

Global Permanent Modular Construction Market Size Study, by Material (Wood, Steel, Concrete) and End-Use Industry (Residential, Office, Hospitality), Type (Permanent Modular Construction and Relocatable Modular Construction) and Regional Forecasts 2025-2035

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Abstracts

The Global Permanent Modular Construction Market is valued at approximately USD 81.05 billion in 2024 and is projected to scale up steadily, reaching nearly USD 146.06 billion by 2035, expanding at a robust CAGR of 5.50% over the forecast period of 2025–2035. Permanent modular construction refers to a modern construction methodology in which building components are manufactured off-site under controlled conditions and subsequently assembled on-site into permanent structures. Unlike temporary modular solutions, these buildings are designed to meet or exceed conventional building codes, offering durability, architectural flexibility, and long-term operational efficiency. The market's momentum is being carried forward by intensifying urbanization, chronic housing shortages, and the construction industry's growing appetite for time-efficient, cost-optimized, and quality-assured building solutions. Historical Data for 2023 and 2024 highlight a clear shift in construction preferences, while 2024 serves as the Base Year for Estimation, anchoring forecasts through 2035.

As construction stakeholders increasingly pivot away from labor-intensive traditional practices, permanent modular construction is being leaned into as a strategic response to workforce shortages, escalating material costs, and compressed project timelines. Governments and private developers alike are doubling down on modular approaches to fast-track residential developments, commercial offices, and hospitality infrastructure without compromising structural integrity or design sophistication. Furthermore,

sustainability mandates are pushing builders to cut down waste, lower carbon footprints, and streamline supply chains—objectives that modular construction naturally delivers on. Technological advancements in Building Information Modeling (BIM), digital twin integration, and precision manufacturing are also being brought to bear, enabling developers to lock in predictability, mitigate risk, and scale projects with confidence. However, challenges such as higher upfront capital requirements and lingering regulatory complexities across regions continue to temper adoption rates in certain markets.

The detailed segments and sub-segments included in the report are:

By Material:

Wood

Steel

Concrete

By End-Use Industry:

Residential

Office

Hospitality

By Type:

Permanent Modular Construction

Relocatable Modular Construction

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Italy

Spain

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among end-use industries, the residential segment is expected to dominate the Global Permanent Modular Construction Market throughout the forecast horizon. Housing demand continues to surge on the back of population growth, rapid urban migration, and affordability constraints in major metropolitan areas. Permanent modular construction has been increasingly rolled out to bridge the housing supply-demand gap, particularly for multi-family housing, student accommodations, and affordable housing initiatives. Developers are gravitating toward modular residential solutions as they allow projects to be turned over faster, financing risks to be phased down, and quality to be locked in early. While office and hospitality projects are gaining traction, residential applications remain the cornerstone of market volume, anchoring growth through 2035.

From a material standpoint, steel-based permanent modular construction currently leads the market in terms of revenue contribution. Steel modules are being widely adopted due to their superior strength-to-weight ratio, seismic resistance, and suitability for mid-rise and high-rise developments. Their compatibility with standardized manufacturing processes and long-span designs has made them a preferred choice for commercial offices and urban residential towers. At the same time, concrete modular solutions continue to hold a strong position in regions prioritizing thermal mass and acoustic performance, while wood-based modular construction is carving out a niche in low-rise residential projects driven by sustainability credentials and aesthetic appeal. Together, these material segments form a balanced ecosystem, though steel remains the revenue engine of the market.

Regionally, North America continues to command a leading share of the Global Permanent Modular Construction Market, underpinned by advanced prefabrication

capabilities, favorable financing models, and strong adoption across residential and commercial developments. The U.S. and Canada have been quick to scale modular construction as a solution to labor shortages and rising construction costs. Europe follows closely, with countries such as the UK and Germany embedding modular construction into public housing and infrastructure programs. Asia Pacific is anticipated to emerge as the fastest-growing regional market over the forecast period, propelled by rapid urban expansion, government-backed housing schemes, and mega infrastructure projects across China and India. Meanwhile, Latin America and the Middle East & Africa are steadily warming up to permanent modular construction, particularly for hospitality, mixed-use developments, and smart city initiatives.

Major market players included in this report are:

Skanska AB

Larsen & Toubro Limited

Bouygues Construction

Laing O'Rourke

Katerra Inc.

Daiwa House Industry Co., Ltd.

Red Sea International Company

ATCO Ltd.

Sekisui House, Ltd.

Algeco (Modular Space)

CIMC Modular Building Systems

Balfour Beatty plc

Vinci Construction

Fluor Corporation

McGrath RentCorp

Global Permanent Modular Construction Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast Period – 2025–2035

Report Coverage – Revenue Forecast, Company Ranking, Competitive Landscape, Growth Factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define and analyze the market size of the Global Permanent Modular Construction Market across different segments and regions in recent years and to forecast its trajectory through 2035. The report is deliberately structured to blend quantitative data with qualitative insights, capturing the industry's evolving dynamics across materials, end-use industries, and geographies. It sheds light on the critical drivers accelerating adoption, the constraints that could hold back momentum, and the opportunities unfolding within niche micro-markets. In addition, the study maps out the competitive landscape in detail, examining strategic positioning, innovation pathways, and market-entry approaches adopted by key players, thereby equipping stakeholders with actionable intelligence to navigate the market with clarity and confidence.

Key Takeaways:

Market estimates and forecasts spanning 2025 to 2035.

Annualized revenue analysis at global, regional, and segment levels.

In-depth geographical insights with country-level breakdowns.

Comprehensive competitive landscape profiling major industry participants.

Strategic analysis of business models, growth strategies, and future market approaches.

Integrated demand-side and supply-side assessment of the market ecosystem.

Contents

CHAPTER 1. GLOBAL PERMANENT MODULAR CONSTRUCTION MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Research Objective
- 1.2. Research Methodology
 - 1.2.1. Forecast Model
 - 1.2.2. Desk Research
 - 1.2.3. Top Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
 - 1.4.1. Market Definition
 - 1.4.2. Market Segmentation
- 1.5. Research Assumption
 - 1.5.1. Inclusion & Exclusion
 - 1.5.2. Limitations
 - 1.5.3. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. key Findings

CHAPTER 3. GLOBAL PERMANENT MODULAR CONSTRUCTION MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping The Global Permanent Modular Construction Market (2024-2035)
- 3.2. Drivers
 - 3.2.1. intensifying urbanization
 - 3.2.2. chronic housing shortages
- 3.3. Restraints
 - 3.3.1. higher upfront capital requirements and lingering regulatory complexities
- 3.4. Opportunities
 - 3.4.1. construction industry's growing appetite for time-efficient, cost-optimized, and quality-assured building solutions

CHAPTER 4. GLOBAL PERMANENT MODULAR CONSTRUCTION INDUSTRY ANALYSIS

- 4.1. Porter's 5 Forces Model
 - 4.1.1. Bargaining Power of Buyer
 - 4.1.2. Bargaining Power of Supplier
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's 5 Force Forecast Model (2024-2035)
- 4.3. PESTEL Analysis
 - 4.3.1. Political
 - 4.3.2. Economical
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024-2025)
- 4.7. Global Pricing Analysis And Trends 2025
- 4.8. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL PERMANENT MODULAR CONSTRUCTION MARKET SIZE & FORECASTS BY MATERIAL 2025-2035

- 5.1. Market Overview
- 5.2. Global Permanent Modular Construction Market Performance - Potential Analysis (2025)
- 5.3. Wood
 - 5.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 5.3.2. Market size analysis, by region, 2025-2035
- 5.4. Steel
 - 5.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 5.4.2. Market size analysis, by region, 2025-2035
- 5.5. Concrete
 - 5.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 5.5.2. Market size analysis, by region, 2025-2035

CHAPTER 6. GLOBAL PERMANENT MODULAR CONSTRUCTION MARKET SIZE & FORECASTS BY END USE INDUSTRY 2025-2035

6.1. Market Overview

6.2. Global Permanent Modular Construction Market Performance - Potential Analysis (2025)

6.3. Residential

6.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.3.2. Market size analysis, by region, 2025-2035

6.4. Office

6.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.4.2. Market size analysis, by region, 2025-2035

6.5. Hospitality

6.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.5.2. Market size analysis, by region, 2025-2035

CHAPTER 7. GLOBAL PERMANENT MODULAR CONSTRUCTION MARKET SIZE & FORECASTS BY TYPE 2025-2035

7.1. Market Overview

7.2. Global Permanent Modular Construction Market Performance - Potential Analysis (2025)

7.3. Permanent Modular Construction

7.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.3.2. Market size analysis, by region, 2025-2035

7.4. Relocatable Modular Construction

7.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.4.2. Market size analysis, by region, 2025-2035

CHAPTER 8. GLOBAL PERMANENT MODULAR CONSTRUCTION MARKET SIZE & FORECASTS BY REGION 2025–2035

8.1. Growth Permanent Modular Construction Market, Regional Market Snapshot

8.2. Top Leading & Emerging Countries

8.3. North America Permanent Modular Construction Market

8.3.1. U.S. Permanent Modular Construction Market

8.3.1.1. Material breakdown size & forecasts, 2025-2035

8.3.1.2. End Use Industry breakdown size & forecasts, 2025-2035

- 8.3.1.3. Type breakdown size & forecasts, 2025-2035
- 8.3.2. Canada Permanent Modular Construction Market
 - 8.3.2.1. Material breakdown size & forecasts, 2025-2035
 - 8.3.2.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.3.2.3. Type breakdown size & forecasts, 2025-2035
- 8.4. Europe Permanent Modular Construction Market
 - 8.4.1. UK Permanent Modular Construction Market
 - 8.4.1.1. Material breakdown size & forecasts, 2025-2035
 - 8.4.1.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.4.1.3. Type breakdown size & forecasts, 2025-2035
 - 8.4.2. Germany Permanent Modular Construction Market
 - 8.4.2.1. Material breakdown size & forecasts, 2025-2035
 - 8.4.2.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.4.2.3. Type breakdown size & forecasts, 2025-2035
 - 8.4.3. France Permanent Modular Construction Market
 - 8.4.3.1. Material breakdown size & forecasts, 2025-2035
 - 8.4.3.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.4.3.3. Type breakdown size & forecasts, 2025-2035
 - 8.4.4. Spain Permanent Modular Construction Market
 - 8.4.4.1. Material breakdown size & forecasts, 2025-2035
 - 8.4.4.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.4.4.3. Type breakdown size & forecasts, 2025-2035
 - 8.4.5. Italy Permanent Modular Construction Market
 - 8.4.5.1. Material breakdown size & forecasts, 2025-2035
 - 8.4.5.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.4.5.3. Type breakdown size & forecasts, 2025-2035
 - 8.4.6. Rest of Europe Permanent Modular Construction Market
 - 8.4.6.1. Material breakdown size & forecasts, 2025-2035
 - 8.4.6.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.4.6.3. Type breakdown size & forecasts, 2025-2035
- 8.5. Asia Pacific Permanent Modular Construction Market
 - 8.5.1. China Permanent Modular Construction Market
 - 8.5.1.1. Material breakdown size & forecasts, 2025-2035
 - 8.5.1.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.5.1.3. Type breakdown size & forecasts, 2025-2035
 - 8.5.2. India Permanent Modular Construction Market
 - 8.5.2.1. Material breakdown size & forecasts, 2025-2035
 - 8.5.2.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.5.2.3. Type breakdown size & forecasts, 2025-2035

- 8.5.3. Japan Permanent Modular Construction Market
 - 8.5.3.1. Material breakdown size & forecasts, 2025-2035
 - 8.5.3.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.5.3.3. Type breakdown size & forecasts, 2025-2035
- 8.5.4. Australia Permanent Modular Construction Market
 - 8.5.4.1. Material breakdown size & forecasts, 2025-2035
 - 8.5.4.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.5.4.3. Type breakdown size & forecasts, 2025-2035
- 8.5.5. South Korea Permanent Modular Construction Market
 - 8.5.5.1. Material breakdown size & forecasts, 2025-2035
 - 8.5.5.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.5.5.3. Type breakdown size & forecasts, 2025-2035
- 8.5.6. Rest of APAC Permanent Modular Construction Market
 - 8.5.6.1. Material breakdown size & forecasts, 2025-2035
 - 8.5.6.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.5.6.3. Type breakdown size & forecasts, 2025-2035
- 8.6. Latin America Permanent Modular Construction Market
 - 8.6.1. Brazil Permanent Modular Construction Market
 - 8.6.1.1. Material breakdown size & forecasts, 2025-2035
 - 8.6.1.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.6.1.3. Type breakdown size & forecasts, 2025-2035
 - 8.6.2. Mexico Permanent Modular Construction Market
 - 8.6.2.1. Material breakdown size & forecasts, 2025-2035
 - 8.6.2.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.6.2.3. Type breakdown size & forecasts, 2025-2035
- 8.7. Middle East and Africa Permanent Modular Construction Market
 - 8.7.1. UAE Permanent Modular Construction Market
 - 8.7.1.1. Material breakdown size & forecasts, 2025-2035
 - 8.7.1.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.7.1.3. Type breakdown size & forecasts, 2025-2035
 - 8.7.2. Saudi Arabia (KSA) Permanent Modular Construction Market
 - 8.7.2.1. Material breakdown size & forecasts, 2025-2035
 - 8.7.2.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.7.2.3. Type breakdown size & forecasts, 2025-2035
 - 8.7.3. South Africa Permanent Modular Construction Market
 - 8.7.3.1. Material breakdown size & forecasts, 2025-2035
 - 8.7.3.2. End Use Industry breakdown size & forecasts, 2025-2035
 - 8.7.3.3. Type breakdown size & forecasts, 2025-2035

CHAPTER 9. COMPETITIVE INTELLIGENCE

- 9.1. Top Market Strategies
- 9.2. Skanska AB
 - 9.2.1. Company Overview
 - 9.2.2. Key Executives
 - 9.2.3. Company Snapshot
 - 9.2.4. Financial Performance (Subject to Data Availability)
 - 9.2.5. Product/Services Port
 - 9.2.6. Recent Development
 - 9.2.7. Market Strategies
 - 9.2.8. SWOT Analysis
- 9.3. Larsen & Toubro Limited
- 9.4. Bouygues Construction
- 9.5. Laing O'Rourke
- 9.6. Kattera Inc.
- 9.7. Daiwa House Industry Co., Ltd.
- 9.8. Red Sea International Company
- 9.9. ATCO Ltd.
- 9.10. Sekisui House, Ltd.
- 9.11. Algeco (Modular Space)
- 9.12. CIMC Modular Building Systems
- 9.13. Balfour Beatty plc
- 9.14. Vinci Construction
- 9.15. Fluor Corporation
- 9.16. McGrath RentCorp

List Of Tables

LIST OF TABLES

- Table 1. Global Permanent Modular Construction Market, Report Scope
- Table 2. Global Permanent Modular Construction Market Estimates & Forecasts By Region 2024–2035
- Table 3. Global Permanent Modular Construction Market Estimates & Forecasts By Segment 2024–2035
- Table 4. Global Permanent Modular Construction Market Estimates & Forecasts By Segment 2024–2035
- Table 5. Global Permanent Modular Construction Market Estimates & Forecasts By Segment 2024–2035
- Table 6. Global Permanent Modular Construction Market Estimates & Forecasts By Segment 2024–2035
- Table 7. Global Permanent Modular Construction Market Estimates & Forecasts By Segment 2024–2035
- Table 8. U.S. Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 9. Canada Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 10. UK Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 11. Germany Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 12. France Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 13. Spain Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 14. Italy Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 15. Rest Of Europe Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 16. China Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 17. India Permanent Modular Construction Market Estimates & Forecasts, 2024–2035
- Table 18. Japan Permanent Modular Construction Market Estimates & Forecasts, 2024–2035

Table 19. Australia Permanent Modular Construction Market Estimates & Forecasts,
2024–2035

Table 20. South Korea Permanent Modular Construction Market Estimates & Forecasts,
2024–2035

.....

List Of Figures

LIST OF FIGURES

- Fig 1. Global Permanent Modular Construction Market, Research Methodology
- Fig 2. Global Permanent Modular Construction Market, Market Estimation Techniques
- Fig 3. Global Market Size Estimates & Forecast Methods
- Fig 4. Global Permanent Modular Construction Market, Key Trends 2025
- Fig 5. Global Permanent Modular Construction Market, Growth Prospects 2024–2035
- Fig 6. Global Permanent Modular Construction Market, Porter's Five Forces Model
- Fig 7. Global Permanent Modular Construction Market, Pestel Analysis
- Fig 8. Global Permanent Modular Construction Market, Value Chain Analysis
- Fig 9. Permanent Modular Construction Market By Application, 2025 & 2035
- Fig 10. Permanent Modular Construction Market By Segment, 2025 & 2035
- Fig 11. Permanent Modular Construction Market By Segment, 2025 & 2035
- Fig 12. Permanent Modular Construction Market By Segment, 2025 & 2035
- Fig 13. Permanent Modular Construction Market By Segment, 2025 & 2035
- Fig 14. North America Permanent Modular Construction Market, 2025 & 2035
- Fig 15. Europe Permanent Modular Construction Market, 2025 & 2035
- Fig 16. Asia Pacific Permanent Modular Construction Market, 2025 & 2035
- Fig 17. Latin America Permanent Modular Construction Market, 2025 & 2035
- Fig 18. Middle East & Africa Permanent Modular Construction Market, 2025 & 2035
- Fig 19. Global Permanent Modular Construction Market, Company Market Share Analysis (2025)

.....

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