

Prefabricated Buildings Market By Product (Skeleton System, Panel System, Cellular System, and Combined System), By Module Type (Bathroom pods, Kitchenette, and Others), By Application (Industrial, Commercial, and Residential) By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

The Global Prefabricated Buildings Market reached a valuation of USD 192.08 billion in 2022 and is poised for robust growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 7.19% through 2028.

The Prefabricated Buildings market represents a sector within the construction industry that specializes in the design, manufacturing, and assembly of building components or entire structures in a controlled factory environment, before transporting and erecting them at the construction site. Prefabricated buildings, commonly referred to as 'prefab' or 'modular' buildings, are characterized by their systematic construction process, involving the pre-fabrication of key building elements such as walls, floors, roof panels, and even entire modules or units.

This market encompasses a wide variety of building types, including residential, commercial, industrial, and institutional structures. These range from single-family homes and apartment complexes to office buildings, schools, healthcare facilities, and more. Prefabrication techniques encompass diverse construction methods, including panelized systems, modular construction, and volumetric (unitized) construction, each offering specific advantages and applications.

The Prefabricated Buildings market is driven by several factors, including sustainability

considerations, cost efficiency, accelerated construction timelines, and technological advancements. It is also influenced by government policies related to green building standards, building codes, and affordable housing initiatives. Nevertheless, the market faces challenges such as overcoming perceptions and stigmas associated with prefab construction and addressing the shortage of skilled labor.

In summary, the Prefabricated Buildings market plays a pivotal role in meeting the evolving demands of the construction industry. It provides innovative solutions that cater to the needs of a rapidly urbanizing and environmentally conscious world. This market continues to evolve as a dynamic and influential segment within the broader construction sector.

Key Market Drivers

Sustainability and Environmental Concerns

Sustainability has become a dominant driver in the global Prefabricated Buildings market. With growing awareness of environmental issues, stakeholders are increasingly demanding eco-friendly construction solutions. Prefabricated buildings offer several advantages in this regard. First, they typically produce fewer construction waste and emissions compared to traditional construction methods. This aligns with global efforts to reduce carbon footprints. Moreover, prefabrication allows for the use of sustainable materials such as recycled steel and wood, as well as the incorporation of energy-efficient features like solar panels and advanced insulation. Governments worldwide are also incentivizing sustainable construction through regulations and tax breaks, further propelling the adoption of prefabricated buildings. Sustainability isn't just a trend; it's a fundamental shift that's driving innovation in the industry, encouraging manufacturers to develop more environmentally friendly materials and construction techniques.

Cost Efficiency and Time Savings

The cost-efficiency and time-saving benefits of prefabricated buildings are driving their popularity globally. Traditional construction projects often face delays due to factors like weather, labor shortages, and supply chain issues. Prefabrication, on the other hand, occurs in a controlled factory environment, reducing the impact of these variables. Prefabricated components are manufactured quickly and efficiently, leading to significant time savings. This is particularly important in regions with high demand for housing or commercial space, where speed to market can be a critical competitive

advantage. Furthermore, the predictability of costs in prefabricated construction is attractive to developers and investors. With reduced on-site labor requirements and fewer unknowns, budgets can be more accurately planned and controlled.

Urbanization and Population Growth

The global trend of urbanization and population growth is a powerful driver for the Prefabricated Buildings market. As more people move to cities in search of economic opportunities, there is a pressing need for affordable and sustainable housing and infrastructure. Prefabricated buildings can address this demand efficiently. Urban areas often face constraints in terms of available land and construction space. Prefabricated buildings, with their ability to maximize the use of limited space, are an ideal solution for crowded cities. They can be designed to fit into tight urban environments while still providing comfortable living and working spaces. Moreover, the scalability of prefabricated construction allows for the rapid expansion of urban infrastructure, meeting the needs of growing populations in a timely manner.

Technological Advancements

Continuous technological advancements are another driving force behind the global Prefabricated Buildings market. Innovations in design, materials, and manufacturing processes have made prefabricated construction more versatile and appealing. Advanced 3D modeling and Building Information Modeling (BIM) software have revolutionized the design phase, enabling architects and engineers to create highly customized and efficient prefab structures. Additionally, automation and robotics have improved the precision and speed of manufacturing, resulting in higher-quality prefabricated components. Furthermore, the integration of smart technology into prefab buildings has enhanced their functionality, making them more attractive to tech-savvy consumers and businesses. This includes features like energy management systems, IoT sensors, and home automation, which can be seamlessly incorporated during the prefabrication process.

Disaster Resilience and Rapid Response

In an era marked by increased frequency and severity of natural disasters, the demand for disaster-resilient and rapidly deployable structures has grown significantly. Prefabricated buildings are well-suited to meet these needs. Prefabrication allows for the production of disaster-resistant structures with reinforced materials and designs capable of withstanding earthquakes, hurricanes, floods, and other calamities. These

buildings can be pre-fabricated and stockpiled for rapid deployment when disaster strikes, providing essential shelter and infrastructure in emergency situations. Governments, NGOs, and private organizations are increasingly recognizing the value of prefabricated structures for disaster response and recovery efforts, leading to greater investment in this segment of the market.

Housing Affordability

Housing affordability remains a critical issue in many regions around the world. The escalating costs of land and construction materials have pushed traditional housing out of reach for many potential buyers. Prefabricated buildings offer a cost-effective solution to this problem. Prefabricated homes and apartments are often more affordable than their conventionally constructed counterparts. The streamlined manufacturing process, reduced labor costs, and economies of scale contribute to lower overall expenses. This affordability makes homeownership and rental housing more accessible, addressing a pressing societal concern. Additionally, some governments and organizations are exploring modular and prefab solutions for affordable housing initiatives, further boosting the adoption of prefabricated buildings in the residential sector.

In conclusion, the global Prefabricated Buildings market is being driven by a diverse set of factors, ranging from sustainability and cost efficiency to technological advancements and disaster resilience.

Government Policies are Likely to Propel the Market

Green Building Standards and Incentives

Green building standards and incentives play a pivotal role in shaping the global Prefabricated Buildings market. Governments worldwide are increasingly recognizing the importance of sustainable construction practices to mitigate environmental impacts. As a result, they have implemented policies that encourage the adoption of green building technologies, including prefabrication. One key policy instrument is the establishment of green building certification systems like LEED (Leadership in Energy and Environmental Design) and BREEAM (Building Research Establishment Environmental Assessment Method). These systems provide guidelines and benchmarks for environmentally friendly construction practices and often reward developers and builders who meet these standards with tax incentives or subsidies. Additionally, governments may offer grants or subsidies for the use of eco-friendly materials and energy-efficient technologies in prefabricated buildings. Such policies not

only stimulate market demand for sustainable prefab structures but also promote innovation in the industry as manufacturers strive to meet these green building requirements. The impact of green building policies is significant, as they drive the Prefabricated Buildings market toward a more sustainable and environmentally responsible future.

Building Codes and Regulations

Building codes and regulations are fundamental government policies that shape the Prefabricated Buildings market. These codes define safety standards, construction practices, and design requirements that builders and manufacturers must adhere to. Governments play a critical role in ensuring that prefabricated buildings meet these codes to guarantee the safety and quality of structures. In many countries, building codes are being updated to specifically address prefabricated construction methods. Governments are investing in research and development to create standards that reflect the unique characteristics and advantages of prefab building systems. These codes often focus on structural integrity, fire safety, and energy efficiency. Government agencies also conduct inspections and quality assurance checks during the manufacturing and assembly phases of prefab buildings to ensure compliance with established regulations. These measures are essential to instill confidence in prefab construction among consumers, developers, and investors. Overall, building codes and regulations are vital government policies that provide a framework for the Prefabricated Buildings market to operate safely and effectively.

Affordable Housing Initiatives

Affordable housing initiatives are a crucial government policy that directly impacts the Prefabricated Buildings market, especially in regions grappling with housing affordability challenges. Governments recognize that prefabricated buildings offer a cost-effective solution to address housing shortages and affordability issues. Many governments are actively promoting the use of prefabricated construction techniques in affordable housing projects. They may provide financial incentives, such as grants or tax breaks, to developers who choose prefab solutions for low-income housing developments. Some governments even establish partnerships with prefab manufacturers to create standardized, affordable housing modules that can be rapidly deployed. These policies not only expand the market for prefabricated buildings but also contribute to social objectives by making housing more accessible to a broader population. In essence, government-backed affordable housing initiatives are a win-win for both the prefab industry and those in need of affordable housing.

Trade and Export Support

Government policies related to trade and export support are instrumental in driving the growth of the global Prefabricated Buildings market. Prefabricated building manufacturers often rely on international markets to expand their customer base and increase sales. Governments can facilitate this expansion by negotiating trade agreements that reduce tariffs and trade barriers for prefab building components and systems. They may also provide financial assistance or incentives to export-focused prefab companies, helping them penetrate new markets. Additionally, governments can support industry-specific trade missions and exhibitions, enabling prefab manufacturers to showcase their products to a global audience. These policies not only boost the export potential of prefab businesses but also contribute to economic growth and job creation. Overall, government policies that support trade and export activities are pivotal in expanding the reach of the Prefabricated Buildings market beyond domestic borders.

Research and Development Funding

Government investment in research and development (R&D) is a significant driver of innovation in the Prefabricated Buildings market. Policymakers recognize the potential of prefab construction to revolutionize the building industry and promote economic competitiveness. Governments often allocate funding for R&D initiatives related to prefabricated construction methods, materials, and technologies. This financial support encourages collaboration between academic institutions, research organizations, and industry players, fostering the development of cutting-edge prefab solutions.

Furthermore, R&D policies may include grants and incentives for manufacturers who invest in innovation, such as the development of more sustainable building materials or advanced automation technologies for prefab production. These policies not only drive progress within the prefab industry but also position countries as leaders in the global construction sector. In conclusion, government policies related to research and development play a crucial role in advancing the Prefabricated Buildings market and promoting innovation within the industry.

Disaster Preparedness and Resilience

In an era of increasing climate-related disasters, government policies focusing on disaster preparedness and resilience are of paramount importance for the Prefabricated Buildings market. These policies aim to ensure that prefab structures are designed and constructed to withstand natural calamities such as earthquakes, hurricanes, and

floods. Governments may establish stringent building codes and zoning regulations in disaster-prone areas, requiring that prefab buildings meet high resilience standards. They may also offer incentives or tax breaks to encourage developers to invest in disaster-resistant prefab construction. Additionally, disaster relief policies often include provisions for the rapid deployment of prefabricated structures in the aftermath of disasters. Governments may maintain stockpiles of prefab modules and components to quickly provide shelter and infrastructure to affected communities. In essence, government policies focusing on disaster preparedness and resilience not only drive demand for resilient prefab structures but also contribute to the safety and well-being of communities facing the increasing threat of natural disasters.

In conclusion, government policies play a pivotal role in shaping the global Prefabricated Buildings market. These policies encompass a wide range of areas, from sustainability and building codes to affordable housing initiatives and disaster resilience. As governments continue to adapt their policies to address evolving societal and environmental challenges, the prefab industry will continue to grow and evolve, meeting the demands of a changing world.

Key Market Challenges

Perception and Stigma

One of the most persistent challenges facing the global Prefabricated Buildings market is the perception and stigma associated with prefab construction. While prefabricated buildings offer numerous advantages, including cost-efficiency, speed of construction, and sustainability, they have long been viewed with skepticism by some stakeholders in the construction industry and the general public. Historically, prefabricated buildings have been associated with lower quality and cookie-cutter designs. This perception stems from early prefab structures, which were often mass-produced with limited customization options and may have had lower-quality materials and finishes. As a result, the industry has had to overcome lingering doubts about the durability, aesthetics, and long-term value of prefab buildings. Changing this perception and overcoming the prefab stigma is crucial for the industry's growth. To address this challenge, manufacturers and industry associations are focusing on several strategies:

Quality Assurance: Prefabricated building companies are investing in research and development to enhance the quality and durability of their products. This includes using high-quality materials, improving manufacturing processes, and adhering to rigorous quality control standards.

Customization: Prefab manufacturers are offering more design flexibility, allowing customers to customize their buildings to meet specific needs and aesthetic preferences. This shift away from one-size-fits-all designs helps combat the perception of prefab as uniform and uninspired.

Education and Outreach: Industry associations, government agencies, and prefab manufacturers are actively educating architects, builders, and the public about the benefits of prefabricated construction. Highlighting successful prefab projects and their advantages is key to changing perceptions.

Regulatory Support: Government policies that promote and incentivize prefab construction can help validate its quality and reliability. By aligning building codes and regulations with modern prefab practices, policymakers can signal confidence in the industry.

Showcase Projects: High-profile, successful prefab construction projects, such as schools, hospitals, and commercial buildings, can serve as powerful examples to dispel negative stereotypes and showcase the capabilities of prefab technology.

In summary, overcoming the perception and stigma associated with prefabricated buildings is a complex challenge that requires a concerted effort from industry stakeholders. As the industry continues to innovate and demonstrate the value of prefab construction, it can gradually shift perceptions and gain broader acceptance in the construction market.

Skilled Labor Shortages and Workforce Training

Another significant challenge facing the global Prefabricated Buildings market is the shortage of skilled labor and the need for specialized training in prefab construction techniques. Prefabrication relies on a different set of skills compared to traditional on-site construction, and the shortage of trained workers can hinder the industry's growth.

Several factors contribute to this challenge:

Traditional Construction Dominance: Traditional construction methods have been the norm for many years, leading to a workforce that is more experienced in traditional practices. This has resulted in a gap in the availability of skilled labor for prefab construction.

Limited Educational Programs: There is a shortage of educational programs and training opportunities focused on prefabrication techniques. Many trade schools and universities still emphasize traditional construction methods, leaving graduates ill-prepared for prefab projects.

Resistance to Change: Resistance to adopting new construction methods, especially among older workers, can slow the transition to prefab. Workers who are accustomed to traditional practices may be hesitant to embrace prefab techniques.

Addressing this challenge requires a multi-faceted approach:

Training and Education: Investment in training programs and educational initiatives specific to prefabrication is essential. This includes partnerships between industry stakeholders and educational institutions to develop curriculum and provide hands-on training.

Apprenticeships and Mentorship Programs: Establishing apprenticeship and mentorship programs that pair experienced prefab workers with newcomers can help bridge the skills gap and facilitate knowledge transfer.

Promoting Prefab as a Career Choice: Encouraging young people to consider careers in prefab construction through outreach and awareness campaigns can help attract new talent to the industry.

Industry Collaboration: Collaboration between prefab manufacturers, construction firms, and trade associations can help identify and address specific skill gaps and develop standardized training programs.

Incentives and Support: Governments can provide incentives and support for training and development programs related to prefabricated construction, making it more attractive for individuals to acquire the necessary skills.

In conclusion, the shortage of skilled labor and the need for specialized training are significant challenges that the Prefabricated Buildings market must address to realize its full potential. By investing in education, training, and workforce development initiatives, the industry can build a skilled and adaptable workforce capable of meeting the demands of the modern construction landscape.

Segmental Insights

Commercial Insights

The Commercial segment had the largest market share in 2022 & expected to maintain it in the forecast period. Commercial projects often have tight deadlines, whether it's for retail spaces, office buildings, or hospitality facilities. Prefabricated construction excels in this regard, as it allows for simultaneous site preparation and component manufacturing. This simultaneous approach significantly accelerates the construction timeline, enabling businesses to open or expand their operations more quickly than with traditional construction methods. Efficiency in construction translates into cost savings, a highly attractive factor for commercial enterprises. Prefabrication reduces on-site labor requirements and minimizes material waste, leading to lower construction costs. This cost-effectiveness makes prefabricated commercial buildings a financially appealing choice for businesses seeking to optimize their budgets. Contrary to common misconceptions, prefabricated commercial buildings offer a high degree of design flexibility. Modern prefabrication techniques allow for customization and architectural diversity. Businesses can achieve unique and aesthetically pleasing designs while still benefiting from the efficiency of prefabricated construction. Prefabricated components are manufactured in controlled factory environments, where quality control measures are rigorous and consistent. This results in higher construction quality and fewer defects compared to traditional construction, which relies more on variable on-site workmanship. Many commercial enterprises are committed to sustainability and energy efficiency. Prefabricated buildings can be designed and constructed to meet strict sustainability standards, incorporating features like energy-efficient HVAC systems, insulation, and renewable energy sources. This aligns with the growing demand for eco-friendly and sustainable business practices. Commercial operations often require flexibility to adapt to changing needs and market conditions. Prefabricated buildings are modular and can be easily expanded or reconfigured, allowing businesses to scale up or down as required. This adaptability reduces the long-term risks associated with fixed-space leases or traditional construction projects. In some regions, government policies and incentives, such as tax breaks and grants, encourage the use of prefabricated buildings in commercial applications. These policies further boost the attractiveness of prefabricated construction for businesses. Due to the shorter construction timelines and cost savings associated with prefabricated commercial buildings, businesses can start generating revenue sooner. This rapid ROI is particularly appealing for enterprises aiming to maximize their profits quickly.

Skeleton System Insights

The Skeleton System segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. The skeleton system serves as the fundamental framework or structure of a building. It provides essential structural integrity and stability, ensuring that the building can withstand various loads, including wind, seismic forces, and the weight of the structure itself. This critical role makes the skeleton system a cornerstone of nearly all construction projects, whether traditional or prefabricated. The skeleton system can be used in a wide range of building types and applications, from residential and commercial buildings to industrial facilities. Its versatility allows it to accommodate different architectural styles and designs, making it a preferred choice for various construction needs. Prefabricated skeleton systems can be tailored to meet specific design and engineering requirements. Manufacturers can produce steel or concrete frames, columns, and beams according to precise project specifications. This customizability ensures that the skeleton system can adapt to diverse construction demands. Skeleton systems can seamlessly integrate with other prefabricated components, such as wall panels, floor systems, and roof systems. This compatibility allows for flexibility in design and construction, enabling builders to combine prefabricated elements to create a complete building. Skeleton systems have a long history in the construction industry, and they are a well-established and trusted construction method. Builders and developers are often familiar with the design and installation of skeleton systems, which contributes to their continued dominance in the market. Prefabricated skeleton systems are manufactured with high-quality materials and undergo rigorous quality control processes. This results in durable and long-lasting structures that meet or exceed industry standards and building codes. Skeleton systems are well-suited to meet stringent building codes and regulations in various regions. Manufacturers can ensure that their prefab structural components adhere to local building standards, providing confidence to builders and project stakeholders.

Regional Insights

Asia-Pacific:

The Asia-Pacific region is expected to be the fastest-growing market for prefabricated buildings, with a high CAGR during the forecast period. This is due to the rapid urbanization and infrastructure development in the region. China, India, and Japan are the major markets in the region. There are various factors which is likely to grow the market in the upcoming years, for instance,

Rise in modular construction: Modular construction is a type of construction where buildings are assembled from prefabricated components that are manufactured off-site. This can help to reduce construction time and costs, as well as improve quality control.

Infrastructure development: There is a growing demand for infrastructure development in developing countries, which is creating opportunities for the prefabricated buildings market.

Expansion of residential and commercial sectors: The growing populations in developing countries are leading to an increase in demand for residential and commercial buildings. Prefabricated buildings can be a cost-effective and quick way to meet this demand.

Increasing demand for sustainable buildings: Prefabricated buildings can be made from sustainable materials, which is helping to meet the growing demand for sustainable buildings.

Government regulations: Governments in many countries are promoting the use of prefabricated buildings in order to reduce construction waste and improve energy efficiency.

Key Market Players

Laing O'Rourke

Red Sea International Company

ATCO Ltd

Modulaire Group

Fluor Corporation

Skanska AB

Mammoet

Wates Group

Balfour Beatty Plc

Inter IKEA Group

Report Scope:

In this report, the Global Prefabricated Buildings Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Prefabricated Buildings Market, By Product:

Skeleton System

Panel System

Cellular System

Combined System

Prefabricated Buildings Market, By Module Type:

Bathroom pods

Kitchenette

Others

Prefabricated Buildings Market, By Application:

Industrial

Commercial

Residential

Prefabricated Buildings Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Prefabricated Buildings Market.

Available Customizations:

Global Prefabricated Buildings 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

2. RESEARCH METHODOLOGY

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL PREFABRICATED BUILDINGS MARKET OUTLOOK

5.1. Market Size & Forecast

5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Product (Skeleton System, Panel System, Cellular System, and Combined System)

5.2.2. By Module Type (Bathroom pods, Kitchenette, and Others)

5.2.3. By Application (Industrial, Commercial, and Residential)

5.2.4. By Region

5.2.5. By Company (2022)

5.3. Market Map

6. NORTH AMERICA PREFABRICATED BUILDINGS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By Module Type

6.2.3. By Application

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States Prefabricated Buildings Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product

6.3.1.2.2. By Module Type

- 6.3.1.2.3. By Application
- 6.3.2. Canada Prefabricated Buildings Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product
 - 6.3.2.2.2. By Module Type
 - 6.3.2.2.3. By Application
- 6.3.3. Mexico Prefabricated Buildings Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product
 - 6.3.3.2.2. By Module Type
 - 6.3.3.2.3. By Application

7. EUROPE PREFABRICATED BUILDINGS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product
 - 7.2.2. By Module Type
 - 7.2.3. By Application
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Prefabricated Buildings Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product
 - 7.3.1.2.2. By Module Type
 - 7.3.1.2.3. By Application
 - 7.3.2. United Kingdom Prefabricated Buildings Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product
 - 7.3.2.2.2. By Module Type

- 7.3.2.2.3. By Application
- 7.3.3. Italy Prefabricated Buildings Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product
 - 7.3.3.2.2. By Module Type
 - 7.3.3.2.3. By Application
- 7.3.4. France Prefabricated Buildings Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Module Type
 - 7.3.4.2.3. By Application
- 7.3.5. Spain Prefabricated Buildings Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product
 - 7.3.5.2.2. By Module Type
 - 7.3.5.2.3. By Application

8. ASIA-PACIFIC PREFABRICATED BUILDINGS MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product
 - 8.2.2. By Module Type
 - 8.2.3. By Application
 - 8.2.4. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Prefabricated Buildings Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product
 - 8.3.1.2.2. By Module Type

- 8.3.1.2.3. By Application
- 8.3.2. India Prefabricated Buildings Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By Module Type
 - 8.3.2.2.3. By Application
- 8.3.3. Japan Prefabricated Buildings Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By Module Type
 - 8.3.3.2.3. By Application
- 8.3.4. South Korea Prefabricated Buildings Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product
 - 8.3.4.2.2. By Module Type
 - 8.3.4.2.3. By Application
- 8.3.5. Australia Prefabricated Buildings Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product
 - 8.3.5.2.2. By Module Type
 - 8.3.5.2.3. By Application

9. SOUTH AMERICA PREFABRICATED BUILDINGS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By Module Type
 - 9.2.3. By Application
 - 9.2.4. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Prefabricated Buildings Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Product

9.3.1.2.2. By Module Type

9.3.1.2.3. By Application

9.3.2. Argentina Prefabricated Buildings Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Product

9.3.2.2.2. By Module Type

9.3.2.2.3. By Application

9.3.3. Colombia Prefabricated Buildings Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product

9.3.3.2.2. By Module Type

9.3.3.2.3. By Application

10. MIDDLE EAST AND AFRICA PREFABRICATED BUILDINGS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product

10.2.2. By Module Type

10.2.3. By Application

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Prefabricated Buildings Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Product

- 10.3.1.2.2. By Module Type
- 10.3.1.2.3. By Application
- 10.3.2. Saudi Arabia Prefabricated Buildings Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product
 - 10.3.2.2.2. By Module Type
 - 10.3.2.2.3. By Application
- 10.3.3. UAE Prefabricated Buildings Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product
 - 10.3.3.2.2. By Module Type
 - 10.3.3.2.3. By Application
- 10.3.4. Kuwait Prefabricated Buildings Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Product
 - 10.3.4.2.2. By Module Type
 - 10.3.4.2.3. By Application
- 10.3.5. Turkey Prefabricated Buildings Market Outlook
 - 10.3.5.1. Market Size & Forecast
 - 10.3.5.1.1. By Value
 - 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Product
 - 10.3.5.2.2. By Module Type
 - 10.3.5.2.3. By Application

11. MARKET DYNAMICS

12. MARKET TRENDS & DEVELOPMENTS

13. COMPETITIVE LANDSCAPE

- 13.1. Laing O'Rourke
- 13.2. Red Sea International Company

- 13.3. ATCO Ltd
- 13.4. Modulaire Group
- 13.5. Fluor Corporation
- 13.6. Skanska AB
- 13.7. Mammoet
- 13.8. Wates Group
- 13.9. Balfour Beatty Plc
- 13.10. Inter IKEA Group

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

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