

Middle East and Africa Modular Construction Market By Type (Permanent, Relocatable), By Material (Steel, Concrete, Wood, Others), By End-User (Residential, Commercial, Industrial, Healthcare, Education, Others), By Country, Competition, Forecast and Opportunities 2020-2030F

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Abstracts

Middle East and Africa Modular Construction Market was valued at USD 5.98 Billion in 2024 and is expected to reach USD 9.04 Billion by 2030 with a CAGR of 5.97% during the forecast period.

Modular construction in the Middle East and Africa refers to the innovative approach of assembling building structures using prefabricated modules manufactured off-site, which are then transported and assembled at the construction site. These modules are produced under controlled factory conditions, ensuring high quality, reduced waste, and faster project completion times compared to conventional construction methods. This market covers various sectors, including residential, commercial, industrial, healthcare, and educational projects. The rising demand for modular construction in the region can be attributed to several factors. Firstly, rapid urbanization and population growth are driving the need for cost-effective and time-efficient building solutions, especially in cities with pressing housing shortages. Governments in the region are increasingly investing in modular construction to expedite the delivery of affordable housing projects and infrastructure development. Furthermore, the harsh climatic conditions of the region, such as extreme heat, are making traditional construction methods less favorable, whereas modular construction offers superior thermal insulation and durability, particularly when using materials like steel. Additionally, the market is expected to expand due to the growing focus on sustainable and green building

practices, as modular construction significantly reduces material waste and carbon footprint. The adoption of advanced technologies like Building Information Modeling (BIM) and automation in the manufacturing process is further enhancing the efficiency and precision of modular construction. As industries like healthcare and education also seek rapid expansion of facilities, modular construction offers the flexibility to scale projects quickly, especially during emergencies or surges in demand. However, despite challenges such as high initial costs and limited skilled labor, the market is projected to grow steadily as stakeholders recognize the long-term benefits of modular solutions in meeting the region's infrastructure needs. As awareness and investments in modular technologies increase, the Middle East and Africa modular construction market is poised for robust growth in the coming years, driven by its ability to deliver sustainable, resilient, and scalable construction solutions.

Saudi Arabia announced plans to invest over USD 175 billion annually in industrial and mega projects between 2025 and 2028, including developments like NEOM and the Red Sea resorts. These projects are expected to significantly enhance the region's infrastructure and housing markets, providing substantial opportunities for modular construction methods

Key Market Drivers

Growing Government Initiatives to Address Housing Shortages

The Middle East and Africa modular construction market is being significantly driven by the rising involvement of governments in addressing the pressing issue of housing shortages. Rapid population growth in countries across the region has led to increased demand for affordable housing solutions. To mitigate this challenge, governments are increasingly adopting modular construction techniques to accelerate the development of residential infrastructure. Modular construction, with its ability to deliver high-quality structures in a fraction of the time required by traditional methods, has gained considerable traction in the housing sector.

The increasing influx of rural populations into urban areas, coupled with the growing number of young families, has further intensified the need for affordable housing. To meet these demands, governments have introduced various policies and initiatives focused on promoting modular construction as a viable solution. For example, the Kingdom of Saudi Arabia, under its Vision 2030 strategy, has committed to increasing housing supply by leveraging modern construction techniques, including modular methods. Similarly, the United Arab Emirates is implementing initiatives to boost

affordable housing to accommodate its growing expatriate population. These efforts are aimed at enhancing the availability of housing units while minimizing construction costs and reducing project timelines.

Moreover, the ability of modular construction to achieve significant cost savings and reduce the environmental impact aligns with the region's sustainability goals, which are increasingly prioritized by both public and private sector stakeholders. Governments are also providing incentives such as tax benefits and streamlined regulatory frameworks to encourage the adoption of modular construction. This strategic push from policymakers is expected to accelerate the adoption of modular construction in the Middle East and Africa, thereby driving market growth in the years ahead. The Saudi government's Vision 2030 program includes plans to build 1.5 million homes by 2030 to meet the country's growing demand for affordable housing. Modular construction is seen as a critical component in meeting these ambitious housing targets.

Rising Demand for Commercial Infrastructure Development

The Middle East and Africa modular construction market is witnessing robust growth driven by the escalating demand for commercial infrastructure. Rapid economic development, particularly in Gulf Cooperation Council countries like Saudi Arabia, the United Arab Emirates, and Qatar, has spurred investments in commercial projects. The modular construction approach is increasingly being adopted in the construction of hotels, office spaces, retail centers, and mixed-use developments to meet the growing demand for high-quality commercial infrastructure. In Egypt, the government has set a target of building 250,000 new homes annually to address the housing shortage. Modular construction is part of these efforts, offering faster and more cost-effective solutions.

One of the key advantages driving the adoption of modular construction in the commercial sector is its ability to significantly reduce construction timelines. Businesses and investors prioritize speed-to-market to ensure quick returns on investment, especially in a competitive commercial real estate market. Modular construction can deliver projects up to 50 percent faster than traditional methods, making it an attractive option for developers seeking to capitalize on emerging market opportunities. Additionally, the flexibility and scalability offered by modular construction allow developers to adjust the size and scope of their projects in response to changing market dynamics without compromising on quality or safety standards.

The tourism and hospitality sector, in particular, is a significant driver of modular

construction in the region, as governments and private enterprises focus on expanding hotel capacities to accommodate increasing visitor numbers. Major cities such as Dubai, Riyadh, and Cairo are witnessing a surge in hotel construction, with modular construction being utilized to meet tight project deadlines, especially in preparation for global events and expos. The increased focus on sustainable building practices in the commercial sector, driven by consumer preferences and regulatory requirements, further supports the growth of modular construction, making it an essential strategy for achieving sustainable commercial development. The UAE government has also been investing heavily in affordable housing projects. The government plans to develop 100,000 affordable housing units by 2030 to address the growing population and housing demand in urban areas.

Increasing Investments in Healthcare Infrastructure

The Middle East and Africa modular construction market is experiencing a surge in growth driven by substantial investments in healthcare infrastructure. The region's healthcare sector has been under pressure to expand its capacity to meet the growing demand for medical services, particularly in light of population growth, aging demographics, and the increasing prevalence of chronic diseases. Modular construction is emerging as a preferred solution to address the critical need for rapid healthcare facility expansion, as it offers the advantage of swift project delivery without compromising quality or safety.

Governments across the Middle East and Africa are prioritizing healthcare infrastructure development as part of their national strategies to enhance public health services and improve access to care. For instance, Saudi Arabia's Vision 2030 includes plans to expand healthcare infrastructure using modern construction techniques to meet the country's increasing healthcare demands. Similarly, the United Arab Emirates and South Africa have been actively investing in healthcare projects, leveraging modular construction to quickly build hospitals, clinics, and diagnostic centers. This approach has proven especially effective in remote or underserved areas, where traditional construction methods face logistical challenges.

Modular construction's ability to deliver prefabricated healthcare facilities that meet stringent regulatory and safety standards is a key factor driving its adoption in the sector. The flexibility of modular units allows for the quick expansion or reconfiguration of healthcare facilities, which is crucial in responding to emergencies or unexpected surges in patient volume, such as during pandemics. Furthermore, the cost efficiency and sustainability of modular construction align with the healthcare sector's goals of

reducing operational costs and minimizing environmental impact. As the need for healthcare infrastructure continues to grow in the Middle East and Africa, modular construction is expected to play a pivotal role in meeting the region's healthcare needs, thereby driving market expansion.

Key Market Challenges

High Initial Costs of Modular Construction

One of the key challenges facing the Middle East and Africa modular construction market is the high initial costs associated with modular building techniques. While modular construction offers long-term cost savings due to reduced labor costs and faster project completion times, the upfront investment required for setting up production facilities, purchasing specialized machinery, and acquiring skilled labor can be a significant financial burden for developers and contractors. This challenge is particularly evident in regions where the modular construction industry is still in its nascent stages, and the infrastructure to support large-scale modular projects may not yet be fully developed.

In the Middle East and Africa, the costs involved in producing prefabricated modules in controlled factory environments are higher compared to traditional on-site construction methods. The need for specialized materials, advanced manufacturing technologies, and transport logistics to deliver the modular units to the construction site further escalates the overall cost. Additionally, modular construction often requires significant investment in research and development to design and produce customized modular units for specific projects, which increases the financial risk for developers.

Although modular construction can lead to cost savings in the long run, particularly in terms of reduced labor, fewer delays, and less material wastage, the high initial costs may discourage many developers from adopting this construction method, particularly in regions where traditional construction methods are deeply ingrained and more cost-effective in the short term. To mitigate this challenge, stakeholders in the modular construction market must focus on scaling production, reducing manufacturing costs, and improving logistics to make modular construction a more financially viable alternative to conventional methods. Governments can also play a crucial role by offering incentives such as tax breaks and subsidies to encourage the adoption of modular construction, particularly in public infrastructure projects.

Limited Availability of Skilled Labor

Another significant challenge facing the Middle East and Africa modular construction market is the ****limited availability of skilled labor****. Unlike traditional construction, which relies on a variety of labor-intensive on-site activities, modular construction requires a specialized workforce that is adept at operating advanced manufacturing equipment, assembling prefabricated modules, and ensuring the modules meet the required quality standards. This skill gap in the region presents a barrier to the widespread adoption of modular construction, as developers face difficulties in sourcing workers with the necessary expertise.

The lack of skilled labor is particularly pronounced in countries where modular construction is still relatively new. Many workers in the region are trained in traditional construction methods and may not have the technical know-how to work with the specialized materials and technologies used in modular building. As modular construction continues to gain popularity in the region, the demand for trained workers in areas such as factory production, assembly, design, and installation is expected to increase, creating pressure on local labor markets to meet this demand.

To overcome this challenge, industry stakeholders, including construction companies, educational institutions, and government agencies, must collaborate to create training programs that equip workers with the necessary skills. Additionally, attracting foreign expertise may be necessary to meet the immediate demand for skilled labor in the modular construction sector. However, reliance on foreign workers can also present challenges in terms of cost and labor regulations. As the market for modular construction expands in the Middle East and Africa, addressing the labor shortage through training, recruitment, and collaboration will be key to overcoming this obstacle and ensuring the sector's sustainable growth.

Key Market Trends

Increased Adoption of Sustainable Construction Practices

A significant trend in the Middle East and Africa modular construction market is the growing emphasis on sustainable construction practices. As environmental concerns rise globally, there is increasing pressure on the construction industry to adopt methods that minimize environmental impact, reduce waste, and optimize resource usage. Modular construction is gaining recognition as an environmentally friendly alternative to traditional building methods due to its inherent sustainability features. The use of prefabricated modules in controlled factory settings helps reduce material waste, as

components are manufactured with precise measurements, and offcuts can be repurposed or recycled.

Additionally, modular construction allows for better energy efficiency during both the construction process and the building's operational lifecycle. Many modular units are designed with sustainable features, including energy-efficient insulation, solar panels, and water-saving technologies. As the Middle East and Africa region faces growing urbanization and a need for more efficient buildings, developers are increasingly turning to modular construction to meet sustainability goals set by governments and regulatory bodies. For example, countries like the United Arab Emirates and Saudi Arabia have introduced green building standards, which encourage the use of energy-efficient and sustainable construction methods.

This trend towards sustainability in modular construction is driven not only by regulatory requirements but also by consumer demand for greener, more energy-efficient buildings. As environmental concerns continue to gain importance in both private and public sectors, the Middle East and Africa modular construction market is expected to experience increased demand for sustainable modular solutions, positioning it as a key driver for growth in the years to come.

Growing Integration of Technology in Modular Construction

Another prominent trend in the Middle East and Africa modular construction market is the increasing integration of technology into the modular construction process. Technological advancements are transforming how buildings are designed, manufactured, and assembled, with innovations such as Building Information Modeling (BIM), 3D printing, and robotics playing a pivotal role in modular construction. These technologies are enhancing efficiency, improving accuracy, and enabling faster project timelines, which is critical in a region where demand for infrastructure development is rapidly growing.

Building Information Modeling allows for precise digital representation of a building's physical and functional characteristics, enabling stakeholders to visualize the entire construction process before construction begins. This ensures that the design of modular units is optimized for efficiency and reduces the likelihood of errors during construction. The use of 3D printing in modular construction also enables the creation of complex components with reduced material waste and shorter production times, making the overall construction process more cost-effective.

Robotics is being increasingly used in the manufacturing of modular components, improving consistency and quality control while reducing human error and labor costs. Additionally, advanced technologies such as artificial intelligence and machine learning are being incorporated into construction project management systems to improve scheduling, resource allocation, and risk management.

As technology continues to advance, the integration of digital tools and automation in modular construction will streamline processes and reduce the overall cost of projects, making modular construction an even more attractive option in the Middle East and Africa. The increased efficiency, speed, and cost-effectiveness offered by these technological innovations will continue to drive the growth of modular construction in the region.

Expansion of Modular Construction in Healthcare and Hospitality Sectors

A key trend in the Middle East and Africa modular construction market is the increasing use of modular techniques in the healthcare and hospitality sectors. The demand for rapid expansion in both sectors, driven by factors such as population growth, rising tourism, and the need for healthcare infrastructure, is prompting stakeholders to adopt modular construction methods. Modular construction's ability to deliver high-quality buildings in a short period of time is particularly valuable in these sectors, where quick turnaround times and high standards are essential.

In the healthcare sector, modular construction is increasingly being used to build hospitals, clinics, and medical facilities to meet the growing demand for healthcare services. The ability to rapidly construct medical facilities is essential in regions where public health needs may exceed the capacity of existing infrastructure. Additionally, modular buildings can be easily adapted or expanded as healthcare needs evolve, making them a flexible solution for hospitals and clinics that must respond to changing patient volumes or medical technologies.

Similarly, the hospitality industry in the Middle East and Africa, particularly in countries with high tourist influxes such as the United Arab Emirates, Qatar, and Egypt, is leveraging modular construction to build hotels, resorts, and other accommodation facilities. Modular construction allows for faster project delivery, which is essential for meeting the demand for new hospitality spaces, particularly around large international events, such as expos, sports events, and festivals. The reduced construction timelines enable businesses to generate revenue sooner, making it an attractive solution for investors in the hospitality sector.

As both the healthcare and hospitality sectors continue to expand in the region, the use of modular construction will continue to rise, further boosting the growth of the modular construction market in the Middle East and Africa.

Segmental Insights

Type Insights

Based on Type, the permanent segment dominated the Middle East and Africa modular construction market and is expected to maintain its dominance during the forecast period. Permanent modular buildings are designed for long-term use and are often utilized for applications such as residential buildings, commercial complexes, and institutional structures. The increasing demand for durable, energy-efficient, and aesthetically appealing buildings in the region has contributed to the strong growth of this segment. Permanent modular construction offers several advantages, including faster project completion times, cost efficiency, and reduced construction waste, making it an attractive option for developers and contractors in the Middle East and Africa.

Moreover, as governments and private entities in the region focus on building sustainable and resilient infrastructure, permanent modular buildings are seen as a viable solution. These buildings can meet high-quality standards and comply with local building codes and regulations, making them suitable for a wide range of applications. The ability to customize designs, integrate advanced building systems, and offer flexibility in layout further enhances the appeal of permanent modular buildings.

The growing focus on urbanization, coupled with the need for rapid construction of residential and commercial spaces in high-demand areas, especially in urban centers and economic hubs such as Dubai, Riyadh, and Cairo, is driving the continued adoption of permanent modular construction. This trend is likely to persist as the demand for long-lasting, functional buildings rises, and as the benefits of modular construction, including cost-effectiveness and speed, continue to be recognized by key stakeholders in the construction industry. Therefore, the permanent segment is expected to maintain its dominant position throughout the forecast period.

Country Insights

In 2024, the United Arab Emirates (UAE) dominated the Middle East and Africa modular construction market and is expected to maintain its dominance during the forecast

period. The UAE's leadership in adopting innovative construction solutions, including modular construction, is driven by rapid urbanization, significant infrastructure development, and government initiatives to promote sustainable and efficient building methods. The country's focus on large-scale infrastructure projects, such as commercial buildings, residential complexes, and tourism-related developments, has fueled the demand for modular construction. Additionally, the UAE's position as a regional economic hub, coupled with its ambitious goals to achieve high standards of sustainability and energy efficiency, has made modular construction an ideal solution for meeting the growing need for infrastructure in a cost-effective and timely manner.

The UAE's success in leveraging modular construction is also supported by its commitment to green building standards and smart city development initiatives, particularly in cities like Dubai and Abu Dhabi. Modular construction's ability to deliver high-quality buildings quickly and with minimal environmental impact aligns with the country's sustainability goals. Moreover, the UAE's infrastructure projects, such as those related to the Dubai Expo 2020 and the preparation for large-scale international events, further reinforced the preference for modular buildings that can be quickly assembled and easily relocated.

As the demand for rapid, cost-effective, and sustainable construction solutions grows across the region, the UAE is expected to continue its leadership role in the modular construction market. The government's support for innovative construction technologies, alongside the increasing focus on urban development and housing projects, ensures that the UAE will maintain its dominant position in the Middle East and Africa modular construction market throughout the forecast period..

Key Market Players

Al Dabbagh Group Holding Company Limited.

Modulaire Group Holdings Limited

Karmod Prefabricated Technologies

Bouygues Construction SA

Dorce Prefabricated Building and Construction Industry Trade Incorporation.

Dutco Group of Companies

Laing O'Rourke Group

ATCO Ltd

Nesma Co. Ltd

Speed House Group of Companies

Report Scope:

In this report, the Middle East and Africa Modular Construction Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Middle East and Africa Modular Construction Market, By Type:

Permanent

Relocatable

Middle East and Africa Modular Construction Market, By Material:

Steel

Concrete

Wood

Others

Middle East and Africa Modular Construction Market, By End-User:

Residential

Commercial

Industrial

Healthcare

Education

Others

Middle East and Africa Modular Construction Market, By Country:

Saudi Arabia

UAE

Kuwait

Iran

Qatar

Egypt

South Africa

Bahrain

Nigeria

Turkey

Rest of Middle East and Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East and Africa Modular Construction Market.

Available Customizations:

Middle East and Africa Modular Construction Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. MIDDLE EAST AND AFRICA MODULAR CONSTRUCTION MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Permanent, Relocatable)
 - 5.2.2. By Material (Steel, Concrete, Wood, Others)
 - 5.2.3. By End-User (Residential, Commercial, Industrial, Healthcare, Education, Others)
 - 5.2.4. By Country (Saudi Arabia, UAE, Kuwait, Iran, Qatar, Egypt, South Africa, Bahrain, Nigeria, Turkey, Rest of Middle East and Africa)
- 5.3. By Company (2024)
- 5.4. Market Map

6. SAUDI ARABIA MODULAR CONSTRUCTION MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Type

6.2.2. By Material

6.2.3. By End-User

7. UAE MODULAR CONSTRUCTION MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Type

7.2.2. By Material

7.2.3. By End-User

8. KUWAIT MODULAR CONSTRUCTION MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Type

8.2.2. By Material

8.2.3. By End-User

9. IRAN MODULAR CONSTRUCTION MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By Material

9.2.3. By End-User

10. QATAR MODULAR CONSTRUCTION MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

- 10.2.1. By Type
- 10.2.2. By Material
- 10.2.3. By End-User

11. EGYPT MODULAR CONSTRUCTION MARKET OUTLOOK

- 11.1. Market Size & Forecast
 - 11.1.1. By Value
- 11.2. Market Share & Forecast
 - 11.2.1. By Type
 - 11.2.2. By Material
 - 11.2.3. By End-User

12. SOUTH AFRICA MODULAR CONSTRUCTION MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Value
- 12.2. Market Share & Forecast
 - 12.2.1. By Type
 - 12.2.2. By Material
 - 12.2.3. By End-User

13. BAHRAIN MODULAR CONSTRUCTION MARKET OUTLOOK

- 13.1. Market Size & Forecast
 - 13.1.1. By Value
- 13.2. Market Share & Forecast
 - 13.2.1. By Type
 - 13.2.2. By Material
 - 13.2.3. By End-User

14. NIGERIA MODULAR CONSTRUCTION MARKET OUTLOOK

- 14.1. Market Size & Forecast
 - 14.1.1. By Value
- 14.2. Market Share & Forecast
 - 14.2.1. By Type
 - 14.2.2. By Material
 - 14.2.3. By End-User

15. TURKEY MODULAR CONSTRUCTION MARKET OUTLOOK

15.1. Market Size & Forecast

15.1.1. By Value

15.2. Market Share & Forecast

15.2.1. By Type

15.2.2. By Material

15.2.3. By End-User

16. MARKET DYNAMICS

16.1. Drivers

16.2. Challenges

17. MARKET TRENDS AND DEVELOPMENTS

18. MIDDLE EAST AND AFRICA ECONOMIC PROFILE

19. COMPANY PROFILES

19.1. Al Dabbagh Group Holding Company Limited.

19.1.1. Business Overview

19.1.2. Key Revenue and Financials

19.1.3. Recent Developments

19.1.4. Key Personnel

19.1.5. Key Product/Services Offered

19.2. Modulaire Group Holdings Limited, .

19.2.1. Business Overview

19.2.2. Key Revenue and Financials

19.2.3. Recent Developments

19.2.4. Key Personnel

19.2.5. Key Product/Services Offered

19.3. Karmod Prefabricated Technologies

19.3.1. Business Overview

19.3.2. Key Revenue and Financials

19.3.3. Recent Developments

19.3.4. Key Personnel

19.3.5. Key Product/Services Offered

19.4. Bouygues Construction SA

- 19.4.1. Business Overview
- 19.4.2. Key Revenue and Financials
- 19.4.3. Recent Developments
- 19.4.4. Key Personnel
- 19.4.5. Key Product/Services Offered

19.5. Dorce Prefabricated Building and Construction Industry Trade Incorporation.

- 19.5.1. Business Overview
- 19.5.2. Key Revenue and Financials
- 19.5.3. Recent Developments
- 19.5.4. Key Personnel
- 19.5.5. Key Product/Services Offered

19.6. Dutco Group of Companies.

- 19.6.1. Business Overview
- 19.6.2. Key Revenue and Financials
- 19.6.3. Recent Developments
- 19.6.4. Key Personnel
- 19.6.5. Key Product/Services Offered

19.7. Laing O'Rourke Group

- 19.7.1. Business Overview
- 19.7.2. Key Revenue and Financials
- 19.7.3. Recent Developments
- 19.7.4. Key Personnel
- 19.7.5. Key Product/Services Offered

19.8. ATCO Ltd

- 19.8.1. Business Overview
- 19.8.2. Key Revenue and Financials
- 19.8.3. Recent Developments
- 19.8.4. Key Personnel
- 19.8.5. Key Product/Services Offered

19.9. Nesma Co. Ltd

- 19.9.1. Business Overview
- 19.9.2. Key Revenue and Financials
- 19.9.3. Recent Developments
- 19.9.4. Key Personnel
- 19.9.5. Key Product/Services Offered

19.10. Speed House Group of Companies

- 19.10.1. Business Overview
- 19.10.2. Key Revenue and Financials

19.10.3. Recent Developments

19.10.4. Key Personnel

19.10.5. Key Product/Services Offered

20. STRATEGIC RECOMMENDATIONS

21. ABOUT US & DISCLAIMER

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