



European Contractor Monitor H1-2022

Prefab

September 2022

About European Contractor Monitor

THE GOAL

To get a picture of the economic situation in the construction market among contractors on a European scale and to get insights into the usage of prefabricated solutions by main contractors. This research is done bi-annually, with registered contractors divided over the 8 major European markets.

THE RESEARCH TOPICS

Recurring topic: Economic developments of construction companies in Europe (order book and turnover development)

Bi-annual theme topics in 2022:

H1: Prefab

H2: Digitalisation and BIM

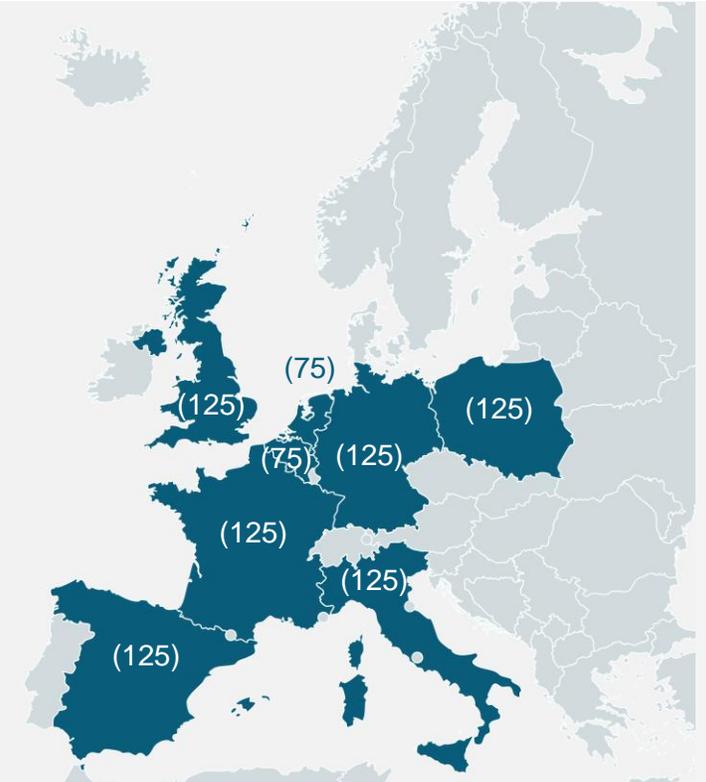
THE TIMELINE



COUNTRY SCOPE

Total of 900 Phone interviews

Background characteristics of the interviewed respondents can be found in [the country-specific profiling the contractor chapter](#).



PROJECT TEAM



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About target group & methodology

Surveying construction companies...

Mid-sized (5 to 15 employees) and **large** (more than 15 employees) building contractors who are active both in residential and non-residential segments are interviewed. Most interviews are conducted with owners/ directors or with purchasers of these companies.

... selected from a country-representative database

USP possesses an **international database of construction companies**, which is constantly updated. Therefore, respondents are not part of a fixed panel; the sample varies from wave to wave.

... through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient sample in order to provide insights that can be relied upon. These phone calls are made **by fixed fieldwork partners, located in the respective countries.**

... centralised and continuous quality control

Results in each country are monitored by the USP project team throughout the fieldwork period. We implement our extensive experience in order to **make sure the answers are of high quality and provide the insights that meet the goal of the project.**



Dummy data has been used on the following slides, this means no real data of this edition is shown.

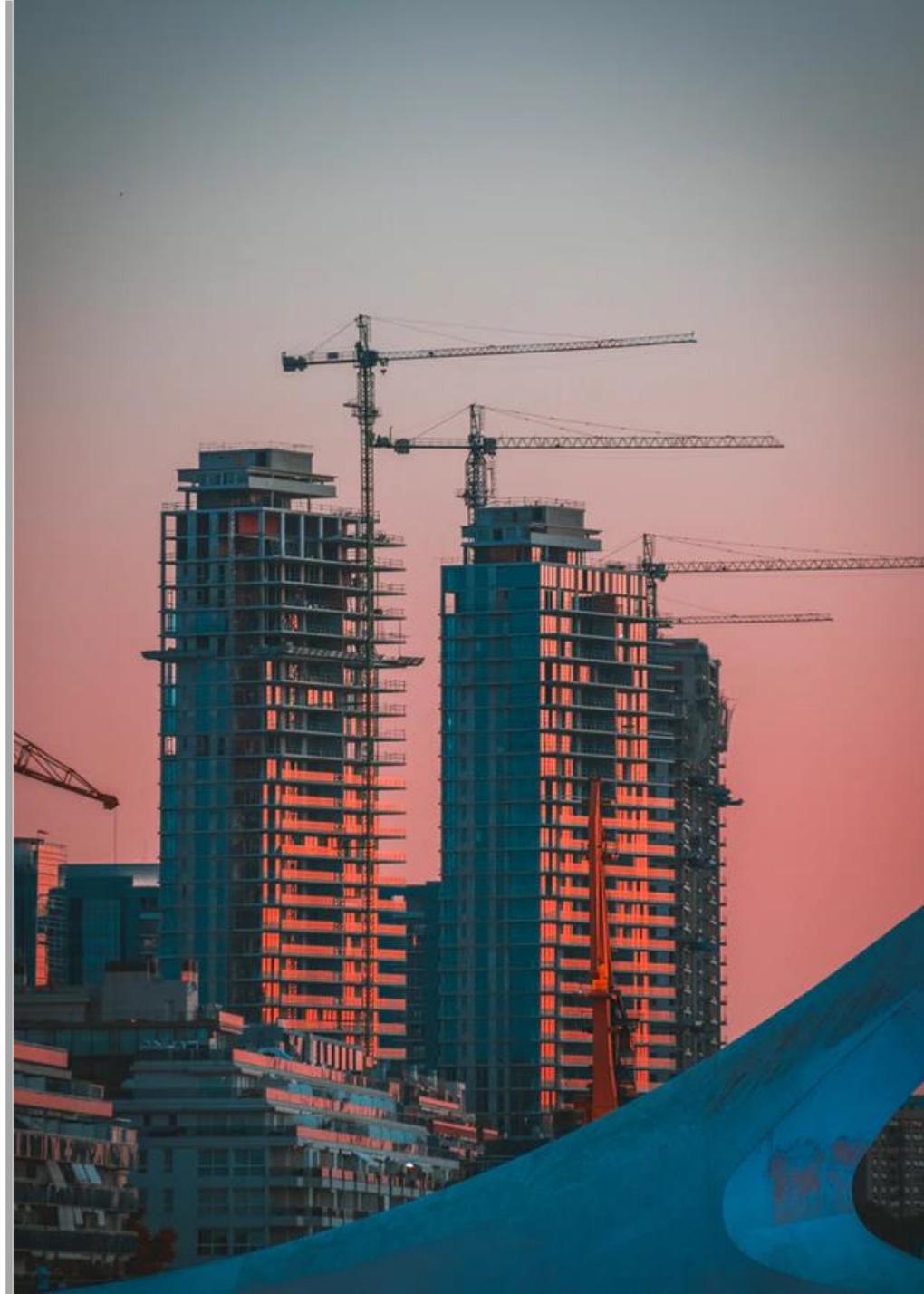
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Business development

Turnovers XXX in most countries in the first half of 2022

European contractors experienced a XXX from the pandemic in 2021 and had XXX expectations regarding turnover for 2022. In the first half of 2022, most countries still experienced a XXX turnover development, although relatively XXX compared to 2021. Especially XXX had XXX in turnover developments. However, contractors are XXX about the second half of the year and the order book portfolios are XXX. Only the contractors in XXX are XXX and having XXX expectations for the near future.

On the average level, order book portfolios of European contractors are similar to the second half of 2021. Still, the portfolios show that XXX. However, most countries experience XXX. XXX and XXX are experiencing the most XXX outlook in their orderbooks. XXX is also experiencing XXX the least of all countries.

Effects of the Ukraine war are concerning for the European contractors

This year, the effects of the Ukraine war brought some insecurity and most European contractors are worried about the negative consequences on the delivery of construction products. Except for contractors in XXX, increasing oil and gas prices also create XXX expectations of the sustainability of the building stock.



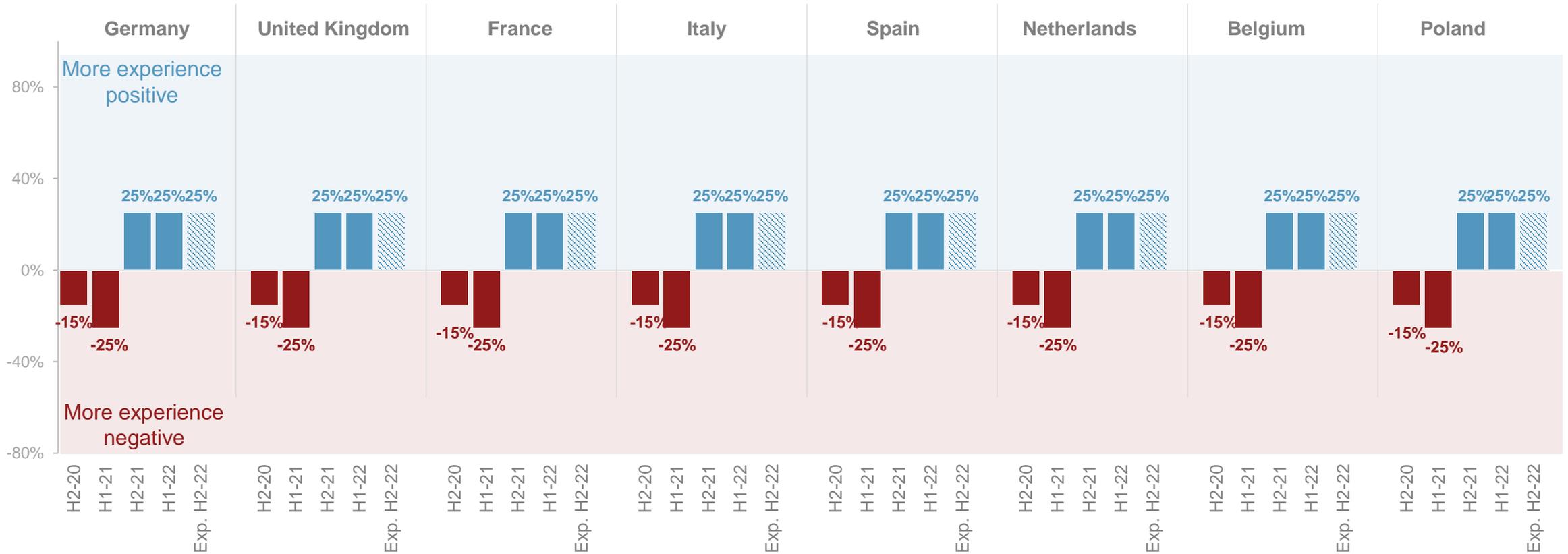
Turnover development

Most countries show a XXX turnover and XXX expectations, except for XXX which is staying XXX like the previous years

Net share of contractors' experience regarding turnover

If you compare your turnover of H1-22 to H1-21, how did your turnover develop?

(Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE in their turnover)

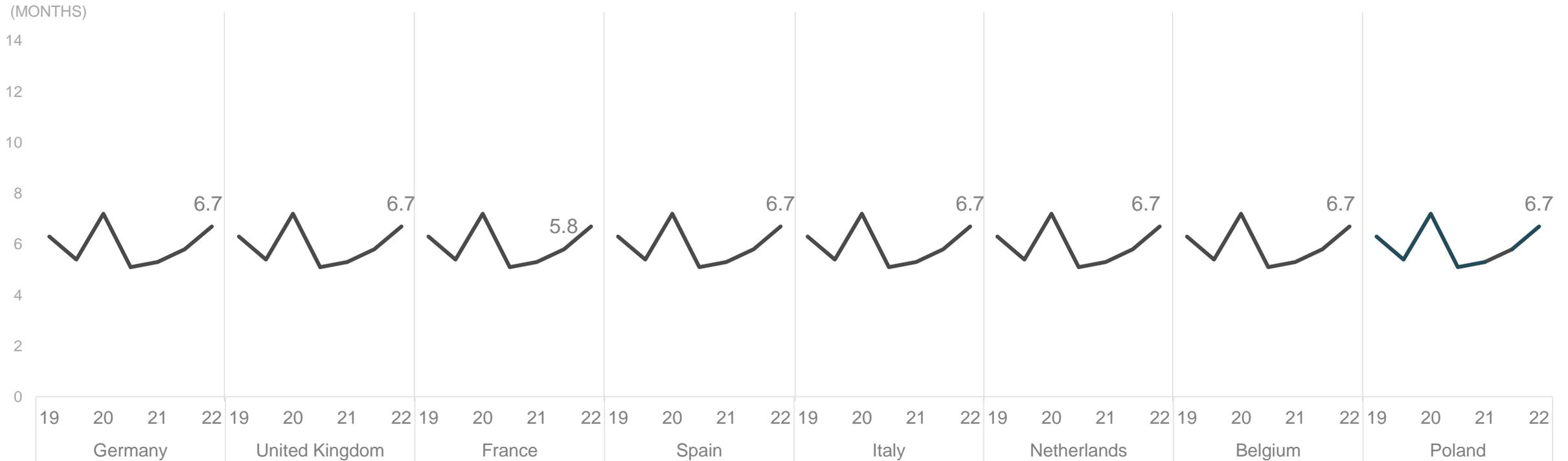


Orderbook portfolio

Orderbook portfolios are XXX for the coming months

Order book portfolio

Question: How big is your current order book portfolio? For how many months will you be able to keep your current staff working?



Labour shortage

Most countries experience labour shortage XXX degrees, except for XXX

Labor shortage

To what degree do you face labor shortage for this year in your company?

		Not at all A little bit Moderate Some Extreme					Total some or extreme shortage
Total	N=900	20%	20%	20%	20%	20%	X%
Germany	n=125	20%	20%	20%	20%	20%	X%
UK	n=125	20%	20%	20%	20%	20%	X%
France	n=125	20%	20%	20%	20%	20%	X%
Italy	n=125	20%	20%	20%	20%	20%	X%
Spain	n=125	20%	20%	20%	20%	20%	X%
Netherlands	n=75	20%	20%	20%	20%	20%	X%
Belgium	n=75	20%	20%	20%	20%	20%	X%
Poland	n=125	20%	20%	20%	20%	20%	X%

Effects of oil & gas prices

In general, contractors XXX that oil and gas prices will be beneficial for the sustainability of the building stock

Oil and gas prices

To what degree do you agree with the statement; the high oil and gas prices will have a *positive effect* on the sustainability of the building stock?

		Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Don't know
Total	N=900	20%	20%	20%	20%	20%	20%
Germany	n=125	20%	20%	20%	20%	20%	20%
UK	n=125	20%	20%	20%	20%	20%	20%
France	n=125	20%	20%	20%	20%	20%	20%
Italy	n=125	20%	20%	20%	20%	20%	20%
Spain	n=125	20%	20%	20%	20%	20%	20%
Netherlands	n=75	20%	20%	20%	20%	20%	20%
Belgium	n=75	20%	20%	20%	20%	20%	20%
Poland	n=125	20%	20%	20%	20%	20%	20%

Negative effects of the Ukraine war

European contractors XXX due to the Ukraine war

Ukraine war

To what degree do you agree with the statement; due to the war in Ukraine we expect that *delivery issues* of building products will increase?

		Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Don't know
Total	N=900	20%	20%	20%	20%	20%	20%
Germany	n=125	20%	20%	20%	20%	20%	20%
UK	n=125	20%	20%	20%	20%	20%	20%
France	n=125	20%	20%	20%	20%	20%	20%
Italy	n=125	20%	20%	20%	20%	20%	20%
Spain	n=125	20%	20%	20%	20%	20%	20%
Netherlands	n=75	20%	20%	20%	20%	20%	20%
Belgium	n=75	20%	20%	20%	20%	20%	20%
Poland	n=125	20%	20%	20%	20%	20%	20%

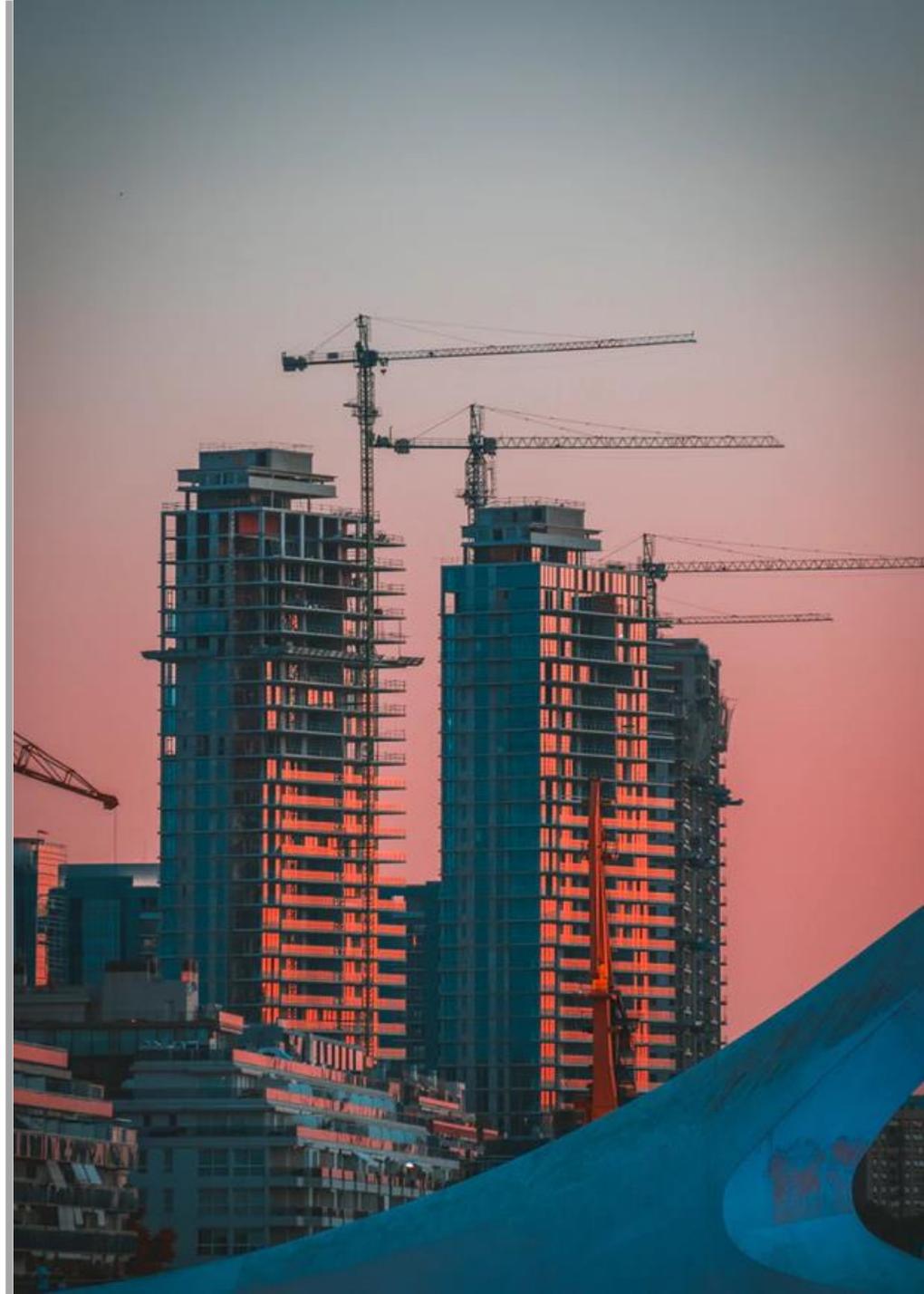
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Background characteristics

Company profile

How many **full-time employees** does your company have?

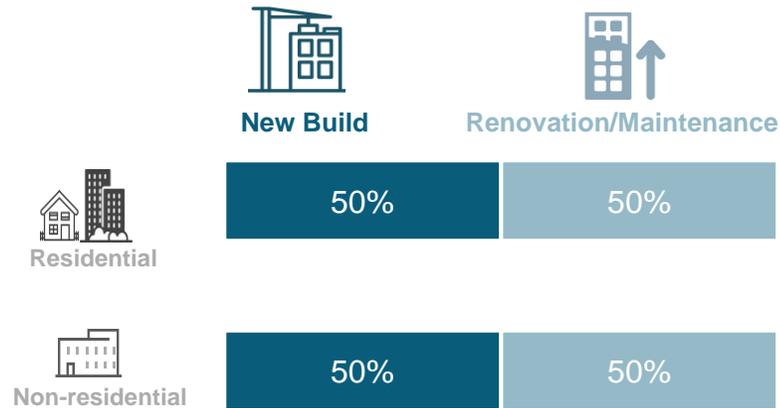


Does your company develop and build projects themselves?



Project segmentation

What percentage of your residential/ non residential **turnover** do you get from **new build projects**?

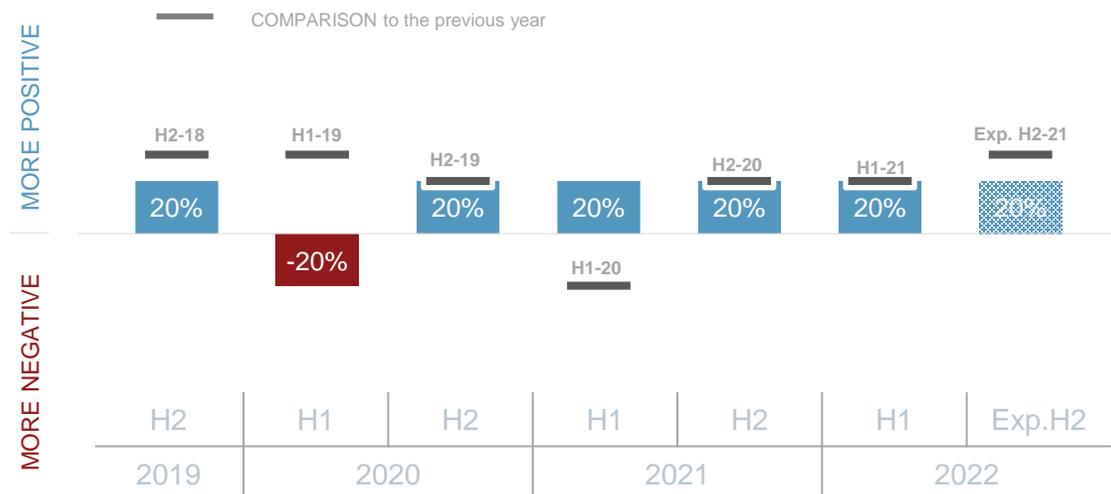


Germany experiences XXX half year compared to the previous half year

Net share of contractors' experience regarding turnover

If you compare your turnover of **H1-22 to H1-21**, how did your turnover develop?
 What are your **expectations** for the development in **H2-22 compared to H2-21**?

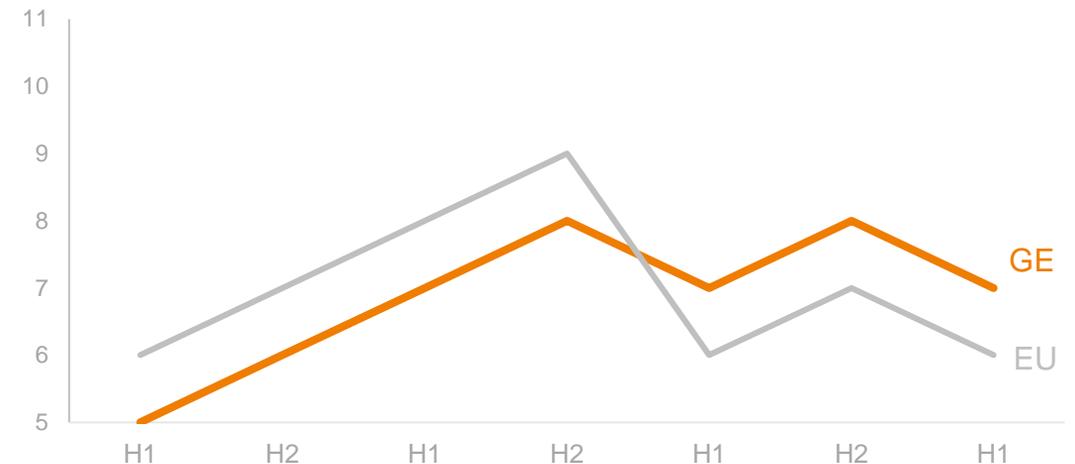
(Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE in their turnover)



How big is your **current order book** portfolio?

For how many months will you be able to keep your current staff working?

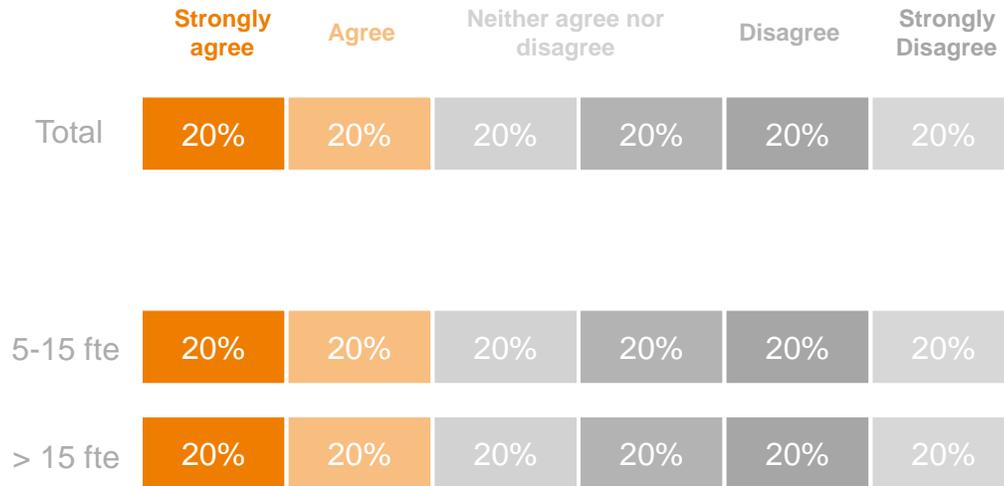
ORDER BOOK (MONTHS)



Contractors in Germany are XXX about the effects of the war

Oil and gas prices

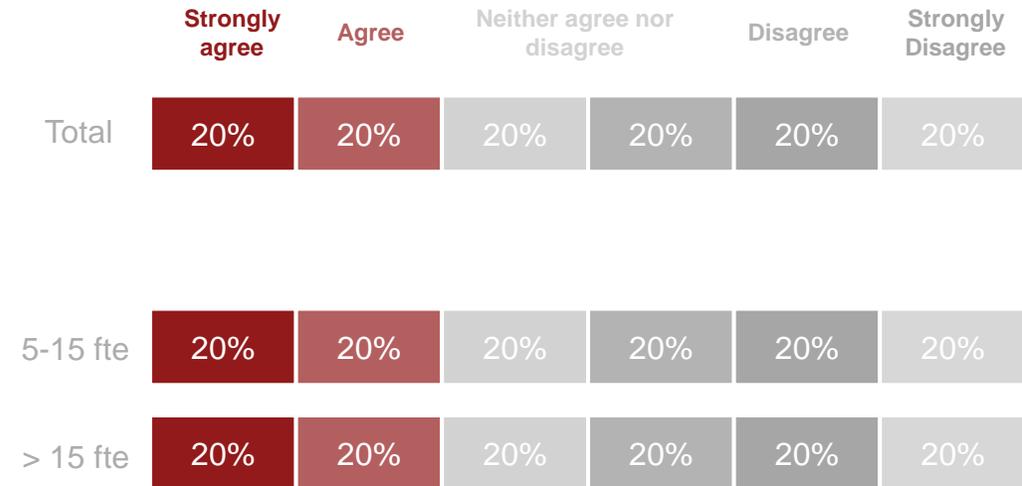
To what degree do you agree with the statement; the high oil and gas prices will have a **positive effect** on the sustainability of the building stock?



Base: n=125

Ukrain war

To what degree do you agree with the statement; due to the war in Ukraine we expect that **delivery issues** of building products will increase?



Base: n=125

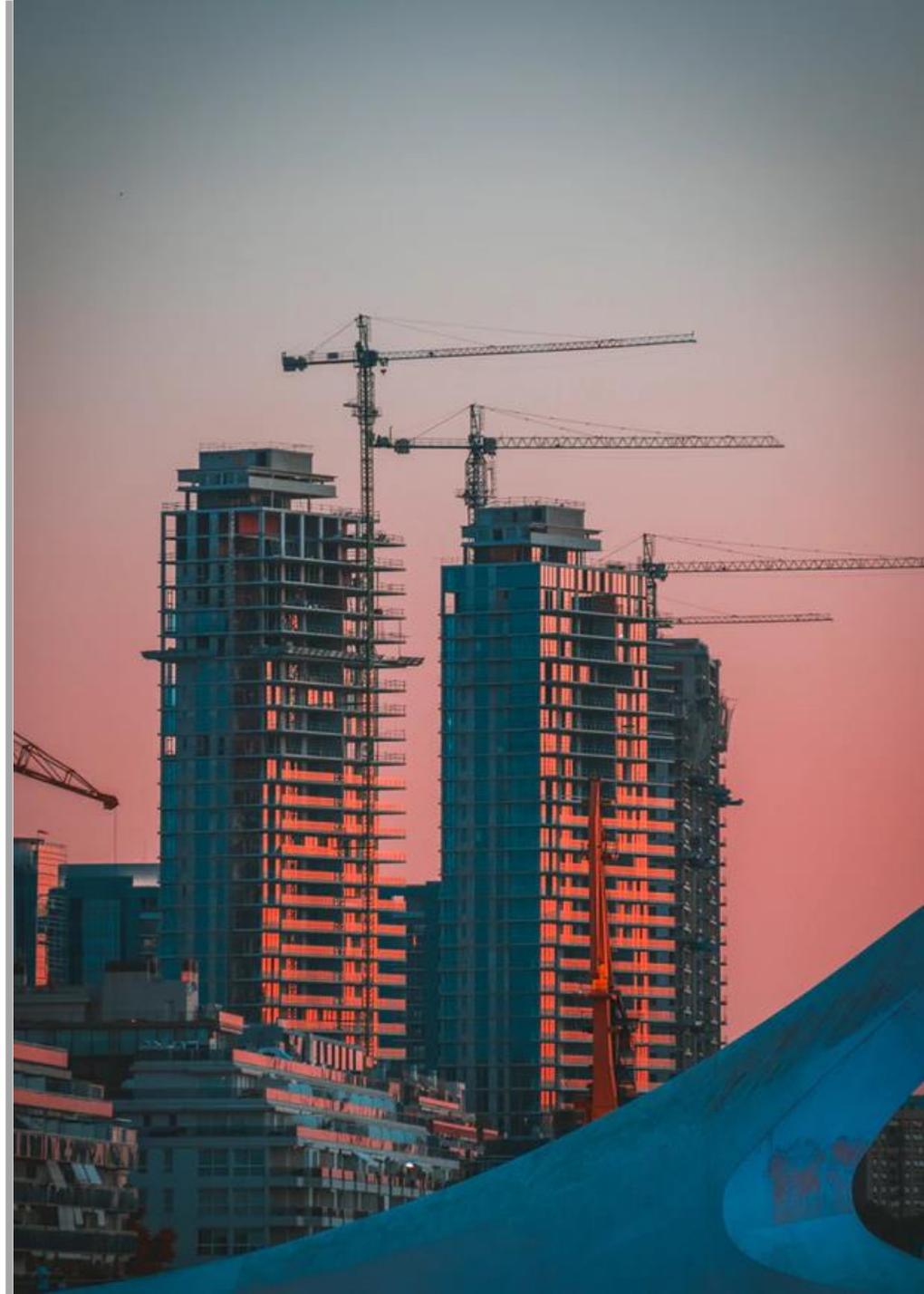
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Prefab

Prefab is XXX in Europe

Prefab usage in Europe is XXX since 2018. It is seen XXX which is quite critical to face increasing demands. XXX has the highest share of usage of prefab and this trend seems to be continued in the future. Most other countries also showed XXX and are expecting to XXX of prefab solutions in the future.

With the increasing XXX, prefab is perceived as XXX. However, it also requires XXX which makes it a difficult switch. Therefore, it is unlikely to see XXX in the usage in the coming years.

Adaptation is difficult because of the requirements

Contractors generally see the benefits only in XXX and are hesitant to adapt to prefab because of requirements such as XXX. Furthermore, they are usually not the main decision makers when it comes to using prefab. In most countries, XXX have more influence on the decision for prefab usage. In some cases, the decision-making process is also influenced by other stakeholders, such as XXX.

Using XXX in projects is more common

Although a high level of prefab usage is XXX, using some kind of prefab element in the projects is getting XXX compared to 2018. Instead of fully adapting the prefab solutions, most construction projects make use of XXX. European contractors also expect to see more XXX in the future projects.

Currently, prefab is mostly used in XXX, similar to the levels in 2018. In the non-residential sector, usage in XXX has the biggest share of usage and this share has been increasing since 2018. In most projects, XXX are still the most common building parts to use prefabricated elements for.



Definitions



Prefab was introduced to the contractors as '*off-site construction or modern methods of construction*'.

Dutch/ Flemish	<i>“off-site bouwen of moderne bouwmethoden”</i>
German	<i>“Bau abseits der Baustelle oder moderne Bauweisen”</i>
French	<i>“la construction hors site ou les méthodes de construction modernes”</i>
Spanish	<i>“a elementos que vienen ya se fabrican y montan fuera de la obra y a métodos de construcción modernos”</i>
Italian	<i>“sistemi di costruzione non in loco o metodi di costruzione moderni”</i>
Polish	<i>“metody konstrukcji poza terenem budowy lub nowoczesne metody konstrukcji”</i>

Decision Makers

In most countries, XXX are the main decision makers, but in the Netherlands, XXX have more influence.

Stakeholders of decisions in prefabricated construction

Who decides to use prefab elements?

	Total N=900	Developer Company		GE N=125	UK N=125	FR N=125	IT N=125	SP N=125	NL N=75	BE N=75	PL N=125
		Yes N = 310	No N = 589								
XXX	59%	55%	60%	53%	54%	61%	68%	70%	41%	61%	55%
XXX	37%	46%	32%	51%	38%	62%	14%	8%	65%	44%	26%
XXX	26%	20%	29%	28%	44%	49%	18%	10%	13%	27%	12%
XXX	19%	21%	17%	25%	21%	31%	2%	27%	17%	24%	3%
XXX	11%	11%	12%	18%	7%	22%	2%	10%	5%	16%	10%
XXX	2%	1%	2%	0%	0%	0%	0%	0%	0%	0%	11%
XXX	1%	2%	1%	1%	0%	0%	0%	5%	0%	4%	0%
XXX	1%	2%	1%	0%	0%	0%	1%	2%	1%	0%	4%
Other	1%	2%	1%	1%	1%	0%	0%	3%	3%	3%	2%
Don't know	2%	0%	3%	2%	2%	0%	0%	1%	1%	1%	8%

Main advantages

The most prominent advantage of using prefab is XXX. In Germany XXX is also very important.

Main advantages of prefab

In your opinion, what are the main advantages of prefab elements?

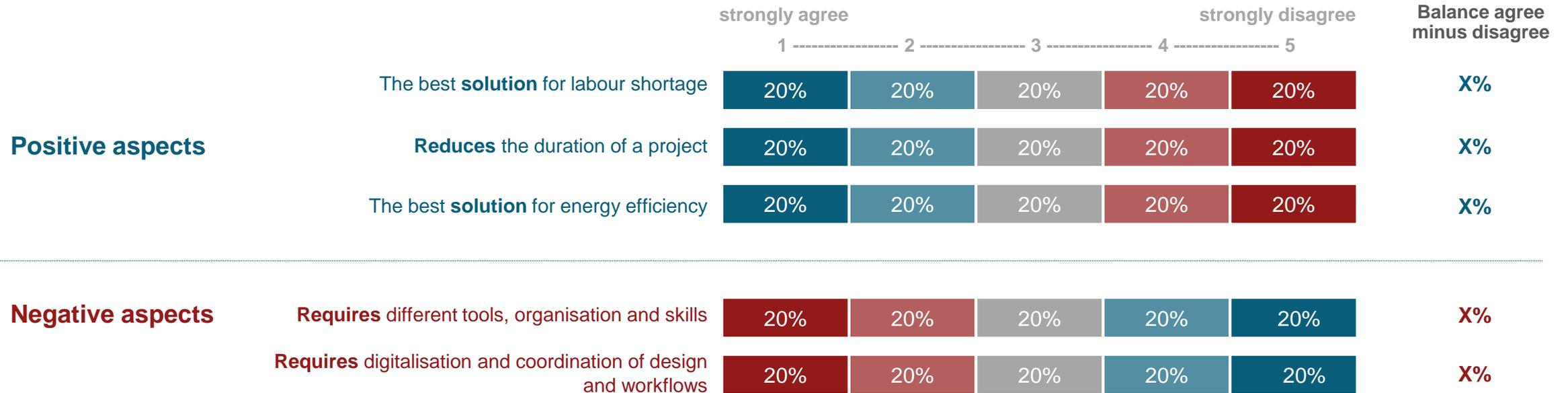
	Total	GE	UK	FR	IT	SP	NL	BE	PL
	N=900	N=125	N=125	N=125	N=125	N=125	N=75	N=75	N=125
XXX	75%	52%	67%	86%	94%	64%	85%	83%	72%
XXX	18%	34%	18%	26%	10%	12%	12%	16%	11%
XXX	15%	47%	13%	8%	2%	6%	17%	16%	9%
XXX	6%	6%	18%	6%	3%	5%	3%	4%	0%
XXX	6%	13%	4%	7%	8%	3%	4%	4%	1%
XXX	5%	14%	2%	6%	3%	1%	1%	9%	2%
XXX	2%	0%	2%	0%	1%	10%	1%	0%	5%
XXX	2%	1%	1%	0%	1%	10%	4%	0%	3%
XXX	2%	4%	5%	2%	1%	0%	0%	0%	0%
Other	9%	13%	3%	3%	6%	12%	20%	4%	9%
Don't know	6%	2%	12%	0%	0%	7%	4%	4%	18%

Attitudes towards Prefab

The most important benefit of the prefab solutions is XXX. However, the difficult requirements to use prefab create XXX

Attitudes for Prefab

To what degree do you disagree or agree with the following statements about prefab?

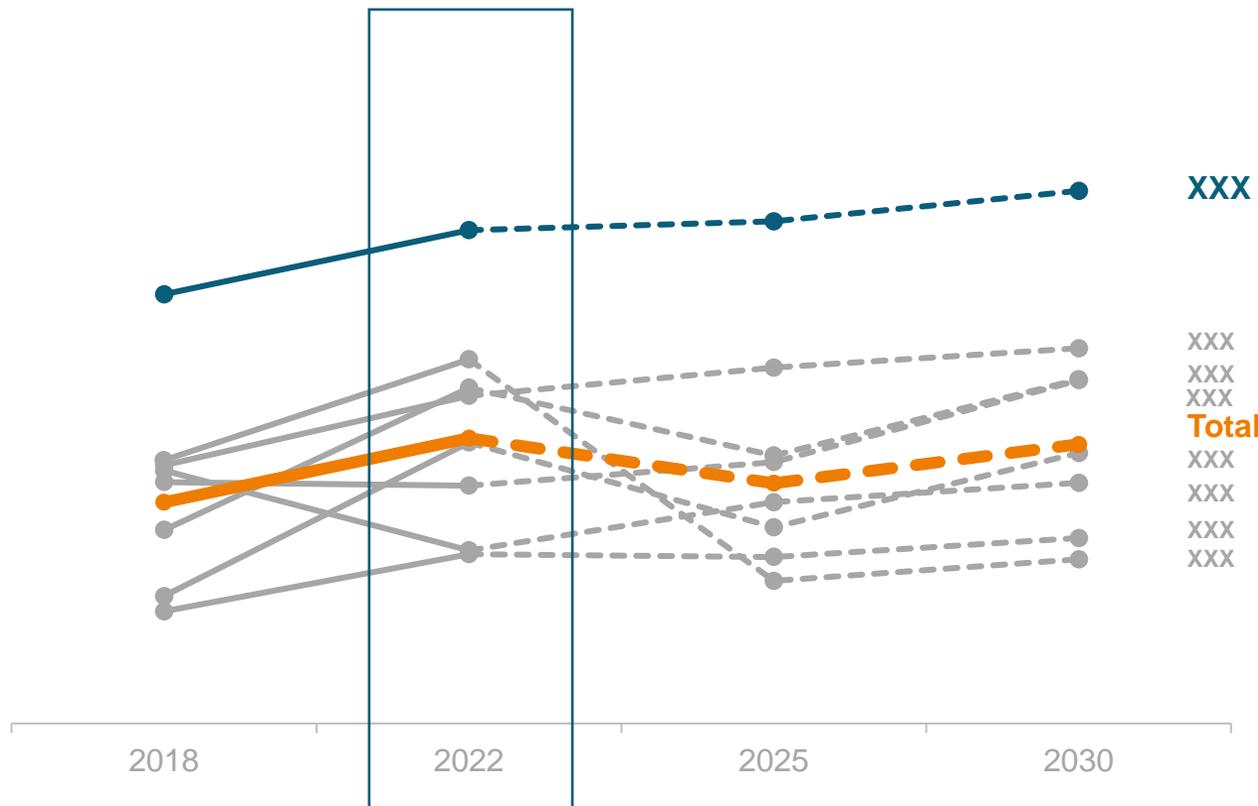


Prefab usage past, present, and future

In Europe, prefab usage increased X% in the last four years.

Trend in share of prefab elements

Percentage of projects contained some form of prefab building elements or off-site construction, Expectations for 2025 and 2030



XXX still has the highest share of usage

However, not all countries are XXX about the usage expectations for prefab, especially for the near future.

Prefab trends per size of project

Prefab was mostly used in XXX buildings in the past and present, and this trend seems to be continued in the future.

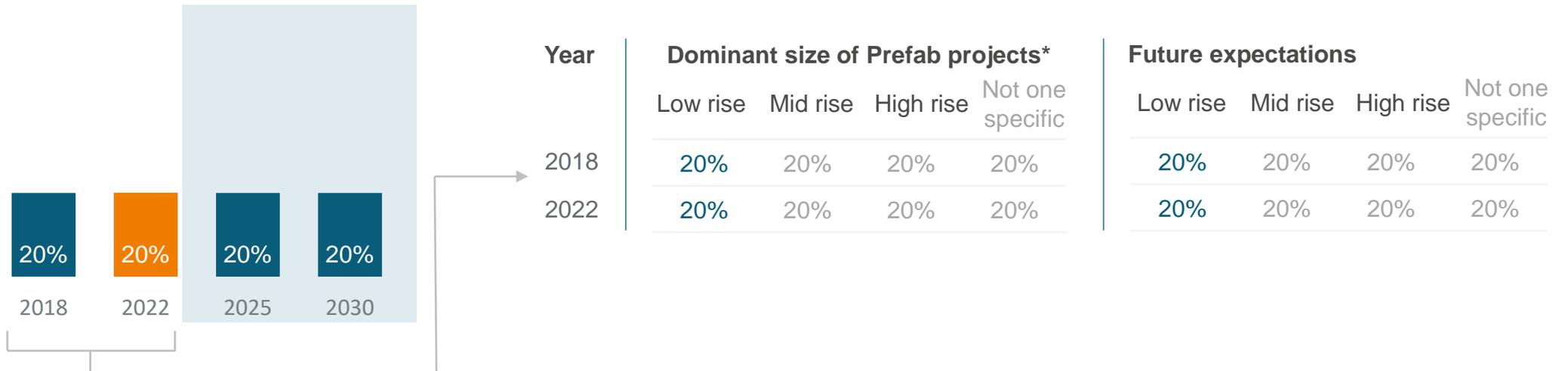
Prefab projects

If you look at the projects you have worked on in the past 2 years, what percentage of your projects contained some form of prefab building elements or off-site construction?

What is your expectations for 2025 and 2030?

And what was the most dominant size of the projects that contained prefab building elements?

In which size segment do you expect the biggest growth of prefab?



*Low rise – up to 4 floors
 Mid rise – 5 up to 10 floors
 High rise – more than 10 floors

Dominant size of projects across countries

In some countries, usage of prefab in XXX is increasing.

Dominant size* of **current** prefab projects

What was the most dominant size of the projects that contained prefab building elements?

Country	Low-rise		Mid-rise		High-rise		No specific	
	2018	2022	2018	2022	2018	2022	2018	2022
Total	20%	20%	20%	20%	20%	20%	20%	20%
Germany	20%	20%	20%	20%	20%	20%	20%	20%
United Kingdom	20%	20%	20%	20%	20%	20%	20%	20%
France	20%	20%	20%	20%	20%	20%	20%	20%
Italy	20%	20%	20%	20%	20%	20%	20%	20%
Spain	20%	20%	20%	20%	20%	20%	20%	20%
Netherlands	20%	20%	20%	20%	20%	20%	20%	20%
Belgium	20%	20%	20%	20%	20%	20%	20%	20%
Poland	20%	20%	20%	20%	20%	20%	20%	20%

Dominant size of **future** prefab projects

In which size segment do you expect the biggest growth of prefab?

Country	Low-rise		Mid-rise		High-rise		No specific	
	2018	2022	2018	2022	2018	2022	2018	2022
Total	20%	20%	20%	20%	20%	20%	20%	20%
Germany	20%	20%	20%	20%	20%	20%	20%	20%
United Kingdom	20%	20%	20%	20%	20%	20%	20%	20%
France	20%	20%	20%	20%	20%	20%	20%	20%
Italy	20%	20%	20%	20%	20%	20%	20%	20%
Spain	20%	20%	20%	20%	20%	20%	20%	20%
Netherlands	20%	20%	20%	20%	20%	20%	20%	20%
Belgium	20%	20%	20%	20%	20%	20%	20%	20%
Poland	20%	20%	20%	20%	20%	20%	20%	20%

Expectations for future projects

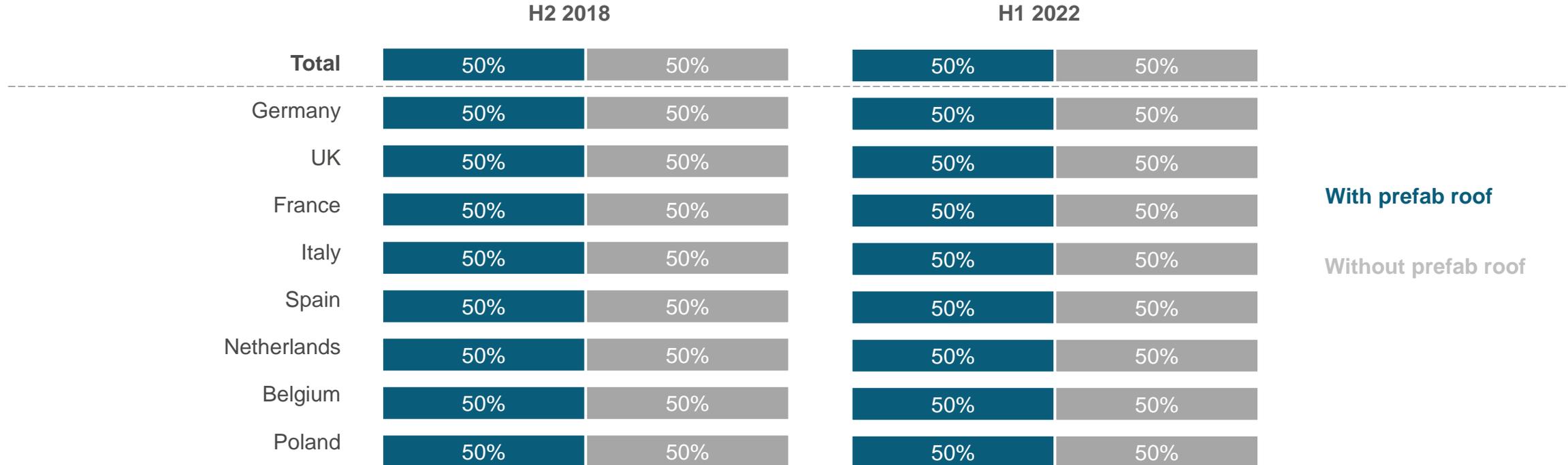
*Low rise – up to 4 floors
 Mid rise – 5 up to 10 floors
 High rise – more than 10 floors

Prefab roof usage

Prefab roofs are XXX in most countries.

Prefab roof usage

What percentage of your residential projects had a prefab roof?



Prefab is mostly used in XXX

Prefab in **current** building types

What kind of projects/ buildings contained prefab building elements?

2022

	Total 2022	Total 2018	2022							
	N=614	N=394	GE	UK	FR	IT	SP	NL	BE	PL
			N=89	N=61	N=63	N=105	N=93	N=67	N=57	N=79
Residential	XXX 41%	40%	57%	39%	59%	36%	29%	46%	35%	27%
	XXX 37%	37%	58%	31%	29%	19%	35%	42%	61%	27%
	XXX 17%	10%	34%	13%	5%	12%	12%	37%	12%	6%
	XXX 15%	15%	24%	33%	3%	7%	3%	43%	11%	4%
	XXX 1%	4%	1%	2%	5%	1%	0%	4%	0%	0%
Non-residential	XXX 21%	16%	8%	11%	29%	33%	32%	13%	19%	13%
	XXX 17%	13%	19%	11%	33%	8%	9%	25%	21%	15%
	XXX 9%	11%	6%	21%	11%	7%	3%	10%	12%	8%
	XXX 8%	7%	11%	11%	5%	8%	2%	9%	12%	5%
	XXX 4%	7%	7%	8%	2%	2%	3%	7%	5%	3%
	XXX 3%	-	2%	3%	2%	3%	4%	0%	0%	10%
	XXX 3%	6%	6%	5%	0%	4%	1%	3%	4%	3%
	XXX 2%	-	1%	0%	0%	1%	1%	0%	0%	13%
	Other 8%	6%	4%	8%	5%	4%	14%	6%	16%	9%

Future expectations are also similar

Prefab in **future** building types

In which building types do you expect the biggest growth of prefab?

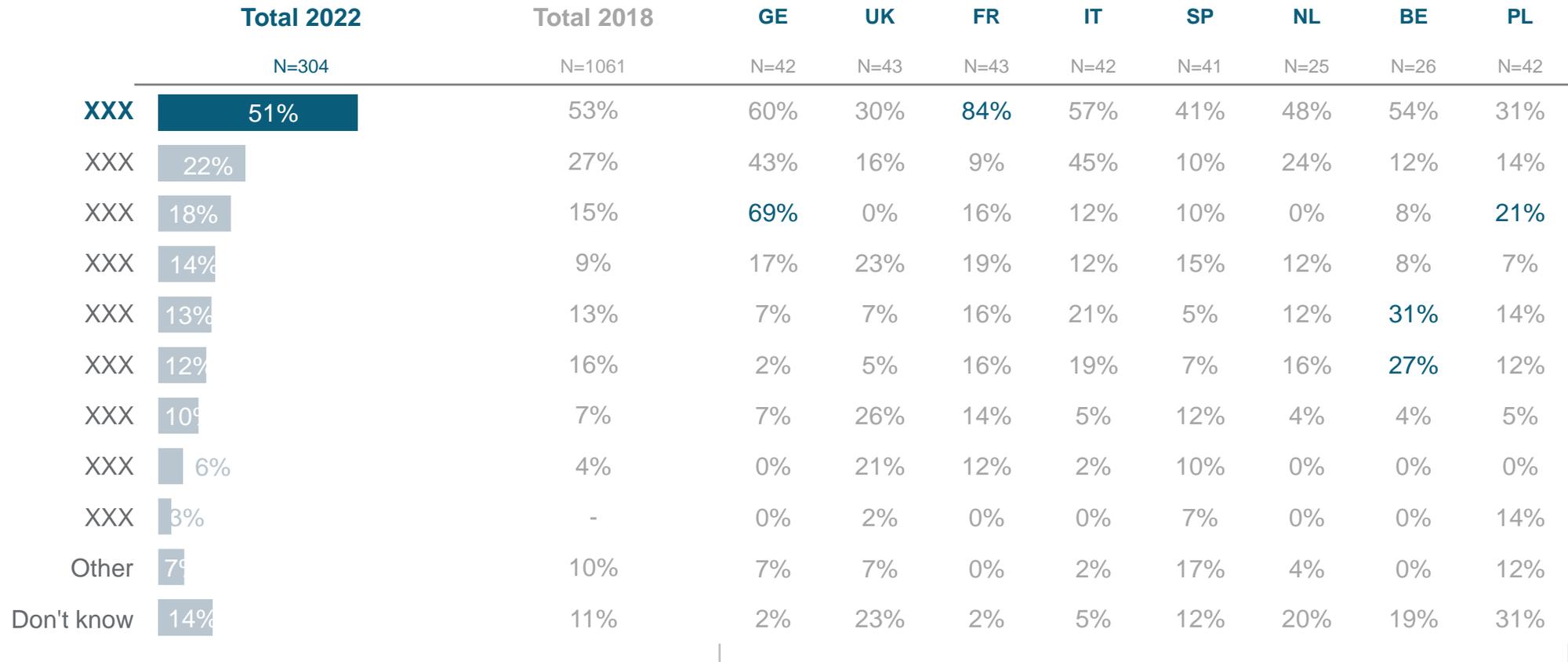
2022 Future Expectations

	Europe 2022	Europe 2018	GE	UK	FR	IT	SP	NL	BE	PL
	N=299	N=524	N=41	N=41	N=42	N=43	N=41	N=25	N=25	N=41
Residential	XXX 41%	35%	56%	46%	40%	30%	34%	44%	36%	39%
	XXX 33%	35%	27%	44%	31%	42%	32%	48%	28%	20%
	XXX 16%	17%	27%	17%	2%	12%	7%	52%	8%	15%
	XXX 14%	15%	22%	39%	2%	5%	7%	32%	8%	2%
	XXX 1%	4%	0%	2%	0%	0%	0%	0%	4%	0%
Non-residential	XXX 17%	12%	17%	7%	43%	12%	7%	8%	36%	10%
	XXX 13%	14%	10%	2%	12%	35%	17%	0%	20%	7%
	XXX 8%	6%	10%	5%	12%	16%	5%	0%	12%	0%
	XXX 7%	9%	10%	15%	10%	7%	2%	4%	12%	0%
	XXX 7%	5%	10%	2%	10%	14%	5%	4%	8%	2%
	XXX 5%	5%	12%	7%	0%	2%	5%	4%	8%	5%
	XXX 2%	-	2%	0%	0%	0%	5%	0%	12%	2%
Other 4%	9%	0%	2%	0%	0%	0%	15%	4%	8%	2%

More than half of prefab usage is used for XXX

Prefab in future construction parts

For which parts of the building do you expect the usage of prefab solutions to grow most?



2022

Definitions

Prefab was introduced to the contractors as '*off-site construction or modern methods of construction*'. Once we got past the general topics about prefab, we went into detail about the different types of prefab. To show how advanced a country is in using prefab construction elements, we defined the following levels of prefab:



- **prefabricated plain unfinished elements**; elements without insulation, windows or installation (e.g. precast floors, facade or roof element without windows)



- **prefabricated panelised systems or elements**; examples are wall, floor, ceiling, roof and facade panels including insulation, windows or installation



- **prefabricated modular buildings or volumetric elements**; examples are dormers, bathroom pods or kitchen pods which are preassembled units before arriving on the construction site (3D prefab)

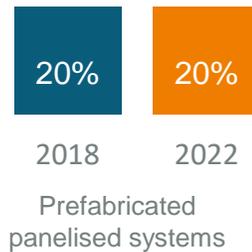
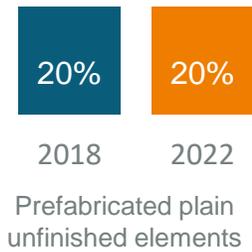
Usage of prefab elements

XXX are the most commonly used prefab elements. However, contractors expect to use more XXX

Projects containing the following prefab elements

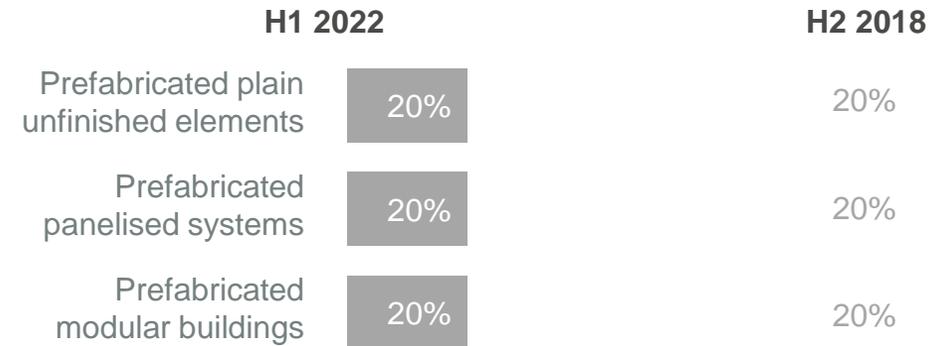
When you look at your projects which included any prefab from the past 2 years, what % of your projects contained the following types of prefabrication?

No Prefab	2018	X%
	2022	X%



Future expectations for prefab types

Which type of prefabrication do you expect to grow the most in the coming years?



Usage of prefab elements

Usage of XXX already increased in most countries since 2018 and they are expected to be used more in the future.

Percentage of projects containing prefabricated elements

When you look at your projects which included any prefab from the past 2 years, what percentage of your projects contained the following types of prefabrication?

Country	Prefab. unfinished elements		Prefab. panelised systems		Prefab. modular buildings		No Prefab	
	2018	2022	2018	2022	2018	2022	2018	2022
Total	20%	20%	20%	20%	20%	20%	20%	20%
Germany	20%	20%	20%	20%	20%	20%	20%	20%
United Kingdom	20%	20%	20%	20%	20%	20%	20%	20%
France	20%	20%	20%	20%	20%	20%	20%	20%
Italy	20%	20%	20%	20%	20%	20%	20%	20%
Spain	20%	20%	20%	20%	20%	20%	20%	20%
Netherlands	20%	20%	20%	20%	20%	20%	20%	20%
Belgium	20%	20%	20%	20%	20%	20%	20%	20%
Poland	20%	20%	20%	20%	20%	20%	20%	20%

Future expectations for type of prefab

Which type of prefabrication do you expect to grow the most in the coming years?

Country	Prefab. unfinished elements		Prefab. panelised systems		Prefab. modular buildings		None	
	2018	2022	2018	2022	2018	2022	2018	2022
Total	20%	20%	20%	20%	20%	20%	20%	20%
Germany	20%	20%	20%	20%	20%	20%	20%	20%
United Kingdom	20%	20%	20%	20%	20%	20%	20%	20%
France	20%	20%	20%	20%	20%	20%	20%	20%
Italy	20%	20%	20%	20%	20%	20%	20%	20%
Spain	20%	20%	20%	20%	20%	20%	20%	20%
Netherlands	20%	20%	20%	20%	20%	20%	20%	20%
Belgium	20%	20%	20%	20%	20%	20%	20%	20%
Poland	20%	20%	20%	20%	20%	20%	20%	20%

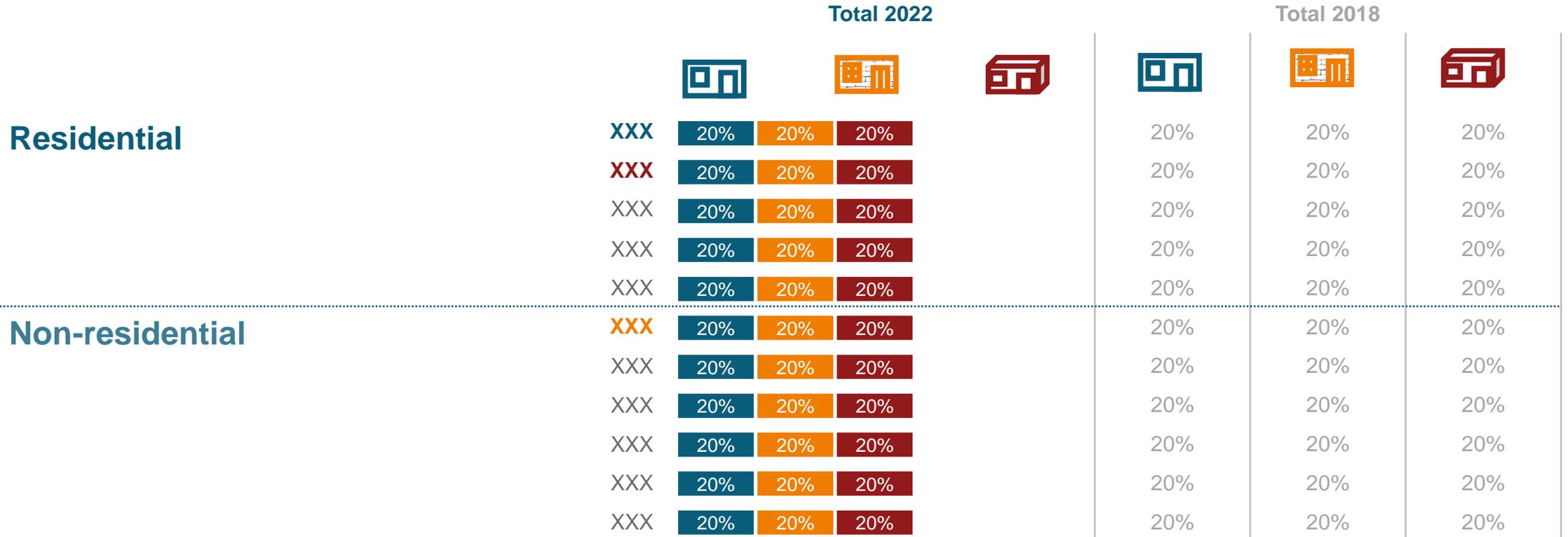
Expectations for future projects

Prefab elements in different building types

When looking at...



...in what type of buildings are those solutions used the most



Prefab elements in different construction parts

When looking at...

 PLAIN PREFAB ELEMENTS WITHOUT ANY INSULATION OR INSTALLATION

 FINISHED PREFAB SYSTEMS WITH INSULATION OR INSTALLATION

 PRE-ASSEMBLED MODULAR BUILDING PARTS / ELEMENTS

...what parts of the building are done in prefab?

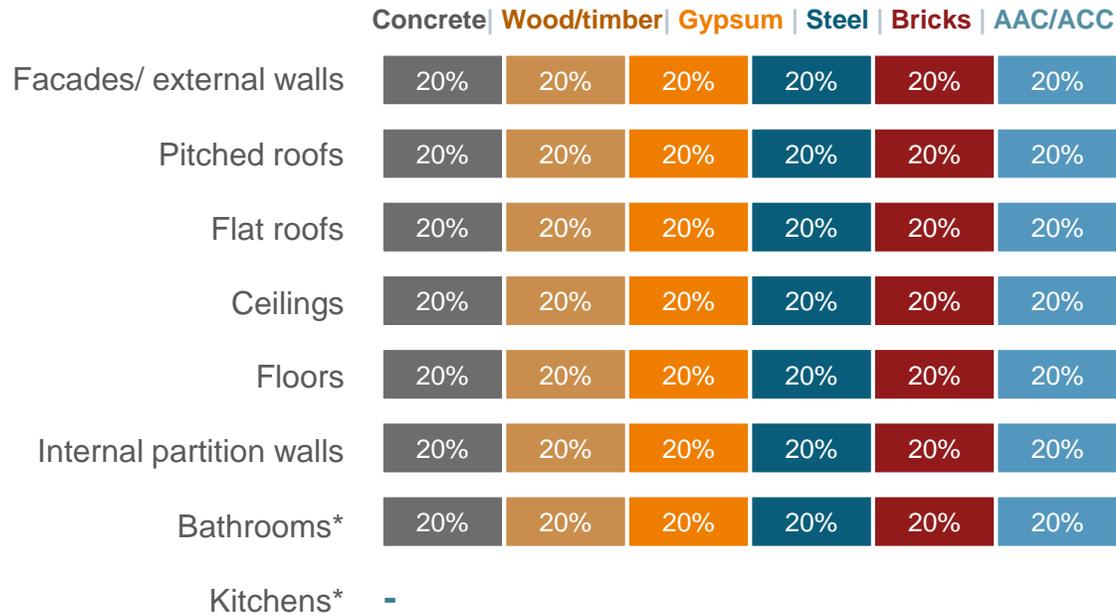


Most used materials in prefab

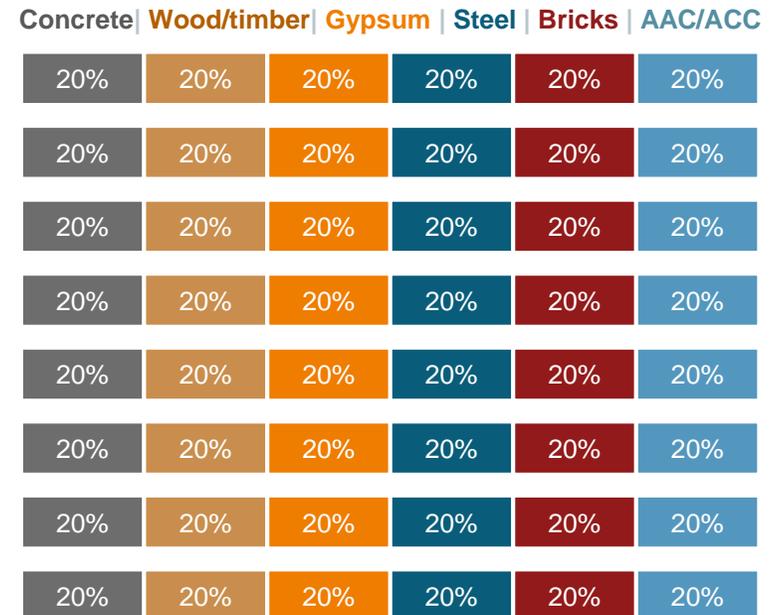


What is the dominant type of construction material when prefabricated plain unfinished elements are used in the following building parts?

H2 2018



H1 2022



*Results are indicative due to low number of observations (N<30).

Most used materials in prefab



What is the dominant type of construction material when *prefabricated panelised systems or elements* are used in the following building parts?

H2 2018



H1 2022



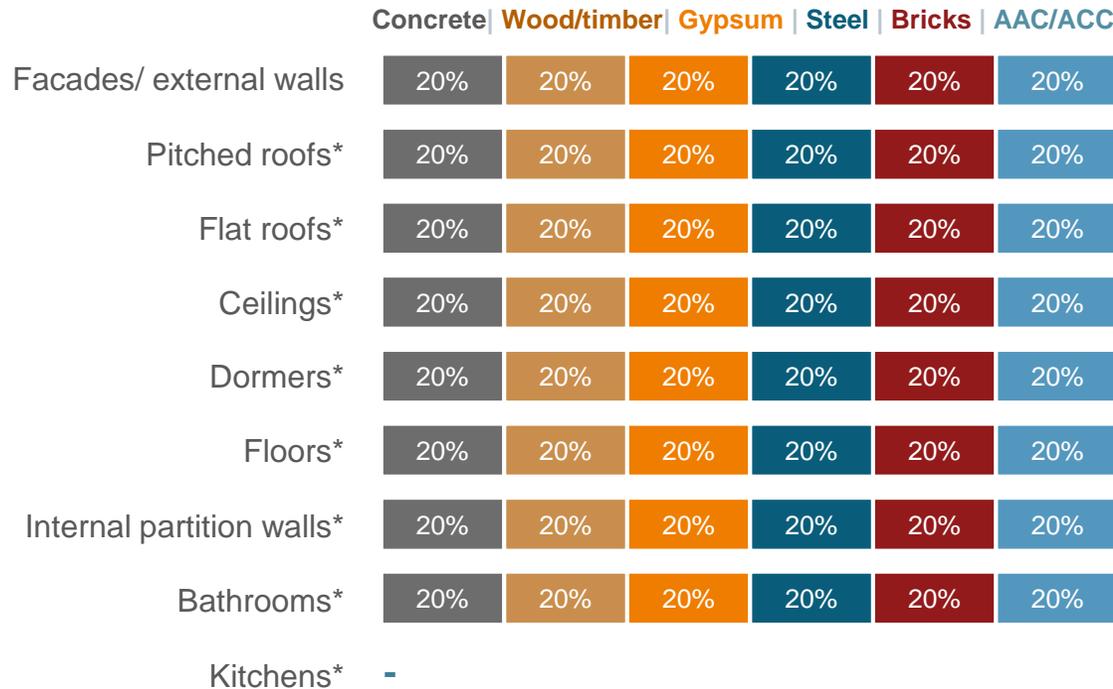
*Results are indicative due to low number of observations (N<30).

Most used materials in prefab

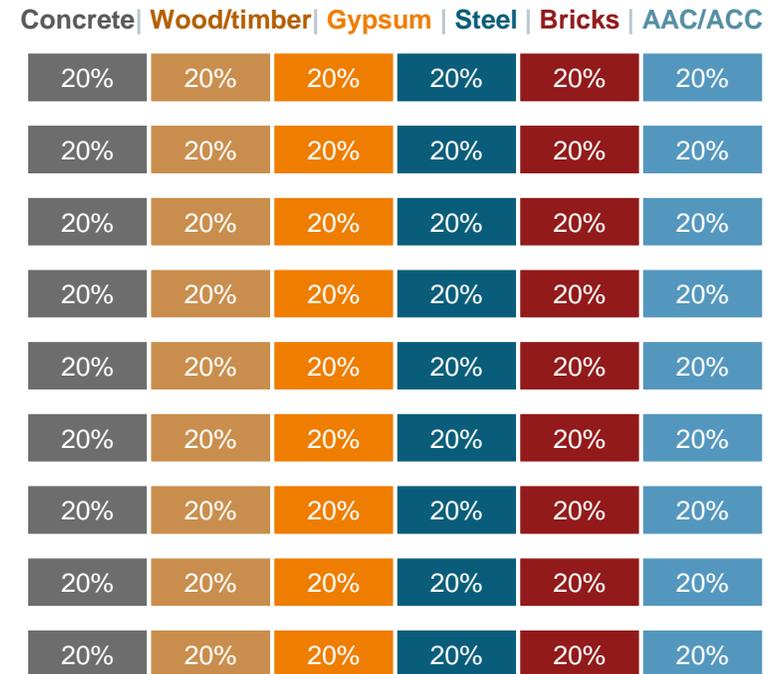


What is the dominant type of construction material when *prefabricated modular buildings or volumetric elements* are used in the following building parts?

H2 2018



H1 2022



*Results are indicative due to low number of observations (N<30).

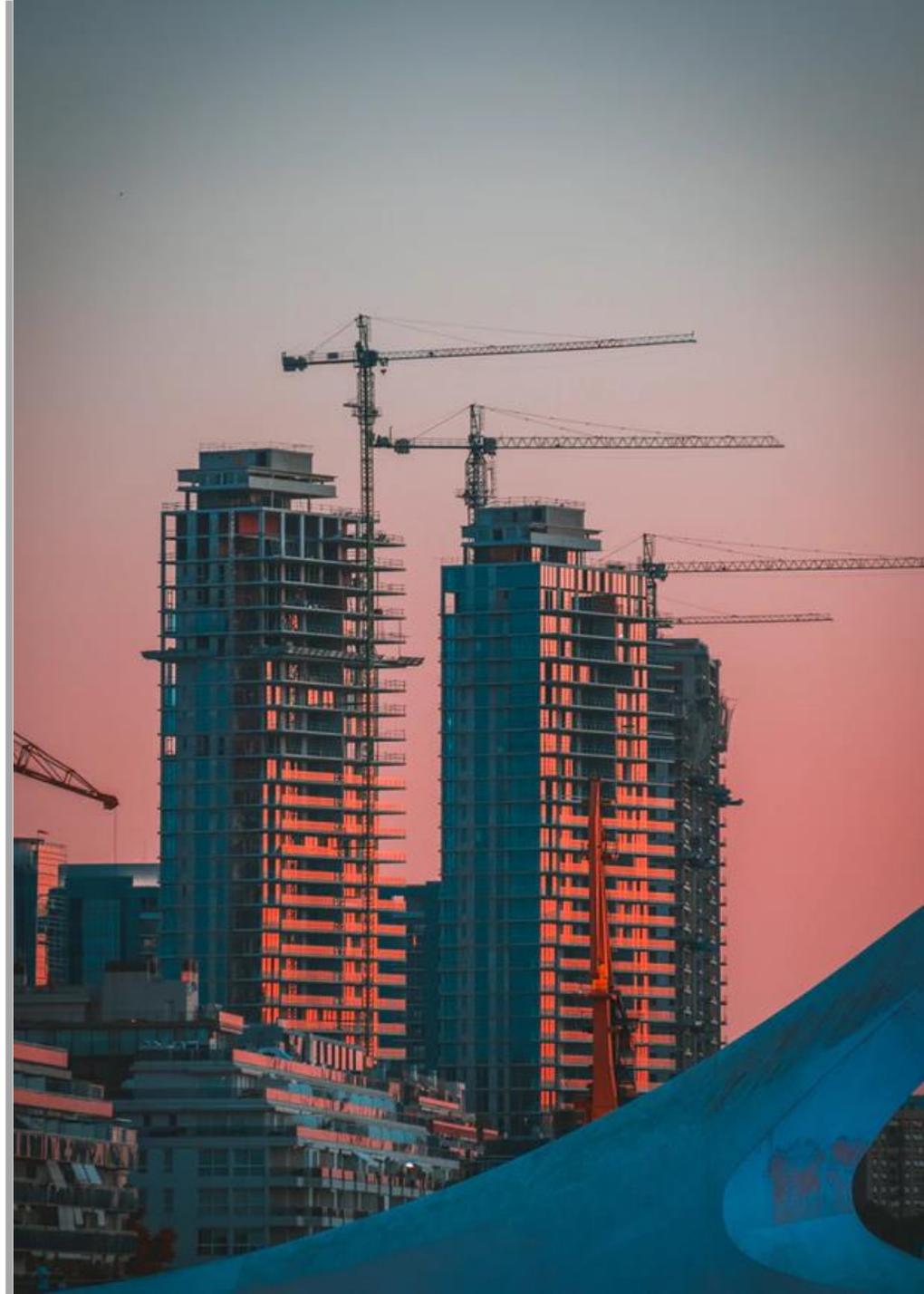
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Management Summary

Profiling the Building Contractor

Prefab

Appendix



Usage of prefab elements – cross-country comparison



When looking at *prefabricated plain unfinished elements*, in what type of buildings are those solutions used the most?

	Total N = 289	GE N = 50	UK N = 23	FR N = 27	IT N = 44	SP N = 40	NL N = 23	BE N = 23	PL N = 59
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
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XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know/no opinion	20%	20%	20%	20%	20%	20%	20%	20%	20%

Usage of prefab elements - cross country comparison



When looking at *prefabricated panelised systems or elements*, in what type of buildings are those solutions used the most?

	Total	GE	UK	FR	IT	SP	NL	BE	PL
	N = 217	N = 30	N = 22	N = 28	N = 42	N = 40	N = 23	N = 22	N = 10
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
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XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
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XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know/no opinion	20%	20%	20%	20%	20%	20%	20%	20%	20%

Usage of prefab elements - cross country comparison



When looking at *prefabricated panelised systems or elements*, what parts of the building are done in prefab?

	Total	GE	UK	FR	IT	SP	NL	BE	PL
	N = 217	N = 30	N = 22	N = 28	N = 42	N = 40	N = 23	N = 22	N = 10
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
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XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know/no opinion	20%	20%	20%	20%	20%	20%	20%	20%	20%

Usage of prefab elements - cross country comparison



When looking at *prefabricated modular buildings or volumetric elements*, in what type of buildings are those solutions used the most?

	Total N = 104	GE N = 6	UK N = 16	FR N = 8	IT N = 20	SP N = 12	NL N = 21	BE N = 12	PL N = 9
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
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XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know/no opinion	20%	20%	20%	20%	20%	20%	20%	20%	20%

Usage of prefab elements - cross country comparison



When looking at *prefabricated modular buildings or volumetric elements*, what parts of the building are done in prefab?

	Total	GE	UK	FR	IT	SP	NL	BE	PL
	N = 104	N = 6	N = 16	N = 8	N = 20	N = 12	N = 21	N = 12	N = 9
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
XXX	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know/no opinion	20%	20%	20%	20%	20%	20%	20%	20%	20%

USP Marketing Consultancy

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