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Prefabricated Housing

US Industry Study with Forecasts for **2011 & 2016**

Study #2296 | January 2008 | $4400 | 218 pages

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US Industry Study with Forecasts for ***2011 & 2016***

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Modest increases in market penetration for both manufactured housing and other prefabricated housing will support growth in the face of a weaker overall new housing environment.

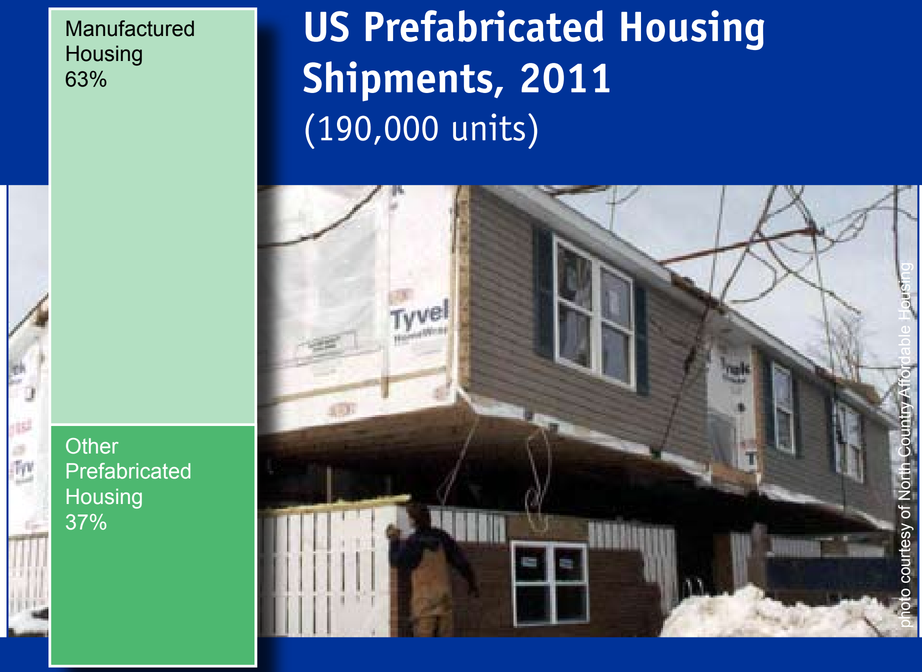
US demand to reach 190,000 units in 2011

US demand for prefabricated housing is forecast to grow 1.5 percent annually to 190,000 units in 2011 (less net exports and stock changes). These gains will occur despite projected declines in US single-family housing starts. Modest increases in market penetration for both manufactured housing and other prefabricated housing will support growth in the face of a weaker overall environment for new housing.

Manufactured housing to offer best opportunities

Shipments of manufactured housing are projected to reach 120,000 units in 2011. These gains will be fueled by positive unit growth following a long period of depressed demand during which easier credit and rising home values made site-built homes relatively more attractive. However, price increases will account for the majority of this growth, as a shifting product mix and increased raw material costs raise the average price of units produced. Driving growth in manufactured housing will be multisection units, particularly those with three or more sections. Multisection manufactured housing, as a closer substitute for conventional housing, will see increased market penetration as households increasingly choose the cost savings of manufactured housing over site-built homes.

US Prefabricated Housing Shipments, 2011
(190,000 units)



Precut homes to lead gains among other types

Shipments of precut homes are forecast to perform the best of all other types of prefabricated housing, growing nearly four percent annually to $630 million in 2011. Demand will benefit from an aging baby boomer population seeking secondary housing. Growth will be the fastest in the Midwest housing market, but precut housing will also see gains in the contracting market of the South. Panelized and modular housing will also experience growth through 2011, but will be restrained by weaker demand in the declining housing market of the Northeast.

Midwest to be fastest growing regional market for prefabricated housing

The Midwest region is expected to be the fastest growing source of demand for prefabricated housing through 2011. This region accounted for approximately 18 percent of total demand for prefabricated housing in 2006, second only to the South. Rebounding from the poorest performance of any region from 2001 to 2006, growing demand for new housing in the Midwest will provide favorable conditions for prefabricated housing.

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Sample Text, Table & Chart

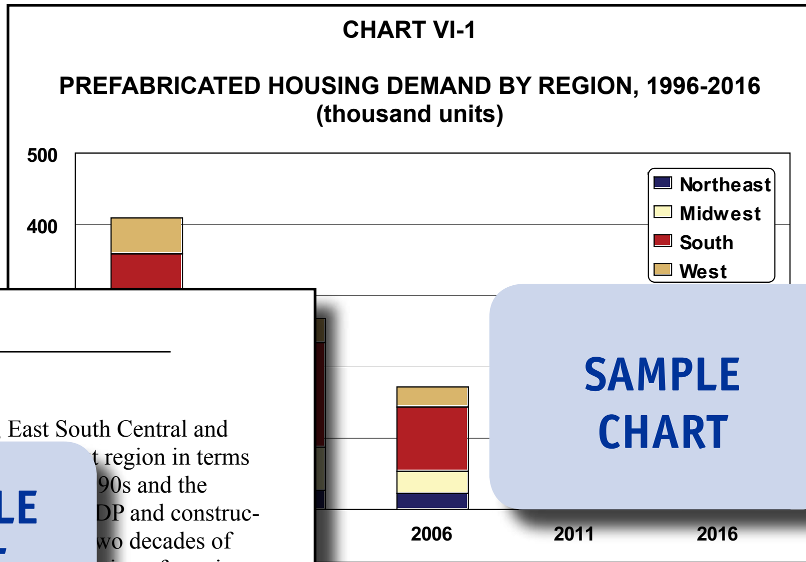

CHART VI-1

PREFABRICATED HOUSING DEMAND BY REGION, 1996-2016
(thousand units)

DEMAND BY REGION

South

The South consists of the South Atlantic, East South Central and West South Central subregio… t region in terms of population and economic … 90s and the early 2000s, the South enjoy… DP and construction expenditures that excee… wo decades of population growth in the reg… ation of previously rural areas into parts c… Cities such as Atlanta, Charlotte, Dallas, Ho… ave been able to expand through incorporation and annexation of surrounding land, a strategy often unavailable to older cities of the Northeast and Midwest. Instead of relying on growth by attracting manufacturing facilities from regions with higher labor costs, growth in the mid-1990s and into the 2000s was based on a broad array of economic activity. Diversification into financial services and information technology, and increased trade with Latin America and Mexico helped boost the prominence of the South in the national economy. However, like the other US regions, the South experienced a slowdown in real GDP growth from 2001 to 2006 as the US experienced a recession in 2001. Going forward the South is expected to continue to see strong, above average economi… tion growth, with gains in construction expenditures contin… with the national average. Between 2001 and 2006, reside… activity was strong, with both existing home sales and priv… starts outpacing all other regions.

SAMPLE TEXT

The South is the largest regional market for prefabrica… While manufactured housing is particularly prominent in th… demand for other prefabricated housing is also greater than… region. Demand for prefabricated housing in the South is f… grow 1.3 percent annually through 2011 to 96,000 units. W… below the national average, it is a dramatic improvement re… significant losses experienced from 1996 to 2006. In the la…

TABLE V-2

MODULAR HOUSING SHIPMENTS

Item	1996	2001	2006	2011	2016
Prefab Housing Shpts (000 units)					05
% modular					2
Modular Housing Shpts (000 units)					5
000$/unit					0
Modular Housing Shipments (mil $)					0
+ value-added costs (mil $)					0
Total Installed Value (mil $)					0
installed 000$/unit*					0

SAMPLE TABLE

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Sample Profile, Table & Chart

TABLE IV-1

MANUFACTURED HOUSING SUPPLY & DEMAND
(thousand units)

Item	1996	2001	2006	2011	2016
Housing Starts					
% manufactured housing					
Manufactured Housing Demand					
+ net exports & stock changes					
Manufactured Housing Shipments					
Single-Section					
Double-Section					
3 or More Sections					
000$/unit					
Manufactured Housing Shpts (mil $)					
Single-Section					
Double-Section					
3 or More Sections					
+ value-added costs (mil $)					
Total Installed Value (mil $)					
installed 000$/unit*					

SAMPLE TABLE

COMPANY PROFILES

Cavco Industries Incorporated
1001 North Central Avenue, Suite 800
Phoenix, AZ 85004
602-256-6263
http://www.cavco.com

Sales: $
Employ

Key Pro

Cav hous
pany, wh markets in the US,
operates d Retail.

SAMPLE PROFILE

The Company participates in the US prefabricated housing try through both segments. In FY 2007, the Company sold a to 3,612 homes to its geographic market, which includes Arizona, New Mexico, Colorado, Utah, Nevada and California. Of these 62 percent, or approximately 2,240, were manufactured homes remaining 38 percent, or about1,375, were park model modular

Through the Manufacturing segment, which had FY 2007 of $161 million, the Company produces manufactured and mod homes. These homes are sold under such brand names as CED VALLEY CABINS, CAVCO DURANGO, LITCHFIELD LIM CAVCO PARK MODELS, CAVCO CABINS and CAVCO LO

The BIRCH, CYPRESS, SEQUOIA and VERDE models prise the CEDAR VALLEY CABINS series. These homes feat oil-rubbed bronze fixtures, cedar paneling, and front and side p

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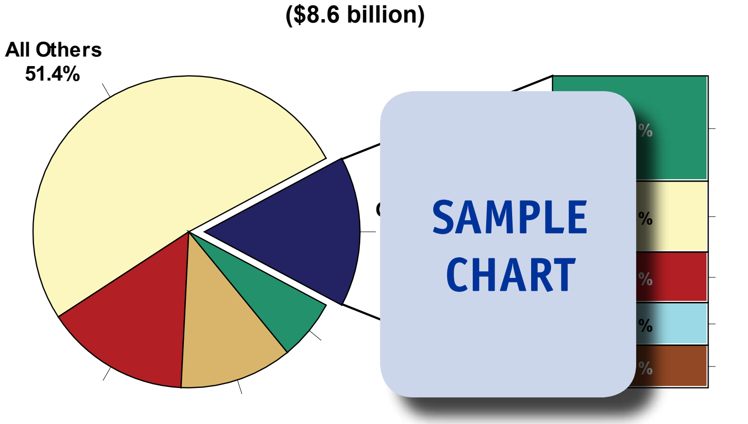
CHART VII-1

PREFABRICATED HOUSING MARKET SHARE, 2006
($8.6 billion)



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Other Studies

Insulation

This study analyzes the US market for insulation. It presents historical demand data for the years 1996, 2001 and 2006 and forecasts for 2011 and 2016 by product (e.g., fiberglass, foamed plastics, cellulose, mineral wool, reflective insulation); market (e.g., residential and nonresidential construction, industrial and HVAC equipment); and geographic region. The study also considers market environment factors, reviews technology, evaluates company market share and profiles leading insulation manufacturers.

#2302 .... 03/2008..................... $4600

Molding & Trim

US demand for molding and trim will reach $11 billion in 2011. Gains will be supported by healthy nonresidential construction activity, especially in office and commercial buildings. Interior moldings will remain the largest product segment, while plastic molding and trim continues to supplant wood materials. This study analyzes the US molding and trim industry, with forecasts for 2011 and 2016 by material, product and market. The study also evaluates market share and profiles leading producers.

#2286 .... 12/2007..................... $4500

World Housing

Global housing demand will rise 2.1% yearly through 2011. The fastest unit gains will be in the Africa/Mideast region (led by Nigeria) and in Mexico, while China will lead growth in value terms. Rural-to-urban migration in developing regions will spur new housing demand to exceed new household formation. This study analyzes the 52.2 million unit global housing industry, with forecasts for 2011 and 2016 by type, region and for 22 national markets. It also considers market environment trends and indicators.

#2270 .... 12/2007..................... $5100

World Windows & Doors

Global window and door demand will rise 5% yearly through 2011. China, India, Mexico and Russia will see some of the largest sales increases. Wood and metal products will stay dominant while plastic types will grow the fastest. The nonresidential building market will outpace the larger residential sector. This study analyzes the $117.5 billion world window and door industry, with forecasts for 2011 and 2016 by product, market, world region and for 30 countries. It also details market share and profiles major players.

#2235 .... 09/2007..................... $5800

World Siding (Cladding)

Global demand for exterior siding (or cladding) will grow 3.8% yearly through 2010 based on a pickup in nonresidential building construction. Metal, concrete and stone, and fiber cement siding will grow the fastest. China, India and Russia will lead gains, while growth rates in developed countries will be slower. This study analyzes the 4.3 billion square meter world siding industry for 2010 and 2015 by product, market, world region and for 31 countries. It also evaluates market share and profiles major producers.

#2159 .... 02/2007..................... $5500

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