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Nonresidential Prefabricated Building Systems

US Industry Study with Forecasts for **2015 & 2020**

Study #2780 | September 2011 | \$4800 | 285 pages

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The recovery in office and commercial construction, coupled with continued gains in institutional, industrial and agricultural construction, will provide opportunities for prefabricated buildings.

US demand to rise 7.8% annually through 2015

Nonresidential prefabricated building system demand in the US is expected to increase 7.8 percent annually to \$15.2 billion in 2015, a strong showing compared to the weakness over much of the previous decade. The recovery in office and commercial construction, coupled with continued gains in institutional, industrial and agricultural construction, will provide opportunities. The development of new products and technologies, including more tailored designs, greater cladding options for metal buildings and improved concrete mixes, will also support demand.

Metal building systems to remain largest segment

Metal building systems have long been the largest segment of the US nonresidential prefabricated building system industry and will remain so for the foreseeable future. While gains are not expected to match the overall prefabricated building system average, demand for metal building systems is expected to post strong 7.2 percent annual gains through 2015. Demand for metal building systems will benefit from product enhancements such as improved coatings, the increased use of nonmetal cladding systems, and greater customization. In addition, solid gains in many types of nonresidential construction, particularly the industrial and agricultural segments, will support the metal building system market.

US Prefabricated Building System Demand, 2010 (\$10.4 billion)



photo: Eco Integrated Systems

Among nonmetal building systems, the modular building system segment is expected to see the strongest gains, just ahead of the panelized precast concrete segment. The modular building system market will benefit from robust growth in both commercial and institutional construction activity, as well as from the growing popularity of prefabricated bathroom and kitchen modules. Gains for panelized precast concrete systems will be driven by increases in office and commercial construction, which are among the more popular applications for these systems. In addition, technological improvements, including better reinforcement materials, improved concrete mixtures and greater design options, will support demand.

Commercial applications to post fastest market gains

Through 2015, commercial applications are expected to post the fastest gains of any major market for prefabricated building systems. The commercial market will benefit from solid growth in construction spending and the prevalence of prefabricated structures in several commercial niches, including mini-storage facilities. In addition, both the retail and hospitality segments are expected to rebound from weak 2010 levels. In contrast, the industrial market will post the slowest gains through 2015, rising 3.0 percent annually.

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REGIONAL DEMAND

New England -- New England includes the states of Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont. Historically, the Northeast's economy was largely driven by manufacturing. However, in the latter half of the 20th century, most of the subregion's traditional industries relocated to states or foreign countries with lower production costs. Nevertheless, the subregion exhibits diverse economic activity, even though it is the smallest of any census subregion in terms of area and population. High technology (e.g., microelectronics, computers and biotechnology) and financial services are important industries near major urban centers, while Maine and parts of New Hampshire have pockets heavily dependent upon natural resources. New England's population is expected to grow faster than it did between 2005 and 2010, but will remain slower than the national average. The subregion's economy will increase 4.5 percent per year through 2015.

Nonresidential prefabricated building system demand in New England is forecast to rise to \$1.2 billion in 2015. Gains will be supported by economic activity, particularly as the region recovers from the recession. However, given the small population and slow growth, New England is expected to remain the smallest market for nonresidential prefabricated systems.

Middle Atlantic -- The Middle Atlantic subregion includes three heavily populated states of New Jersey, Pennsylvania and New York. Like New England, the Middle Atlantic has lost most of its manufacturing industry to areas with lower production costs. Industries that remain in some of that gap include drug manufacturing, communications and financial services. However, the Middle Atlantic states will continue to be plagued by an array of structural economic problems. In addition to the loss of much of its manufacturing base, these problems include high real estate costs and social problems of poverty and illiteracy in urban areas.

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SAMPLE TEXT

TABLE IV-1

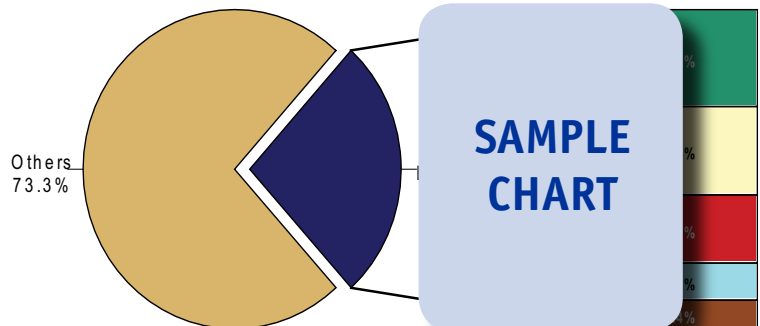
METAL BUILDING SYSTEM SUPPLY & DEMAND (million dollars)

Item	2000	2005	2010	2015	2020
Nonres Bldg Construction (bil 2005\$)	100	100	100	100	100
\$ metal building/000\$ construction	6	6	6	6	6
Metal Building Demand (mil 2005\$)	6	6	6	6	6
price deflator (2005=100)	9	9	9	9	9
Metal Building System Demand	0	0	0	0	0
+ imports	0	0	0	0	0
- exports	0	0	0	0	0
Metal Building System Shipments	0	0	0	0	0

SAMPLE TABLE

CHART VIII-1

NONRESIDENTIAL PREFABRICATED BUILDING SYSTEM MARKET SHARE (\$10.4 billion, 2010)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-1
NONRESIDENTIAL PREFABRICATED BUILDING SYSTEM DEMAND BY MARKET
 (million dollars)

Item	2000	2005	2010	2015	2020
Nonres Building Construction (bil \$)	200	250	300	350	400
\$ prefab building/000\$ construction	10	15	20	25	30
Prefabricated Building System Demand	100	150	200	250	300
Institutional	10	15	20	25	30
Industrial	10	15	20	25	30
Commercial	10	15	20	25	30
Office	10	15	20	25	30
Agricultural	10	15	20	25	30
Other	10	15	20	25	30

SAMPLE TABLE

COMPANY PROFILES

Lester Building Systems LLC

1111 2nd Avenue South
 Lester Prairie, MN 55354
 320-395-2531
<http://www.lesterbuilding.com>

Annual Sales:

Employment:

Key Products:

SAMPLE PROFILE

Lester Building Systems LLC is a pre-engineered metal buildings for farm, ranch, equestrian, commercial, agricultural, personal storage and other applications. The Company is privately held.

The Company's pre-engineered buildings include pole, horse, steel and metal barns; storage, tool, outdoor and other sheds and storage buildings; garages; and commercial and retail facilities. These structures feature interlocking framing systems that provide high structural integrity; saddled truss connections; flush purlin roof systems; UNI-RIB corrugated, high performance steel roof and wall panels; UNI-FRAME I footings that provide stability and resistance to wind damage; and flexible foundation systems. Additionally, Lester's buildings can be constructed with INSL-WALL insulated wall panels that feature double studs every four feet. The Company produces its buildings with a wide variety of color, trim, door and window options. Lester's EBUILDINGS software allows customers to design and customize pre-engineered buildings to meet needed specifications.

Lester maintains service centers in Lester Prairie, Minnesota; Charleston, Illinois; and Clear Brook, Virginia. These locations serve

"Demand for prefabricated building systems in commercial applications is expected to increase 13.7 percent annually to \$3.7 billion in 2015, the fastest pace for any major market. Gains will be driven by solid growth in construction spending in commercial settings and the prevalence of prefabricated structures in several commercial niches, including mini-storage facilities. In addition, ..."

--Section VI, pg. 109

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OTHER STUDIES

Roofing

This study analyzes the US roofing industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by roofing product (e.g., asphalt shingles, bituminous low-slope, metal, elastomeric, plastic, roofing tile, wood shingles and shakes), market (residential, nonresidential) and US geographic subregion. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2814 November 2011 \$5100

World Windows & Doors

This study analyzes the world window and door industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (wood, metal, plastic), market (residential, nonresidential), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2790 October 2011 \$6300

Hard Surface Flooring

US demand for hard surface flooring is forecast to rise 7.2 percent annually through 2015. Tile and laminate flooring will see the fastest gains, while vinyl flooring remains the largest segment. The nonresidential building market will outpace the residential building and transportation equipment segments. This study analyzes the 6.5 billion square foot US hard surface flooring industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2789 July 2011 \$4900

Precast Concrete Products

US demand for precast concrete products is forecast to rise 6.1 percent annually through 2015. Residential building will be the fastest growing market, led by foundations, basement walls and floors. Architectural components will be the fastest growing products, spurred by decorative facades, door and window surrounds and siding. This study analyzes the \$8.4 billion US precast concrete products industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles 34 industry competitors.

#2746 March 2011 \$4800

Molding & Trim

US demand for molding and trim is forecast to grow ten percent annually through 2014, driven by a rebound in new residential construction expenditures. Despite competition from plastics and wood-plastic composites, wood will remain the leading material. Other products such as exterior trim will outpace molding and stairwork. This study analyzes the \$6.3 billion US molding and trim industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.

#2729 February 2011 \$4900

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