

**Modular Construction Market by Type (Permanent, Relocatable), Module, Material (Wood, Steel, Concrete), End-Use Industry (Residential, Office, Education, Retail & Commercial, Hospitality, Healthcare), Region - Global Forecast to 2029**

Market Report | 2024-04-04 | 284 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The global modular construction market size is projected to grow from USD 104.1 billion in 2024 to USD 140.8 billion by 2029, at a CAGR of 6.2% during the forecast period. Shorter project schedules, housing shortages in many regions, financial construction requirements, and workforce scarcities, are the factors that drive the growth of the modular construction market.

By Type, Permanent modular construction segment to account for major market share

Permanent modular construction dominates the modular construction market due to its versatility, durability, and suitability for diverse building applications. Unlike relocatable modular construction, which is often used for temporary structures, permanent modular construction offers long-lasting solutions with greater design flexibility and customization options. The consistent standards of safety, quality, and durability associated with permanent modular construction make it a preferred choice for developers and clients seeking reliable building solutions.

By Material, steel to account for highest growth rate during the forecast period

Steel is the fastest growing segment in the modular construction market due to several key advantages. Firstly, steel is incredibly strong and durable, providing superior structural integrity and resistance to environmental factors such as moisture, pests, and fire. This strength allows for larger, more complex structures to be built using steel, expanding the scope of modular construction projects. Additionally, steel's lightweight nature facilitates easier transportation and assembly of modular components, reducing construction time and costs. Furthermore, steel is highly versatile and can be easily customized to meet specific design requirements, offering architects and developers greater flexibility in their projects. Finally, steel is a sustainable building material, as it is often made from recycled materials and is fully recyclable at the end of its lifespan, aligning with the growing

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

emphasis on eco-friendly construction practices. These advantages collectively contribute to the rapid growth of steel in the modular construction market, making it the preferred choice for many developers and builders.

By End Use Industry, Residential segment to account for the highest CAGR during the forecast period

The residential segment is experiencing rapid growth in the modular construction market due to several factors. The increasing demand for affordable housing solutions, particularly in urban areas, has propelled the adoption of modular construction techniques, which offer cost-effective and efficient building solutions. Additionally, modular construction allows for faster project completion times compared to traditional methods, enabling developers to meet the pressing need for housing more quickly.

By region, Asia Pacific modular construction market is projected to grow at the highest CAGR during the forecast period

Asia Pacific region is expected to expand at the highest CAGR from 2024 to 2029. Factors like easy and complete accessibility of raw materials and workforce, advanced technologies, have propelled the development of the economy in the Asia Pacific region. Additionally, rapid urbanization and industrialization in countries like China, Japan, and India are driving greater manufacturing and construction activities and, consequently, increasing demand for modular construction.

By Company: Tier1: 40%, Tier 2: 25%, Tier3: 4: 35%

By Designation: C-Level: 35%, Director Level: 30%, Others: 35%

By Region: North America: 25%, Europe: 20%, Asia Pacific: 45%, South America: 5%, and Middle East & Africa: 5%.

Companies Covered: Laing O'Rourke (UK), Red Sea Housing (Saudi Arabia), Atco Ltd. (Canada), Skanska AB (Sweden), Modulaire Group (UK), Bechtel Corporation (US), Fluor Corporation (US), Lendlease Corporation (Australia), Kleusberg GmbH (Germany), and others are covered in the modular construction market.

#### Research Coverage

The market study covers the modular construction market across various segments. It aims at estimating the market size and the growth potential of this market across different segments based on type, material, end-use industry, and region. The study also includes an in-depth competitive analysis of key players in the market, their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to improve their position in the modular construction market.

#### Key Benefits of Buying the Report

The report is expected to help the market leaders/new entrants in this market share the closest approximations of the revenue numbers of the overall modular construction market and its segments and sub-segments. This report is projected to help stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses, and plan suitable go-to-market strategies. The report also aims to help stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Investments in infrastructure industry, increasing work-zone safety and building sustainability), restraints (Risk of transportation and assembly issues in modular constructions), opportunities (Population growth and urbanization translating to increased number of construction projects), and challenges (Lack of experts in the market) influencing the growth of the modular construction market.
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the modular construction market
- Market Development: Comprehensive information about lucrative markets - the report analyses the modular construction market across varied regions
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the modular construction market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Laing O'Rourke (UK), Red Sea Housing (Saudi Arabia), Atco Ltd. (Canada), Skanska AB (Sweden), Modulaire Group (UK), Bechtel Corporation (US), Fluor Corporation (US), Lendlease Corporation (Australia), Kleusberg GmbH (Germany) among others in the

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

modular construction market. The report also helps stakeholders understand the pulse of the modular construction market and provides them with information on key market drivers, restraints, challenges, and opportunities.

**Table of Contents:**

1 INTRODUCTION 27

1.1 STUDY OBJECTIVES 27

1.2 MARKET DEFINITION 27

1.3 MARKET SCOPE 28

1.3.1 MARKETS COVERED 28

FIGURE 1 MODULAR CONSTRUCTION MARKET SEGMENTATION 28

1.3.2 YEARS CONSIDERED 28

1.3.3 REGIONAL SCOPE 29

FIGURE 2 MODULAR CONSTRUCTION MARKET, BY REGION 29

1.4 INCLUSIONS AND EXCLUSIONS 29

TABLE 1 INCLUSIONS AND EXCLUSIONS 29

1.5 CURRENCY CONSIDERED 30

1.6 LIMITATIONS 30

1.7 UNIT CONSIDERED 30

1.8 STAKEHOLDERS 30

1.9 SUMMARY OF CHANGES 31

2 RESEARCH METHODOLOGY 32

2.1 RESEARCH DATA 32

FIGURE 3 MODULAR CONSTRUCTION MARKET: RESEARCH DESIGN 32

2.1.1 SECONDARY DATA 33

2.1.1.1 Key data from secondary sources 33

2.1.2 PRIMARY DATA 33

2.1.2.1 Key data from primary sources 34

2.1.2.2 Key industry insights 34

2.1.2.3 Breakdown of primary interviews 35

2.2 MARKET SIZE ESTIMATION 35

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH 36

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH 36

2.3 DATA TRIANGULATION 37

FIGURE 6 MODULAR CONSTRUCTION MARKET: DATA TRIANGULATION 37

2.4 KEY MARKET INSIGHTS 38

2.5 IMPACT OF RECESSION 38

2.6 RESEARCH ASSUMPTIONS 39

2.6.1 LIMITS AND RISKS ASSOCIATED 39

2.6.2 RISK ASSESSMENT 40

TABLE 2 RISK ASSESSMENT IN MODULAR CONSTRUCTION MARKET 40

3 EXECUTIVE SUMMARY 41

FIGURE 7 PERMANENT MODULAR SEGMENT TO LEAD MARKET BY 2029 42

FIGURE 8 WOOD TO LEAD MODULAR CONSTRUCTION MARKET DURING FORECAST PERIOD 42

FIGURE 9 HEALTHCARE SEGMENT TO GROW AT FASTEST RATE DURING FORECAST PERIOD 43

FIGURE 10 ASIA PACIFIC LED MODULAR CONSTRUCTION MARKET IN 2023 43

4 PREMIUM INSIGHTS 45

4.1 ASIAN ECONOMIES TO WITNESS RELATIVELY HIGHER GROWTH RATE FOR MODULAR CONSTRUCTION MARKET 45

FIGURE 11	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN MODULAR CONSTRUCTION MARKET	45
4.2	ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY TYPE AND MATERIAL, 2023	46
FIGURE 12	PERMANENT MODULAR CONSTRUCTION ACCOUNTED FOR LARGER SHARE IN TERMS OF VOLUME	46
4.3	ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY AND COUNTRY, 2023	47
FIGURE 13	RESIDENTIAL ACCOUNTED FOR LARGEST SHARE IN TERMS OF VOLUME	47
4.4	MODULAR CONSTRUCTION MARKET, BY COUNTRY	48
FIGURE 14	MODULAR CONSTRUCTION MARKET IN CHINA TO GROW AT HIGHEST CAGR	48
5	MARKET OVERVIEW	49
5.1	INTRODUCTION	49
5.2	MARKET DYNAMICS	49
FIGURE 15	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN MODULAR CONSTRUCTION MARKET	49
5.2.1	DRIVERS	50
5.2.1.1	Need for time-saving and cost-effective construction	50
5.2.1.2	Investments in infrastructure industry	50
FIGURE 16	PERCENTAGE ANNUAL GROWTH RATE FOR INDUSTRY INCLUDING CONSTRUCTION	51
5.2.1.3	Increasing work-zone safety and building sustainability	51
5.2.1.4	Ease of relocation of modular buildings	52
5.2.1.5	Supportive government initiatives	52
5.2.2	RESTRAINTS	53
5.2.2.1	Risks of transportation and assembly issues in modular construction	53
5.2.2.2	Lack of awareness in developing economies	53
5.2.3	OPPORTUNITIES	53
5.2.3.1	Population growth and urbanization translating to increased number of construction projects	53
FIGURE 17	INCREASING POPULATION TREND IN DIFFERENT REGIONS	54
TABLE 3	ASIA PACIFIC URBANIZATION TREND, 1990-2050	54
5.2.3.2	Increasing demand for high-end residential and multi-story buildings	55
FIGURE 18	BUILDINGS 200 METERS OR TALLER COMPLETED IN 2022, BY REGION	55
5.2.3.3	Housing crisis in developed countries	55
5.2.4	CHALLENGES	56
5.2.4.1	Lack of experts in market	56
5.2.4.2	Volatility in transportation charges	56
5.3	TRENDS & DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS	56
FIGURE 19	REVENUE SHIFT FOR MODULAR CONSTRUCTION MANUFACTURERS	58
5.4	PRICING ANALYSIS	58
FIGURE 20	AVERAGE SELLING PRICE TREND OF MODULAR CONSTRUCTION OF KEY PLAYERS, BY TOP 3 END-USE INDUSTRIES	58
TABLE 4	AVERAGE PRICE TREND OF MODULAR CONSTRUCTION OF KEY PLAYERS, BY TOP 3 END-USE INDUSTRIES (USD/SQUARE FOOT), 2023	59
FIGURE 21	AVERAGE SELLING PRICE TREND, BY REGION (USD/SQUARE FOOT)	59
TABLE 5	AVERAGE PRICE TREND, BY REGION (USD/SQUARE FOOT)	59
5.5	VALUE CHAIN ANALYSIS	60
FIGURE 22	SUPPLY CHAIN ANALYSIS	60
5.5.1	PROMINENT COMPANIES	60
5.5.2	SMALL & MEDIUM-SIZED ENTERPRISES	60
5.5.3	DESIGN	61
5.5.4	ENGINEERING	61
5.5.5	PERMITS & APPROVALS	62
5.5.6	SITE DEVELOPMENT & BUILDING FOUNDATION	62

5.5.7	PLANT FABRICATION	62
5.5.8	TRANSPORTATION	63
5.5.9	INSTALLATION	63
FIGURE 23	VALUE CHAIN ANALYSIS	63
5.6	ECOSYSTEM/MARKET MAP	64
FIGURE 24	ECOSYSTEM MAPPING	64
TABLE 6	ECOSYSTEM OF MODULAR CONSTRUCTION MARKET	65
FIGURE 25	ECOSYSTEM MAPPING ANALYSIS	66
5.7	TECHNOLOGY ANALYSIS	67
5.7.1	KEY TECHNOLOGIES	67
5.7.2	COMPLEMENTARY TECHNOLOGY	67
5.7.3	ADJACENT TECHNOLOGY	68
5.8	PATENT ANALYSIS	68
5.8.1	INTRODUCTION	68
5.8.2	METHODOLOGY	68
5.8.3	MODULAR CONSTRUCTION MARKET, PATENT ANALYSIS (2014-2023)	68
FIGURE 26	LIST OF MAJOR PATENTS FOR MODULAR CONSTRUCTION MARKET (2014-2023)	69
TABLE 7	LIST OF PATENTS FOR MODULAR CONSTRUCTION	69
5.9	TRADE ANALYSIS	73
FIGURE 27	EXPORT SCENARIO, HS CODE 9406: PREFABRICATED BUILDINGS, WHETHER OR NOT COMPLETE OR ALREADY ASSEMBLED (USD MILLION)	73
FIGURE 28	IMPORT SCENARIO, HS CODE 9406: PREFABRICATED BUILDINGS, WHETHER OR NOT COMPLETE OR ALREADY ASSEMBLED (USD MILLION)	73
5.10	KEY CONFERENCES AND EVENTS IN 2024-2025	74
TABLE 8	MODULAR CONSTRUCTION MARKET: DETAILED LIST OF CONFERENCES & EVENTS, 2024-2025	74
5.11	TARIFF AND REGULATORY LANDSCAPE	75
5.11.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	75
TABLE 9	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	75
TABLE 10	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	76
5.12	TARIFF AND REGULATORY LANDSCAPE	76
5.12.1	AVERAGE TARIFF RATES	76
TABLE 11	TARIFF RELATED TO PREFABRICATED BUILDINGS, WHETHER OR NOT COMPLETE OR ALREADY ASSEMBLED	76
5.12.2	REGULATIONS IN MODULAR CONSTRUCTION MARKET	78
5.12.2.1	ICC/MBI 1200-2021 Standard for Off-site Construction	78
5.12.2.2	ICC/MBI 1205-2021 Standard for Off-site Construction	78
5.12.2.3	CSA A277 STANDARD	78
5.12.2.4	CSA Z240 MH Series-16 (R2021) STANDARD	78
5.12.2.5	CSA Z240.10.1:19 STANDARD	78
5.13	PORTER'S FIVE FORCES ANALYSIS	79
FIGURE 29	PORTER'S FIVE FORCES ANALYSIS	79
TABLE 12	MODULAR CONSTRUCTION MARKET: PORTER'S FIVE FORCES ANALYSIS	79
5.13.1	THREAT OF NEW ENTRANTS	80
5.13.2	THREAT OF SUBSTITUTES	80
5.13.3	BARGAINING POWER OF SUPPLIERS	80
5.13.4	BARGAINING POWER OF BUYERS	80
5.13.5	INTENSITY OF COMPETITIVE RIVALRY	81
5.14	KEY STAKEHOLDERS AND BUYING CRITERIA	81

5.14.1	KEY STAKEHOLDERS IN BUYING PROCESS	81
FIGURE 30	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS	81
TABLE 13	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS OF MODULAR CONSTRUCTION MARKET	82
5.14.2	BUYING CRITERIA	82
FIGURE 31	KEY BUYING CRITERIA FOR TOP THREE END-USE INDUSTRIES	82
TABLE 14	KEY BUYING CRITERIA FOR MODULAR CONSTRUCTION IN TOP THREE END-USE INDUSTRIES	82
5.15	CASE STUDY ANALYSIS	83
5.15.1	MODULAR CONSTRUCTION MANUFACTURER HELPED IN SPEEDY CONSTRUCTION OF SCHOOL	83
5.15.2	MAJOR MODULAR CONSTRUCTION COMPANY HELPED PHARMACEUTICAL COMPANY DELIVER TEMPORARY SPACES	83
5.15.3	MODULAR CONSTRUCTION DELIVERED SUSTAINABLE HOSPITAL COMPLEX	83
5.16	INVESTMENT AND FUNDING SCENARIO	84
FIGURE 32	INVESTMENT AND FUNDING SCENARIO	84
5.17	MACROECONOMIC INDICATORS	85
5.17.1	INTRODUCTION	85
5.17.2	GDP TRENDS AND FORECASTS	85
TABLE 15	WORLD GDP GROWTH PROJECTION, 2021-2028 (USD TRILLION)	85
5.17.3	CONSTRUCTION INDUSTRY AS PERCENTAGE OF GDP AND ITS IMPACT ON MODULAR CONSTRUCTION	85
TABLE 16	CONSTRUCTION AS PERCENTAGE OF GDP, BY KEY COUNTRY, 2021	86
6	MODULAR CONSTRUCTION MARKET, BY TYPE	87
6.1	INTRODUCTION	88
FIGURE 33	PERMANENT MODULAR CONSTRUCTION TO DOMINATE MARKET DURING FORECAST PERIOD	88
TABLE 17	MODULAR CONSTRUCTION MARKET, BY TYPE, 2022-2029 (USD MILLION)	88
TABLE 18	MODULAR CONSTRUCTION MARKET, BY TYPE, 2022-2029 (THOUSAND SQUARE FEET)	89
6.2	PERMANENT MODULAR CONSTRUCTION	89
6.2.1	EFFICIENT TIME AND LABOR MANAGEMENT TO DRIVE MARKET	89
6.3	RELOCATABLE MODULAR CONSTRUCTION	89
6.3.1	EASE OF RELOCATION, FAST DELIVERY, AND LOW COST TO DRIVE MARKET	89
7	MODULAR CONSTRUCTION MARKET, BY MODULE	90
7.1	INTRODUCTION	90
7.2	FOUR-SIDED MODULES	90
7.2.1	USE OF CELLULAR BUILDINGS TO PROPEL MARKET	90
7.3	OPEN-SIDED MODULES	90
7.3.1	INCREASED UTILIZATION IN LOW-RISE AND RESIDENTIAL BUILDINGS TO DRIVE MARKET	90
7.4	PARTIALLY OPEN-SIDED MODULES	90
7.4.1	INCREASED CONSTRUCTION SPEED IRRESPECTIVE OF WEATHER FLUCTUATIONS TO DRIVE MARKET	90
7.5	MIXED MODULES AND FLOOR CASSETTES	91
7.5.1	RESTRICTIONS DUE TO INCREASED LOAD ON MODULES IN CONSTRUCTION TO LIMIT MARKET	91
7.6	MODULES SUPPORTED BY PRIMARY STRUCTURES	91
7.6.1	USE IN MIXED RETAIL AND COMMERCIAL CONSTRUCTIONS TO DRIVE MARKET	91
7.7	OTHER MODULES	91
?		
8	MODULAR CONSTRUCTION MARKET, BY MATERIAL	92
8.1	INTRODUCTION	93
FIGURE 34	STEEL TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	93
TABLE 19	MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (USD MILLION)	94
TABLE 20	MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (THOUSAND SQUARE FEET)	94
TABLE 21	MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	94

TABLE 22 MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET) 94

8.2 CONCRETE 95

8.2.1 INCREASED DURABILITY TO STIMULATE DEMAND 95

8.3 STEEL 95

8.3.1 IMPROVED STRUCTURAL INTEGRITY, DESIGN FLEXIBILITY, STRENGTH, DURABILITY, AND FIRE RESISTANCE TO DRIVE MARKET 95

8.4 WOOD 96

8.4.1 COST-EFFECTIVENESS AND EASY TRANSPORTATION TO DRIVE MARKET 96

9 MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY 97

9.1 INTRODUCTION 98

FIGURE 35 RESIDENTIAL SEGMENT TO LEAD MARKET DURING FORECAST PERIOD 98

TABLE 23 MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (USD MILLION) 98

TABLE 24 MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (THOUSAND SQUARE FEET) 99

TABLE 25 MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION) 99

TABLE 26 MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET) 100

9.2 RESIDENTIAL 100

9.2.1 ECO-FRIENDLY AND COST-EFFECTIVE PROPERTIES OF MODULAR CONSTRUCTION TO DRIVE MARKET 100

9.3 RETAIL & COMMERCIAL 101

9.3.1 EASE OF RELOCATION, LOW-COST RECONFIGURATION, AND FAST DELIVERY TO DRIVE MARKET 101

9.4 HEALTHCARE 101

9.4.1 SHORT CONSTRUCTION SCHEDULES AND REDUCED COSTS TO DRIVE MARKET 101

9.5 EDUCATION 101

9.5.1 COST EFFICIENCY, SUPERIOR BUILD TIME, AND OFF-SITE CONSTRUCTION POTENTIAL TO DRIVE MARKET 101

9.6 HOSPITALITY 102

9.6.1 GROWING NUMBER OF TOURISTS AND STRONG TOURISM SECTOR TO DRIVE MARKET 102

?

9.7 OFFICE 103

9.7.1 LESSER TIME AND DISRUPTIONS IN ONGOING WORK ENVIRONMENT TO DRIVE MARKET 103

9.8 OTHER END-USE INDUSTRIES 103

10 MODULAR CONSTRUCTION MARKET, BY REGION 104

10.1 INTRODUCTION 105

FIGURE 36 CHINA TO RECORD FASTEST GROWTH DURING FORECAST PERIOD 105

FIGURE 37 ASIA PACIFIC MARKET TO RECORD FASTEST GROWTH DURING FORECAST PERIOD 106

TABLE 27 MODULAR CONSTRUCTION MARKET, BY REGION, 2022-2029 (USD MILLION) 106

TABLE 28 MODULAR CONSTRUCTION MARKET, BY REGION, 2022-2029 (THOUSAND SQUARE FEET) 106

10.2 ASIA PACIFIC 107

10.2.1 RECESSION IMPACT 107

FIGURE 38 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET SNAPSHOT 108

TABLE 29 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (USD MILLION) 108

TABLE 30 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (THOUSAND SQUARE FEET) 109

TABLE 31 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (USD MILLION) 109

TABLE 32 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (THOUSAND SQUARE FEET) 109

TABLE 33 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION) 110

TABLE 34 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET) 110

TABLE 35 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (USD MILLION) 110

TABLE 36 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (THOUSAND SQUARE FEET) 111

TABLE 37 ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION) 111

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 38□ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)□112  
10.2.2□CHINA□112

10.2.2.1□Government initiatives and favorable policies to drive market□112

TABLE 39□CHINA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)□113

TABLE 40□CHINA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)□114

TABLE 41□CHINA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)□114

TABLE 42□CHINA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)□114

10.2.3□JAPAN□115

10.2.3.1□Increasing urban population to drive market□115

TABLE 43□JAPAN: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)□115

TABLE 44□JAPAN: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)□115

TABLE 45□JAPAN: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)□116

TABLE 46□JAPAN: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)□116

10.2.4□AUSTRALIA & NEW ZEALAND□117

10.2.4.1□Growing population and stable economic conditions to support growth□117

TABLE 47□AUSTRALIA & NEW ZEALAND: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)□117

TABLE 48□AUSTRALIA & NEW ZEALAND: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)□117

TABLE 49□AUSTRALIA & NEW ZEALAND: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)□118

TABLE 50□AUSTRALIA & NEW ZEALAND: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)□118

10.2.5□INDIA□119

10.2.5.1□Rising population, GDP, and purchasing power of customers to stimulate growth□119

TABLE 51□INDIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)□119

TABLE 52□INDIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)□119

TABLE 53□INDIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)□120

TABLE 54□INDIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)□120

10.2.6□SOUTH KOREA□121

10.2.6.1□Commercial construction projects to drive demand□121

TABLE 55□SOUTH KOREA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)□121

TABLE 56□SOUTH KOREA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)□121

TABLE 57□SOUTH KOREA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)□122

TABLE 58□SOUTH KOREA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)□122

10.2.7□REST OF ASIA PACIFIC□122

TABLE 59□REST OF ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)□123

TABLE 60□REST OF ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)□123

TABLE 61□REST OF ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)□123

TABLE 62□REST OF ASIA PACIFIC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)□124

10.3□NORTH AMERICA□124

10.3.1□RECESSION IMPACT□125

FIGURE 39□NORTH AMERICA: MODULAR CONSTRUCTION MARKET SNAPSHOT□125

TABLE 63□NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (USD MILLION)□126

TABLE 64□NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (THOUSAND SQUARE FEET)□126

TABLE 65□NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (USD MILLION)□126

TABLE 66□NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (THOUSAND SQUARE FEET)□126

TABLE 67□NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)□127

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 68	NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	127
TABLE 69	NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	127
TABLE 70	NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (THOUSAND SQUARE FEET)	128
TABLE 71	NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	128
TABLE 72	NORTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	129
10.3.2	US	129
10.3.2.1	Growing building construction, renovation, and remodeling activities to boost market	129
TABLE 73	US: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	130
TABLE 74	US: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	130
TABLE 75	US: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	130
TABLE 76	US: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	131
10.3.3	CANADA	131
10.3.3.1	Increase in remodeling activities to propel market	131
TABLE 77	CANADA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	131
TABLE 78	CANADA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	132
TABLE 79	CANADA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	132
TABLE 80	CANADA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	132
10.3.4	MEXICO	133
10.3.4.1	Growth in construction and infrastructure sectors to drive market	133
TABLE 81	MEXICO: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	133
TABLE 82	MEXICO: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	133
TABLE 83	MEXICO: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	134
TABLE 84	MEXICO: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	134
10.4	EUROPE	135
TABLE 85	EUROPE: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (USD MILLION)	135
TABLE 86	EUROPE: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (THOUSAND SQUARE FEET)	136
TABLE 87	EUROPE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (USD MILLION)	136
TABLE 88	EUROPE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (THOUSAND SQUARE FEET)	136
TABLE 89	EUROPE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	137
TABLE 90	EUROPE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	137
TABLE 91	EUROPE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	137
TABLE 92	EUROPE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (THOUSAND SQUARE FEET)	138
TABLE 93	EUROPE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	138
TABLE 94	EUROPE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	139
TABLE 95	EUROPE: MODULAR CONSTRUCTION MARKET, BY CONSTRUCTION, 2022-2029 (USD MILLION)	139
TABLE 96	EUROPE: MODULAR CONSTRUCTION MARKET, BY CONSTRUCTION, 2022-2029 (THOUSAND SQUARE FEET)	139
10.4.1	GERMANY	140
10.4.1.1	Shortage of affordable homes and slow growth in industrialization	140
TABLE 97	GERMANY: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	140
TABLE 98	GERMANY: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	141
TABLE 99	GERMANY: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	141
TABLE 100	GERMANY: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	141
10.4.2	UK	142
10.4.2.1	Government to create new opportunities for modular building manufacturers	142
TABLE 101	UK: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	142

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 102	UK: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	142
TABLE 103	UK: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	143
TABLE 104	UK: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	143
10.4.3	FRANCE	143
10.4.3.1	Growing demand for modular wood buildings to drive market	143
TABLE 105	FRANCE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	144
TABLE 106	FRANCE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	144
TABLE 107	FRANCE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	145
TABLE 108	FRANCE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	145
10.4.4	ITALY	145
10.4.4.1	Investments in construction sector and awareness about modular homes to drive market	145
TABLE 109	ITALY: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	146
TABLE 110	ITALY: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	146
TABLE 111	ITALY: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	146
TABLE 112	ITALY: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	147
10.4.5	SPAIN	147
10.4.5.1	Increase in demand for affordable homes to drive market	147
TABLE 113	SPAIN: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	147
TABLE 114	SPAIN: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	148
TABLE 115	SPAIN: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	148
TABLE 116	SPAIN: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	148
10.4.6	RUSSIA	149
10.4.6.1	High demand for new housing to drive market	149
TABLE 117	RUSSIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	149
TABLE 118	RUSSIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	149
TABLE 119	RUSSIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	150
TABLE 120	RUSSIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	150
10.4.7	AUSTRIA	150
10.4.7.1	Housing initiatives by government to drive demand	150
TABLE 121	AUSTRIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	151
TABLE 122	AUSTRIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	151
TABLE 123	AUSTRIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	152
TABLE 124	AUSTRIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	152
10.4.8	POLAND	152
10.4.8.1	Rise in price of building materials and labor shortage in traditional construction methods to drive market	152
TABLE 125	POLAND: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	153
TABLE 126	POLAND: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	153
TABLE 127	POLAND: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	153
TABLE 128	POLAND: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	154
10.4.9	REST OF EUROPE	154
TABLE 129	REST OF EUROPE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	154
TABLE 130	REST OF EUROPE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	155
TABLE 131	REST OF EUROPE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	155
TABLE 132	REST OF EUROPE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	155
10.5	MIDDLE EAST & AFRICA	156
10.5.1	RECESSION IMPACT	156

TABLE 133	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (USD MILLION)	156
TABLE 134	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (THOUSAND SQUARE FEET)	157
TABLE 135	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (USD MILLION)	157
TABLE 136	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (THOUSAND SQUARE FEET)	157
TABLE 137	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	158
TABLE 138	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	158
TABLE 139	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	158
TABLE 140	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (THOUSAND SQUARE FEET)	159
TABLE 141	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	159
TABLE 142	MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	160
10.5.2	GCC COUNTRIES	160
TABLE 143	GCC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	160
TABLE 144	GCC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	160
TABLE 145	GCC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	161
TABLE 146	GCC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	161
10.5.2.1	Saudi Arabia	161
10.5.2.1.1	Mega housing projects and increase in demand for affordable houses to drive market	161
TABLE 147	SAUDI ARABIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	162
TABLE 148	SAUDI ARABIA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	162
TABLE 149	SAUDI ARABIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	163
TABLE 150	SAUDI ARABIA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	163
10.5.2.2	UAE	163
10.5.2.2.1	Strong government support and ongoing construction projects to stimulate market	163
TABLE 151	UAE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	164
TABLE 152	UAE: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	164
TABLE 153	UAE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	165
TABLE 154	UAE: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	165
10.5.2.3	Rest of GCC	166
TABLE 155	REST OF GCC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	166
TABLE 156	REST OF GCC: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	166
TABLE 157	REST OF GCC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	166
TABLE 158	REST OF GCC: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	167
10.5.3	TURKEY	167
10.5.3.1	Housing schemes initiated by government to drive market	167
TABLE 159	TURKEY: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	168
TABLE 160	TURKEY: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	168
TABLE 161	TURKEY: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	168
TABLE 162	TURKEY: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	169
10.5.4	SOUTH AFRICA	169
10.5.4.1	Rapid urbanization and growing demand for sustainable buildings to drive market	169
TABLE 163	SOUTH AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	170
TABLE 164	SOUTH AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	170
TABLE 165	SOUTH AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	170
TABLE 166	SOUTH AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	171
10.5.5	REST OF MIDDLE EAST & AFRICA	171

TABLE 167	REST OF MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	171
TABLE 168	REST OF MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	172
TABLE 169	REST OF MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	172
TABLE 170	REST OF MIDDLE EAST & AFRICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	172
10.6	SOUTH AMERICA	173
10.6.1	RECESSION IMPACT	173
TABLE 171	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (USD MILLION)	173
TABLE 172	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY COUNTRY, 2022-2029 (THOUSAND SQUARE FEET)	174
TABLE 173	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (USD MILLION)	174
TABLE 174	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2018-2021 (THOUSAND SQUARE FEET)	174
TABLE 175	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	174
TABLE 176	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	175
TABLE 177	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (USD MILLION)	175
TABLE 178	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2018-2021 (THOUSAND SQUARE FEET)	175
TABLE 179	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	176
TABLE 180	SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	176
10.6.2	BRAZIL	176
10.6.2.1	Booming construction industry to drive market	176
TABLE 181	BRAZIL: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	177
TABLE 182	BRAZIL: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	177
TABLE 183	BRAZIL: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	177
TABLE 184	BRAZIL: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	178
10.6.3	ARGENTINA	178
10.6.3.1	Increased construction to drive market	178
TABLE 185	ARGENTINA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	178
TABLE 186	ARGENTINA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	179
TABLE 187	ARGENTINA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	179
TABLE 188	ARGENTINA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	179
10.6.4	REST OF SOUTH AMERICA	180
TABLE 189	REST OF SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (USD MILLION)	180
TABLE 190	REST OF SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY MATERIAL, 2022-2029 (THOUSAND SQUARE FEET)	180
TABLE 191	REST OF SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (USD MILLION)	181
TABLE 192	REST OF SOUTH AMERICA: MODULAR CONSTRUCTION MARKET, BY END-USE INDUSTRY, 2022-2029 (THOUSAND SQUARE FEET)	181
11	COMPETITIVE LANDSCAPE	182
11.1	OVERVIEW	182
TABLE 193	OVERVIEW OF STRATEGIES ADOPTED BY KEY MODULAR CONSTRUCTION PLAYERS	182
11.2	REVENUE ANALYSIS OF TOP MARKET PLAYERS	183
FIGURE 40	REVENUE ANALYSIS FOR KEY COMPANIES IN MODULAR CONSTRUCTION MARKET, 2019-2023	183
11.3	MARKET SHARE ANALYSIS	184
FIGURE 41	MODULAR CONSTRUCTION: MARKET SHARE ANALYSIS	184

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

TABLE 194	MODULAR CONSTRUCTION MARKET: DEGREE OF COMPETITION	184
11.4	COMPANY VALUATION AND FINANCIAL METRICS	186
FIGURE 42	COMPANY VALUATION (USD BILLION)	186
FIGURE 43	FINANCIAL MATRIX: EV/EBITDA RATIO	186
11.5	PRODUCT/BRAND COMPARISON	187
FIGURE 44	MODULAR CONSTRUCTION MARKET: PRODUCT COMPARISON	187
?		
11.6	COMPANY EVALUATION MATRIX	188
11.6.1	STARS	188
11.6.2	EMERGING LEADERS	188
11.6.3	PERVASIVE PLAYERS	188
11.6.4	PARTICIPANTS	188
FIGURE 45	COMPANY EVALUATION MATRIX, 2023	189
11.6.5	COMPANY FOOTPRINT: KEY PLAYERS	190
FIGURE 46	MODULAR CONSTRUCTION MARKET: COMPANY FOOTPRINT	190
TABLE 195	MODULAR CONSTRUCTION MARKET: REGIONAL FOOTPRINT (19 COMPANIES)	191
TABLE 196	MODULAR CONSTRUCTION MARKET: MATERIAL FOOTPRINT (19 COMPANIES)	192
TABLE 197	MODULAR CONSTRUCTION MARKET: TYPE FOOTPRINT (19 COMPANIES)	193
TABLE 198	MODULAR CONSTRUCTION MARKET: END-USE INDUSTRY FOOTPRINT (19 COMPANIES)	194
11.7	START-UPS/SMES EVALUATION MATRIX	195
11.7.1	PROGRESSIVE COMPANIES	195
11.7.2	RESPONSIVE COMPANIES	195
11.7.3	DYNAMIC COMPANIES	195
11.7.4	STARTING BLOCKS	195
FIGURE 47	START-UPS/SMES EVALUATION MATRIX: MODULAR CONSTRUCTION MARKET, 2023	196
11.7.5	COMPETITIVE BENCHMARKING	197
TABLE 199	MODULAR CONSTRUCTION MARKET: DETAILED LIST OF KEY STARTUPS/SMES	197
TABLE 200	MODULAR CONSTRUCTION MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES	198
11.8	COMPETITIVE SITUATIONS AND TRENDS	199
11.8.1	PRODUCT LAUNCHES	199
TABLE 201	MODULAR CONSTRUCTION MARKET: PRODUCT LAUNCHES, JANUARY 2019-DECEMBER 2023	199
11.8.2	DEALS	200
TABLE 202	MODULAR CONSTRUCTION MARKET: DEALS, JANUARY 2019-DECEMBER 2023	200
11.8.3	EXPANSIONS	207
TABLE 203	MODULAR CONSTRUCTION MARKET: EXPANSIONS, JANUARY 2019-DECEMBER 2023	207
11.8.4	OTHER DEVELOPMENTS	207
TABLE 204	MODULAR CONSTRUCTION MARKET: OTHER DEVELOPMENTS, JANUARY 2019-MARCH 2024	207

## Modular Construction Market by Type (Permanent, Relocatable), Module, Material (Wood, Steel, Concrete), End-Use Industry (Residential, Office, Education, Retail & Commercial, Hospitality, Healthcare), Region - Global Forecast to 2029

Market Report | 2024-04-04 | 284 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-20

Signature



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)