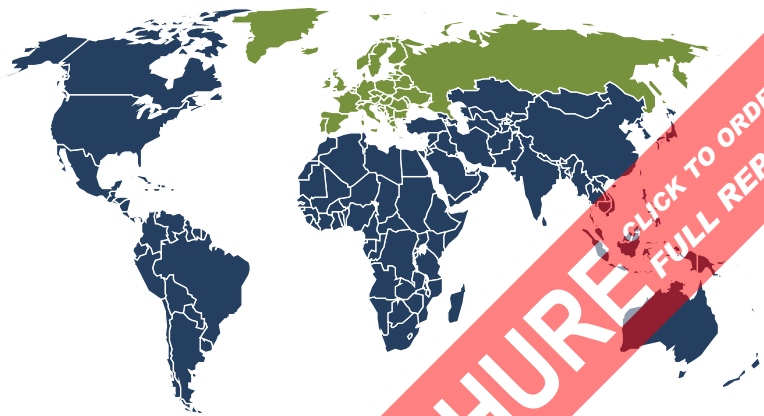




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# Prefabricated Housing: Europe

January 2021



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# About This Report

## Scope

This report forecasts to 2024 prefabricated housing demand and shipments in units and prefabricated housing demand in nominal US dollars at the manufacturer level in Europe. Total demand in units is segmented by product in terms of:

- panelized and precut
- manufactured and modular
- temporary

To illustrate historical trends, total demand in units is provided in annual series from 2009 to 2019; total demand by value, total shipments in units, and the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Excluded from this report are traditional site-built homes using some prefabricated building components (e.g., pre-hung windows or doors), prefabricated structures used for nonresidential purposes, and any temporary housing that resembles a tent.

For any given historical year, US dollar amounts are obtained from values expressed in applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2019.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden*
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands	United Kingdom*
France*	Isle of Man	Norway	Vatican City

\*Major prefabricated housing market.

Source: The Freedonia Group

## About This Report

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

\*Major prefabricated housing market.

Source: The Freedonia Group

## Sources

*Prefabricated Housing: Europe* (FE60031) is based on *Global Prefabricated Housing*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 7 | Relevant NACE Codes

NACE Code	Definition
45.21	General construction of buildings and civil engineering works

Source: European Commission

Table 8 | Relevant HS Codes

HS Code	Definition
9406	Prefabricated Buildings

Source: United Nations Statistics Division

# Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Prefabricated Housing*

### Freedonia Industry Studies

*Global Architectural Paint*

*Global Construction Chemicals*

*Global Flooring*

*Global Housing*

*Global Roofing*

*Global Siding (Cladding)*

*Global Windows & Doors*

### Freedonia Focus Reports

*Cement: Europe*

*Construction: United States*

*Flat Glass: Europe*

*Housing: United States*

*Industrial & OEM Insulation: Europe*

*Paint & Coatings: Europe*

*Plumbing Fixtures & Fittings: Europe*

*Prefabricated Housing: United States*

*Real Estate: United States*

### Freedonia Custom Research

### Trade Publications

*Builder*

*Custom Home*

*Dwell*

*The Journal of Light Construction*

*Log Home Living*

*Manufactured Housing Review*

### Agencies & Associations

Eurostat

Germany Federal Statistical Office

Institute for Building Technology and Safety

Manufactured Housing Institute

UN Comtrade

UNdata