Prefabricated Housing

US Industry Study with Forecasts to 2009 & 2014

Study #2030 | February 2006 | $4100 | 238 pages
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# Prefabricated Housing

US Industry Study with Forecasts to 2009 & 2014

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</table>
Through 2009, US demand for prefabricated housing will see a significant improvement from the double-digit declines experienced during the 1999-2004 period.

US prefabricated housing demand to reach 195,000 unites in 2009

US demand for manufactured, modular, precut and panelized housing is forecast to decline just under one percent annually through 2009 to 195,000 units. This pace nonetheless represents a significant improvement from the double-digit declines experienced during the 1999-2004 period, which mainly resulted from a collapse in the manufactured housing segment. Going forward, prefabricated housing’s share of total housing starts is expected to rise to over ten percent in 2009, a modest improvement from 2004, but well below its 21 percent share in 1999. While prospects for prefabricated housing will be supported by the cost advantages of factory production, these advantages are likely to narrow somewhat as an increasing share of the site-building segment is accounted for by large production builders who are able to achieve substantial economies of scale. Innovations in style and design that allow prefabricated houses, particularly modular homes, to better resemble site-built houses will also support demand.

Multisection units to pace manufactured segment

Even taking into consideration a temporary increase in demand for manufactured housing because of rebuilding and temporary housing needs related to the destruction from Hurricane Katrina in 2005, shipments of manufactured housing, which accounted for three-fifths of total prefabricated housing shipments in 2004, are projected to fall through 2009 to 120,000 units. This decline will be much less severe than that of the 1999-2004 period, during which manufactured housing shipments contracted almost 18 percent annually. Multisection units, comprising almost 75 percent of the total, will fare better than single-section manufactured housing units, with shipments falling less than one percent per year through 2009 to 93,000 units.

Shipments of other prefabricated housing (modular, precut and panelized) are forecast to decline just over one percent per year through 2009, to 80,000 units. Market penetration will increase as other prefabricated houses make incursions into higher-end applications, helping to drive up average price per unit. Furthermore, export opportunities for precut and panelized housing in Latin America and Asia will help support shipments.

South to remain largest regional market

The South will continue to account for the bulk of prefabricated housing demand, benefiting from slightly above-average population and economic growth, and population in-migration through 2009. In addition, the affordability of prefabricated housing and the more positive consumer perceptions of manufactured housing in the South will aid growth.
TABLE IV-1
MANUFACTURED HOUSING SUPPLY & DEMAND
(thousand units)

<table>
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<td>Housing Starts</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>% manufactured housing</td>
<td>17.4</td>
<td>17.5</td>
<td>6.3</td>
<td>6.4</td>
<td>7.0</td>
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<td>Manufactured Housing Demand</td>
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<tr>
<td>+ net exports &amp; stock changes</td>
<td>13</td>
<td>9</td>
<td>6</td>
<td>neg</td>
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<td>Manufactured Housing Shipments</td>
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<td>Single-Section</td>
<td>156</td>
<td>122</td>
<td>34</td>
<td>27</td>
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<tr>
<td>Double-Section</td>
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<td>222</td>
<td>92</td>
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<td>100</td>
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<td>3 or More Sections</td>
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<td>3</td>
<td>4</td>
<td>4</td>
<td>5</td>
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<tr>
<td>000$/unit</td>
<td>21.9</td>
<td>27.2</td>
<td>38.7</td>
<td>49.8</td>
<td>60.7</td>
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<td>Manufactured Housing Shpts (mil $)</td>
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<td>9450</td>
<td>5030</td>
<td>5970</td>
<td>8190</td>
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<td>2700</td>
<td>2355</td>
<td>770</td>
<td>750</td>
<td>990</td>
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<td>Double-Section</td>
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<td>240</td>
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<td>460</td>
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<td>+ value-added costs (mil $)</td>
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<td>281</td>
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<td>190</td>
<td>260</td>
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<td>Total Installed Value (mil $)</td>
<td>6834</td>
<td>9731</td>
<td>5190</td>
<td>6160</td>
<td>8450</td>
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<td>installed 000$/unit*</td>
<td>22.5</td>
<td>28.0</td>
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</tbody>
</table>

OTHER PREFABRICATED HOUSING

Modular Housing

In 2004, modular housing constituted seven percent of total housing starts in the Northeast. The penetration of modular housing in the region is expected to be virtually unchanged through 2009, so a projected drop in housing starts in the Northeast of three percent annually will result in a fall in modular housing demand. In contrast to the Northeast, the South and the West -- the two largest regional housing markets -- have lower demand for modular housing. In 2009, for example, the South and the West will account for only 42 percent of modular housing (most of which is in the South), although they will account for 75 percent of overall housing starts.

In unit shipments, the dollar value of modular housing is projected to advance slightly through 2009 to $2.6 billion. Unit prices will increase as the average square footage and number of value-added features continue to rise, thereby placing upward pressure on the average price per square foot of living space. The cost effectiveness of the factory-built process will continue to temper increases in material costs and will help keep average prices well below those of site-built houses.

Modular housing can compete with many styles of conventional site-built housing, particularly in the design flexibility and capacity for customization. Many participants are starting to object to the term "modular," insisting that the term connotes a product that is too standardized and sterile. The terminology is beginning to be...
American Homestar Corporation
2450 South Shore Boulevard, Suite 300
League City, TX 77573
281-334-9700
http://www.americanhomestar.com

Revenues: $76 million (FY 2005)
Employment: 640 (FY 2005)

Key Products: single- & multisection manufactured & modular homes

American Homestar is a vertically integrated manufactured housing company that conducts production, retailing, financing, insurance, rental community and subdivision development operations. Following the completion of reorganization under Chapter 11 of the US Bankruptcy Code in 2004, the Company deregulated its common stock in March 2005.

The Company constructs manufactured and modular homes through the Manufacturing division, which generated FY 2005 sales of $26 million. These homes are marketed under the OAK CREEK brand name.

Manufactured & Modular Homes -- Manufactured homes from American Homestar, which are available in traditional lower-priced and distinctive higher-priced models, meet the US Department of Housing and Urban Development (HUD) codes. In FY 2005, it produced 1,439 homes, of which 1,171 met HUD codes and 268 met modular home codes. American Homestar also sold 419 previously owned homes in FY 2005. Principal materials used in the production of American Homestar’s prefabricated homes include lumber and lumber products, steel, aluminum, gypsum wallboard, carpeting, vinyl flooring, fiberglass, fasteners, electrical items, appliances, windows and doors. In FY 2005, 63 percent, or about 906, of the Company’s manufactured homes were multisection. Manufactured homes from

“In dollar terms, prefabricated housing shipments are projected to advance 2.7 percent per annum to $10.1 billion in 2009. The average price per unit will also continue to rise, reaching $50,300 per unit in 2009. Driving these gains will be an increase in the average floor space per unit, as well as advances in the average price per square foot, which will result from the addition of more value-added features and amenities, as well as increases in material costs. Lumber costs, in particular, are expected to ...”

--Section III, pg. 48
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Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia’s team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Other Studies

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 to 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

World Roofing
The global market for roofing materials will reach $54 billion in 2010. Developing countries in Asia, such as China, will record the fastest growth in demand. Rising living standards in India, Malaysia and Thailand will foster demand for new housing construction, as well as reroofing with more durable or aesthetically pleasing materials. This study analyzes the world roofing industry to 2010 and 2015 by product, market, region and for 29 countries. It also evaluates market share and profiles major players.

#2073 .......................... 07/2006 .......................... $5500

World Drywall & Building Plasters
Global drywall demand will grow 4.4% annually through 2009. North America will remain dominant while growth in the Asia/Pacific region will be particularly strong. Drywall based on synthetic gypsum will continue to gain market share, allowing producers to locate closer to cities and lower transportation costs. This study analyzes the 6.6 billion square meter world drywall industry to 2009 and 2014 by product, market, world region and for 13 countries. It also details market share and profiles major players.

#2047 .......................... 04/2006 .......................... $5300

Insulation
US insulation demand will grow 4.9% yearly through 2010, driven by nonresidential building, appliance and transportation markets. Replacement uses will outpace new home insulation in the residential segment. Fiberglass and foamed plastic insulation will remain dominant while reflective insulation and radiant barriers will grow the fastest from a small base. This study analyzes the $7.7 billion US insulation industry to 2010 and 2015 by product, market and region. It also evaluates market share and profiles.

#2041 .......................... 03/2006 .......................... $4300

Residential Kitchen & Bath Countertops
US demand for kitchen and bath countertops will reach 509 million square feet in 2009. Gains will be driven by modest growth in remodeling expenditures and by an ongoing trend toward larger kitchens and more bathrooms per home. Value gains will be promoted by a shift toward high value materials. This study analyzes the $1.2 billion US residential kitchen and bath countertop industry to 2009 and 2014 by material, product, market and region. The study also includes company profiles and market share data.

#1993 .......................... 11/2005 .......................... $4200

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com