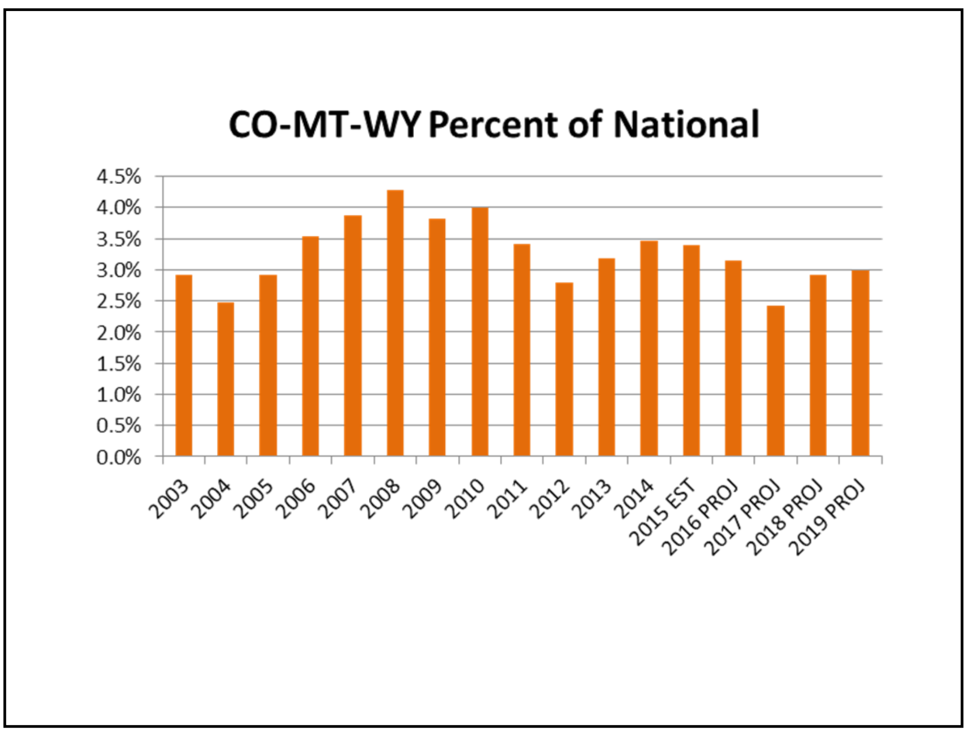
In spite of the dip in energy prices – activity up

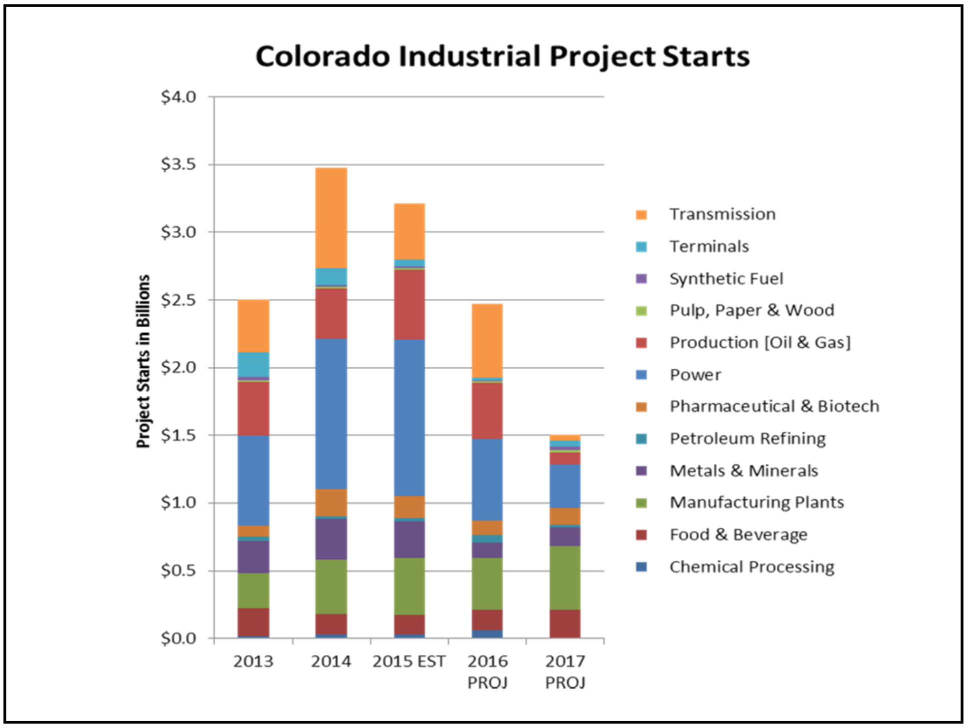
Industrial Construction Market



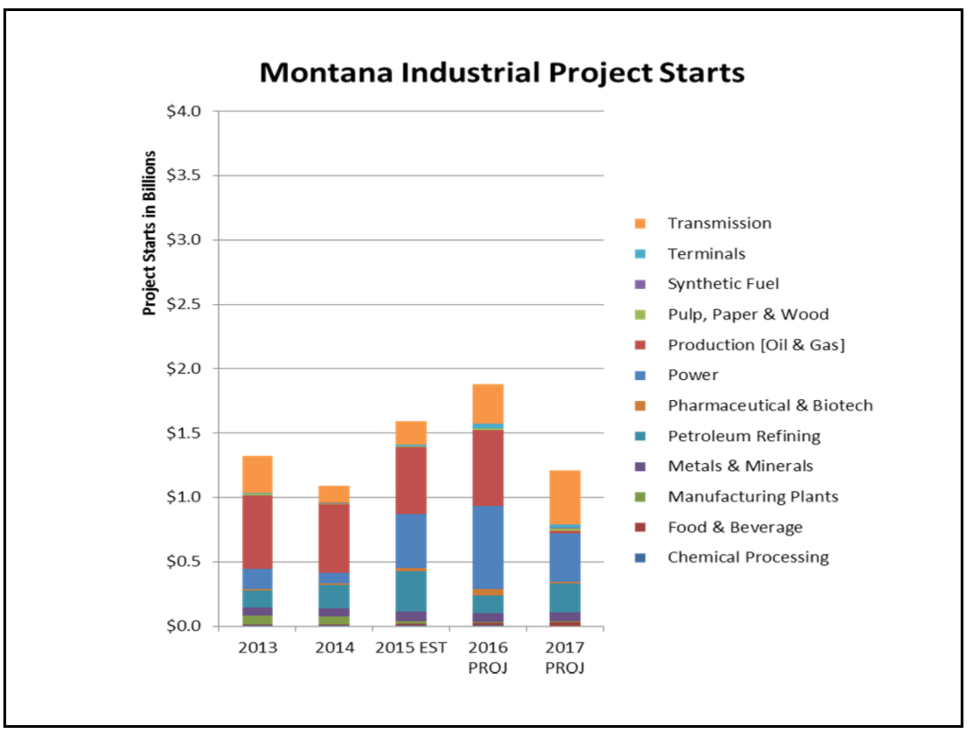
Uncertainty in forecasts


Industrial Project Breakdown by State
Project Starts in Billions
$0
$1
$2
$3
$4
$5
$6
$7
$8
$9
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015 EST
2016 PROJ
2017 PROJ
2018 PROJ
2019 PROJ
Wyoming
Montana
Colorado

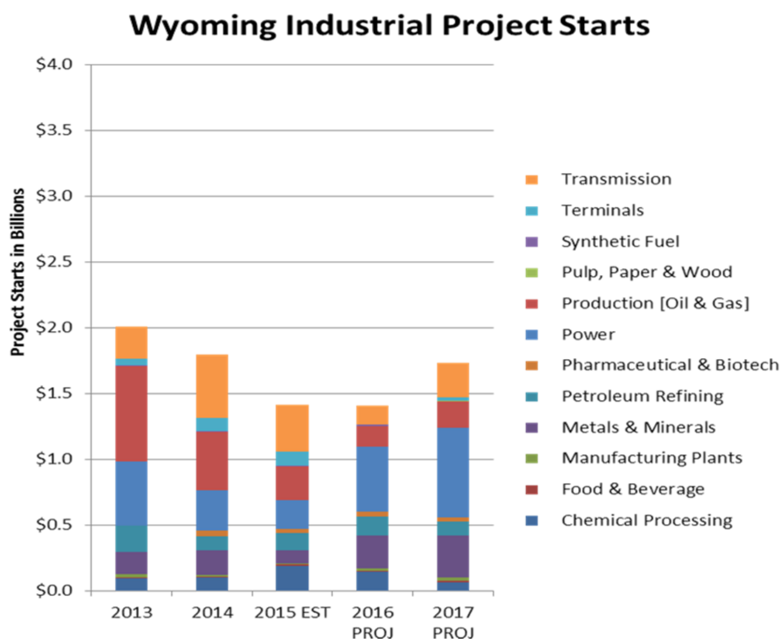

CO-MT-WY Percent of National
0.0%
0.5%
1.0%
1.5%
2.0%
2.5%
3.0%
3.5%
4.0%
4.5%
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015 EST
2016 PROJ
2017 PROJ
2018 PROJ
2019 PROJ



Colorado Industrial Project Starts
$4.0
$3.5
$3.0
$2.5
$2.0
$1.5
$1.0
$0.5
$0.0
Project Starts in Billions
2013
2014
2015 EST
2016 PROJ
2017 PROJ
Transmission
Terminals
Synthetic Fuel
Pulp, Paper & Wood
Production [Oil & Gas]
Power
Pharmaceutical & Biotech
Petroleum Refining
Metals & Minerals
Manufacturing Plants
Food & Beverage
Chemical Processing



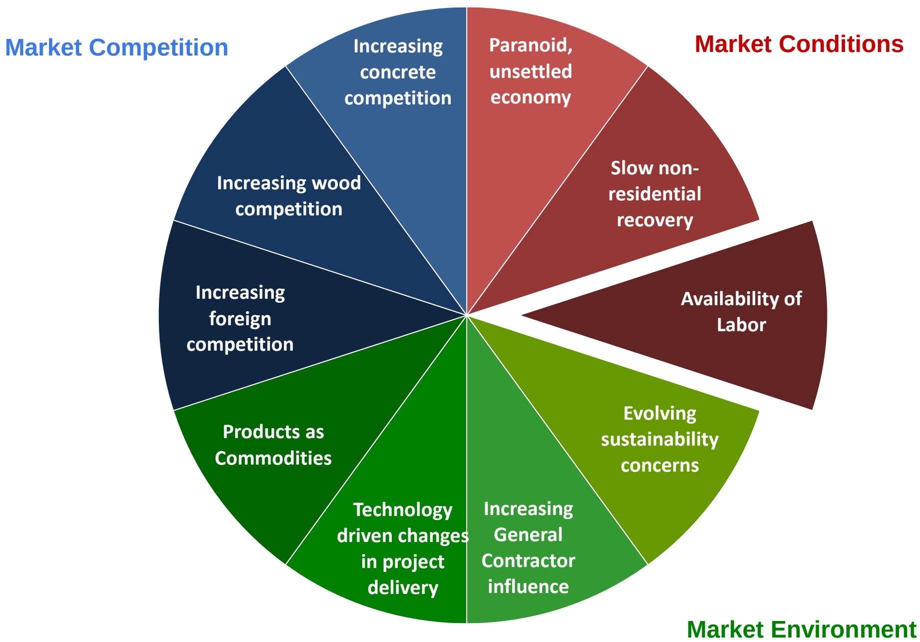
Montana Industrial Project Starts
$4.0
$3.5
$3.0
$2.5
$2.0
$1.5
$1.0
$0.5
$0.0
Project Starts in Billions
2013
2014
2015 EST
2016 PROJ
2017 PROJ
Transmission
Terminals
Synthetic Fuel
Pulp, Paper & Wood
Production [Oil & Gas]
Power
Pharmaceutical & Biotech
Petroleum Refining
Metals & Minerals
Manufacturing Plants
Food & Beverage
Chemical Processing



So what does it all mean for CO-MT-WY?

Multi-story residential	**Flat to small decline**
Non-residential	**Up 8% to 10%**
Industrial	**Down 10%**
Infrastructure	**Flat**

PRELIMINARY



Where Did All the Construction Workers Go?

Posted on October 16, 2015

New Census Data on Job-to-Job Flows

By Hubert Janicki and Erika McEntarfer

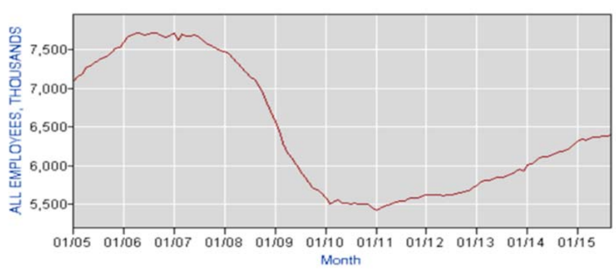
US Census Bureau

Unfilled job openings in the construction industry have risen steadily since 2009. The rise follows a sharp fall due to the housing bust and the subsequent Great Recession. Anecdotally, many builders and contractors have reported difficulty finding new workers.

Specifically, we investigated the dynamics of worker flows in the construction industry in an attempt to examine some possible causes of this recent tightening in the labor market.

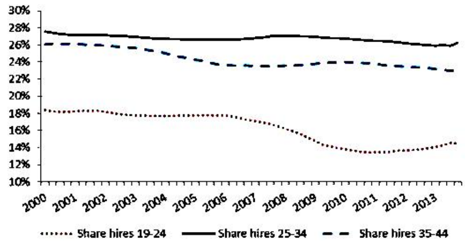
We find that **over 60 percent of construction workers displaced by the housing bust are employed in other industries or have left the labor market by 2013.**

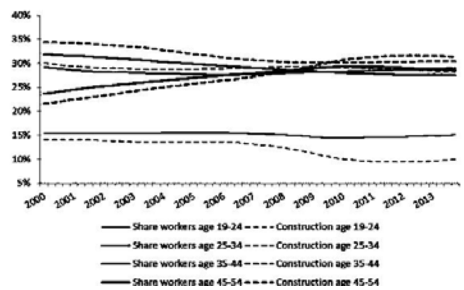
We also find evidence of a **persistent drop in hiring of younger workers into construction jobs** over the last decade that is likely contributing to the current shortage of skilled workers in construction.



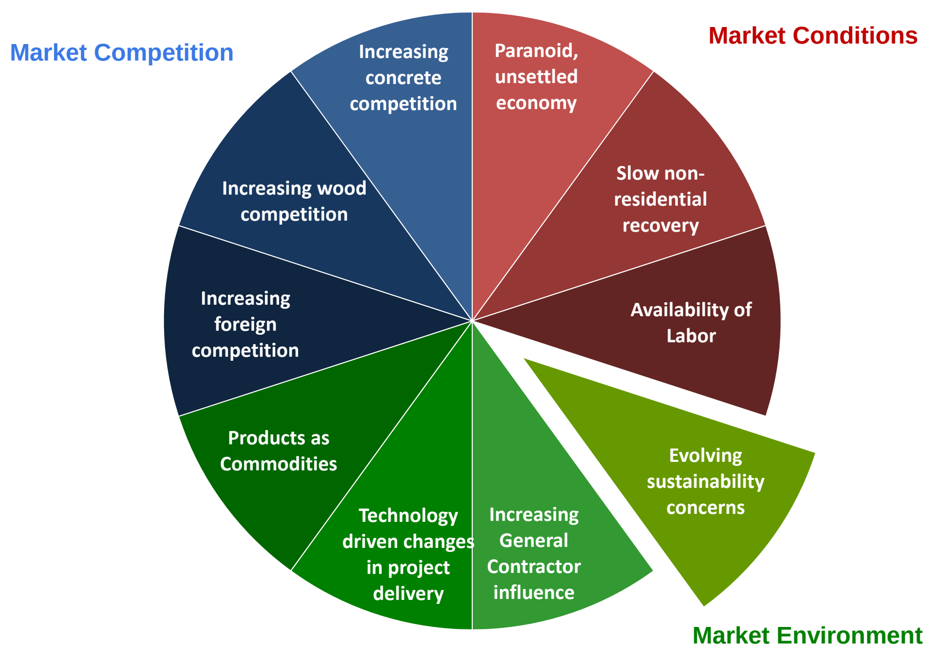
- Pre-Great Recession
  - Worker flow from manufacturing, mining, leisure/hospitality (50%) into construction
- Great Recession ------ 37% of jobs lost
- Post-Great Recession
  - 40% recalled
  - 35% left for another industry (transportation)
  - Typically to transportation or business services
  - 25% left labor force

Lack of Young Worker Hiring



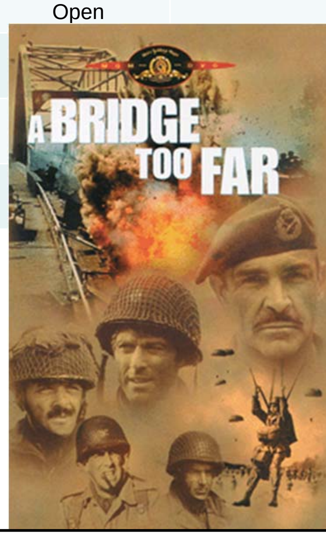


- Cost of training new workers
- Union desire to increase wages
- Willingness to work on short term basis
- Drug testing failure rates

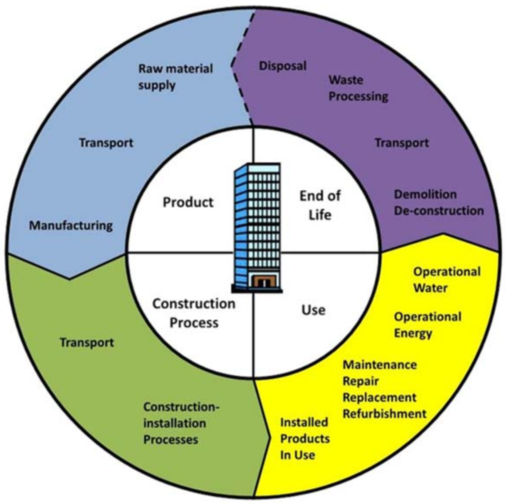


New Sustainability Requirements

Version	Status	Registration Opened	Registration Closed	Application Sunset Date
LEED v4	Registration Open	Nov 1, 2013	TBD	TBD
NC 2009	Registration Open	Apr 27, 2009	Oct 15, 2016	June 1, 2021
NC v2.2			June 27, 2009	June 27, 2015
NC v2.1			Dec 31, 2005	Dec 15, 2011
NC v2.0			Nov 13, 2002	Dec 31, 2009



The Goal: Whole Building LCAs

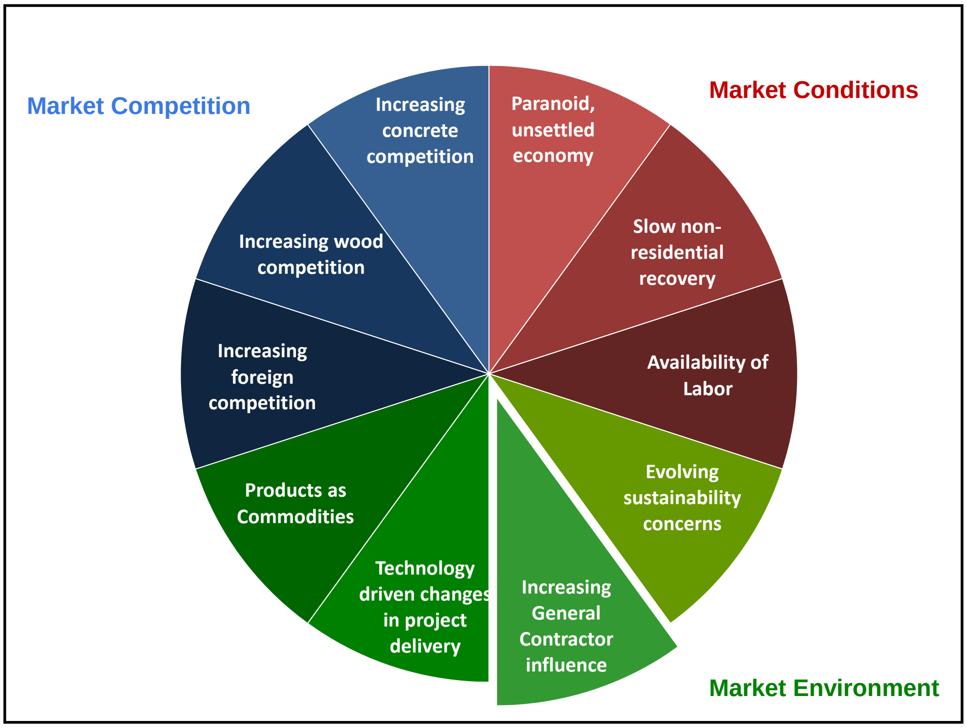


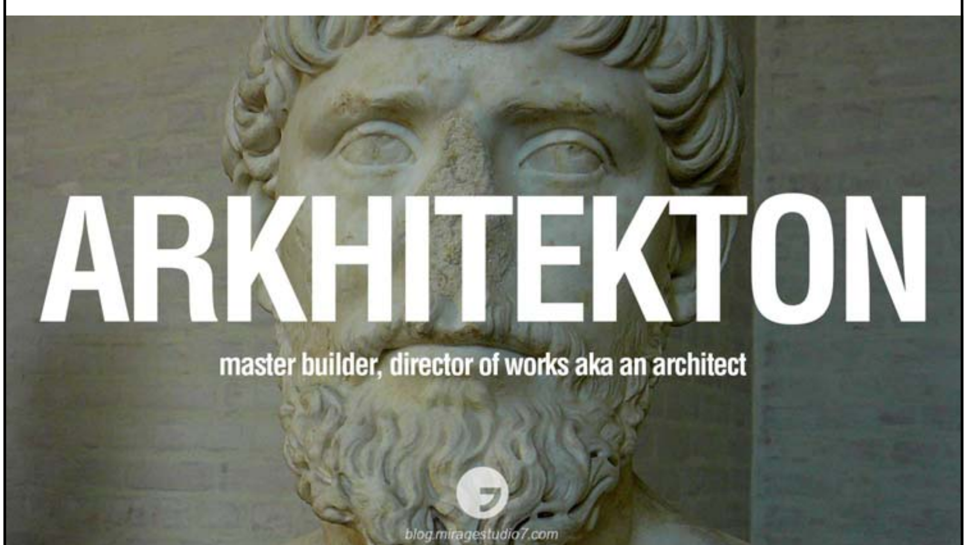
81 Major Corporations--Including Google, Facebook, Coca Cola, General Motors--Sign WH Pledge to Back Global Climate Change Deal

By Mairead McArdle | October 20, 2015 | 5:21 PM EDT

(CNSNews.com) – Eighty-one major corporations with operations in the U.S.--including Google, Facebook, Apple, Coca Cola and General Motors--have taken a White House pledge "to demonstrate their support for action on climate change and the conclusion of a climate change agreement in Paris that takes a strong step forward toward a low-carbon, sustainable future."

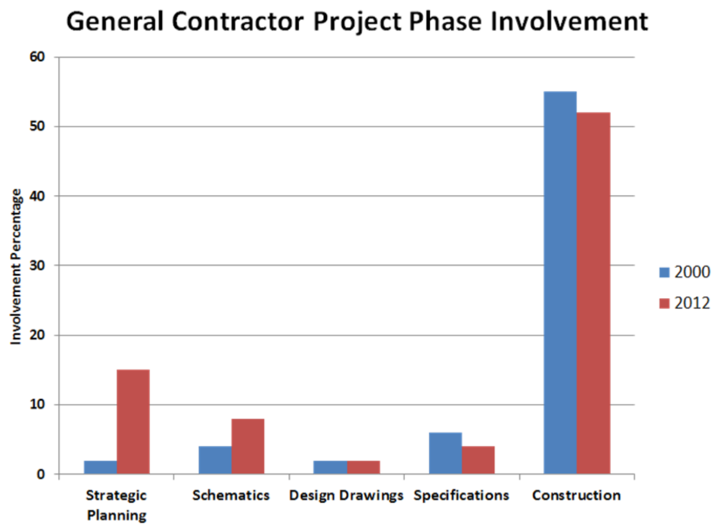
President Obama meets with top business leaders in the Roosevelt Room of the White House on Oct. 19, 2015. (AP photo)

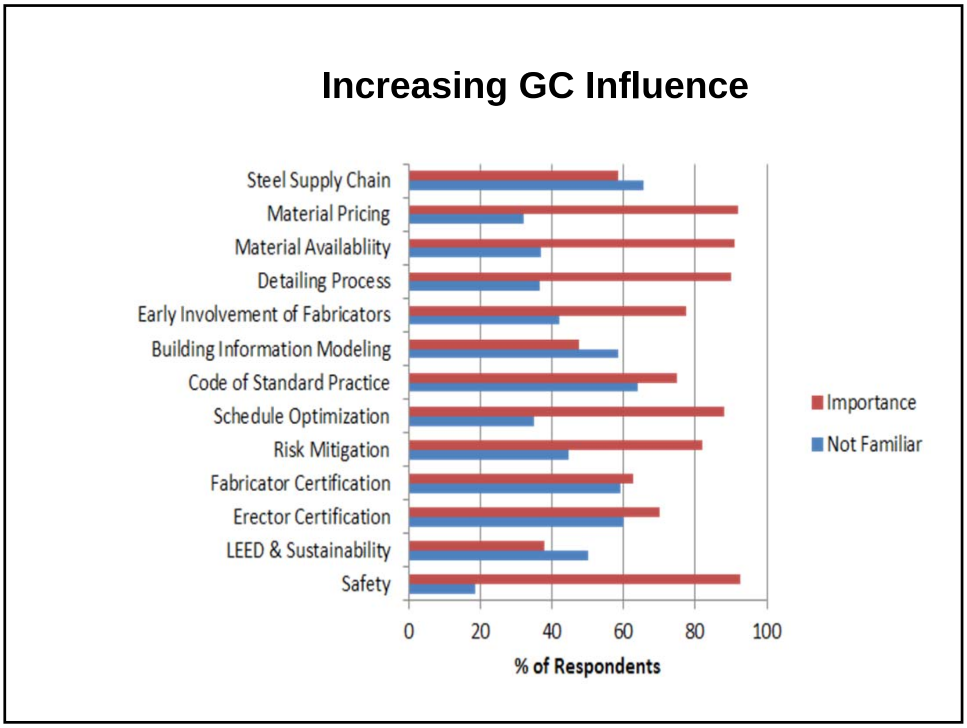

Market Competition
Market Conditions
Increasing concrete competition
Paranoid, unsettled economy
Increasing wood competition
Slow non-residential recovery
Increasing foreign competition
Availability of Labor
Products as Commodities
Evolving sustainability concerns
Technology driven changes in project delivery
Increasing General Contractor influence
Market Environment

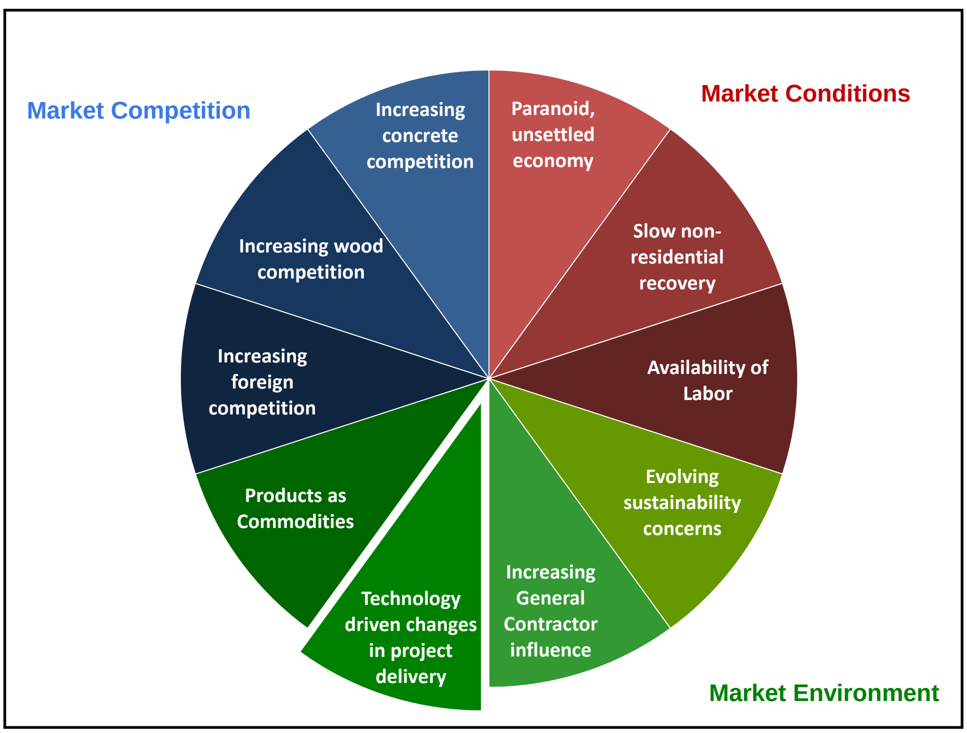

ARKHITEKTON
master builder, director of works aka an architect
blog.miragestudio7.com

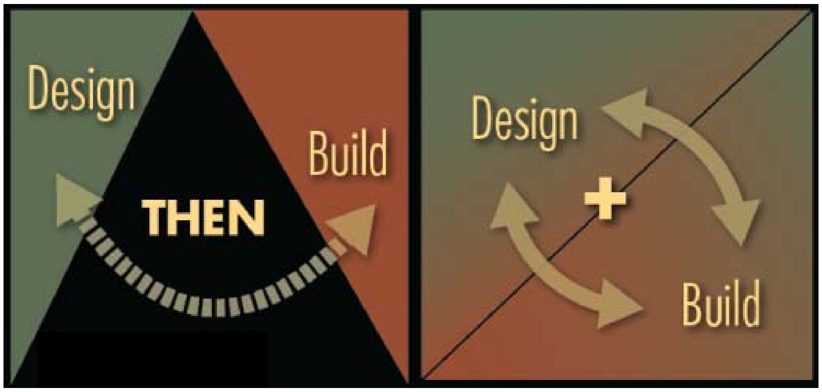
MASTER BUILDERS
ASSOCIATION

Increasing GC Influence

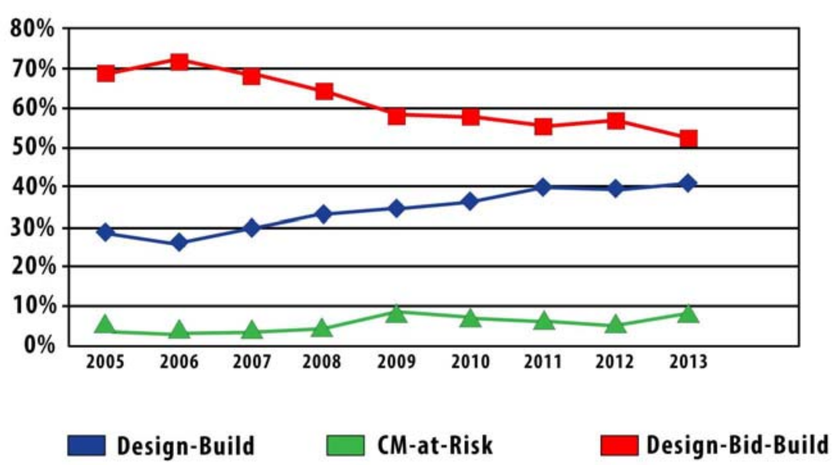



Increasing GC Influence
Steel Supply Chain
Material Pricing
Material Availablity
Detailing Process
Early Involvement of Fabricators
Building Information Modeling
Code of Standard Practice
Schedule Optimization
Risk Mitigation
Fabricator Certification
Erector Certification
LEED & Sustainability
Safety
0
20
40
60
80
100
% of Respondents
Importance
Not Familiar

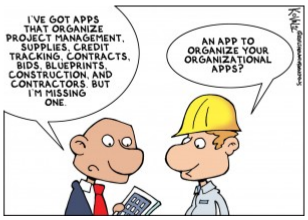

Market Competition
Market Conditions
Increasing concrete competition
Paranoid, unsettled economy
Increasing wood competition
Slow non-residential recovery
Increasing foreign competition
Availability of Labor
Products as Commodities
Evolving sustainability concerns
Technology driven changes in project delivery
Increasing General Contractor influence
Market Environment

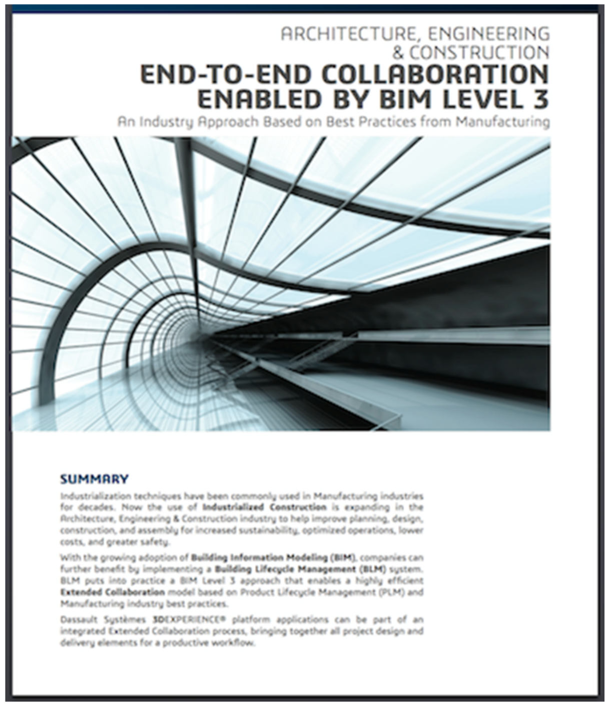


Project Delivery Method Market Share
for Non-Residential Construction



Analysis by RSMeans Market Intelligence a div. of Reed Construction Date





ARCHITECTURE, ENGINEERING & CONSTRUCTION

END-TO-END COLLABORATION ENABLED BY BIM LEVEL 3

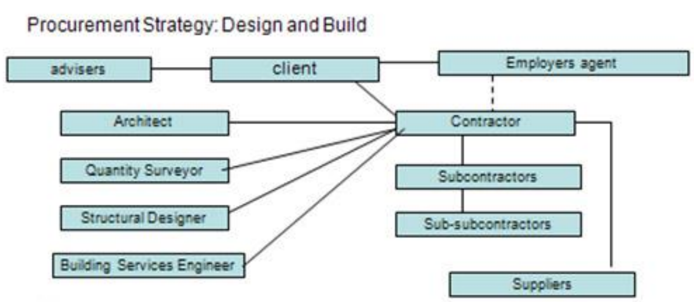
An Industry Approach Based on Best Practices from Manufacturing

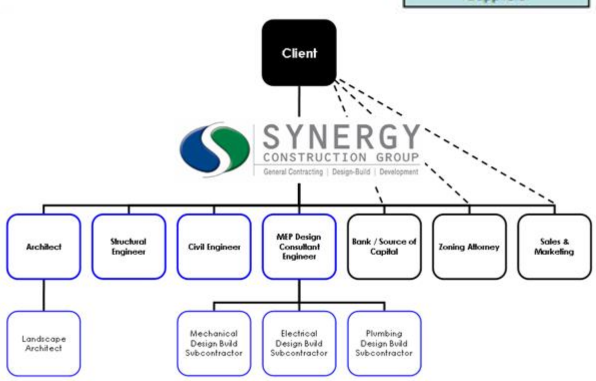
SUMMARY

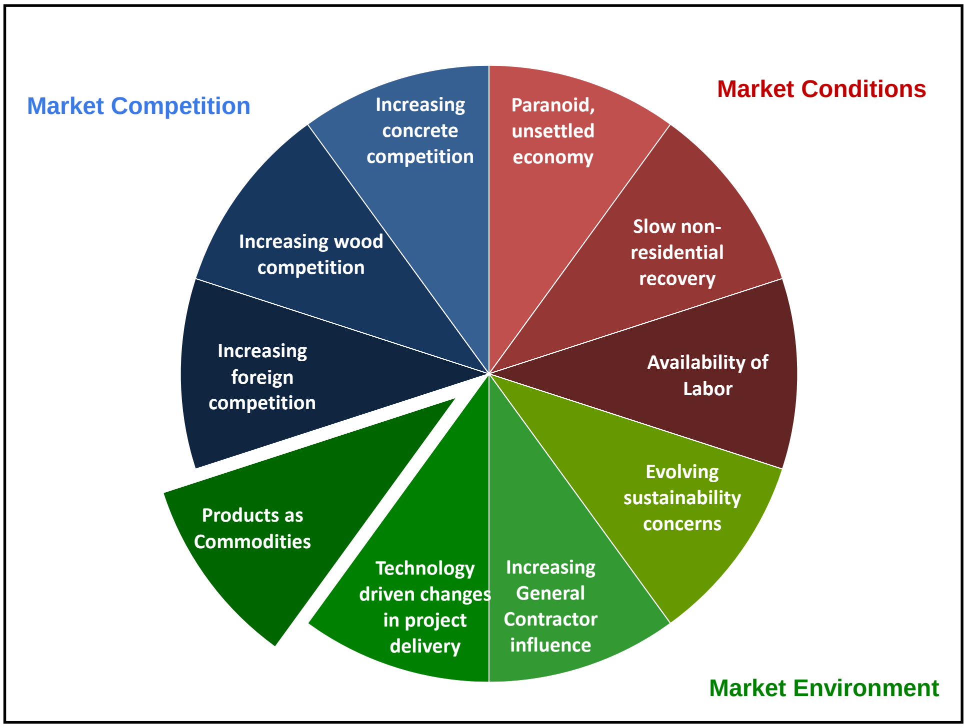
Industrialization techniques have been commonly used in Manufacturing industries for decades. Now the use of **Industrialized Construction** is expanding in the Architecture, Engineering & Construction industry to help improve planning, design, construction, and assembly for increased sustainability, optimized operations, lower costs, and greater safety.

With the growing adoption of **Building Information Modeling (BIM)**, companies can further benefit by implementing a **Building Lifecycle Management (BLM)** system. BLM puts into practice a BIM Level 3 approach that enables a highly efficient **Extended Collaboration** model based on Product Lifecycle Management (PLM) and Manufacturing industry best practices.

Dassault Systèmes **3D**EXPERIENCE® platform applications can be part of an integrated Extended Collaboration process, bringing together all project design and delivery elements for a productive workflow.





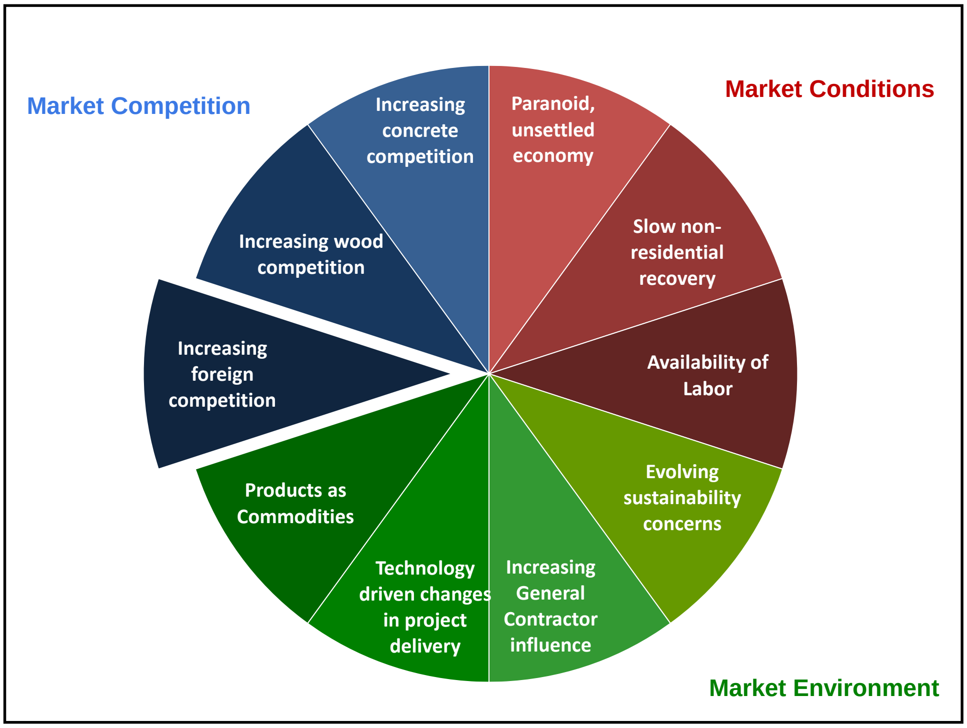

Market Competition
Market Conditions
Increasing concrete competition
Paranoid, unsettled economy
Increasing wood competition
Slow non-residential recovery
Increasing foreign competition
Availability of Labor
Products as Commodities
Evolving sustainability concerns
Technology driven changes in project delivery
Increasing General Contractor influence
Market Environment

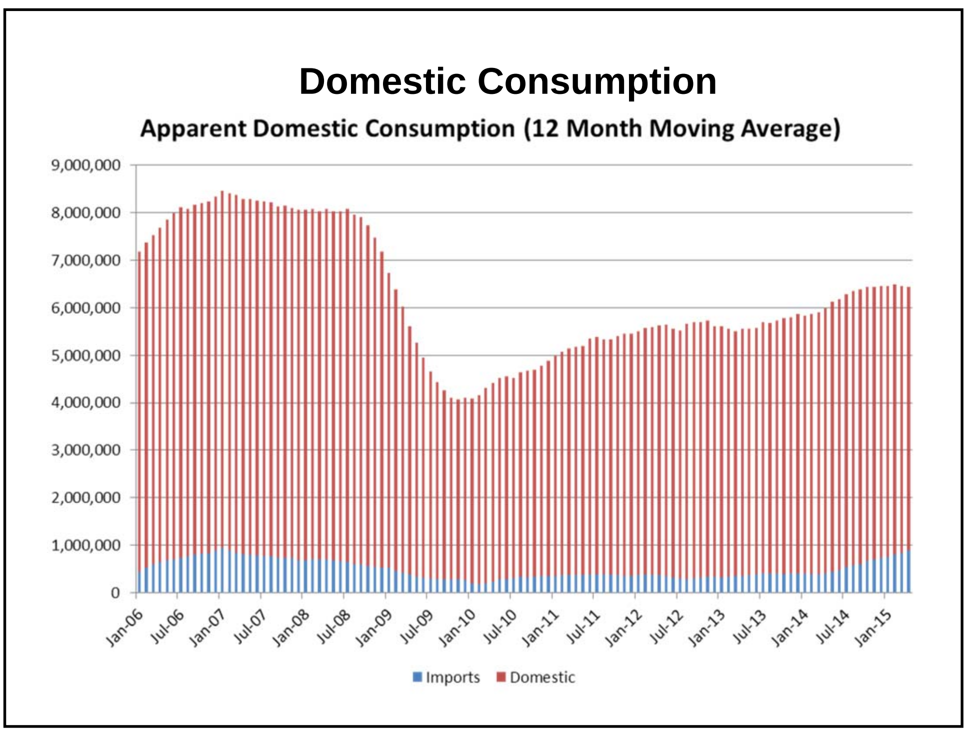

Commodities
market
coffee
electricity
palladium
product
oil
differentiation
sugar
silver
goods
price
demand
fungibility
brand
salt
Commodity
commodification
coal
products
customers
wheat
crude
gold
iron
differentiating
platinum
notebook
supply
copper
count
rice
beans
soybeans
aluminium
perceived
ore
based
hence

Fabricated steel is not a commodity.

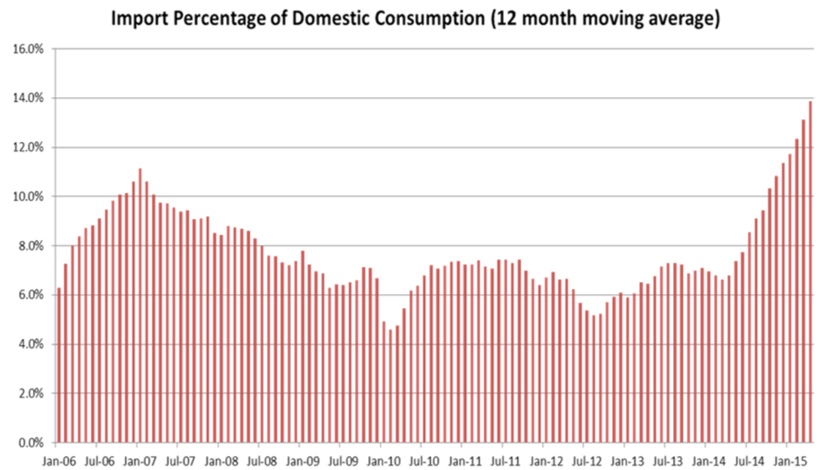
Fabricated steel is a specialty product.

The key is the expertise of the fabricator.


Market Competition
Market Conditions
Increasing concrete competition
Paranoid, unsettled economy
Slow non-residential recovery
Availability of Labor
Evolving sustainability concerns
Increasing General Contractor influence
Technology driven changes in project delivery
Products as Commodities
Increasing foreign competition
Increasing wood competition
Market Environment


Domestic Consumption
Apparent Domestic Consumption (12 Month Moving Average)
9,000,000
8,000,000
7,000,000
6,000,000
5,000,000
4,000,000
3,000,000
2,000,000
1,000,000
0
Jan-06
Jul-06
Jan-07
Jul-07
Jan-08
Jul-08
Jan-09
Jul-09
Jan-10
Jul-10
Jan-11
Jul-11
Jan-12
Jul-12
Jan-13
Jul-13
Jan-14
Jul-14
Jan-15
Imports
Domestic

Domestic Consumption



Ask AISC

Category: Other

First Name:	Ping
Last Name:	ZHONG
Email Address:	zhongping@gmail.com
Company:	The Embassy of P.R. China in USA
Street:	3505 International Pl. NW.
City:	washington
State:	District of Columbia
Zip Code:	20008
Work Phone:	2024952242
Fax:	
Date:	10/19/2015 12:09:41

What perspective are you asking the question?

Other

Enter your question below:

Dear AISC, I'm a Chinese diplomat in Washington DC, and I recently want to know more about the steel framed construction in US, and your organization and your website provided many useful information. In general, I'd like to know the answers to the following: 1- The history and current status of steel framed building in the US, percentage of steel framed buildings in all buildings, the relationship between the development of the steel framed buildings and the domestic production of steel? 2- The Economic character of the steel framed building in US, comparing with the concrete building for instance. The cost of steel framed building during design, construction and maintenance period? What are the requirements on the steel performance, and how much steel needed on average for typical unit of the building? 3- The technical standards, fire and earthquake standards about steel framed buildings in US. If the questions above are too general, would you please let me know where I can find the statistics on the current share of the steel-framed buildings? Your website provided some info (https://www.aisc.org/content.aspx?id=3800 on the Market Size and Growth), where I can find more details with historic date over the years? Moreover, I noticed that there's one section called "Structural Steel today" in your "Designing with Structural Steel- A guide for Architectures", where can I get a copy of the chapter? Thanks you so much for your help. Best, Ping ZHONG Tel: (202)495-2242 Fax: (202)363-4870 Email: zhongping@gmail.com Add: 3505 International Place N.W., Washington D.C. 20008

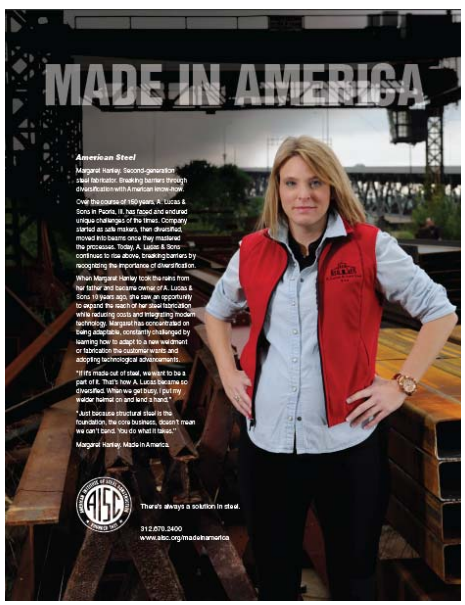
Dear AISC,

I'm a Chinese diplomat in Washington DC, and I recently want to know more about the steel framed construction in US, and your organization and your website provided many useful information.

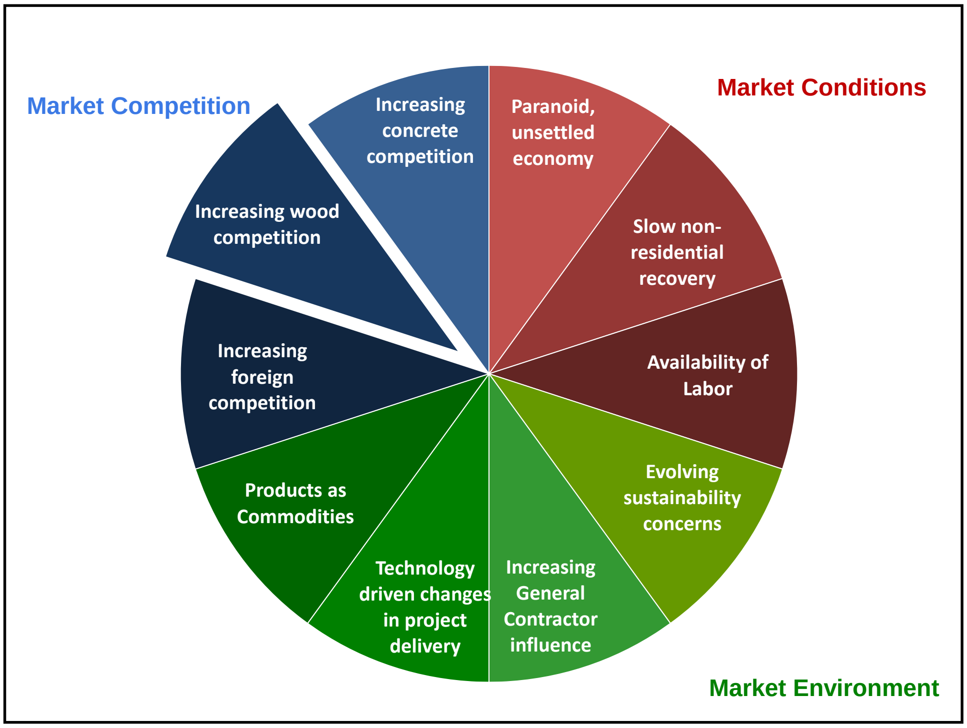
I'd like to know the answers to the following: 1- The history and current status of steel framed building in the US, percentage of steel framed buildings in all buildings, the relationship between the development of the steel framed buildings and the domestic production of steel? 2- The Economic character of the steel framed building in US, comparing with the concrete building for instance. The cost of steel framed building during design, construction and maintenance period? What are the requirements on the steel performance, and how much steel needed on average for typical unit of the building? 3- The technical standards, fire and earthquake standards about steel framed buildings in US. If the questions above are too general, would you please let me know where I can find the statistics on the current share of the steel-framed buildings?

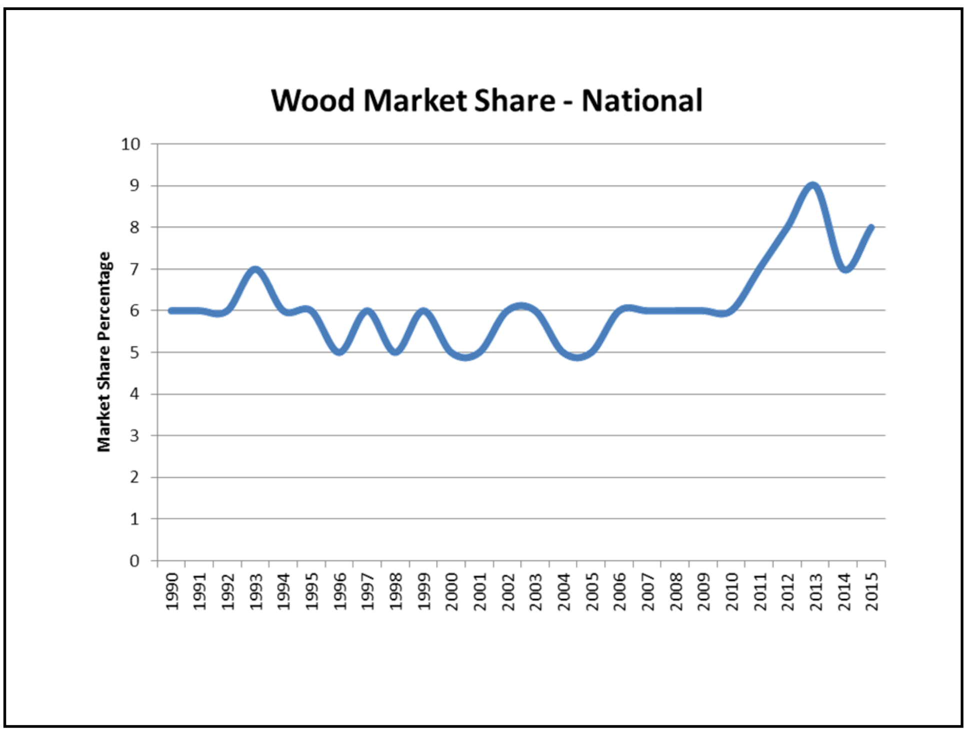
Thanks you so much for your help.

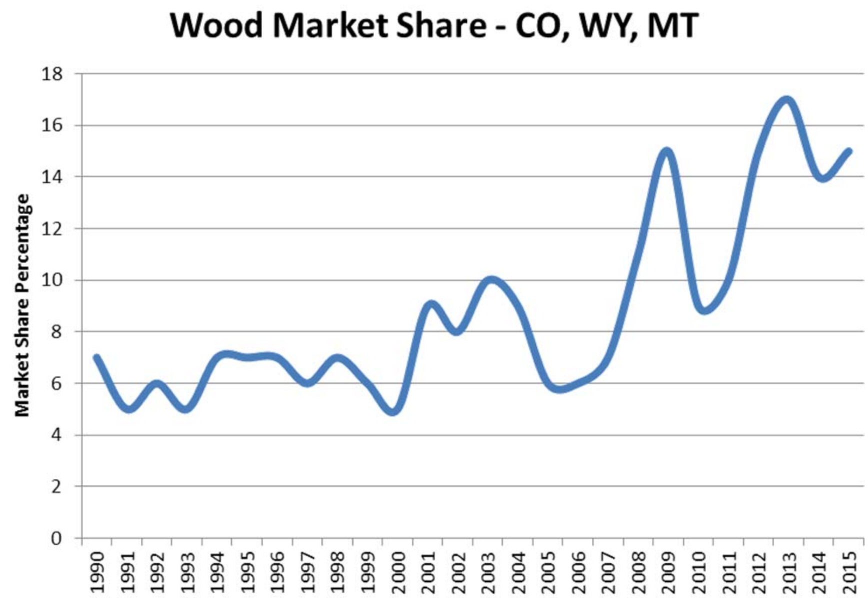
Best, Ping ZHONG



The key is the expertise of the fabricator.


Market Competition
Market Conditions
Increasing concrete competition
Paranoid, unsettled economy
Increasing wood competition
Slow non-residential recovery
Increasing foreign competition
Availability of Labor
Products as Commodities
Evolving sustainability concerns
Technology driven changes in project delivery
Increasing General Contractor influence
Market Environment


Wood Market Share - National
Market Share Percentage
10
9
8
7
6
5
4
3
2
1
0
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015

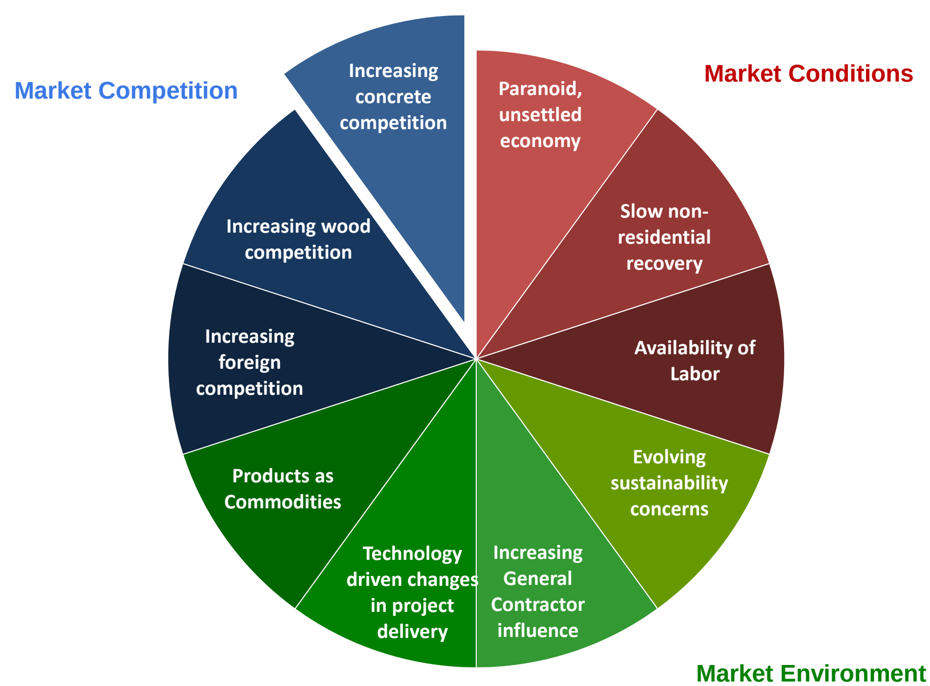


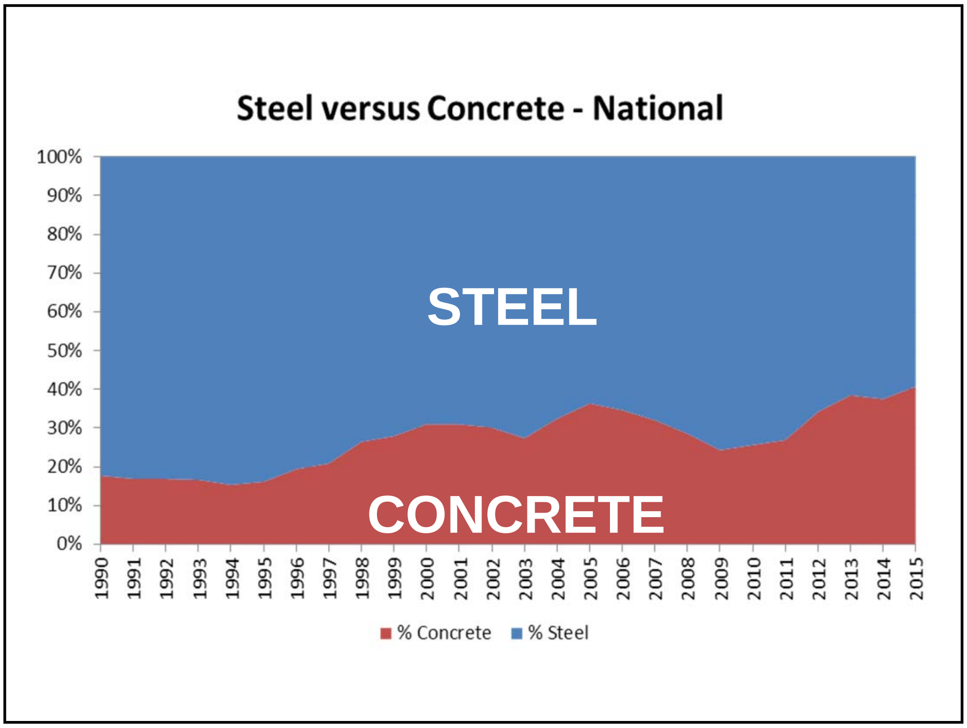
U.S. Tall Wood Building Prize Competition Winners Revealed

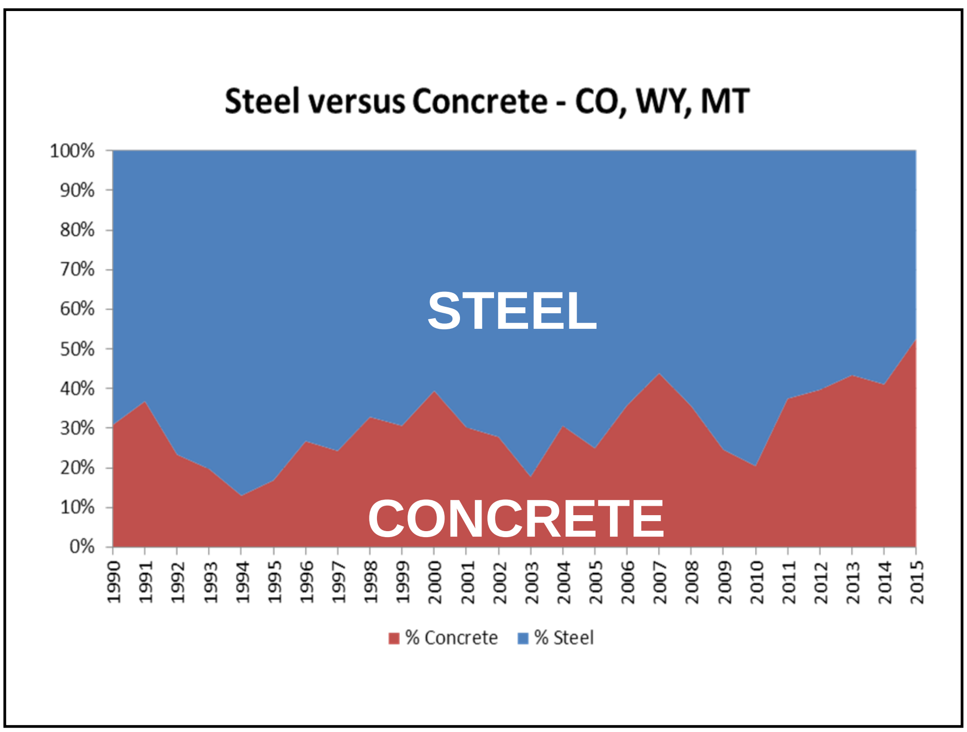
USDA and Softwood Lumber Board award $3 million to support tall wood demonstration projects in New York and Portland, Oregon

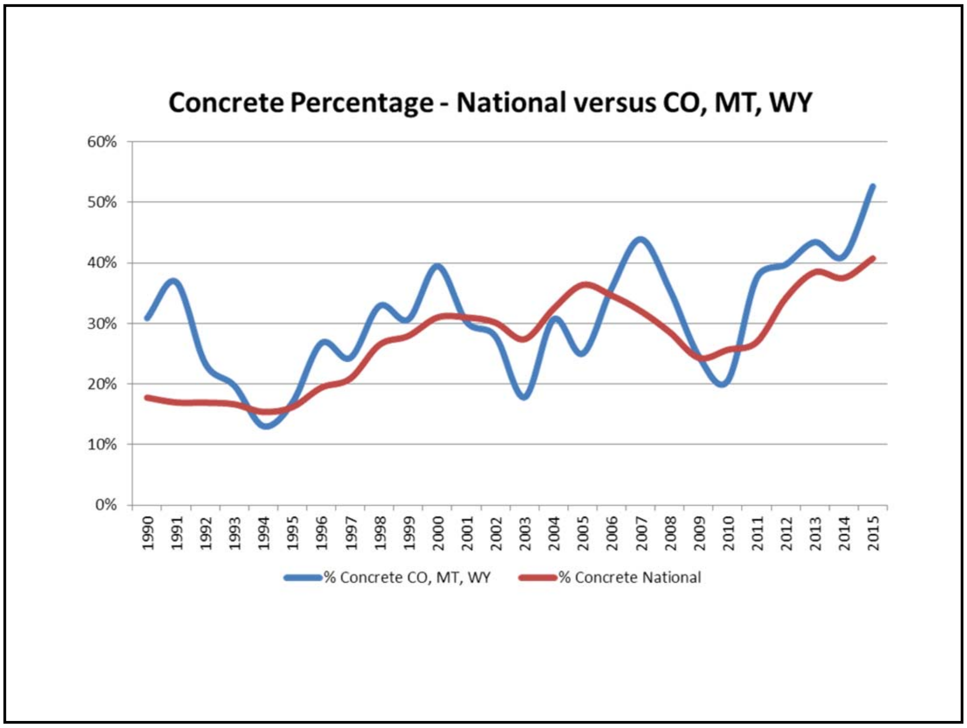
Washington, D.C. — September 17, 2015 — Today, U.S. Secretary of Agriculture Tom Vilsack, in partnership with the Softwood Lumber Board and the Binational Softwood Lumber Council, announced the winners of the U.S. Tall Wood Building Prize Competition. The two winning development teams were granted a combined $3 million in funding to support the development of tall wood demonstration projects in New York and Portland, Oregon.

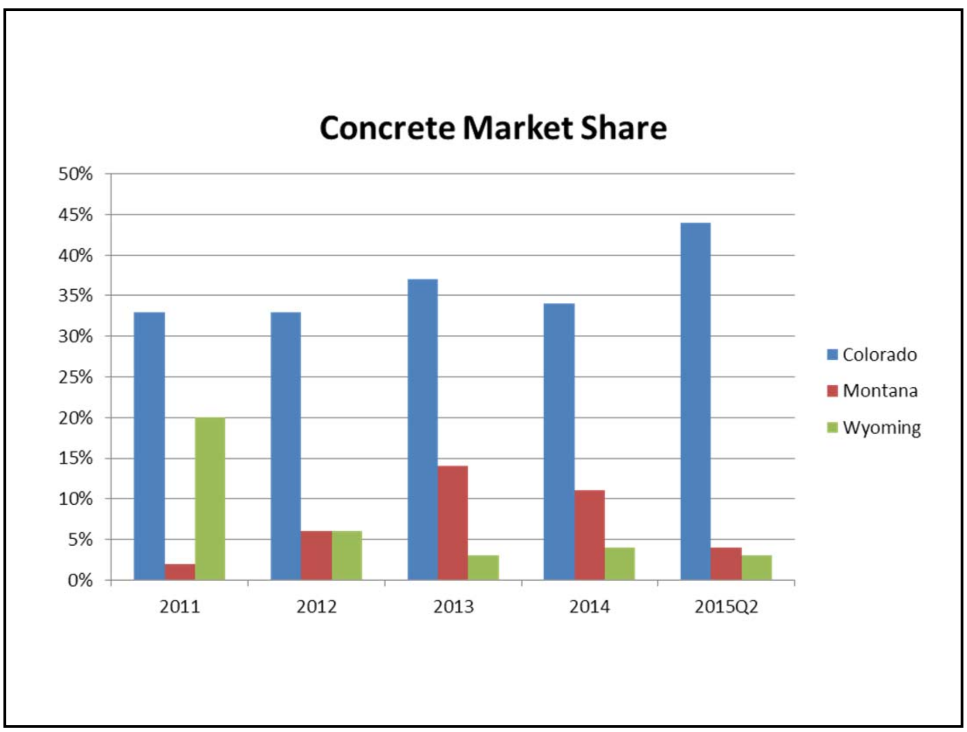
At the International Code Council Board of Director's (ICC-BOD)meetings one agenda item was entitled "AWC Tall Wood Ad-Hoc Committee Proposal". Only the ICC BOD had a copy of this proposal. This proposal was brought before the BOD at the request of the American Wood Council (AWC) as part of an overall proposal to both have ICC BOD establish an ad-hoc committee and to also fund same at an estimated cost of **$200,000**. The focus of the proposal appears to be to assess this 'new technology', on such topics as **heights and areas, construction types, fire, means of egress, structural**, etc. The initial concept is to have an ad-hoc committee complete their work in time for the **2021 code cycle** (2018-2020 three year cycle).




Steel versus Concrete - National
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
STEEL
CONCRETE
1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015
% Concrete
% Steel


Steel versus Concrete - CO, WY, MT
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
STEEL
CONCRETE
1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015
% Concrete
% Steel


Concrete Percentage - National versus CO, MT, WY
60%
50%
40%
30%
20%
10%
0%
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
% Concrete CO, MT, WY
% Concrete National

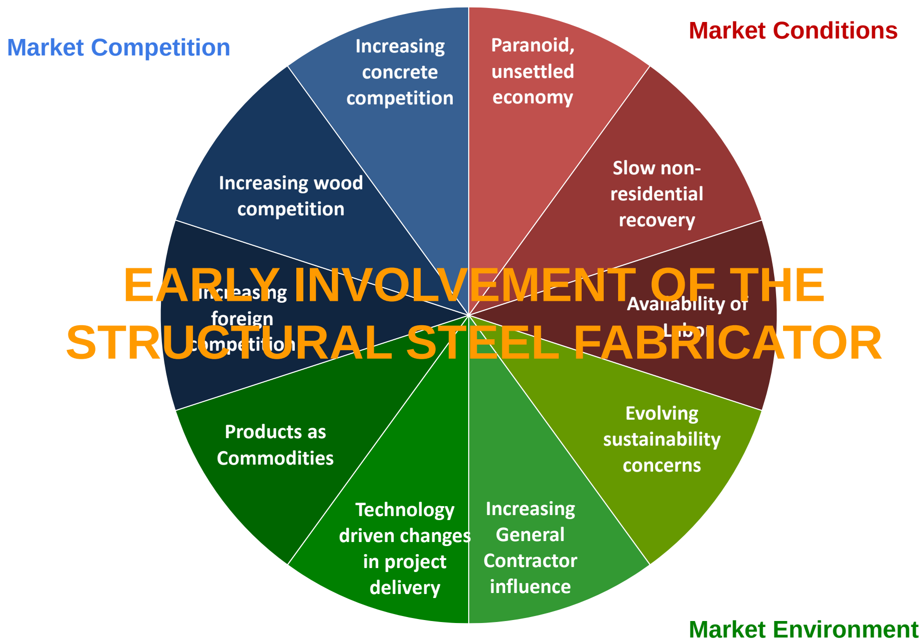

Concrete Market Share
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
2011
2012
2013
2014
2015Q2
Colorado
Montana
Wyoming

What are we going to do about it?

	% of Market	2011	2012	2013	2014	2015Q2	
Retail	8%	76%	73%	69%	71%	75%	
Warehouses	6%	25%	53%	11%	25%	25%	
Office	11%	86%	63%	62%	65%	72%	
Parking/Auto	23%	4%	16%	13%	7%	15%	
Manufacturing	1%	22%	60%	54%	43%	2%	
Schools	5%	70%	75%	93%	83%	61%	Wood
Hospitals	6%	80%	27%	65%	56%	66%	
Government	2%	57%	67%	49%	78%	59%	
Religious	0%	31%	35%	39%	40%	0%	
Amusement	3%	54%	54%	62%	67%	35%	Pre-engineered
Misc	4%	76%	33%	10%	28%	28%	
Hotels	4%	67%	0%	86%	33%	37%	
Dormitories	2%			0%	0%	0%	
Apartments	24%	0%	16%	11%	19%	9%	Concrete

	% of Market	2011	2012	2013	2014	2015Q2	
1 Story	25%	46%	51%	37%	43%	36%	Wood
2 to 4 story	26%	66%	50%	62%	52%	50%	
5 to 19 story	40%	31%	16%	21%	16%	18%	Wood
20+ story	9%				100%	39%	Concrete

EARLY INVOLVEMENT OF THE STRUCTURAL STEEL FABRICATOR



RMSCA

There's always a solution in steel.