World Prefabricated Housing

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.

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.

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.

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.

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World Prefabricated Housing

Executive Summary

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Executive Summary

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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 posted during the 2004-2009 period.

Demand for prefabricated housing in Australia is projected to expand from the 7,000 units a decade earlier to 7,900 units, a deceleration from the gains of the 2009-2014 period. However, prefabricated homes account for higher than average shares of new housing units, as these products continue to gain popularity due to their generally lower construction time.

Shipments of prefabricated homes from plants in Australia totaled 3,000 units in 2014. A large percentage of Australia’s prefabricated housing shipments are manufactured and modular homes, unlike many countries in the region. The country also produces panelized and precut 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).
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

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

About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport
- Chemicals
- Construction & Building Products
- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
- Machinery & Equipment
- Metals, Minerals & Glass
- Packaging
- Plastics & Other Polymers
- Security
- Services
- Textiles & Nonwovens
- Water Treatment

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