

Modular Construction Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028

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Abstracts

The global modular construction market size reached US\$ 81.4 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 114.7 Billion by 2028, exhibiting a growth rate (CAGR) of 5.88% during 2022-2028. The rising need for rapid construction in urban areas, rising demand for energy efficiency in construction, continual innovations and customization in architectural designs, and the escalating demand for affordable housing are some of the factors that are propelling the market.

Modular construction refers to a method where a building or structure is constructed off-site, using the same materials and adhering to the same standards as conventional on-site construction, but in a controlled factory environment. The process involves the production of individual components known as modules, which are assembled on-site to complete the final structure. These modules are manufactured with precision and efficiency, ensuring consistent quality and conformity to specific design standards. It is characterized by flexibility in design, controlled environment manufacturing, and the potential for enhanced sustainability.

The global market is primarily driven by the rising need for rapid construction in urban areas, enhancing its appeal for time-sensitive projects. In line with this, the consistent quality control offered by manufacturing in controlled environments is adding momentum to the market. Moreover, government initiatives promoting sustainable construction practices are acting as significant growth-inducing factors. In addition to this, the ability to minimize construction waste aligns with global sustainability goals, creating a favorable environment for this method. Also, technological advancements in manufacturing and assembly processes are positively impacting the market. The market is further driven by the requirement for buildings that can withstand extreme weather

conditions, leading to a preference for this method. Some of the other factors contributing to the market include the growing awareness regarding the long-term benefits including reduced maintenance and increased durability, inflating disposable income levels and an enhanced focus on sustainable development.

Modular Construction Market Trends/Drivers:

Rising Demand for Energy Efficiency in Construction

The global emphasis on energy efficiency is playing a critical role in stimulating the market. As nations strive to meet stringent energy-saving targets, the adoption of construction practices that minimize energy consumption is gaining momentum. It facilitates better insulation and energy control, owing to the precision in manufacturing and assembly within controlled environments. This leads to structures with enhanced thermal performance and a marked reduction in energy consumption for heating and cooling. The alignment of construction methods with international efforts to reduce greenhouse gas emissions and conserve finite resources makes it a sought-after choice. This energy-efficient approach not only lowers operational costs but also contributes to environmental stewardship, which resonates with a growing environmentally conscious consumer base.

Continual innovations and customization in Architectural Designs:

Another vital driver of the market is the burgeoning demand for innovation and customization in architectural designs. Unlike traditional construction methods, modular methods enable a broader range of aesthetic and functional solutions, allowing architects to explore unique designs without significant cost escalation. The controlled manufacturing process ensures precision, enabling intricate customization that may be cumbersome in conventional on-site construction. The adaptability of this construction method to client needs extends beyond aesthetics to include unique functional requirements, such as specific spatial arrangements or the incorporation of advanced technological features. This flexibility fosters a new era of creativity within the construction sector, accommodating both artistic expression and practical necessity. The blend of innovation and customization within modular construction technologies is positioning it as a desirable alternative, facilitating more personalized and dynamic built environments.

Escalating Demand for Affordable Housing

The escalating demand for affordable housing, particularly in densely populated urban

areas and emerging economies, represents a significant impetus for the growth of the market. The efficiency of modular construction translates to cost savings without compromising quality, enabling developers to address a fundamental global challenge. With urbanization trends showing no signs of slowing down, the demand for housing solutions that balance cost, quality, and speed is at an all-time high. The scalable nature and controlled manufacturing process enable quicker project completion, thus reducing financing costs. Furthermore, the potential for mass production aligns with the need for large-scale housing projects. In the context of social equity, governments and developers are recognizing the potential of modular construction to contribute to housing accessibility. This method's alignment with the pressing need for affordable, quality housing solutions makes it an essential driver for the market growth.

Modular Construction Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global modular construction market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on type, module type, material and end use.

Breakup by Type:

Permanent
Relocatable

Permanent accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the type. This includes permanent and relocatable. According to the report, permanent represented the largest segment.

The permanent segment is driven by the increasing need for lasting structures that match conventional buildings in terms of durability and strength. The assurance of long-term stability with a shorter construction timeframe is appealing for both residential and commercial applications. The preference for structures that stand the test of time without compromising quality or aesthetics is boosting this segment of the market.

On the other hand, the demand for relocatable segment is growing due to its adaptability and flexibility in meeting temporary space needs. These structures are often used in industries such as education and healthcare, where temporary expansion or relocations might be necessary. The capacity to dismantle and reconstruct these

structures without significant loss in quality is a significant driver for this segment.

Breakup by Module Type:

Four Sided

Open Sided

Partially Open Sided

Mixed Modules and Floor Cassettes

Modules Supported by a Primary Structure

Others

Modules supported by a primary structure represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the module type. This includes four sided, open sided, partially open sided, mixed modules and floor cassettes, modules supported by a primary structure, and others. According to the report, modules supported by a primary structure represented the largest segment.

Modules supported by a primary structure offer enhanced structural integrity, often used in high-rise or large-scale projects. The combination of modules with primary support adds to the building's stability and safety. The ability to achieve tall or extensive structures through this method is appealing for commercial and large residential developments.

On the other hand, four-sided modular construction offers comprehensive enclosure, providing enhanced stability and insulation. This type is often chosen for permanent structures where full protection from external elements is essential, such as in extreme weather conditions. The robustness and weather-resilience of four-sided modules make them preferred in many commercial and residential applications.

Additionally, open-sided modular construction is favored in scenarios that require natural ventilation and integration with surrounding landscapes. This design finds utility in recreational facilities, hospitality, and certain commercial spaces that seek a blend of indoor and outdoor environments. The appeal of an open architectural aesthetic, coupled with the potential for energy savings, drives this segment.

Moreover, partially open-sided constructions offer a balance between enclosed spaces and open areas, allowing for both security and ventilation. This approach is popular in retail and commercial spaces that require a blend of openness and enclosure. The

versatility and adaptability of partially open-sided constructions to various design requirements fuel their demand.

Additionally, mixed modules and floor cassettes allow for complex designs and customized layouts, providing architects with more creative freedom. The ability to mix and match different components to achieve specific design goals is attractive in commercial and high-end residential construction. This approach enables innovative architectural solutions and is driving this segment.

Breakup by Material:

Steel

Concrete

Wood

Plastic

Others

Steel accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the material. This includes steel, concrete, wood, plastic, and others. According to the report, steel represented the largest segment.

Steel construction is favored for its strength, durability, and resistance to environmental conditions. The application of steel is widespread in commercial and industrial settings, where robust construction is essential. The recyclability of steel aligns with sustainability goals, further enhancing its appeal.

On the other hand, concrete modules offer solid construction with excellent sound insulation and fire resistance. This material is often chosen for permanent structures in both residential and commercial sectors, including schools and hospitals. Its inherent durability and protective qualities drive its demand in the market.

Moreover, the wooden segment is gaining traction due to its aesthetic appeal and sustainable attributes. Utilized in residential and hospitality sectors, wood offers a natural and warm appearance. Its renewable nature and the potential for carbon sequestration align with environmental considerations.

Furthermore, the plastic modular construction is appealing for its lightweight nature and

resistance to corrosion. Often used in temporary or specialty constructions, such as emergency shelters or outdoor facilities, plastic offers flexibility and cost-efficiency. Its adaptability to various applications supports its growth in the market.

Breakup by End Use:

- Residential
- Commercial
- Education
- Retail
- Hospitality
- Healthcare
- Others

Residential represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the end use. This includes residential, commercial, education, retail, hospitality, healthcare, and others. According to the report, residential represented the largest segment.

The residential segment is growing due to the demand for affordable and quickly constructed housing solutions. Modular construction's ability to provide cost-effective, customizable homes is particularly attractive in urban areas. This segment is further supported by the increased consumer interest in sustainable living options.

On the other hand, the commercial segment is driven by the need for efficient, customizable office and retail spaces. Modular construction allows for adaptability in design, facilitating brand-specific customization. Its alignment with rapid urbanization and commercial expansion trends fuels this segment.

In the education, retail, hospitality, and healthcare sectors, modular construction provides solutions for quick expansions or temporary facilities. The ability to construct classrooms or administrative spaces in a short timeframe without compromising quality meets the dynamic needs of educational institutions, brand identities, different hospitality needs, or stringent medical requirements. The cost-effectiveness and adaptability of this method are vital for these segments. The ability to create aesthetically pleasing, customized spaces that cater to different hospitality needs is crucial. This segment is further supported by the growing trend towards sustainable and eco-friendly construction practices.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest modular construction market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

In North America, the modular construction market is experiencing significant growth,

driven by a combination of socio-economic and regulatory factors. The emphasis on sustainable construction methods in developed countries such as the U.S. and Canada is fueling interest in modular building practices, known for reducing waste and energy consumption.

Additionally, the region's focus on innovation and technological advancements has created an environment where modular construction, with its precision manufacturing and customization, thrives. The escalating urbanization and associated demand for rapid construction solutions are compelling industry players to adopt modular techniques.

The availability of skilled labor and sophisticated manufacturing technology further enables quality control, making this approach attractive for various construction sectors. Government initiatives promoting energy efficiency and affordable housing also play a crucial role in the regional market growth. The diversity in architectural preferences across North America, coupled with the flexibility of modular construction, is a contributing factor as well.

Furthermore, the strong economic investment in infrastructure development and the growing awareness about long-term environmental responsibilities are essential driving forces, positioning modular construction as a strategic solution in North America's construction landscape.

Competitive Landscape:

The top players in the market are dedicating resources to innovation and the development of new materials and construction techniques. By focusing on R&D, they can create more efficient, sustainable, and adaptable modular solutions that meet evolving customer needs. Many companies are prioritizing eco-friendly practices by utilizing sustainable materials and energy-efficient construction methods to appeal to a growing segment of environmentally conscious consumers and comply with increasingly stringent environmental regulations. Also, they are expanding into new regions with rising urbanization and construction needs for diversifying their consumer base and tapping into growing economies. Furthermore, they are also forming strategic alliances and collaborations with architects, developers, and other industry stakeholders for strengthening their market position.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Algeco
Balfour Beatty plc
Bouygues
Etex Group
Guerdon LLC
KLEUSBERG GmbH & Co KG
Laing O'Rourke
Larsen & Toubro Limited
Lendlease Corporation
Red Sea International
Skanska AB
Taisei Corporation

Recent Developments:

In July 2023, Algeco completed the new modular Starbucks restaurant in Derby in just 6 weeks. Algeco installed the shell in 2 weeks, delivering modules with a PMV (Pre Manufactured Value) of over 80%. This allowed the restaurant to generate income more quickly than a traditional on-site build, contributing to a quicker return on investment.

In July 2023, Balfour Beatty announced today that it has acquired a 168-unit/592-bed student housing community in Tallahassee, Florida. The acquisition expands the company's overall Florida footprint to 12 residential properties. The property will be managed internally by the Company's residential management division, Balfour Beatty Communities.

In June 2023, Etex Group closed the acquisition of UK insulation producer Superglass. Through this deal, Etex expands its already strong activities in the UK and complements the extensive European sales and production network of its Insulation division. With this latest acquisition of Superglass, Etex's Insulation division consists of 11 plants across Europe, over 1,500 employees and two brands: Superglass and URSA.

Key Questions Answered in This Report:

How has the global modular construction market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global modular construction market?

What is the impact of each driver, restraint, and opportunity on the global modular construction market?

What are the key regional markets?

Which countries represent the most attractive modular construction market?

- What is the breakup of the market based on the type?
- Which is the most attractive type in the modular construction market?
- What is the breakup of the market based on the module type?
- Which is the most attractive module type in the modular construction market?
- What is the breakup of the market based on the material?
- Which is the most attractive material in the modular construction market?
- What is the breakup of the market based on the end use?
- Which is the most attractive end use in the modular construction market?
- What is the competitive structure of the global modular construction market?
- Who are the key players/companies in the global modular construction market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL MODULAR CONSTRUCTION MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY TYPE

- 6.1 Permanent
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Relocatable
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast

7 MARKET BREAKUP BY MODULE TYPE

- 7.1 Four Sided
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Open Sided
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Partially Open Sided
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Mixed Modules and Floor Cassettes
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Modules Supported by a Primary Structure
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast
- 7.6 Others
 - 7.6.1 Market Trends
 - 7.6.2 Market Forecast

8 MARKET BREAKUP BY MATERIAL

- 8.1 Steel
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 Concrete
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Wood
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast
- 8.4 Plastic
 - 8.4.1 Market Trends
 - 8.4.2 Market Forecast
- 8.5 Others
 - 8.5.1 Market Trends
 - 8.5.2 Market Forecast

9 MARKET BREAKUP BY END USE

9.1 Residential

9.1.1 Market Trends

9.1.2 Market Forecast

9.2 Commercial

9.2.1 Market Trends

9.2.2 Market Forecast

9.3 Education

9.3.1 Market Trends

9.3.2 Market Forecast

9.4 Retail

9.4.1 Market Trends

9.4.2 Market Forecast

9.5 Hospitality

9.5.1 Market Trends

9.5.2 Market Forecast

9.6 Healthcare

9.6.1 Market Trends

9.6.2 Market Forecast

9.7 Others

9.7.1 Market Trends

9.7.2 Market Forecast

10 MARKET BREAKUP BY REGION

10.1 North America

10.1.1 United States

10.1.1.1 Market Trends

10.1.1.2 Market Forecast

10.1.2 Canada

10.1.2.1 Market Trends

10.1.2.2 Market Forecast

10.2 Asia-Pacific

10.2.1 China

10.2.1.1 Market Trends

10.2.1.2 Market Forecast

10.2.2 Japan

10.2.2.1 Market Trends

- 10.2.2.2 Market Forecast
- 10.2.3 India
 - 10.2.3.1 Market Trends
 - 10.2.3.2 Market Forecast
- 10.2.4 South Korea
 - 10.2.4.1 Market Trends
 - 10.2.4.2 Market Forecast
- 10.2.5 Australia
 - 10.2.5.1 Market Trends
 - 10.2.5.2 Market Forecast
- 10.2.6 Indonesia
 - 10.2.6.1 Market Trends
 - 10.2.6.2 Market Forecast
- 10.2.7 Others
 - 10.2.7.1 Market Trends
 - 10.2.7.2 Market Forecast
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.1.1 Market Trends
 - 10.3.1.2 Market Forecast
 - 10.3.2 France
 - 10.3.2.1 Market Trends
 - 10.3.2.2 Market Forecast
 - 10.3.3 United Kingdom
 - 10.3.3.1 Market Trends
 - 10.3.3.2 Market Forecast
 - 10.3.4 Italy
 - 10.3.4.1 Market Trends
 - 10.3.4.2 Market Forecast
 - 10.3.5 Spain
 - 10.3.5.1 Market Trends
 - 10.3.5.2 Market Forecast
 - 10.3.6 Russia
 - 10.3.6.1 Market Trends
 - 10.3.6.2 Market Forecast
 - 10.3.7 Others
 - 10.3.7.1 Market Trends
 - 10.3.7.2 Market Forecast
- 10.4 Latin America

10.4.1 Brazil

10.4.1.1 Market Trends

10.4.1.2 Market Forecast

10.4.2 Mexico

10.4.2.1 Market Trends

10.4.2.2 Market Forecast

10.4.3 Others

10.4.3.1 Market Trends

10.4.3.2 Market Forecast

10.5 Middle East and Africa

10.5.1 Market Trends

10.5.2 Market Breakup by Country

10.5.3 Market Forecast

11 SWOT ANALYSIS

11.1 Overview

11.2 Strengths

11.3 Weaknesses

11.4 Opportunities

11.5 Threats

12 VALUE CHAIN ANALYSIS

13 PORTERS FIVE FORCES ANALYSIS

13.1 Overview

13.2 Bargaining Power of Buyers

13.3 Bargaining Power of Suppliers

13.4 Degree of Competition

13.5 Threat of New Entrants

13.6 Threat of Substitutes

14 PRICE ANALYSIS

15 COMPETITIVE LANDSCAPE

15.1 Market Structure

15.2 Key Players

15.3 Profiles of Key Players

15.3.1 Algeco

15.3.1.1 Company Overview

15.3.1.2 Product Portfolio

15.3.2 Balfour Beatty plc

15.3.2.1 Company Overview

15.3.2.2 Product Portfolio

15.3.2.3 Financials

15.3.2.4 SWOT Analysis

15.3.3 Bouygues

15.3.3.1 Company Overview

15.3.3.2 Product Portfolio

15.3.4 Etex Group

15.3.4.1 Company Overview

15.3.4.2 Product Portfolio

15.3.5 Guerdon LLC

15.3.5.1 Company Overview

15.3.5.2 Product Portfolio

15.3.6 KLEUSBERG GmbH & Co KG

15.3.6.1 Company Overview

15.3.6.2 Product Portfolio

15.3.7 Laing O'Rourke

15.3.7.1 Company Overview

15.3.7.2 Product Portfolio

15.3.7.3 SWOT Analysis

15.3.8 Larsen & Toubro Limited

15.3.8.1 Company Overview

15.3.8.2 Product Portfolio

15.3.8.3 Financials

15.3.8.4 SWOT Analysis

15.3.9 Lendlease Corporation

15.3.9.1 Company Overview

15.3.9.2 Product Portfolio

15.3.9.3 Financials

15.3.9.4 SWOT Analysis

15.3.10 Red Sea International

15.3.10.1 Company Overview

15.3.10.2 Product Portfolio

15.3.10.3 Financials

15.3.11 Skanska AB

15.3.11.1 Company Overview

15.3.11.2 Product Portfolio

15.3.11.3 Financials

15.3.11.4 SWOT Analysis

15.3.12 Taisei Corporation

15.3.12.1 Company Overview

15.3.12.2 Product Portfolio

15.3.12.3 Financials

15.3.12.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Modular Construction Market: Key Industry Highlights, 2022 and 2028

Table 2: Global: Modular Construction Market Forecast: Breakup by Type (in Million US\$), 2023-2028

Table 3: Global: Modular Construction Market Forecast: Breakup by Module Type (in Million US\$), 2023-2028

Table 4: Global: Modular Construction Market Forecast: Breakup by Material (in Million US\$), 2023-2028

Table 5: Global: Modular Construction Market Forecast: Breakup by End Use (in Million US\$), 2023-2028

Table 6: Global: Modular Construction Market Forecast: Breakup by Region (in Million US\$), 2023-2028

Table 7: Global: Modular Construction Market: Competitive Structure

Table 8: Global: Modular Construction Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Modular Construction Market: Major Drivers and Challenges

Figure 2: Global: Modular Construction Market: Sales Value (in Billion US\$), 2017-2022

Figure 3: Global: Modular Construction Market Forecast: Sales Value (in Billion US\$), 2023-2028

Figure 4: Global: Modular Construction Market: Breakup by Type (in %), 2022

Figure 5: Global: Modular Construction Market: Breakup by Module Type (in %), 2022

Figure 6: Global: Modular Construction Market: Breakup by Material (in %), 2022

Figure 7: Global: Modular Construction Market: Breakup by End Use (in %), 2022

Figure 8: Global: Modular Construction Market: Breakup by Region (in %), 2022

Figure 9: Global: Modular Construction (Permanent) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 10: Global: Modular Construction (Permanent) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 11: Global: Modular Construction (Relocatable) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 12: Global: Modular Construction (Relocatable) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 13: Global: Modular Construction (Four Sided) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 14: Global: Modular Construction (Four Sided) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 15: Global: Modular Construction (Open Sided) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 16: Global: Modular Construction (Open Sided) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 17: Global: Modular Construction (Partially Open Sided) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 18: Global: Modular Construction (Partially Open Sided) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 19: Global: Modular Construction (Mixed Modules and Floor Cassettes) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 20: Global: Modular Construction (Mixed Modules and Floor Cassettes) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 21: Global: Modular Construction (Modules Supported by a Primary Structure) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 22: Global: Modular Construction (Modules Supported by a Primary Structure) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 23: Global: Modular Construction (Other Module Types) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 24: Global: Modular Construction (Other Module Types) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 25: Global: Modular Construction (Steel) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 26: Global: Modular Construction (Steel) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 27: Global: Modular Construction (Concrete) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 28: Global: Modular Construction (Concrete) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 29: Global: Modular Construction (Wood) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 30: Global: Modular Construction (Wood) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 31: Global: Modular Construction (Plastic) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 32: Global: Modular Construction (Plastic) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 33: Global: Modular Construction (Other Materials) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 34: Global: Modular Construction (Other Materials) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 35: Global: Modular Construction (Residential) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 36: Global: Modular Construction (Residential) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 37: Global: Modular Construction (Commercial) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 38: Global: Modular Construction (Commercial) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 39: Global: Modular Construction (Education) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 40: Global: Modular Construction (Education) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 41: Global: Modular Construction (Retail) Market: Sales Value (in Million US\$),

2017 & 2022

Figure 42: Global: Modular Construction (Retail) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 43: Global: Modular Construction (Hospitality) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 44: Global: Modular Construction (Hospitality) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 45: Global: Modular Construction (Healthcare) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 46: Global: Modular Construction (Healthcare) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 47: Global: Modular Construction (Other End Uses) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 48: Global: Modular Construction (Other End Uses) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 49: North America: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 50: North America: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 51: United States: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 52: United States: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 53: Canada: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 54: Canada: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 55: Asia-Pacific: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 56: Asia-Pacific: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 57: China: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 58: China: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 59: Japan: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 60: Japan: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 61: India: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 62: India: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 63: South Korea: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 64: South Korea: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 65: Australia: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 66: Australia: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 67: Indonesia: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 68: Indonesia: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 69: Others: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 70: Others: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 71: Europe: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 72: Europe: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 73: Germany: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 74: Germany: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 75: France: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 76: France: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 77: United Kingdom: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 78: United Kingdom: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 79: Italy: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 80: Italy: Modular Construction Market Forecast: Sales Value (in Million US\$),

2023-2028

Figure 81: Spain: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 82: Spain: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 83: Russia: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 84: Russia: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 85: Others: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 86: Others: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 87: Latin America: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 88: Latin America: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 89: Brazil: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 90: Brazil: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 91: Mexico: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 92: Mexico: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 93: Others: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 94: Others: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 95: Middle East and Africa: Modular Construction Market: Sales Value (in Million US\$), 2017 & 2022

Figure 96: Middle East and Africa: Modular Construction Market: Breakup by Country (in %), 2022

Figure 97: Middle East and Africa: Modular Construction Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 98: Global: Modular Construction Industry: SWOT Analysis

Figure 99: Global: Modular Construction Industry: Value Chain Analysis

Figure 100: Global: Modular Construction Industry: Porter's Five Forces Analysis

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