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# World Housing

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Industry Study with Forecasts for **2016 & 2021**

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Study #2942 | September 2012 | \$5500 | 208 pages

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*Ongoing rural-to-urban migration and increasing household formation in developing countries will spur construction of new housing units, particularly in the Asia/Pacific and Africa/Mideast regions.*

## World demand to rise 3.5% annually through 2016

Demand for housing is projected to spur the construction of 60.5 million new housing units in 2016, an increase of 3.5 percent per annum. Ongoing rural-to-urban migration and increases in the number of households in developing countries will spur construction of new housing units through 2016. Such urbanization and household formation will generate particularly strong demand for housing in the Asia/Pacific and Africa/Mideast regions. The Asia/Pacific region will account for 62 percent of the world's new housing units in 2016, with the Africa/Mideast region comprising an additional 20 percent of the world total.

## Industrialized countries to see fastest growth

The strongest annual growth in construction will be in industrialized countries that had depressed housing markets in 2011. For most of these countries, the impressive growth rates will still leave the 2016 level of construction below that of a decade earlier, prior to the global financial crisis and resulting recession. In the US, for example, although new housing construction will advance over 18 percent per year to 1.5 million units in 2016, this figure will represent only 70 percent of the construction activity in 2006. Western Europe will also experience robust growth in new housing construction over the forecast period, rising 6.3 percent per annum to 1.8

## World New Housing Units, 2016 (60.5 million units)

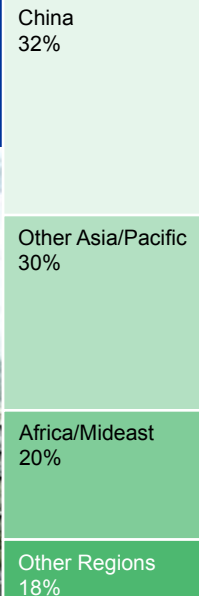


photo: MVRDV 07-04-06

million units, which will be roughly two-thirds of the level in 2006.

## Multifamily housing units to outpace single-family

Multifamily housing units will record faster gains in new construction through 2016 than will single-family units. Increasing urbanization in developing countries will contribute to the trend. In the Africa/Mideast region, for instance, growth in multifamily housing unit construction will accelerate to 4.4 percent per year through 2016. In that region and worldwide, however, single-family housing units will continue to constitute a majority of new housing construction.

## World housing stock to reach 2.1 billion units

The world housing stock was approaching two billion units in 2011, roughly one percent larger than the number of households. The world stock of housing is expected to increase 1.8 percent per annum through 2016 to 2.1 billion units, a deceleration from the 2001-2011 period as new household formation slows. The most rapid increases in the housing stock will be in the Africa/Mideast region, fueled by above-average population growth. Gains will be driven both by new household formation and by efforts to expand the availability of housing for families who currently share space in one house.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Housing Stock

China's housing stock reached 406 million units in 2011. Total floor space of 39.7 billion square meters. Single-family households held a larger but declining share of the total stock, about 56 percent in 2011, down from 59 percent in 2001. Over the last decade, the stock has grown steadily, both in terms of units and floor area. This growth has been supported by healthy new housing construction across the country. However, a large number of existing homes were in poor condition between 2001 and 2011 because of their poor condition (due to factors as age, inferior construction quality, or inadequate maintenance). The vast majority of these were, however, replaced by newer structures (often with more floors) containing a larger number of housing units than the original buildings.

The number of units in China's housing stock is forecast to grow by 2 million, a slightly more than 0.5 percent increase. Growth will be restrained by a decline in spending and an increase in the number of units needing to be demolished. At the same time, government efforts to improve living conditions for rural and urban residents, and

units in China will rise through 2016 at a faster rate than the minimal growth projected for single-family housing over the same span. Such gains will result from massive spending on new multifamily construction, almost seven times that for single family housing. Moreover, expansion of urban industrial areas will result in the conversion of millions of single-family farmhouses as cities and towns expand into what was once agricultural land. However, single-family housing will still account for 52 percent of the stock of housing units in 2016.

100

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TABLE VI-3

CHINA: HOUSING STOCK  
(millions)

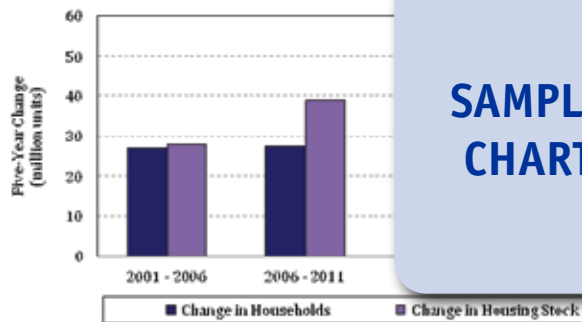
Item	2001	2006	2011	2016	2021
Population	1,212	1,328	1,354	1,380	1,406
persons per household	3.2	3.1	3.0	2.9	2.8
Households	379	428	451	476	502
stock per household	1.1	1.2	1.3	1.4	1.5
Housing Stock	406	408	410	412	414
Single-Family	240	238	236	234	232
Multifamily	166	170	174	178	182
sq meters/unit	97	98	99	100	101
Existing Floor Space (bil sq meters)	39.7	41.8	44.7	47.6	50.5

SAMPLE  
TABLE

SAMPLE  
TEXT

CHART VI-2

CHINA: GROWTH IN HOUSEHOLDS  
& HOUSING STOCK, 2001-2021



SAMPLE  
CHART

Source: The Freedonia Group, Inc.

## Sample Page, Table & Forecast

“The average size of new multifamily units in China grew between 2001 and 2011, benefiting from rising household incomes and from government efforts to increase per capita living space. The privatization of home ownership resulted in a substantial increase in construction of larger, higher-end apartments. Gains in new multifamily unit sizes are forecast to continue through 2016, boosting the total floor space per housing unit to 116 square meters, one-quarter higher than the world average.”

--Section VI, pg. 103

### ASIA/PACIFIC

#### China: New Housing Units

Construction of new housing units in China is forecast to grow at a rate less than one-half the pace during 2011-2016 as household formation slows. Nonmetropolitan urban areas will result in substantial gains in the level of housing construction and represent one-third of the work

Multifamily units will continue to dominate construction in 2016, with new units reaching 80 percent. Advances will be driven by rising personal income levels. As multifamily housing represents by far the dominant residential housing type in urban China, further urban migration will also be a primary contributor to multifamily housing construction market growth. Government efforts to improve living conditions for low income earners in urban areas and to raise land usage efficiency in rural areas will bring further gains. However, new multifamily homes will remain beyond the financial reach of many consumers, and slowing population and household growth will constrain future increases in demand.

Construction of single-family housing units in China is forecast to

reach 1.5 million. The majority of new units will be in rural areas. It is common for rural areas to be the builders of new housing. In China, rural land belongs to the state and is not sold. There are also a number of urban areas. The housing stock is typically one- or two-story family houses typically fall

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TABLE VI-4

#### CHINA: NEW HOUSING UNITS

Item	2001	2006	2011	2016	2021
Residential Building Expend (bil 2010\$)	35.0	50.0	100.0	120.0	150.0
\$/sq meter new housing					
New Housing Floor Space (mil sq meters)					
sq meters/unit					
New Housing Units (000)					
Single-Family					
Multifamily					
new units/000 stock					
Housing Stock (mil units)	35.0	50.0	100.0	120.0	150.0

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**OTHER STUDIES**

**World Plumbing**

Global demand for plumbing fixtures and fittings will rise 6.2 percent yearly through 2016 to \$80 billion. The Asia/Pacific region will lead gains, fueled mainly by China's increasing but slowing rate of industrialization. North America will post the second fastest growth. The residential market will outpace the nonresidential segment. This study analyzes the \$58.8 billion world plumbing product industry, with forecasts for 2016 and 2021 by product, material, market, world region and for 23 countries. The study also evaluates company market share and profiles industry participants.

#2934 ..... September 2012..... \$6100

**World Drywall & Building Plaster**

Worldwide sales of drywall will rise 8.6 percent annually through 2016 to 10.7 billion square meters, with China and the US claiming most new demand. The residential market will outpace its nonresidential counterpart. Global building plaster demand will rise 5.8 percent annually to 37.4 million metric tons in 2016. This study analyzes the world drywall and building plaster industry, with forecasts for 2016 and 2021 by product, market, world region and for 23 major countries. The study also evaluates company market share and profiles industry participants.

#2924 ..... August 2012..... \$6100

**World Solid Surface & Other Cast Polymers**

Global demand for cast polymers will grow 7.9 percent annually to 252 million square meters in 2016. Most projected growth will be attributable to China, a country with an emerging domestic cast polymer industry and large construction sector. Engineered stone will grow the fastest while solid surface materials remain dominant. This study analyzes the 172 million square meter world cast polymer industry, with forecasts for 2016 and 2021 by product, application, world region and for 18 countries. The study also evaluates company market share and profiles industry players.

#2901 ..... July 2012..... \$6100

**World Roofing**

World demand for roofing materials is forecast to grow 3.8 percent annually through 2016 to 11.7 billion square meters. The US and China will jointly account for nearly 60 percent of global gains in roofing volume demand. The dominant bituminous products segment will post the fastest growth. This study analyzes the 9.7 billion square meter world roofing industry, with forecasts for 2016 and 2021 by product, market, world region and major country. The study also evaluates company market share and profiles industry participants.

#2896 ..... June 2012 ..... \$6300

**World Asphalt**

Global consumption of asphalt is forecast to advance 4.1 percent annually from a very weak base to 119.5 million metric tons in 2015. Gains will be most rapid in North America. Massive infrastructure projects in China and India will continue to drive strong growth in the Asia/Pacific region. This study analyzes the 98 million metric ton world asphalt industry, with forecasts for 2015 and 2020 for primary asphalt, asphalt products, world region and for 24 major countries. The study also evaluates company market share and profiles industry participants.

#2847 ..... February 2012..... \$6100

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