

Europe Prefabricated Housing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Europe Prefabricated Housing Market size is estimated at USD 32.5 billion in 2024, and is expected to reach USD 44.71 billion by 2029, growing at a CAGR of 6.59% during the forecast period (2024-2029).

The European prefabricated housing market is mainly driven by low- to mid-rise residential buildings, project homes, and public housing demand. The value of the modular construction sector in Poland has increased by almost half over the past two years as prefabricated technology is increasingly used to construct buildings. A large selection of available materials and a rise in raw material prices and labor costs have helped the process.

The construction of the two modules that make up a two-bedroom home takes only 14 days in L&G's factory. Dispatched on the back of lorries and bolted together on site, a house has staircases, windows, doorways, a fully equipped kitchen and bathroom, sockets, radiators, and a heat pump. Modular homes are in the top energy performance bracket, so they could save an average household up to GBP 800 (USD 1013.49) a year on energy bills, according to the industry group Make UK Modular. L&G aims to produce 450 homes at the factory this year but could increase this to 3,000 annually.

Another modular firm, the Goldman Sachs-backed Top Hat company, is creating its second housing site near Corby. It will be the largest 3D modular housing factory in western Europe, the size of 11 football fields. It is planning to build 4,000 homes a year.

According to Make UK Modular, by 2025, the industry will have been able to produce 20,000 prefab homes. The government has set a target of 300,000 new homes annually

by 2025, representing a fifth of the 100,000 annual shortfall.

The prefabricated housing market is growing across Europe as people increasingly focus on turnkey solutions that tick all the modern boxes. The manufacturing firms' acceptance and ease of planning and consent processes are expected to boost demand further. Modular construction is gaining popularity across the European region owing to population growth and shortages in housing. It is gaining momentum as an effective means to build affordable housing.

In Italy, the demand for prefabricated, anti-seismic houses in steel is expected to gain popularity, owing to their validity and efficiency in housing safety. It is applicable, especially in those areas subjected to recurrent seismic events. Sweden is one of the world's most developed markets for prefabricated construction, with a high penetration rate.

Sweden is the leading country in implementing penalized building systems, where around 80% of its housing sector uses structures and elements prefabricated in factories. Offsite manufacturing is used in Sweden to build at least 45% of its new homes and 30% of new-build multi-residence buildings. According to an industrial study, about eight out of 10 detached houses in Sweden are built using modern methods.

Europe Prefabricated Housing Market Trends

Huge Demand for Multi-family Houses Driving Market Growth

Germany is Europe's largest multi-family market, which is worth approximately EUR 8 billion in investment. Denmark and France ranked second and third with about EUR 5 billion and EUR 3.5 billion, respectively.

The United Kingdom is experiencing significant demand for housing, particularly in urban areas. Such demand is likely to continue or even increase in the long run. Converting office spaces into multi-family properties provides an opportunity to capitalize on this demand.

Construction completions of 140,900 units in Q4 2023 brought the annual total to 416,500—the highest amount since 1996. Reduced construction starts in recent quarters are expected to lower deliveries in 2025 and beyond. Q4 2023 multi-family investment volume of USD 25.7 billion brought the annual total to USD 117.5 billion, down by 60% from 2022. However, the sector retained the most significant investment volume of

commercial real estate at 32%.

In September 2023, asset and investment manager MPC Capital expanded its leading role in the market for ESG real estate investments. The property comprises two multi-family houses with around 7,000 sq. m of living space spread over 113 residential units. In addition, the property, completed and fully rented in mid-2022, includes 39 underground parking spaces and one commercial unit. The property is in the Pankow district, within walking distance of the famous Prenzlauer Berg district.

The United Kingdom is Dominating the Market

While technology has revolutionized many aspects of life, including transportation, entertainment, shopping, and consumer goods, housebuilding has been slow to catch up. That is all set to change with the introduction of the next generation of factory-built modular homes.

A new report from Make UK Modular, in collaboration with KOPE, has revealed that by 2025, the modular housing industry will be able to provide 20,000 energy-efficient, low-carbon homes across the United Kingdom. These homes will be 55% less likely to need to be heated than the average UK family house and will be built twice as fast.

Modular manufacturers are already setting up plants in post-industrial small towns or cities, employing more than 3,000 people, and bringing GBP 700 million (USD 860.10 million) of investment to low-growth, low-employment areas.

The government has expedited the planning process for modular homes and committed to 20% of the affordable housing program for modular homes, which would double new jobs in a short period.

Europe Prefabricated Housing Industry Overview

The European prefabricated housing market is highly fragmented, with no players occupying a significant share. Skanska AB, Peab AB, Swietelsky AG, Laing O'Rourke, and Bouygues Batiment International are major players. The market is expected to grow during the forecast period due to increased prefab construction building investments,

upcoming vital projects in the country, and other factors driving the market.

Prefabricated building systems and construction hold a high potential to improve the efficiency and performance of the European construction industry in a more sustainable sense. Companies use environment-friendly materials and manufacturing techniques to differentiate their products.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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