

World Prefabricated Housing

Industry Study with Forecasts for 2019 & 2024

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In the developing countries of the Asia/Pacific region, Africa/Mideast region, and Central and South America, advances in overall housing activity as well as increasing market penetration of prefabricated housing will drive gains going forward. In these regions, prefabricated housing will find applications both as low cost units to reduce housing shortages (particularly in multifamily applications) and as high quality houses for more affluent consumers. Most higher-income countries have low penetration levels for prefabricated housing, but its generally lower cost, shorter construction time, and greater energy efficiency will boost demand.

Growth in key Asia/Pacific market to slow

The Asia/Pacific region, which accounts for the vast majority of prefabricated housing demand, is expected to post gains slightly below the global average through 2019. In the two largest global markets for prefabricated housing -- China and India -- demand is expected to slow through 2019. In China, temporary housing is widely used to house construction workers, but demand for this type of housing is forecast to decline as construction activity throughout the country decelerates. Slowing construction of new housing units will restrict demand gains for prefabricated housing in India going forward.

Historically, Japan was a major market for prefabricated housing but demand will grow at a pace below the global average through 2019 as the country's overall residential construction market is not expected to perform well. However, prefabricated housing's share of new housing

units in Japan has risen since 2004, and is expected to continue to do so through 2019.

Manufactured housing's share of new housing units to decline slightly

Manufactured housing accounts for the majority of prefabricated housing demand in the US, but demand for these homes has been declining since the late 1990s, when liberalized lending standards made conventional housing more affordable for lower-income homebuyers. During the housing market collapse over the 2006-2011 period, manufactured housing's market penetration actually increased due to its lower cost. As the US housing market began its recovery, manufactured housing's penetration began to fall again. Through 2019, continued growth in US housing demand will increase sales of prefabricated housing, but its share of new housing units will decline slightly.

Study coverage

This study analyzes global demand for prefabricated housing. It presents historical data (2004, 2009 and 2014) and forecasts (2019 and 2024) by prefabricated housing type for six world regions and 20 major countries. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles 40 industry participants, including Daiwa House, Persimmon, and Asahi Kasei.

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ASIA/PACIFIC

Australia: Prefabricated Housing Supply & Demand

In 2014, demand for prefabricated housing in Australia totaled 7,000 units. Prefabricated homes accounted for four percent of new housing units that year, a level slightly below the regional average. Between 2009 and 2014, demand for these homes rose 9.7 percent per year, as construction of new housing units rebounded from losses during the 2004-2009 period.

Demand for prefabricated housing in Australia is projected to expand from the 2014 level to 7,500 units in 2019. However, production of new housing units is expected to decline. Prefabricated housing units are generally less expensive than traditional construction methods, and their use can help reduce construction costs and shorten project timelines.

Shipments of prefabricated housing in Australia totaled 3,000 units in 2014. Prefabricated housing shipments are manufactured and modular homes, unlike traditional construction methods. The country also produces panelized and precast homes that are often exported to countries such as Japan. However, in 2014, Australia maintained a trade deficit equivalent to 57 percent of demand.

Through 2019, shipments of prefabricated homes from factories in Australia are projected to fall slightly to 2,900 units. Production gains will be limited by slowing domestic demand. As a result, the country's trade deficit is expected to expand going forward.

Prefabricated housing manufacturers based within Australia include JAYZ Building Solutions, Algeco Scotsman and EDILSIDER (Italy).

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RUSSIA: PREFABRICATED HOUSING SUPPLY & DEMAND

Item	2004	2009	2014	2019	2024
Population (millions)					
GDP/capita					
Gross Domestic Product (bil 2013 \$)					
units/000 persons					
units/mil \$ GDP					
Prefabricated Housing Demand (000 units)					
000\$/unit					
Prefabricated Housing Demand (mil \$)					
net exports					
Prefabricated Housing Shpts (000 units)					

Source: The Freedonia Group

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CANADA: PREFABRICATED HOUSING DEMAND BY TYPE (000 units)

Item	2004	2009	2014	2019	2024
Residential Construction (bil 2013 US\$)					
New Housing Units					
Prefab units/000\$ construction share of new housing units					
Prefabricated Housing Demand					
Manufactured & Modular					
Temporary					
Panelized & Precut					
% Canada					
North America Prefab Housing Demand					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

World Roofing

This study analyzes world demand for roofing. It presents historical data (2005, 2010 and 2015) and forecasts (2020 and 2025) by product (e.g., bituminous roofing, tile roofing, metal roofing, fiber cement roofing, elastomeric roofing, plastic roofing), 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 participants.

#3399.....April 2016..... \$6600

Behind the Wall Plumbing

US demand for behind the wall plumbing products is projected to advance 6.5 percent annually to \$12.4 billion in 2020. Pipe and sprinklers will be the fastest growing products, with PEX and PVC leading gains among pipe materials. Water distribution and drain, waste, and vent (DWV) will be the fastest growing applications. This study analyzes the \$9 billion US behind the wall plumbing market, with forecasts for 2020 and 2025 by product, market, application, and region. The study also evaluates company market share and profiles industry players.

#3392..... March 2016..... \$5300

World Siding (Cladding)

The global siding market is projected to grow 4.2 percent yearly through 2019 to 5.9 billion square meters, valued at \$80 billion. North America will post the fastest market gains while the Asia/Pacific region will account for half of additional global demand. Metal, vinyl, stucco and EIFS siding will grow the fastest. This study analyzes the 4.8 billion square meter world siding industry, with forecasts for 2019 and 2024 by product and market/application for six world regions and 20 major countries. The study also evaluates company market share and profiles industry players.

#3327.....September 2015..... \$6500

World Housing

Worldwide construction of new housing units is forecast to increase 3.0 percent annually to 2.3 billion units in 2019. North America and Western Europe will see the fastest growth from a depressed 2014 base. On a global basis, new construction of multifamily units will outpace single-family units. This study analyzes the 2.1 billion unit world housing industry, with existing stock and new unit forecasts presented for 2019 and 2024 by type in six world regions and 22 major countries. The study also considers economic trends, demographics, and other market factors.

#3312..... July 2015 \$5900

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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