



European Contractor Monitor H1-2024

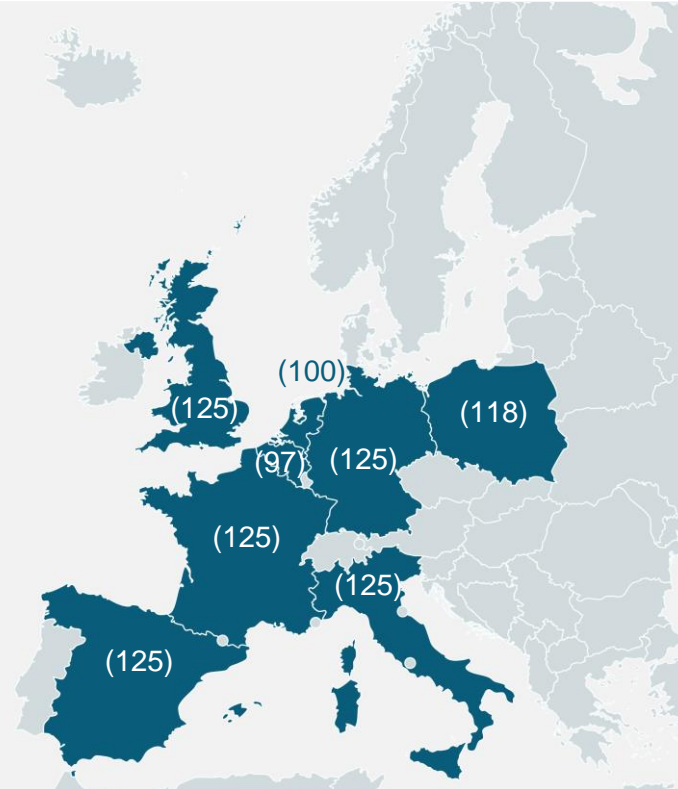
Prefab
July 2024

About European Contractor Monitor – Prefab

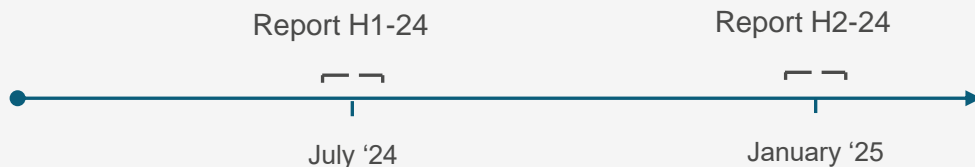
COUNTRY SCOPE

Total of 940 Phone interviews

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



THE TIMELINE



DEFINITIONS USED

In this report, we also go 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)

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.**

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Profiling the building contractor

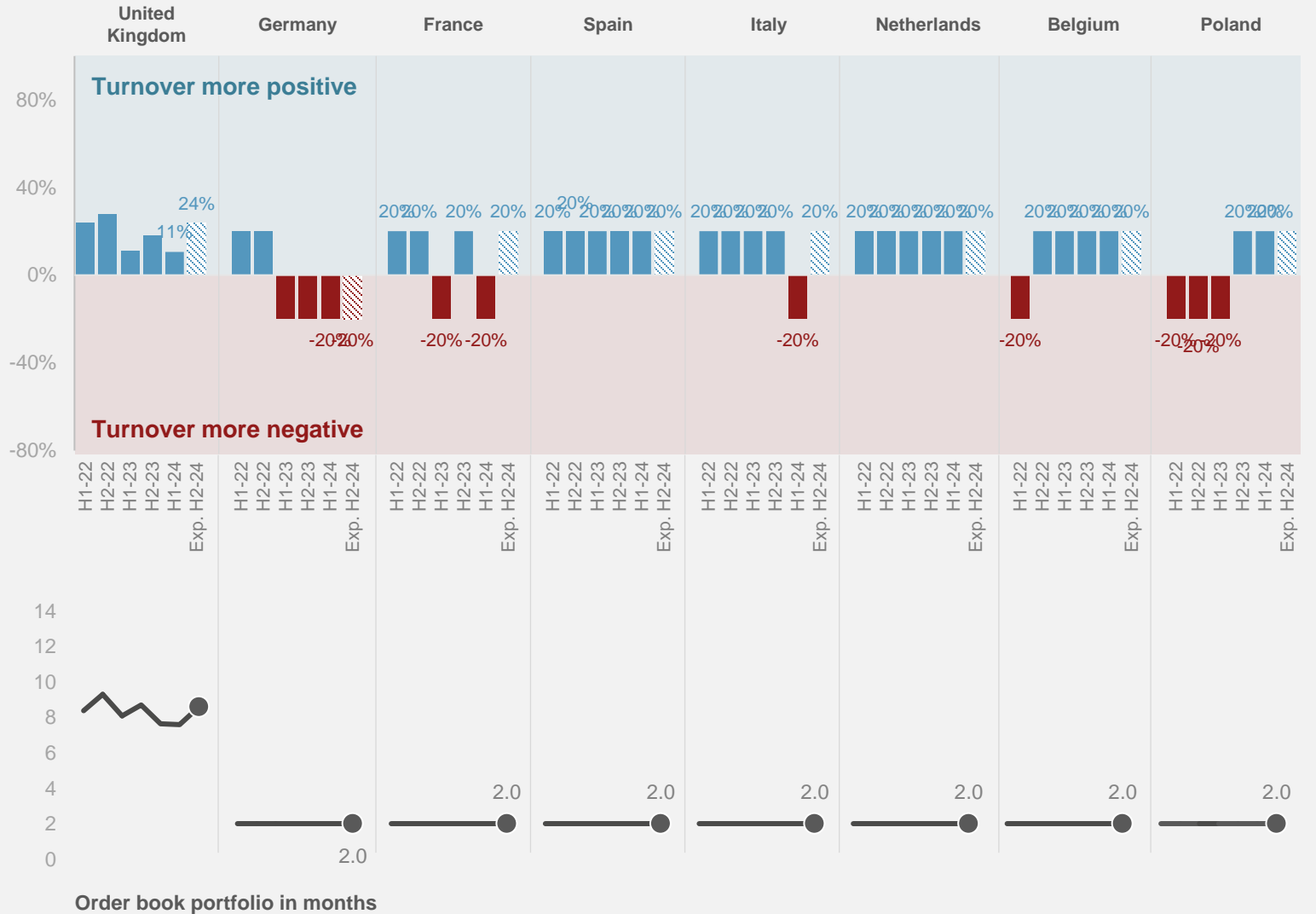
Theme part: Prefab





...Conclusion

Net share of contractors' experience regarding turnover

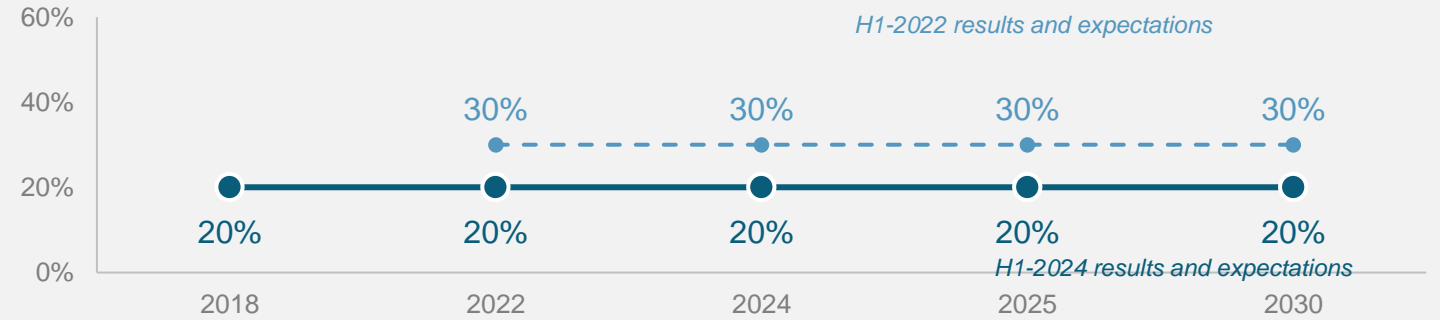




...Conclusion

Trend in share of prefab elements

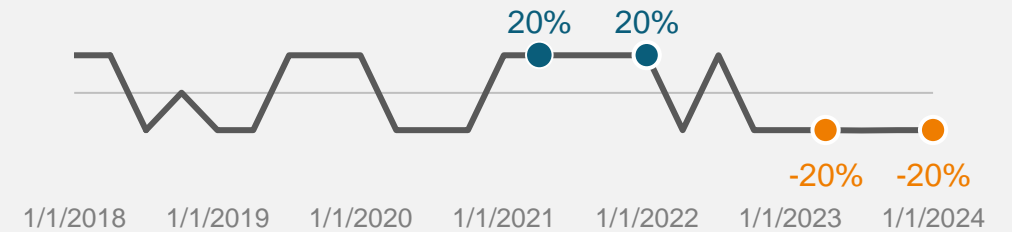
When you look at your projects from the past 2 years, what percentage of your projects contained some form of prefabrication? What is your expectation for 2025 and 2030?



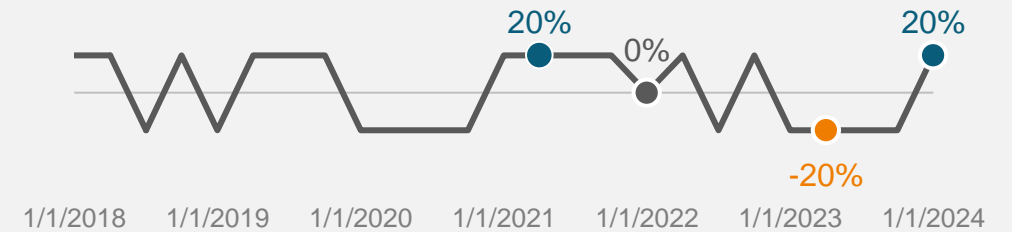
Development permit rate

annual rate of change %, Euro area, 20 countries

Residential buildings



Non-residential buildings

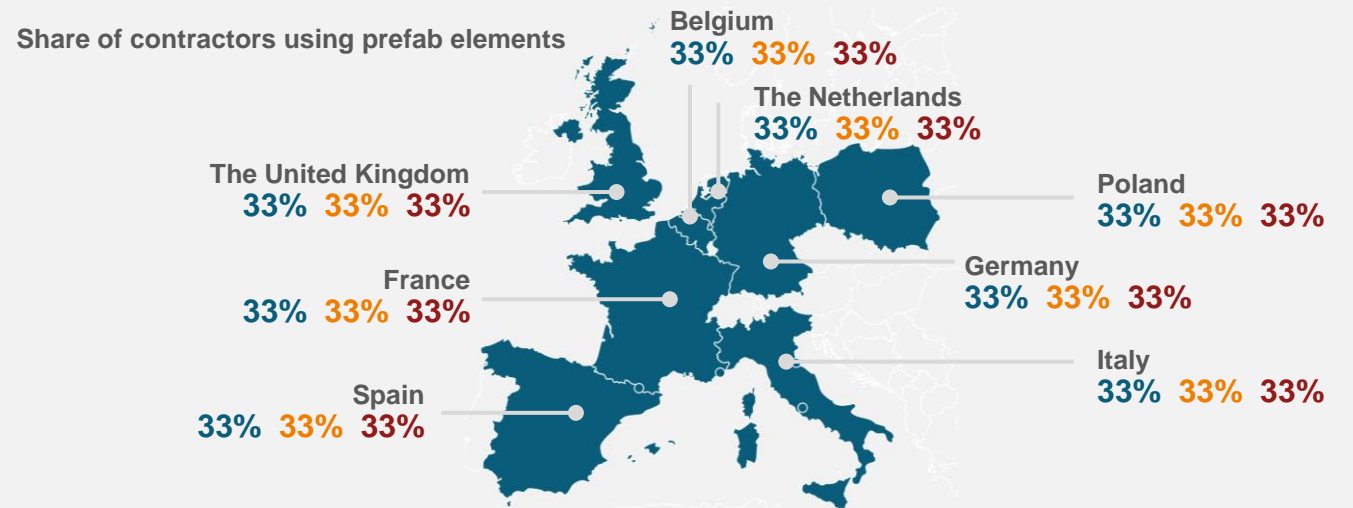
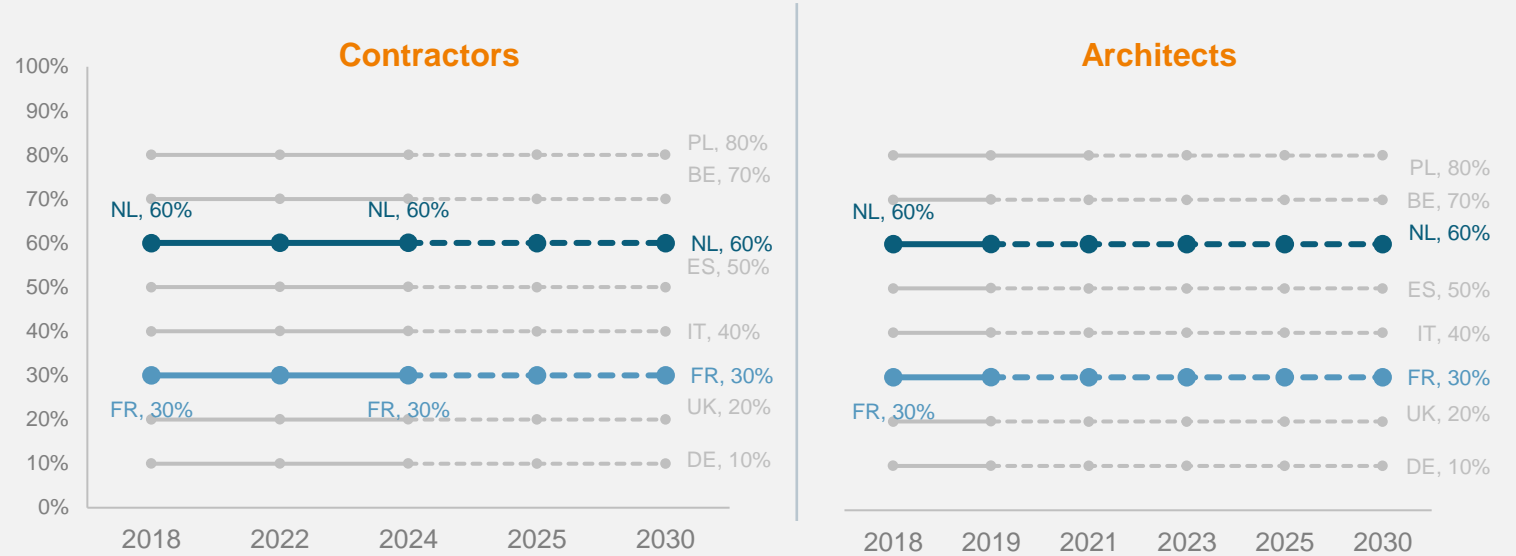




...Conclusion

Trend in share of prefab elements

When you look at your projects from the past 2 years, what percentage of your projects contained some form of prefabrication? What is your expectation for 2025 and 2030?

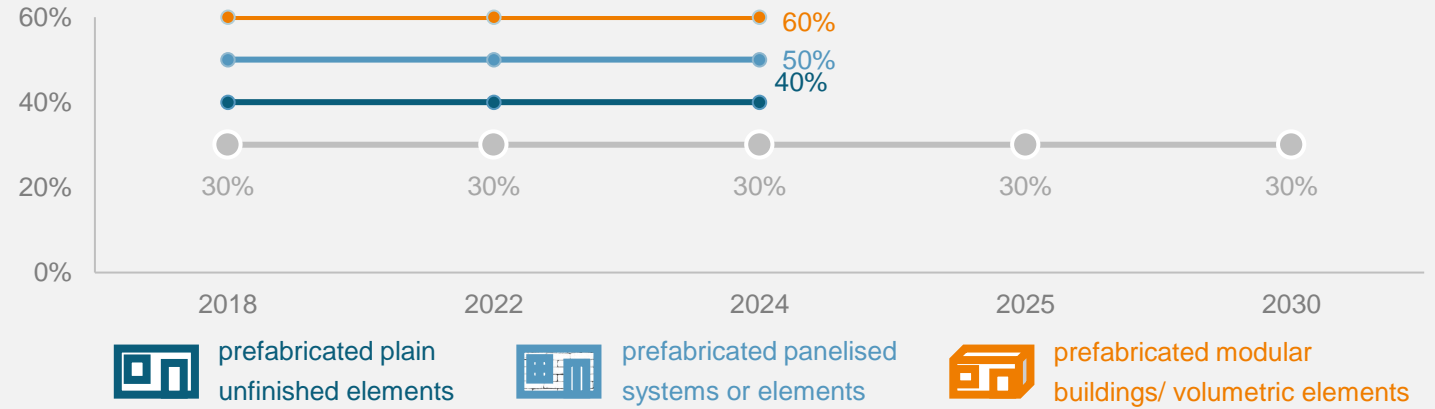




...Conclusion

Trend in types of prefab

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



Growth expectation

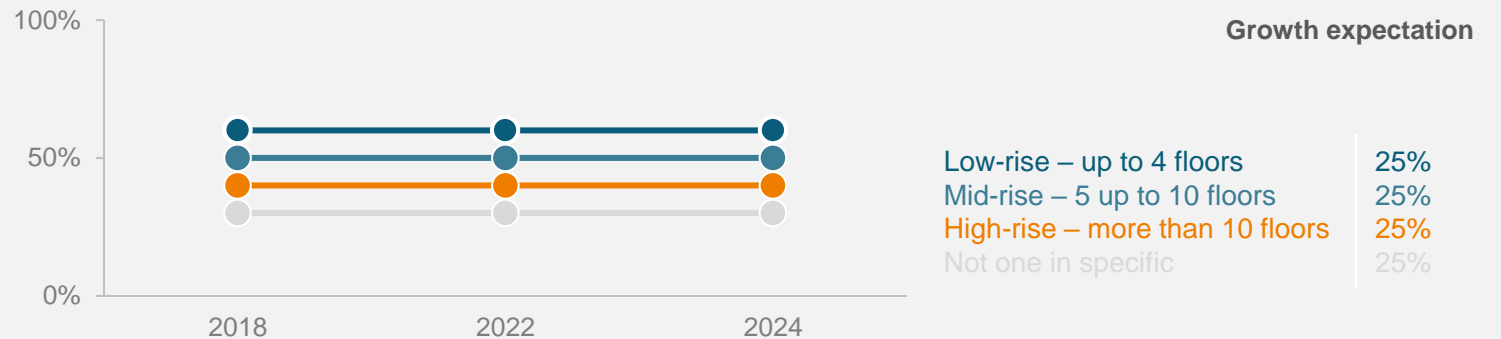
25%

25%

25%

Trend in size of prefab projects

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



Growth expectation

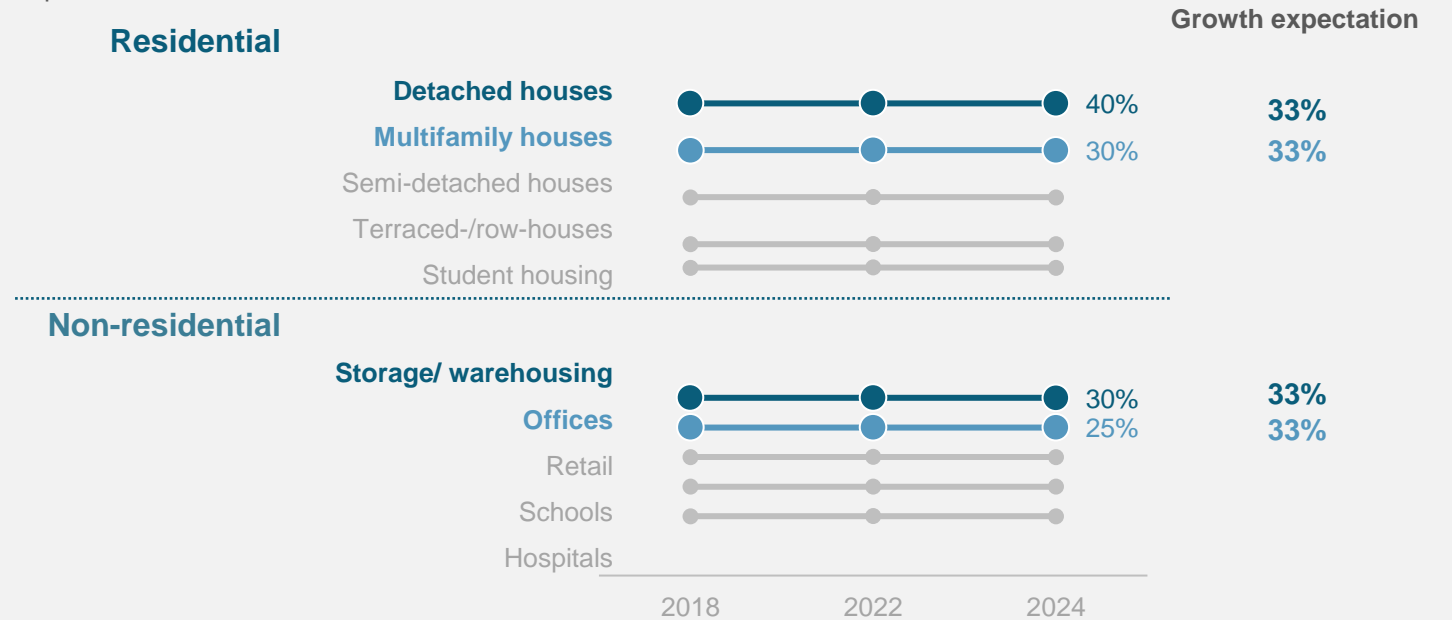
Low-rise – up to 4 floors 25%
 Mid-rise – 5 up to 10 floors 25%
 High-rise – more than 10 floors 25%
 Not one in specific 25%



...Conclusion

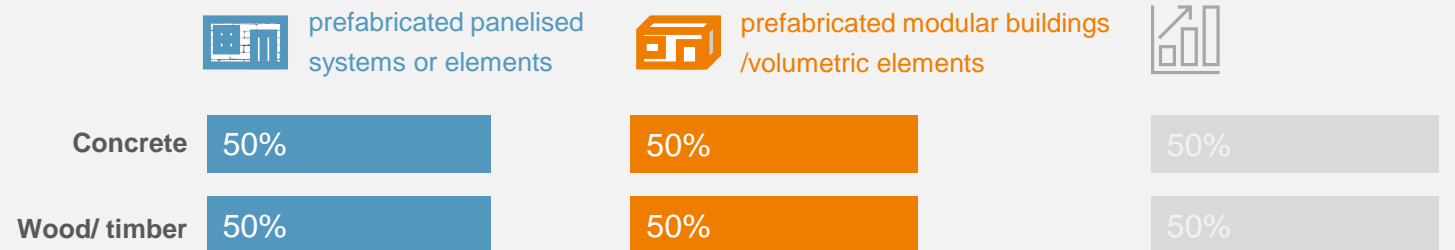
Trend in building types where prefab is applied

What kind of projects/ buildings contained prefab building elements? In which building types do you expect the biggest growth of prefab?



Trend in material usage in prefab projects

What is the most dominant material of prefabricated panelised systems/ elements and modular buildings/ volumetric elements? Which material do you expect to grow the most?

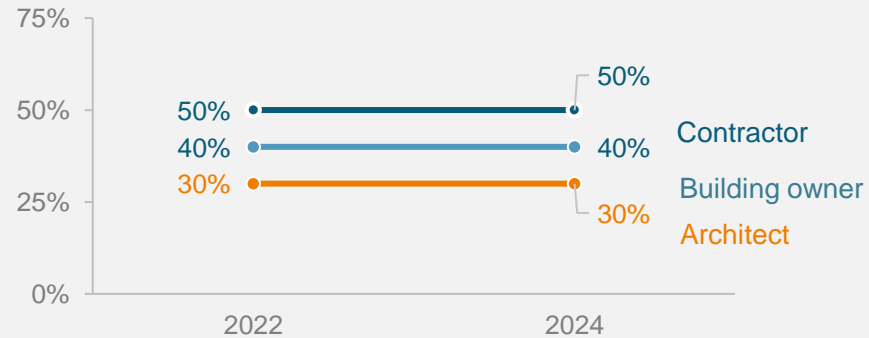




...Conclusion

Decision maker prefab

Who makes the final decision whether or not to use prefab?



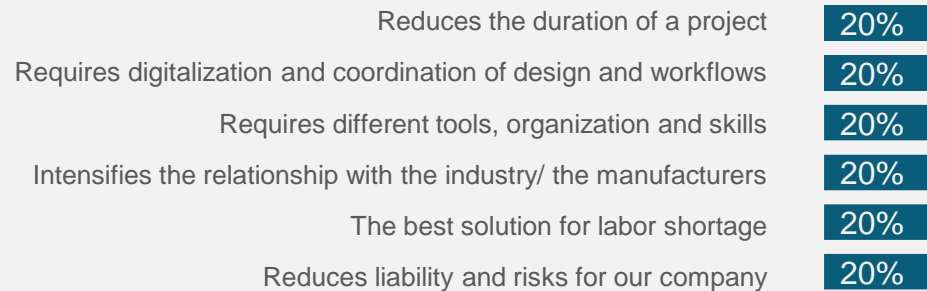
Emergence of new players

To what degree did you see new players entering the construction market offering prefab-only solutions?



Attitude towards prefab

To what degree do you disagree or agree with the following statements about prefab? (% fully agree + % agree are shown)

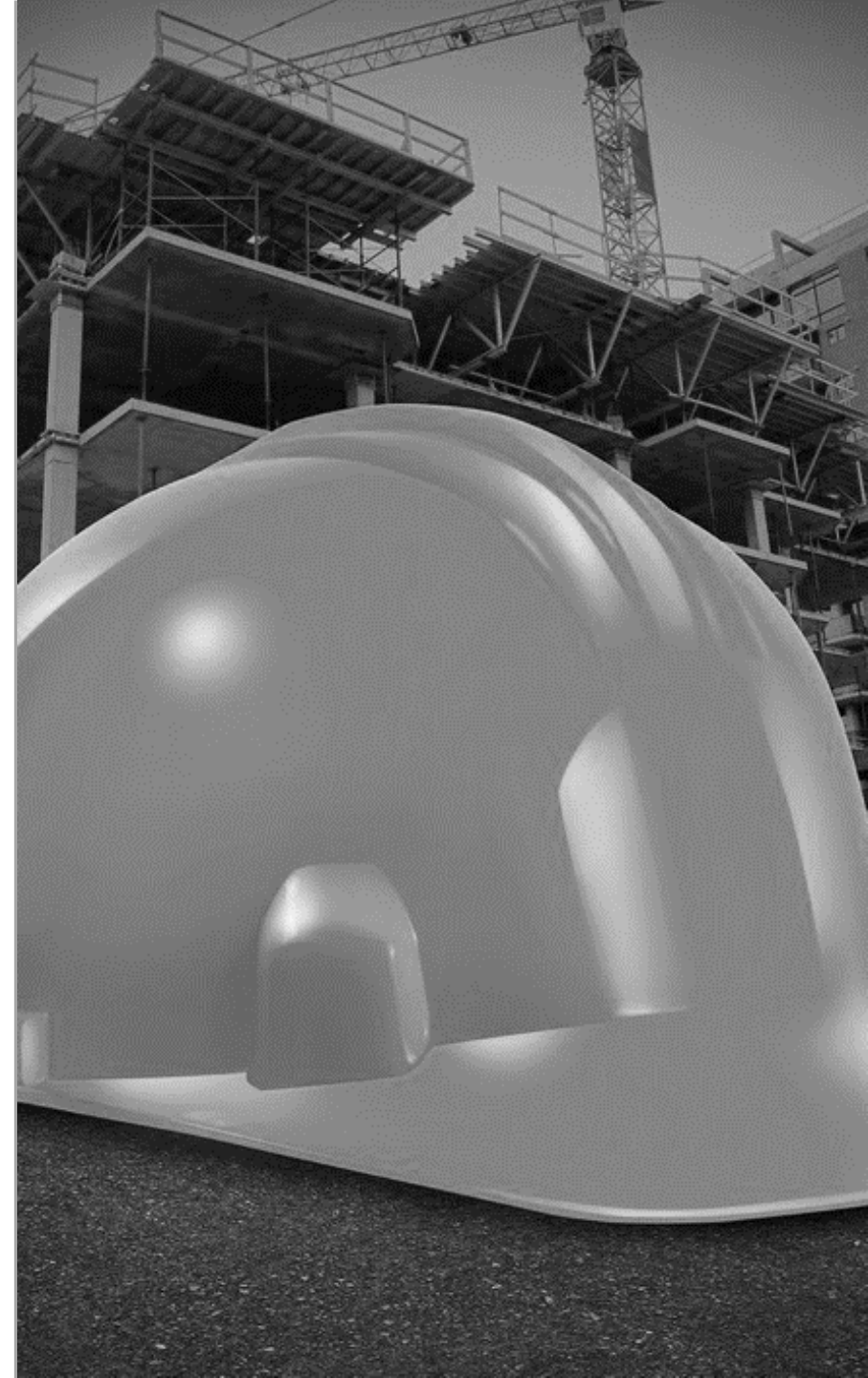


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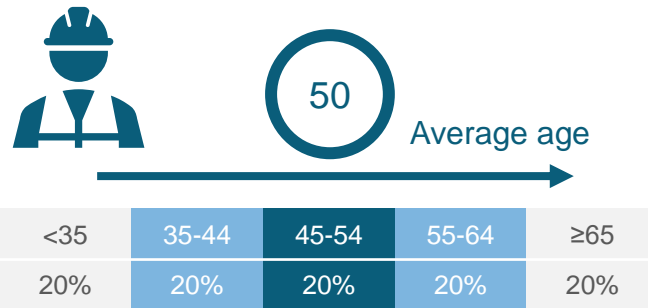
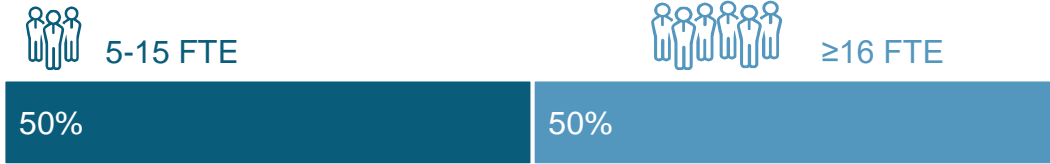
Theme part: Prefab



Background characteristics

Company and respondent profile

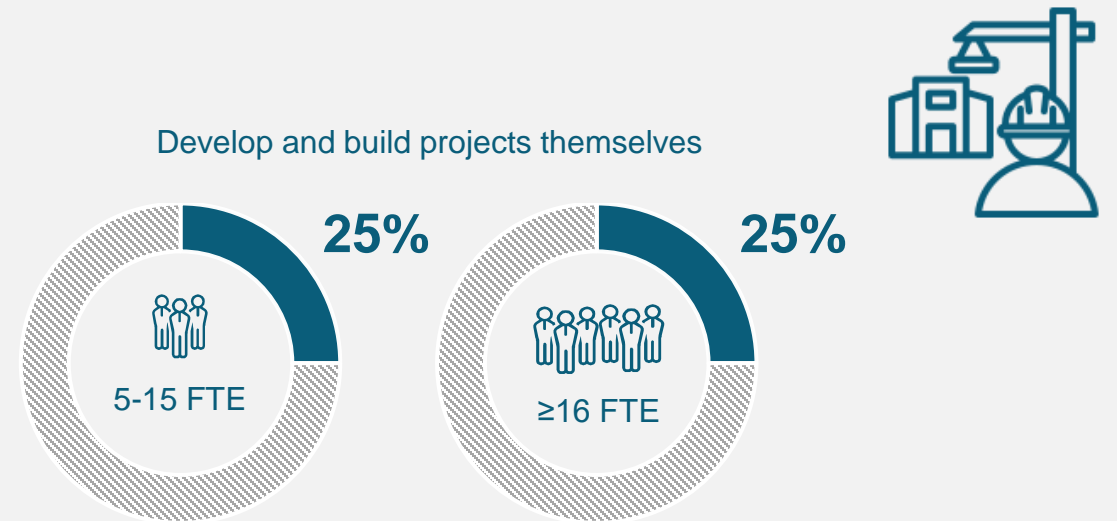
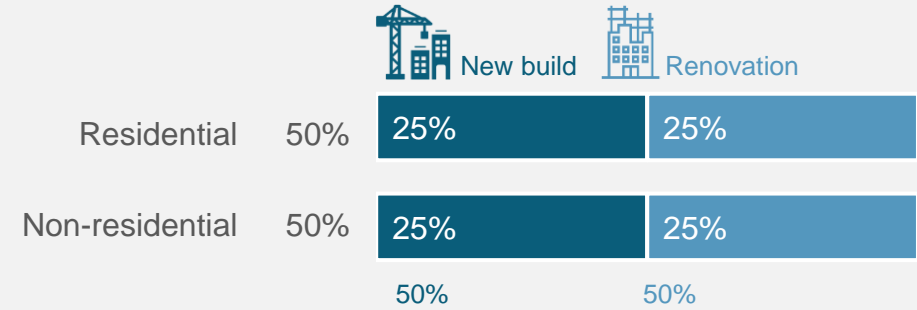
How many full-time employees does your company have?



*Results are weighted: Actual total N=125; 5 – 15 FTE N=76; 16+ FTE N=49

Project segmentation

What percentage of your turnover do you get from new build projects?

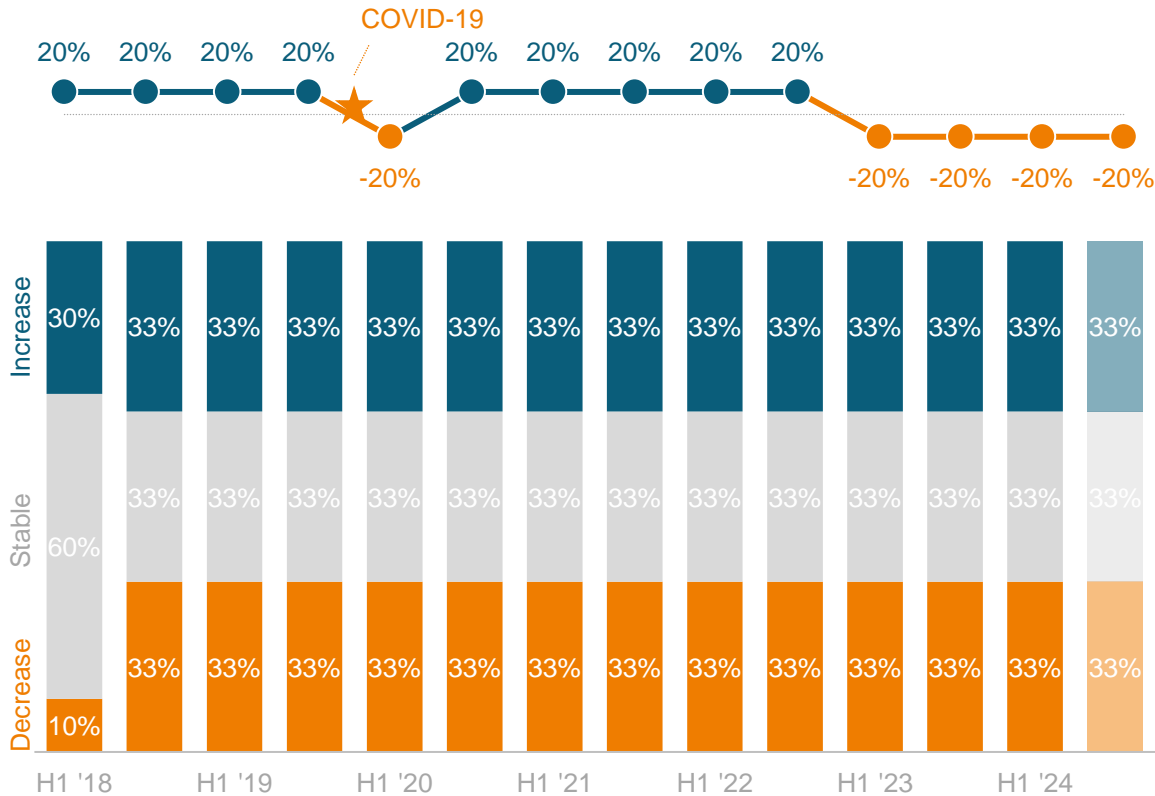


The current order book in Germany

Net share of contractors' experience regarding turnover

If you compare your turnover of H1-24 to H1-23, how did your turnover develop?
What are your expectations for the development in H2-24 compared to H2-23?

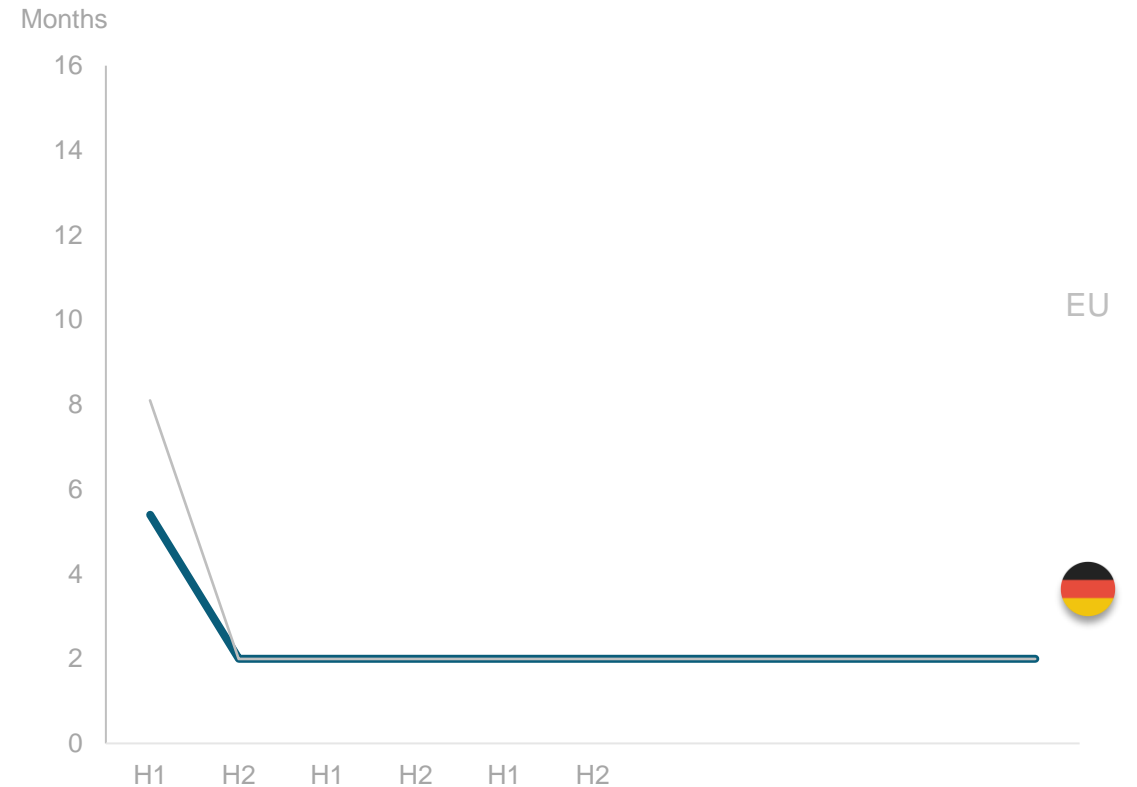
Balance: Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE



*Results are weighted: Actual total N=125; 5 – 15 FTE N=76; 16+ FTE N=49

Order book in months

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



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Main advantages of prefab

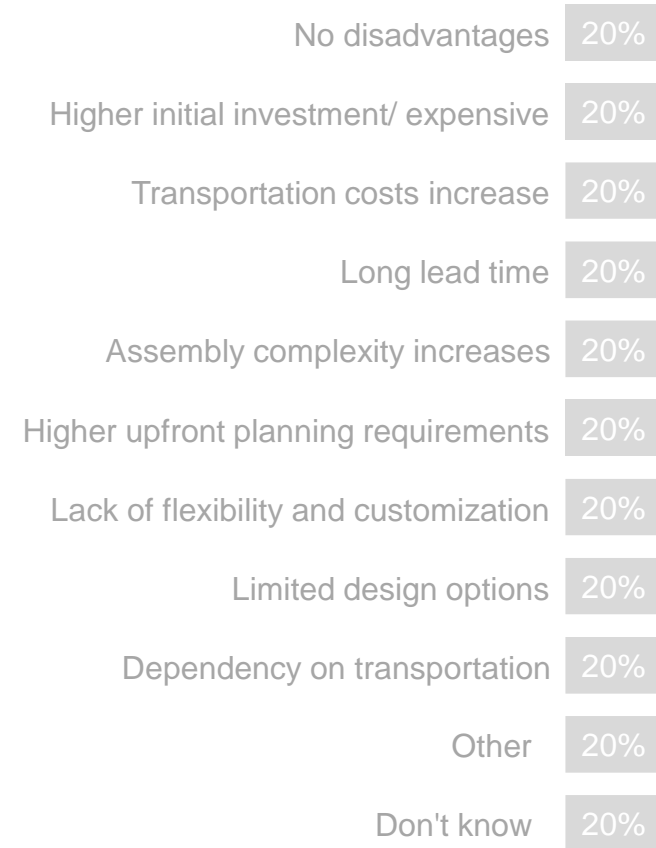
Our main topic is prefab. What are the main advantages of this method of construction?

2022



Main disadvantages of prefab

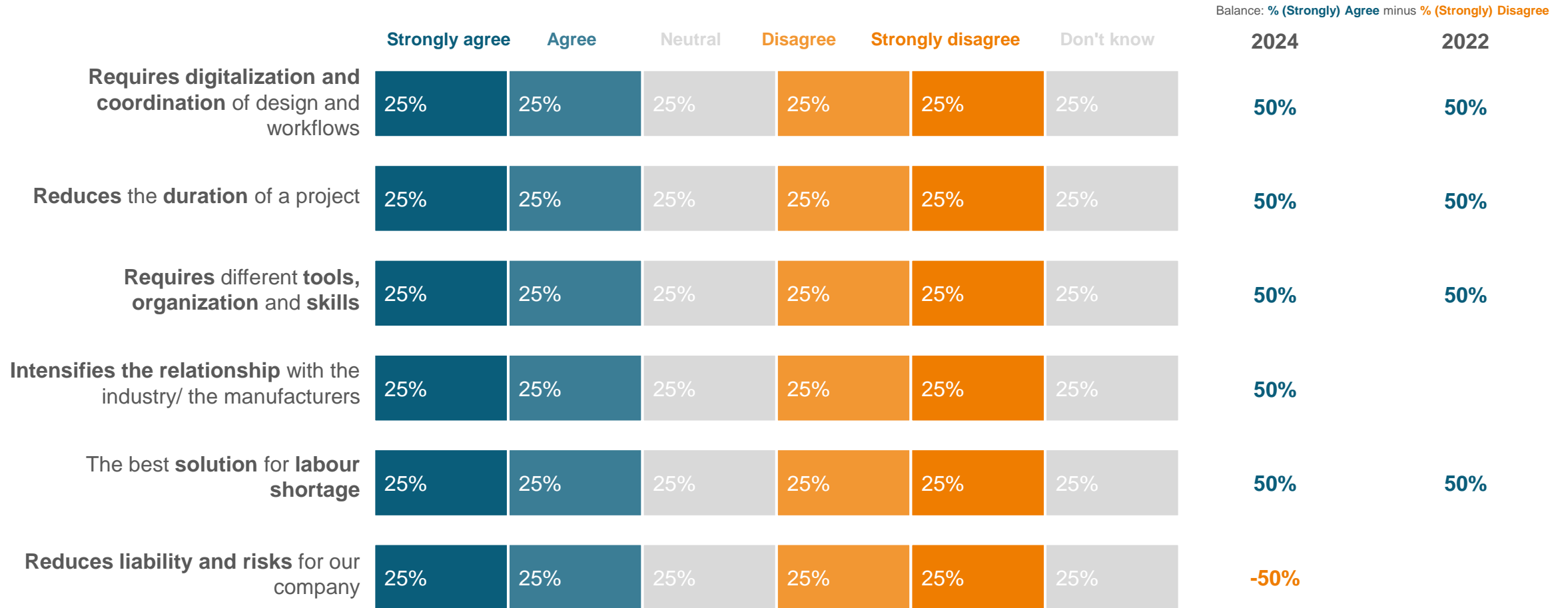
In your opinion, what are the main challenges or pain points of prefab elements?



...Conclusion

Attitudes towards prefab

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



...Conclusion

Decision makers of prefab

Who makes the final decision whether or not to use prefab?

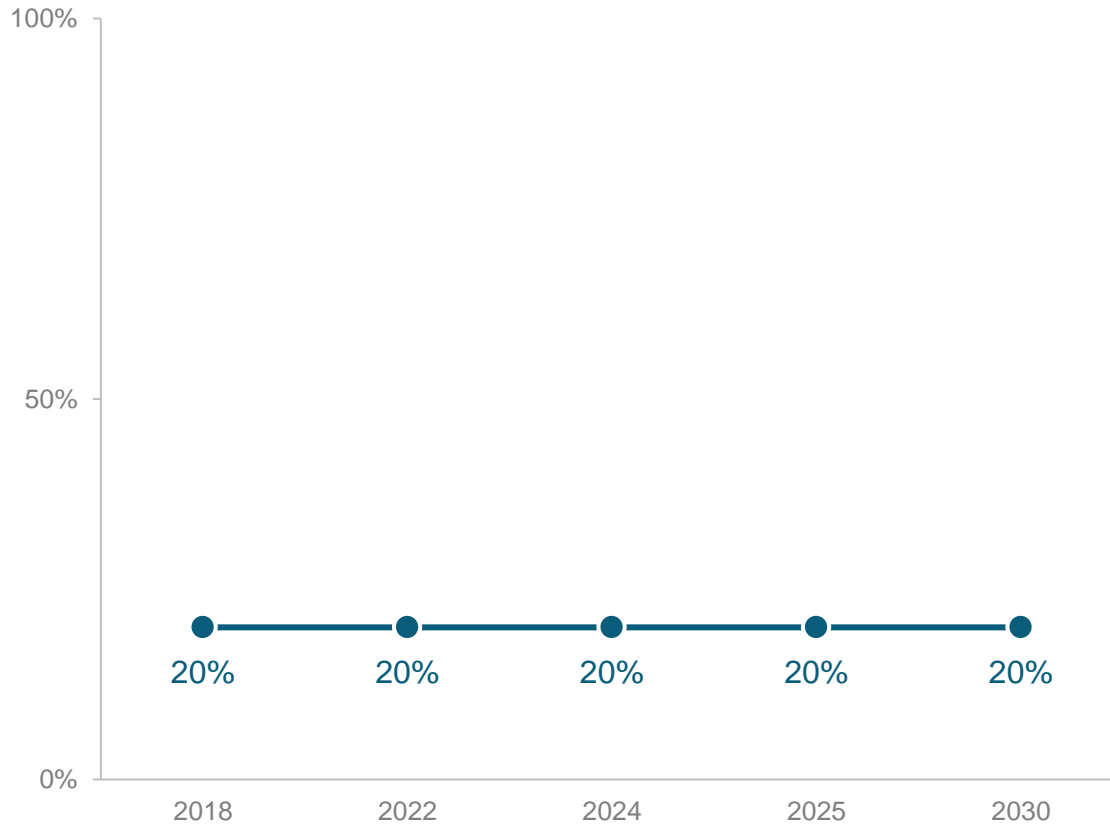
Note: in 2022 it was a multiple response question and in 2024 a single response

	Total	2022
Contractor	20%	50%
Building owner/ End client	20%	50%
Architect	20%	50%
Developer	20%	50%
Project/ construction management	20%	50%
Real estate owner	20%	50%
Investor	20%	50%
Home builder	20%	50%
Main contractor (not own company)	20%	50%
Other	20%	50%
Don't know	20%	50%

...Conclusion

Trend in share of prefab elements

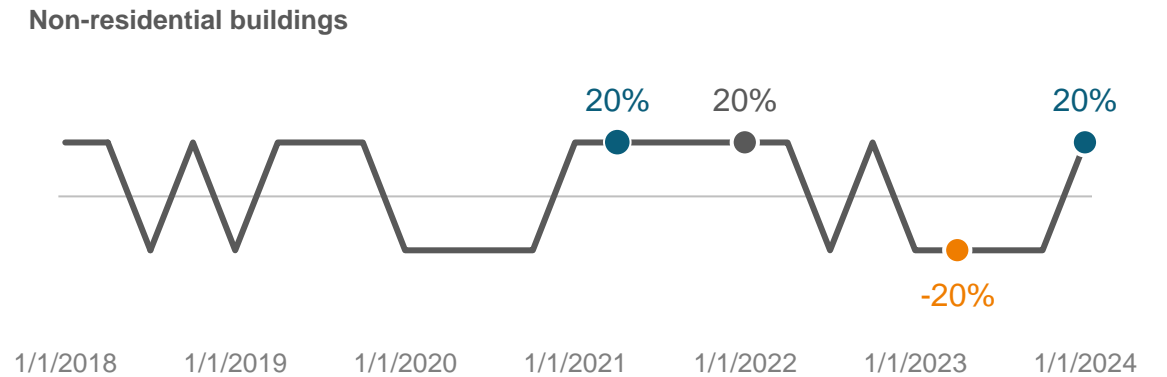
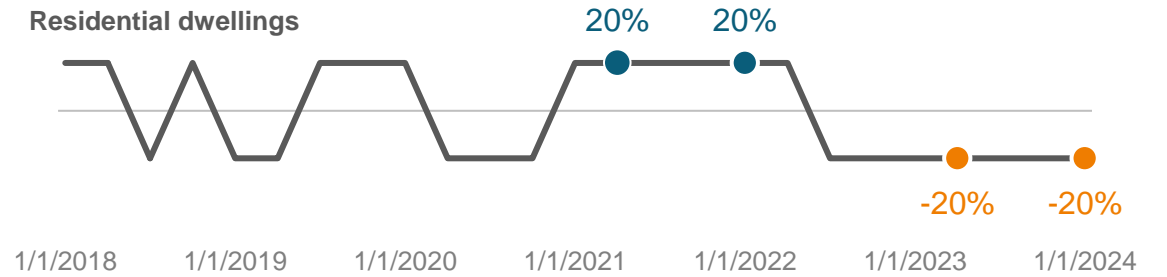
When you look at your projects from the past 2 years, what percentage of your projects contained some form of prefabrication? What is your expectation for 2025 and 2030?



2024 N=940; 2022 N=900; 2018 N=1039

Development building permits

(annual rate of change %, Euro area, 20 countries)

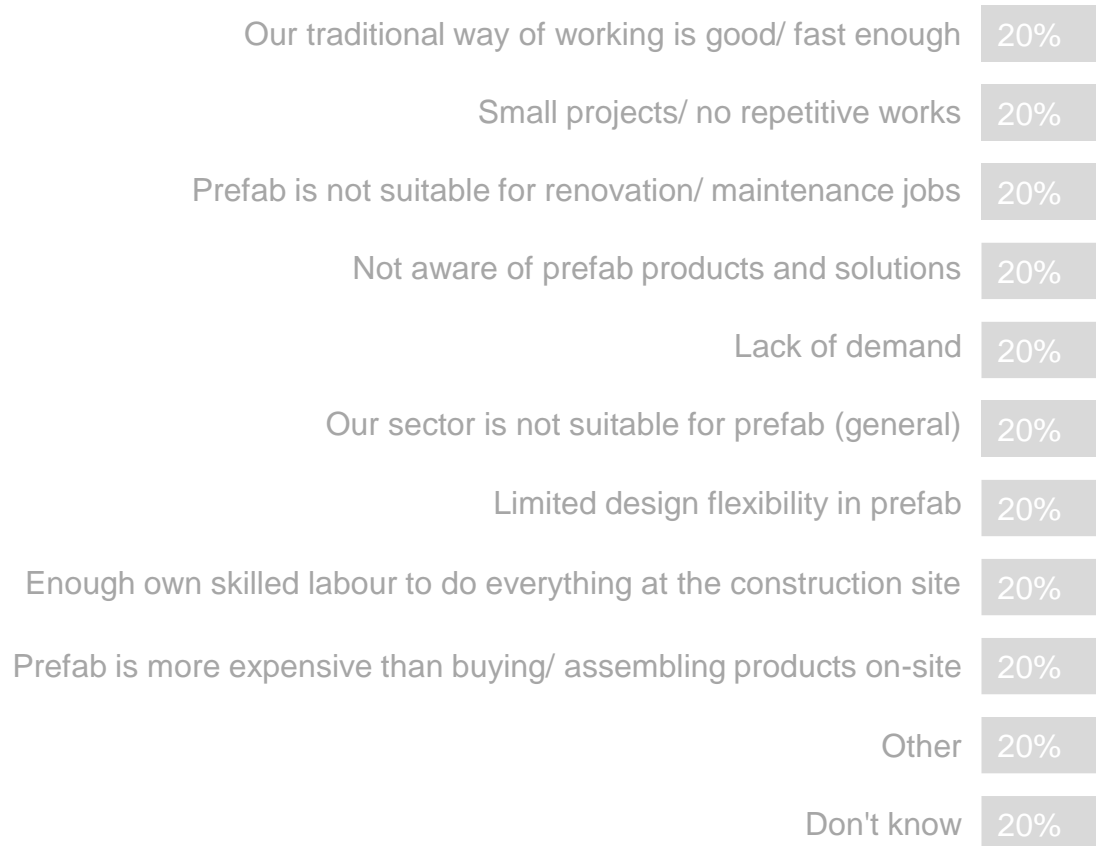


source: Eurostat & BouwKennis

...Conclusion

Reasons for not using prefab

What are the main reasons for you not to work with prefab/ prefab elements?

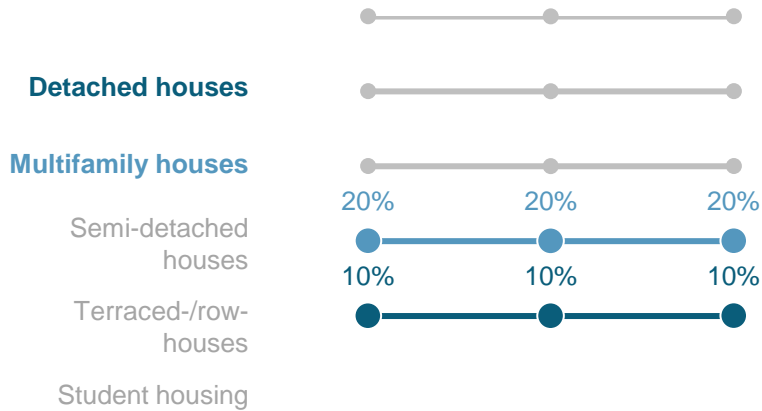


...Conclusion

Prefab in current building types

What kind of projects/ buildings contained prefab building elements?

Residential



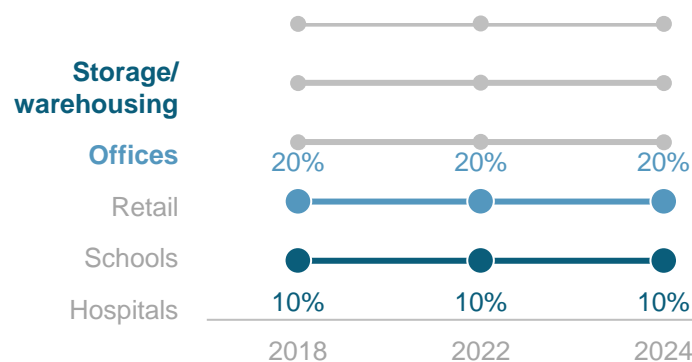
Prefab in future building types

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

25% expect that **prefab in detached houses will show the biggest growth**

25% expect prefab will show biggest growth in the **multifamily houses** segment

Non-residential



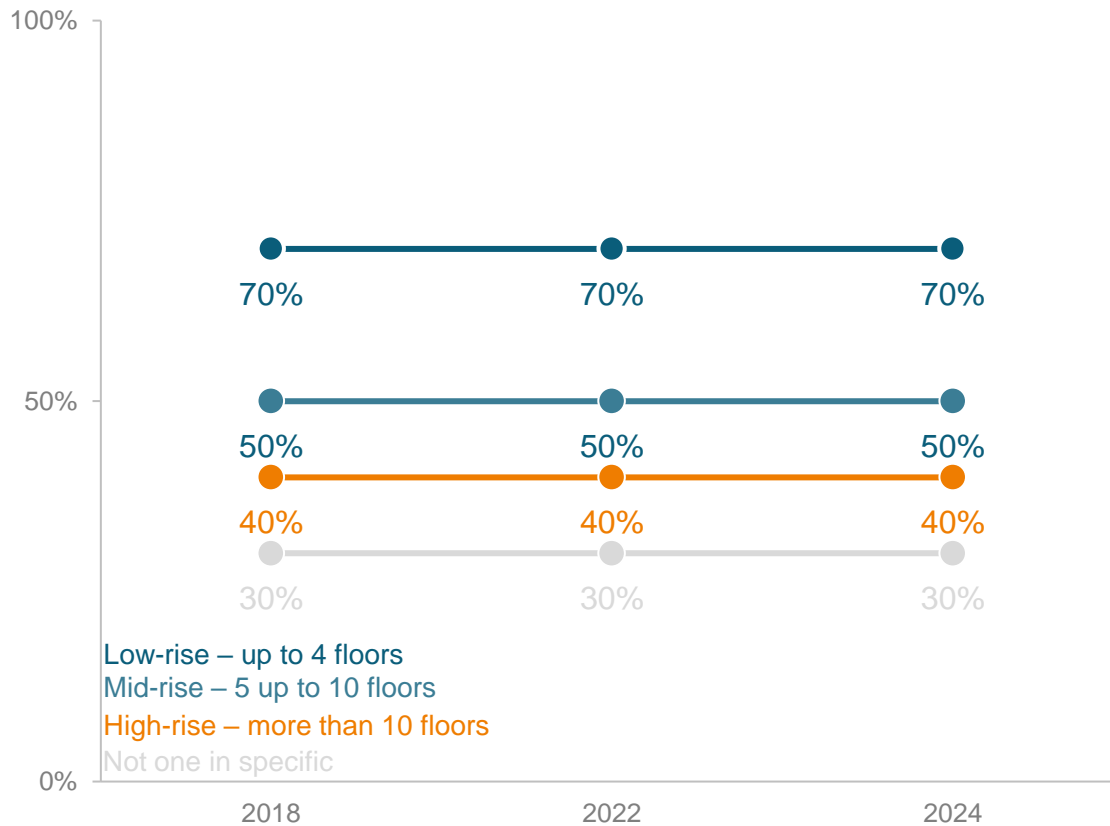
25% expect that **prefab will show biggest growth** in the **storage/warehousing** segment

25% expect prefab will show biggest growth in the **offices** segment

...Conclusion

Dominant size of prefab projects

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



2024 N=940; 2022 N=900; 2018 N=404

Dominant size of future prefab projects

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

50% of the contractors expect that **the low-rise segment will grow the most** the coming years

20% expect that there is **not one specific segment** that will grow the most

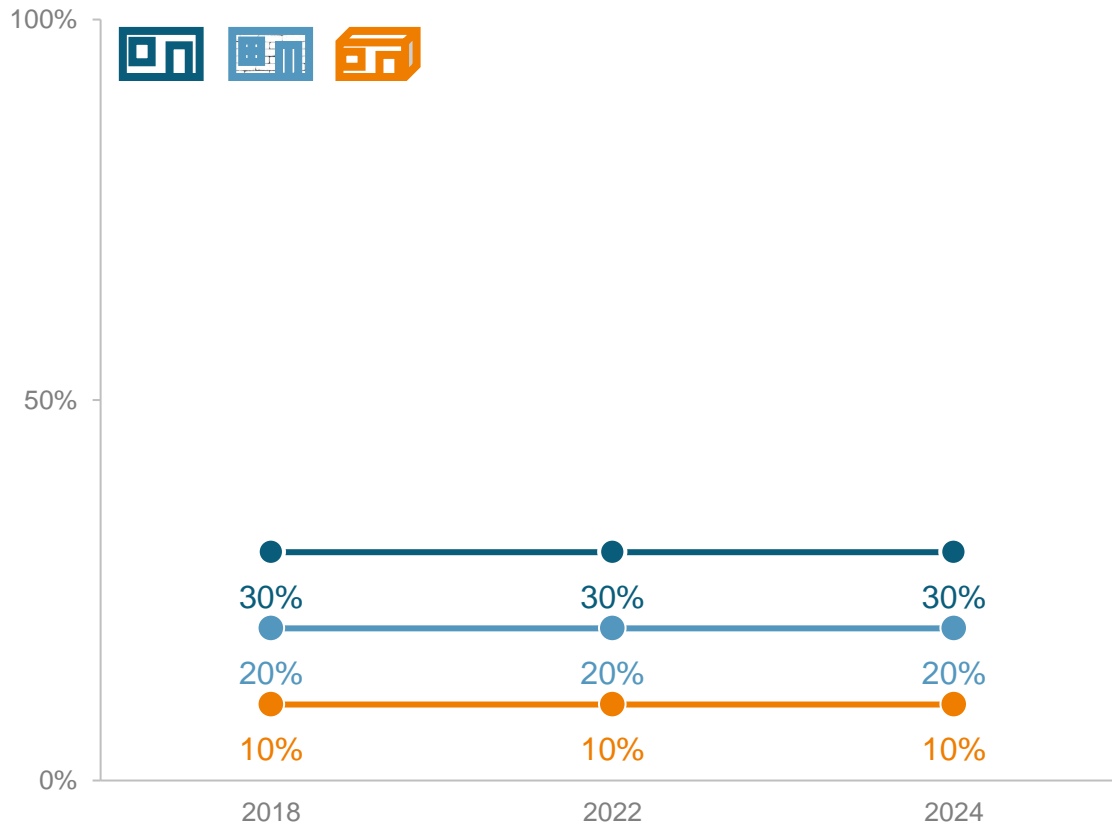
10% expect that **the segment for high-rise projects** will grow the most

...Conclusion

It hardly had impact on the prefabricated modular buildings or volumetric elements. This type of prefab is expected to grow the most in the coming years.

Division of type of prefab 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?



Future expectations for prefab types

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

While contractors expected in previous years (2018 and 2022) prefabricated panelised systems would grow the most (48%), it has now shifted to the prefabricated modular buildings.

30% expect that **prefabricated modular buildings will grow the most** the coming years

25% expect that that **prefabricated plain unfinished elements**

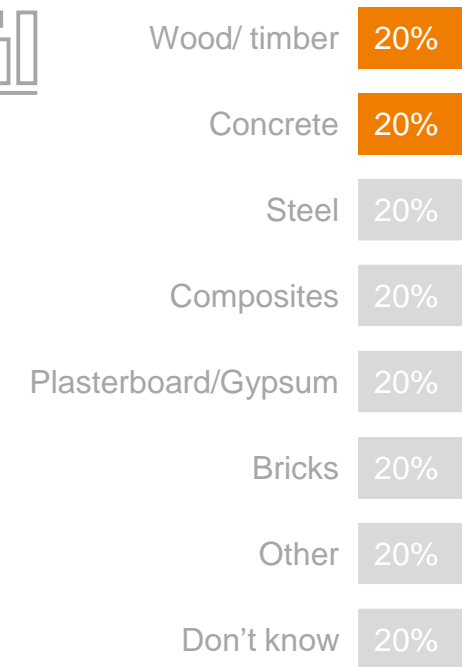
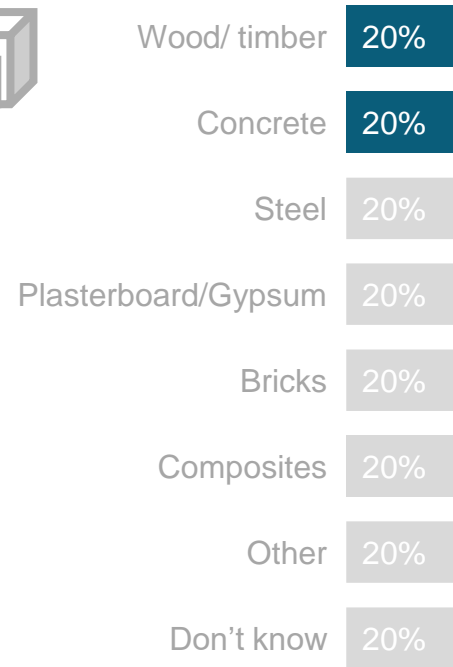
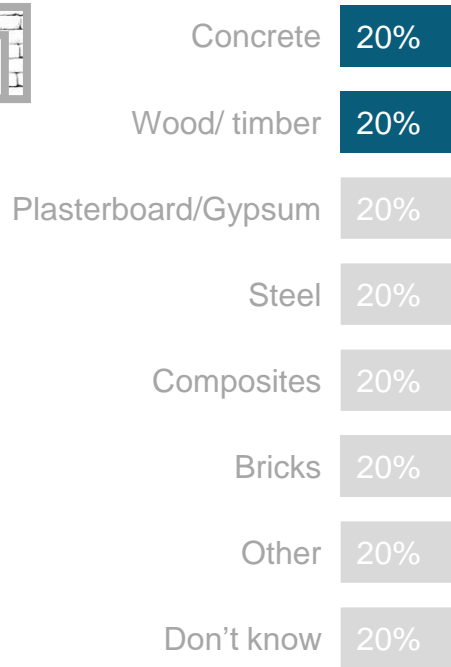
25% expect that to be for **prefabricated panelised systems**

...Conclusion

We also see that wood/ timber is expected to grow the most in the future. When analysing further, we see this mainly has to do with the type of projects: wood/ timber is used more often in low-rise/ residential and concrete in high-rise/ non-residential projects. Since low-rise and residential projects are expected to grow the most, this also has a positive effect on the materials used there.

Most dominant material of prefab panelised systems and modular buildings

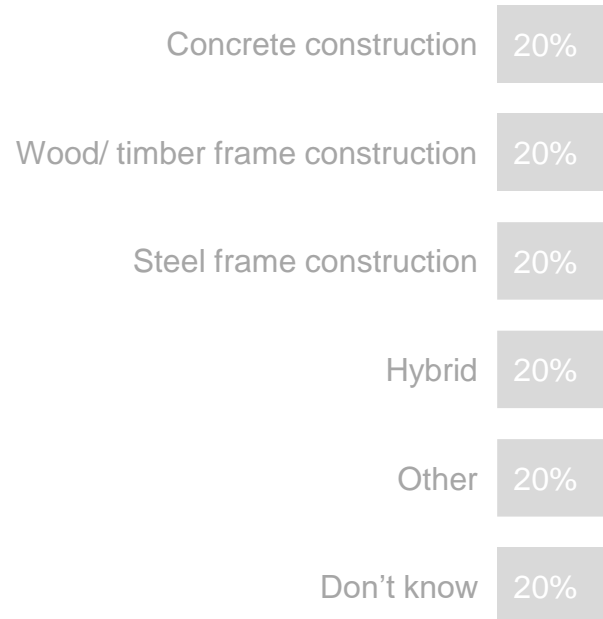
What is the most dominant material of **prefabricated panelised systems/ elements** and **modular buildings/ volumetric elements**? Which **material** do you expect to **grow the most**?



...Conclusion

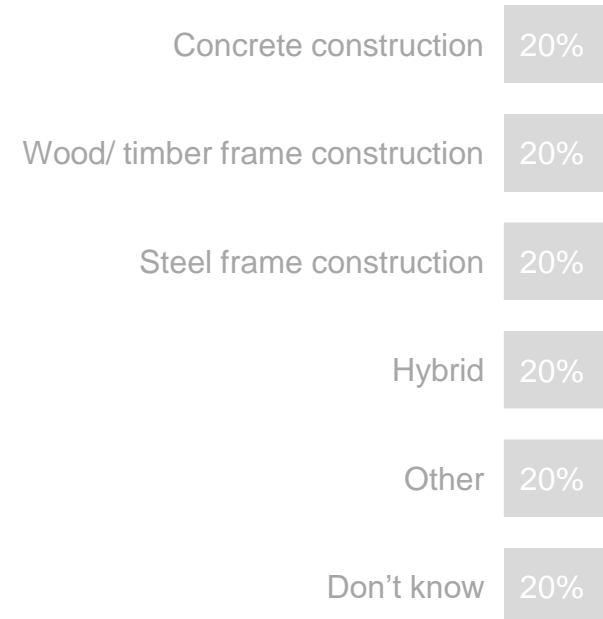
Most dominant structural construction method

What was the most dominant structural construction method contained prefab building elements?



Growth expectations structural construction method

For which structural construction method do you expect the usage of prefab solutions to grow most?

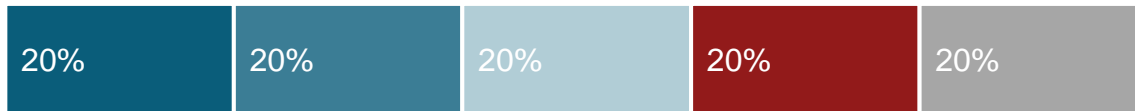


...Conclusion

Emergence of new players in the prefab market

To what degree did you see new players entering the construction market offering prefab-only solutions?

To a great extent To some extent To a small extent **None** Don't know

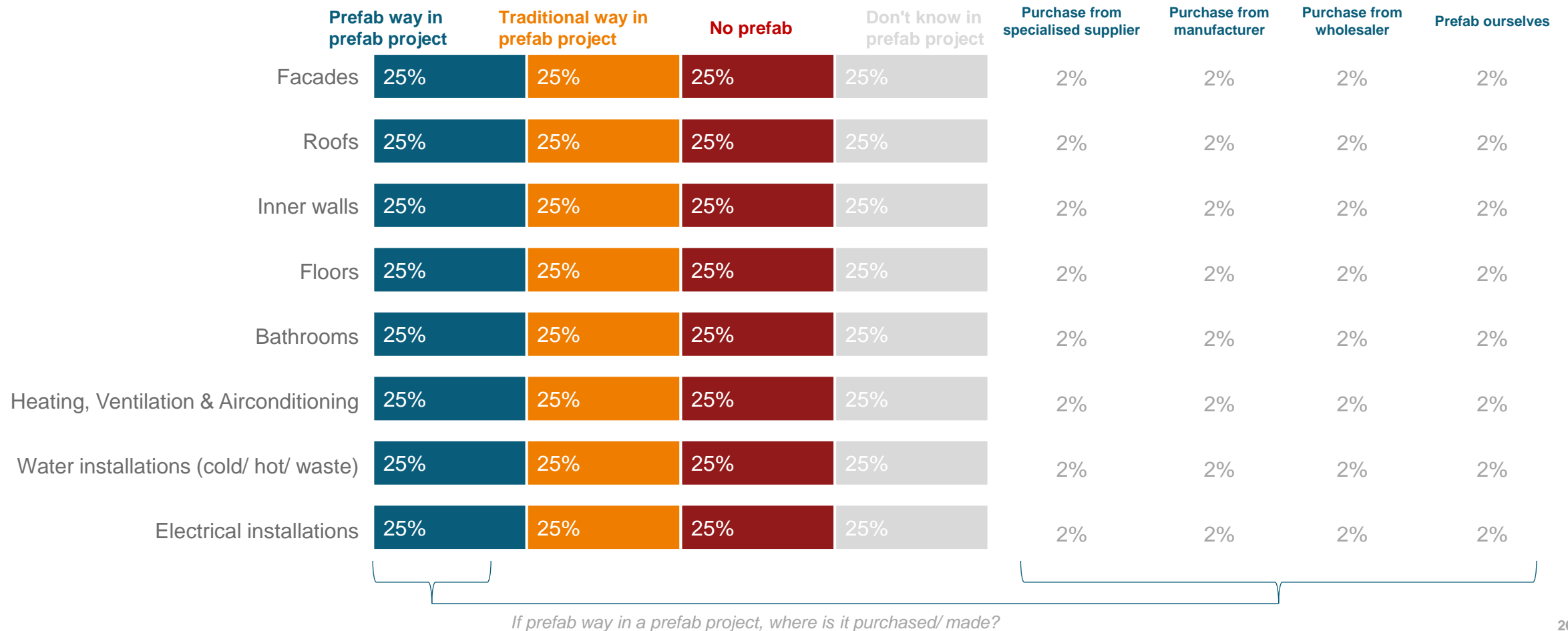


...Conclusion

Building components in (prefab) projects

How is your company dealing with the following building components in the majority of the (prefab) projects?

Results are shown for total projects, including the projects that had no prefabricated elements in them (76%).



...Conclusion

How manufacturers can improve prefab support

In what way can manufacturers assist you or improve with regards to prefab?

“Quote.”

“Quote.”

“Quote.”

“Quote.”

“Quote.”

“Quote.”

“Quote.”

“Quote.”

“Quote.”

“Quote.”

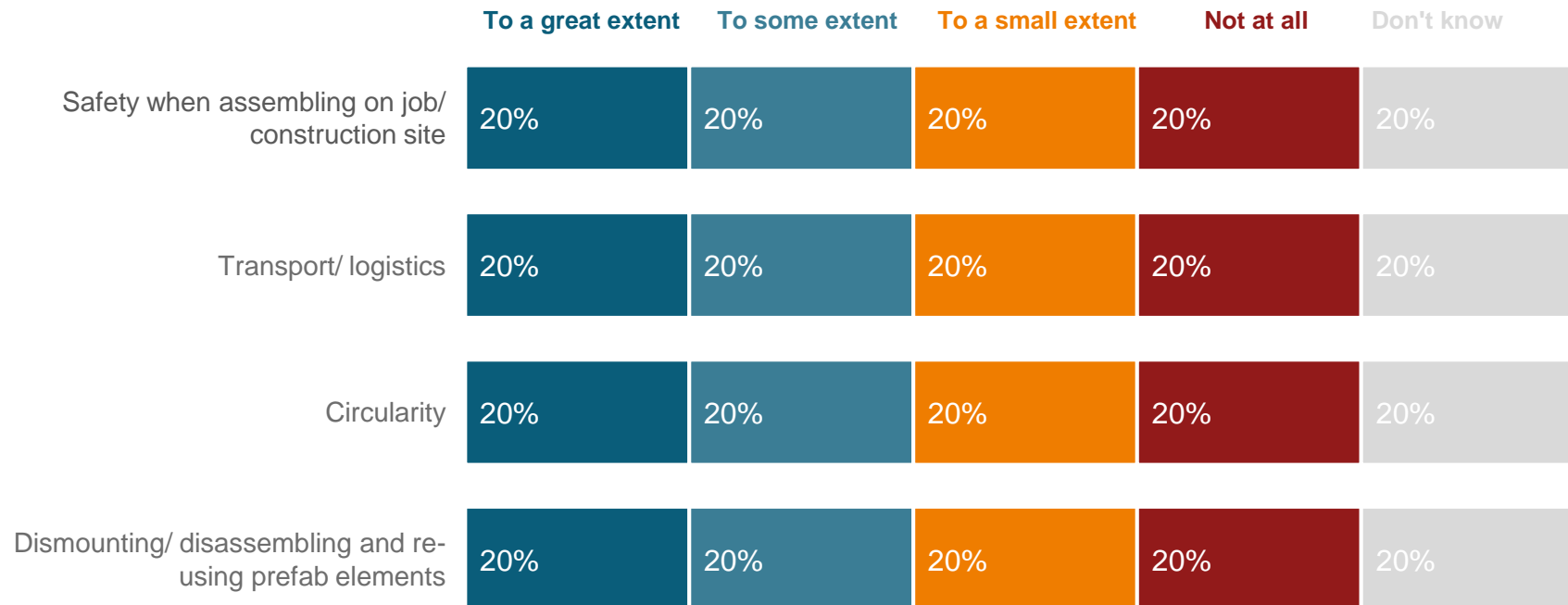
“Quote.”

“Quote.”

...Conclusion

Safety, transport, circularity and re-usage in prefab projects

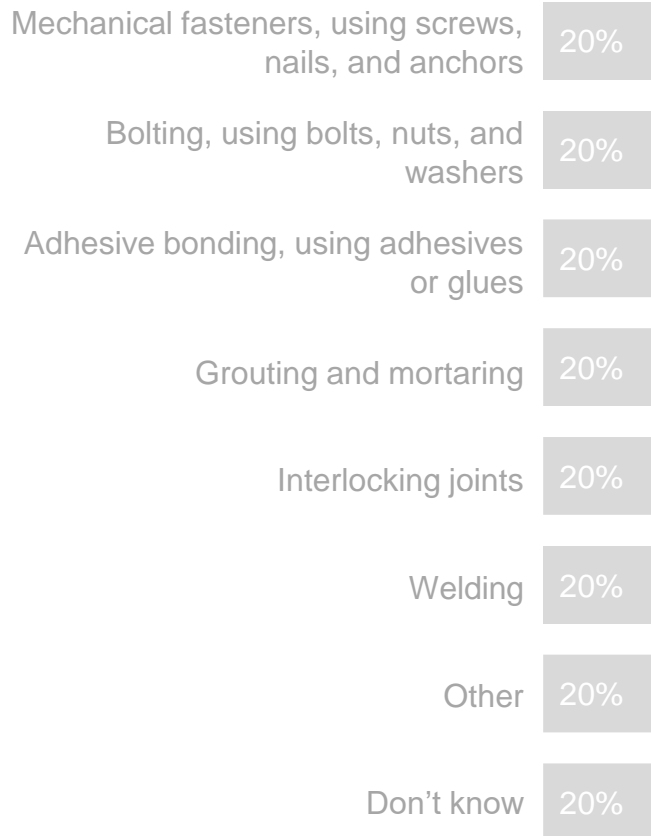
To what extent are the following aspects taken into account when working with prefab solutions?



...Conclusion

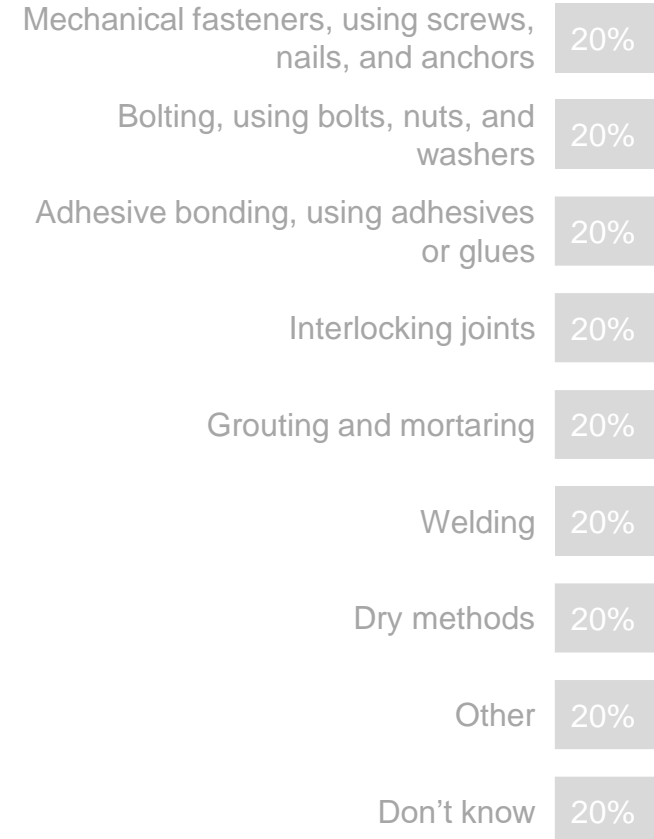
Prefab in current construction parts

What are the most dominant fixing methods within the projects that contained prefab building elements?



Prefab in future construction parts

For which fixing method do you expect the usage within prefab solutions will grow the most?



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Theme part: Prefab

European overview











Cross-country comparison



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Main advantages of prefab











Our main topic is prefab. What are the main advantages of this method of construction?

	Total	 5 to 14	 Over 15	 GE	 UK	 FR	 IT	 ES	 NL	 BE	 PL
Time saving	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
No advantages	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Saves money/ cheaper	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Increased cost-efficiency	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Lower education level/ labour shortage	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Easier construction/ fewer errors	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Reduced environmental impact	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Higher and constant quality	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Improved quality control	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Main disadvantages of prefab

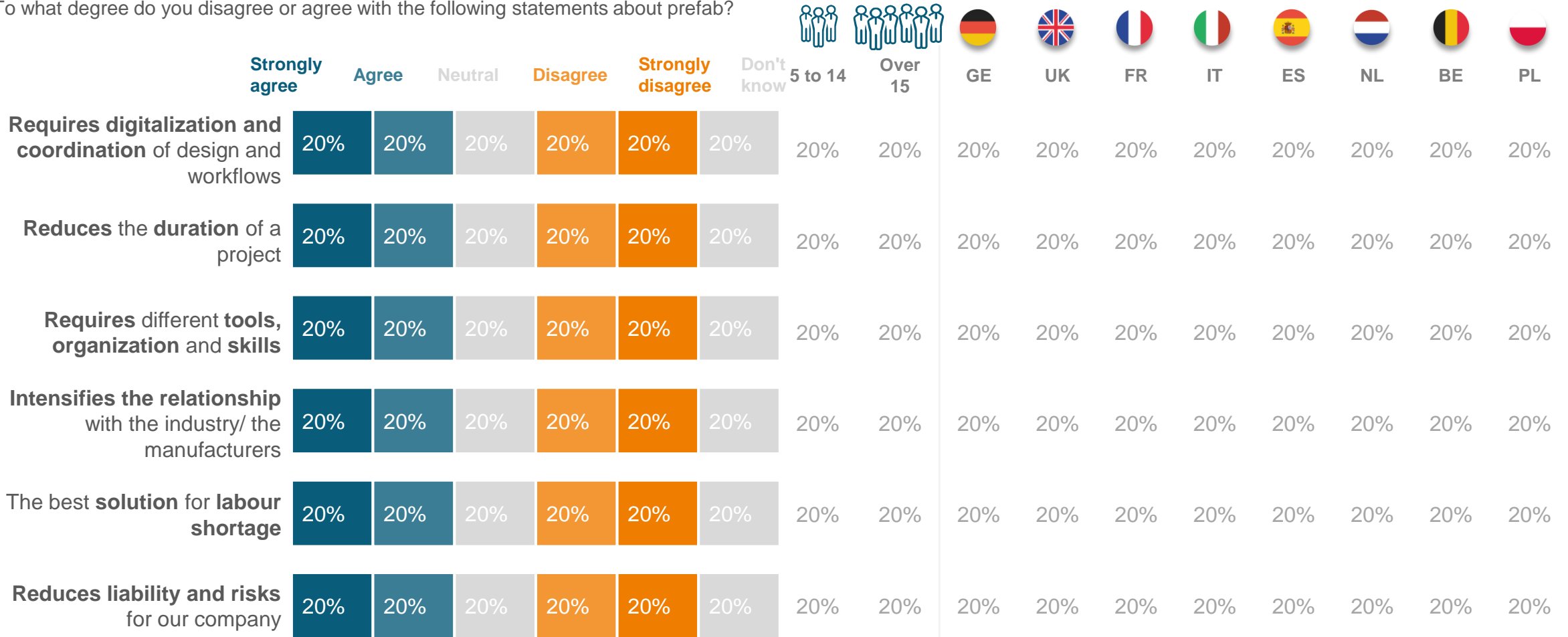
In your opinion, what are the main challenges or pain points of prefab elements?

	Total	 5 to 14	 Over 15	 GE	 UK	 FR	 IT	 ES	 NL	 BE	 PL
No disadvantages	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Higher initial investment/ expensive	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Transportation costs increase	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Long lead time	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Higher upfront planning requirements	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Assembly complexity increases	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Lack of flexibility and customization	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Dependency on transportation	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Limited design options	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Attitudes towards prefab

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








Balance: % (Strongly) Agree minus % (Strongly) Disagree

...Conclusion

Decision makers of prefab

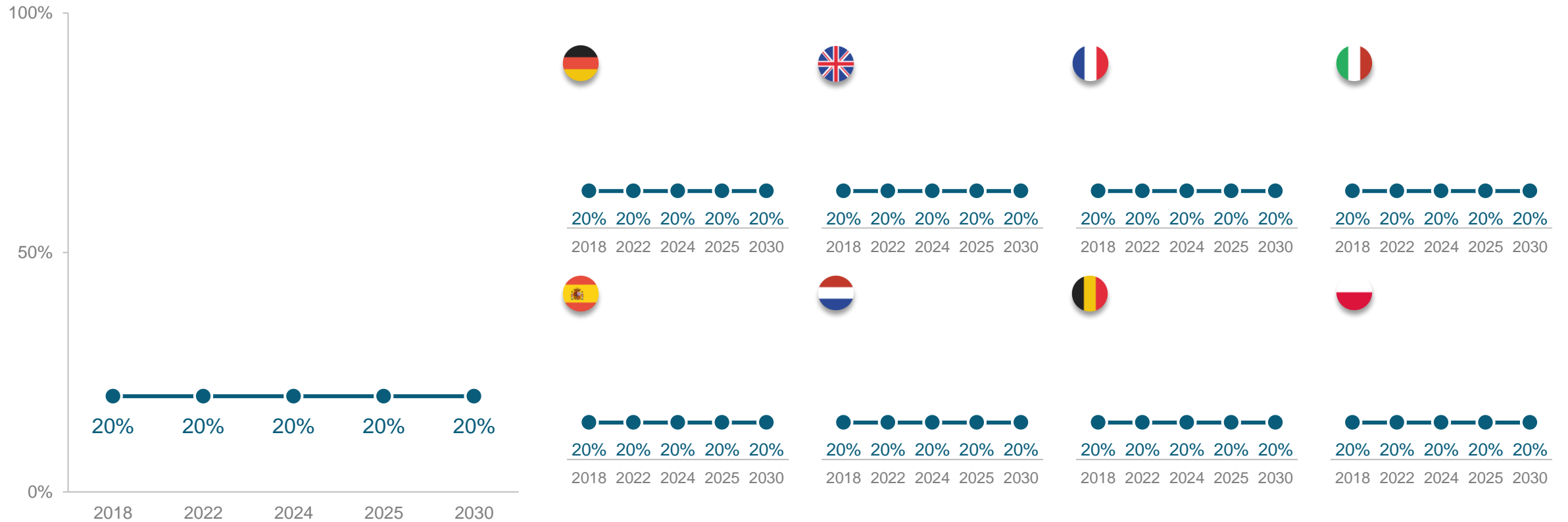
Who makes the final decision whether or not to use prefab?

	Total	 5 to 14	 Over 15	 GE	 UK	 FR	 IT	 ES	 NL	 BE	 PL
Contractor	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Building owner/ End client	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Architect	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Developer	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Project/ construction management	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Real estate owner	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Investor	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Home builder	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Main contractor (not own company)	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Trend in share of prefab elements

When you look at your projects from the past 2 years, what percentage of your projects contained some form of prefabrication? What is your expectation for 2025 and 2030?



...Conclusion

Reasons for not using prefab

What are the main reasons for you not to work with prefab/ prefab elements?

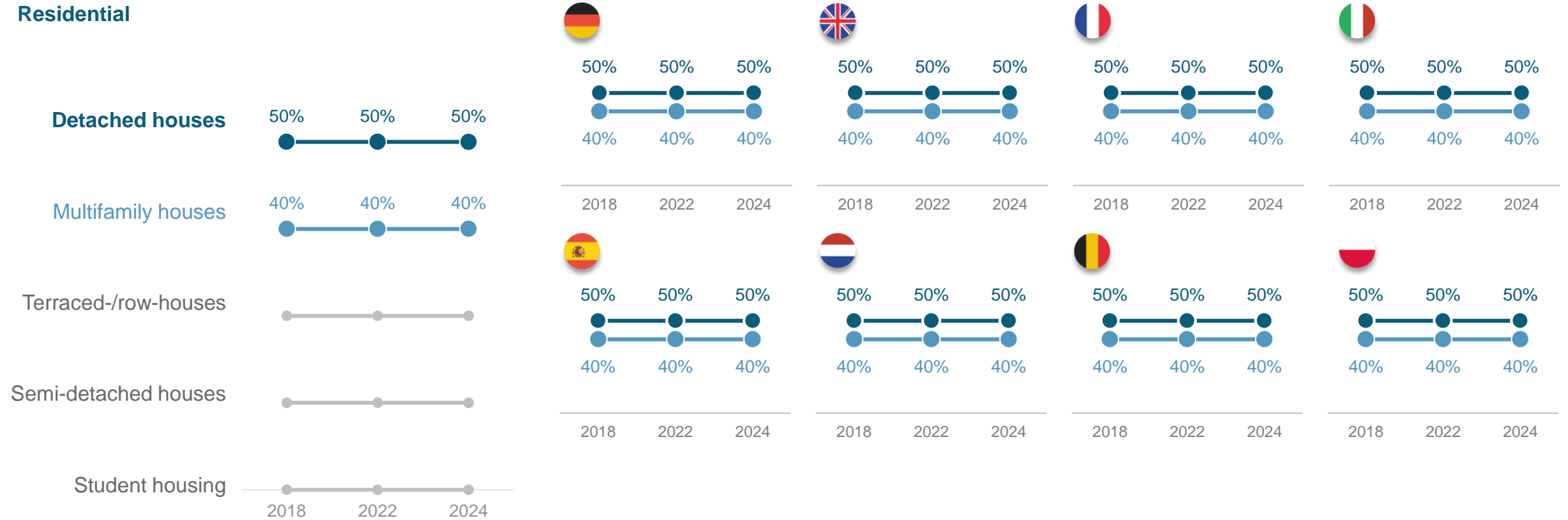
	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Our traditional way of working is good/ fast enough	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Small projects/ no repetitive works	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Prefab is not suitable for renovation/ maintenance jobs	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Not aware of prefab products and solutions	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Lack of demand	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Our sector is not suitable for prefab (general)	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Limited design flexibility in prefab	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Enough own skilled labour to do everything at the construction site	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Prefab is more expensive than buying/ assembling products on-site	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Prefab in current building types

What kind of projects/ buildings contained prefab building elements?

Residential

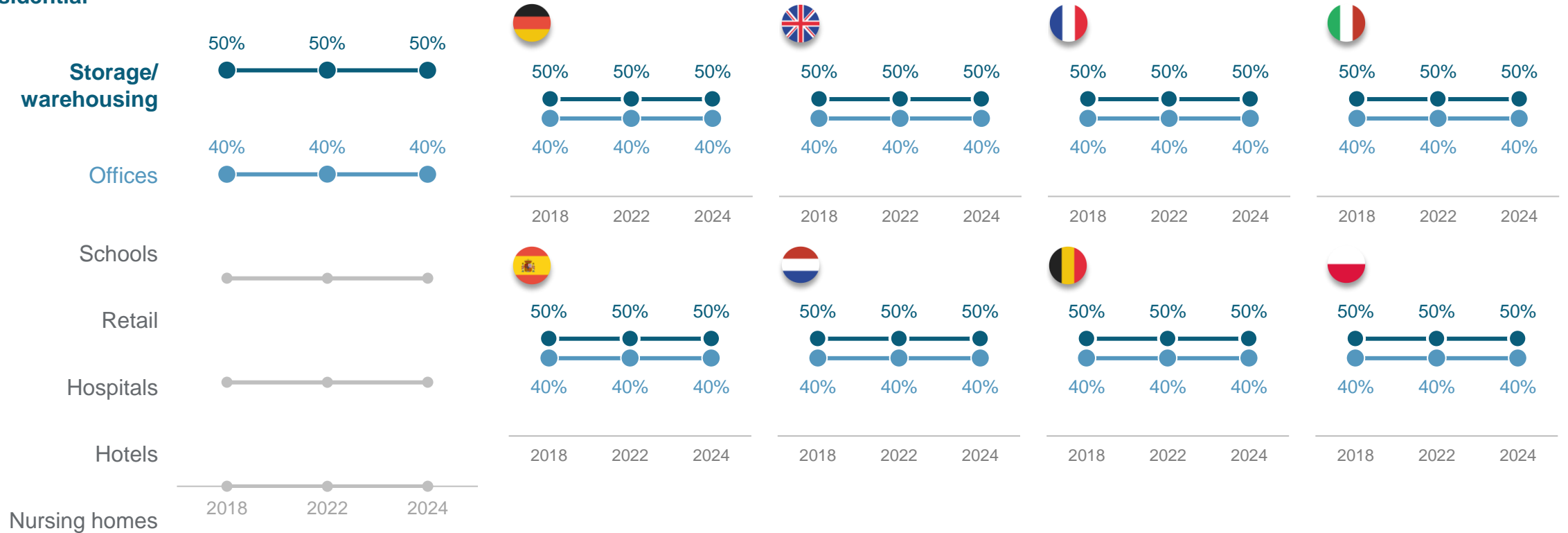


...Conclusion

Prefab in current building types

What kind of projects/ buildings contained prefab building elements?

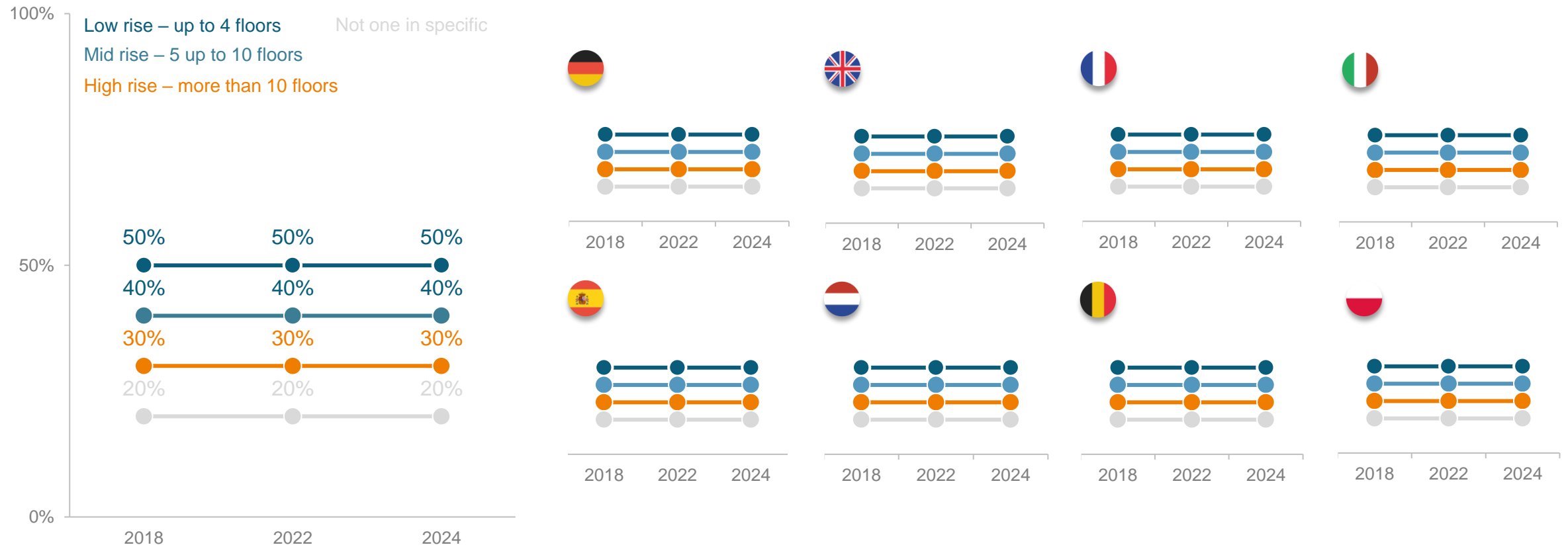
Non-residential



...Conclusion

Dominant size of prefab projects

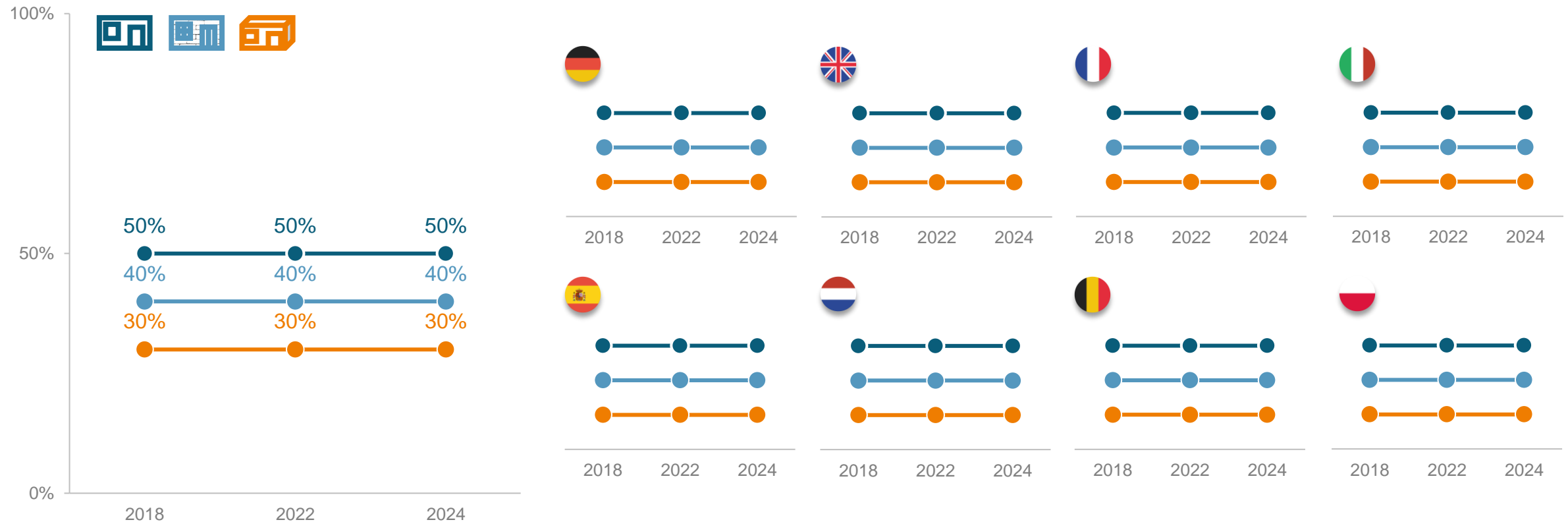
What was the most dominant size of the projects that contained prefab building elements?



...Conclusion

Division of type of prefab elements

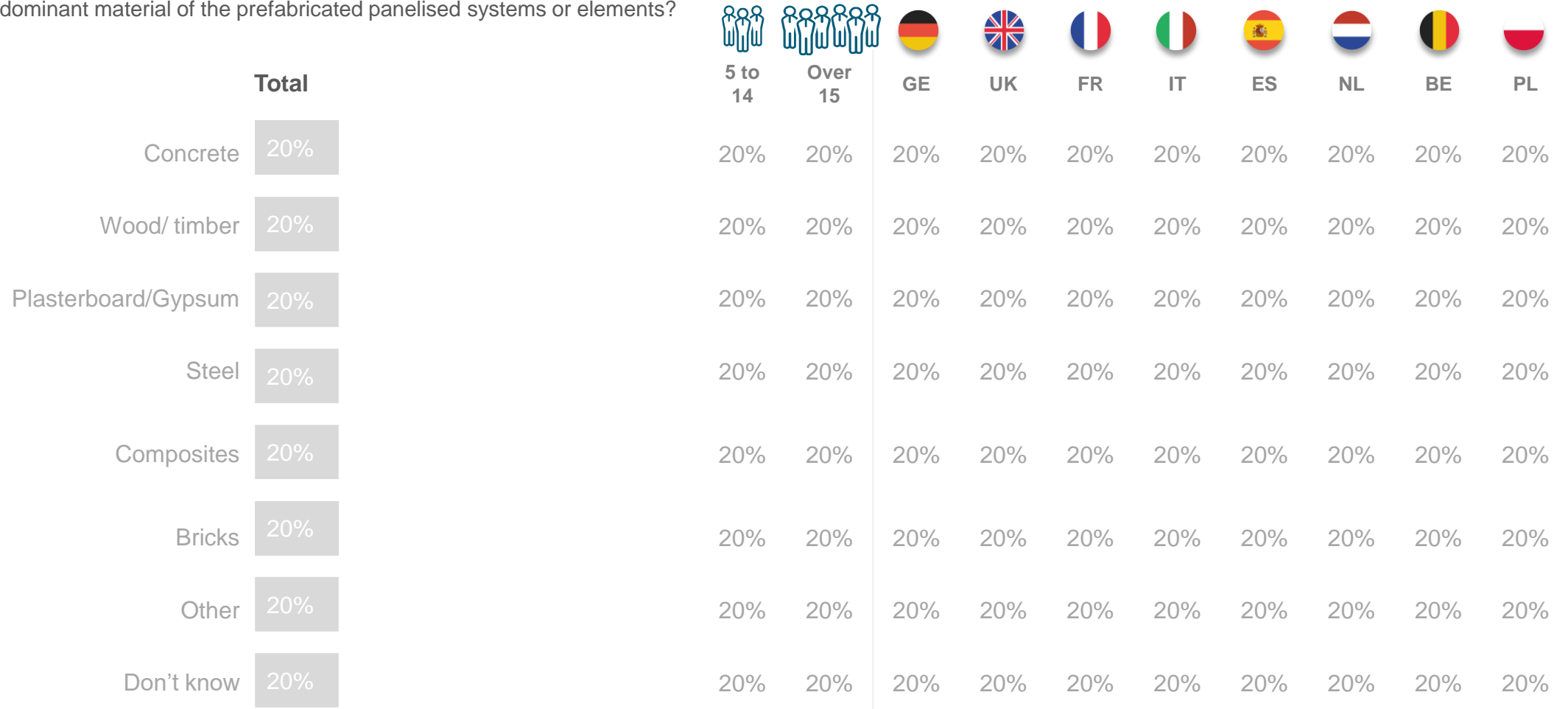
When you look at your projects which included any prefab from the past 2 years, what percentage of your projects contained the following types of prefabrication?



...Conclusion

Most dominant material of prefab panelised systems

What is the most dominant material of the prefabricated panelised systems or elements?



...Conclusion

Most dominant material of prefab modular buildings

What is the most dominant material of prefabricated modular buildings/ volumetric elements?



	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Wood/ timber	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Concrete	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Steel	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Plasterboard/Gypsum	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bricks	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Composites	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Future projects expectations for type of material

Which material do you expect to grow the most within prefabricated panelised systems or elements/ modular buildings or volumetric elements in the coming years?



	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Wood/ timber	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Concrete	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Steel	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Composites	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Plasterboard/Gypsum	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bricks	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Most dominant structural construction method

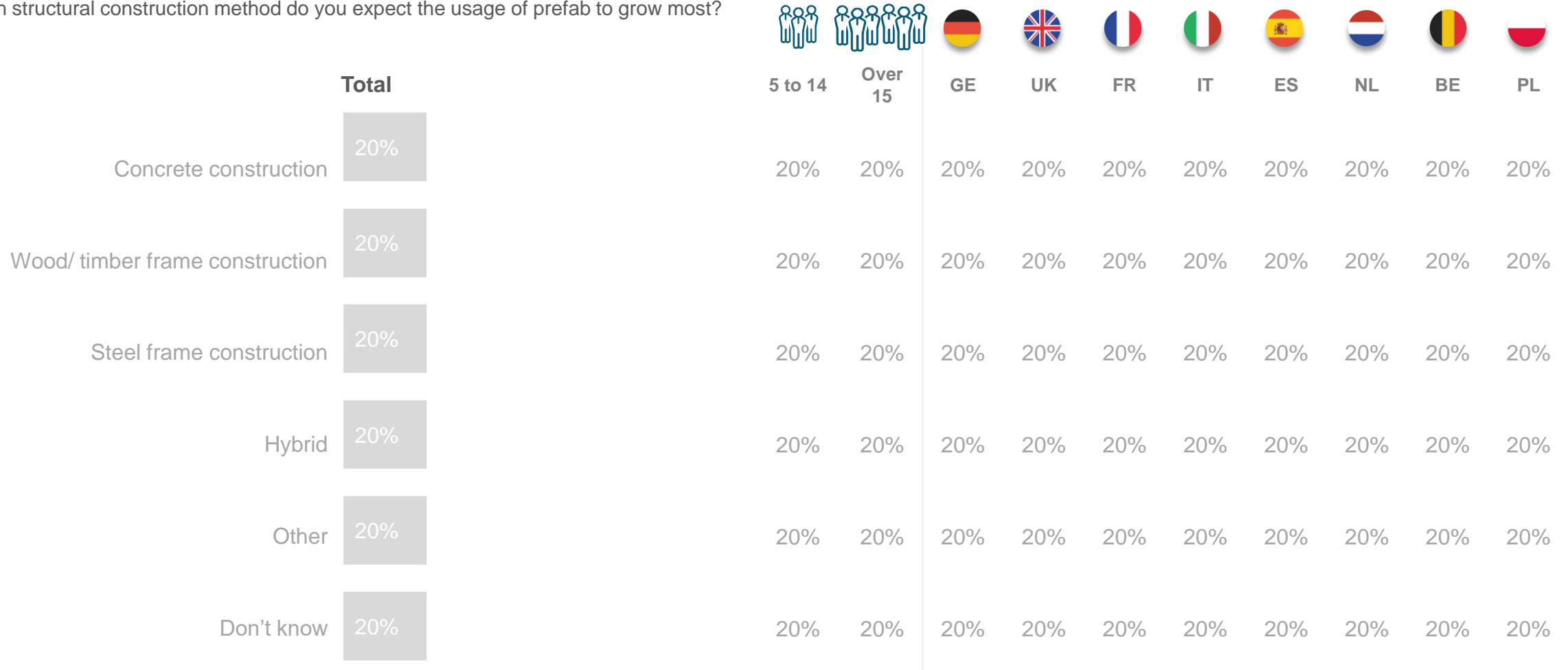
What was the most dominant structural construction method contained prefab building elements?



...Conclusion

Growth expectations structural construction method

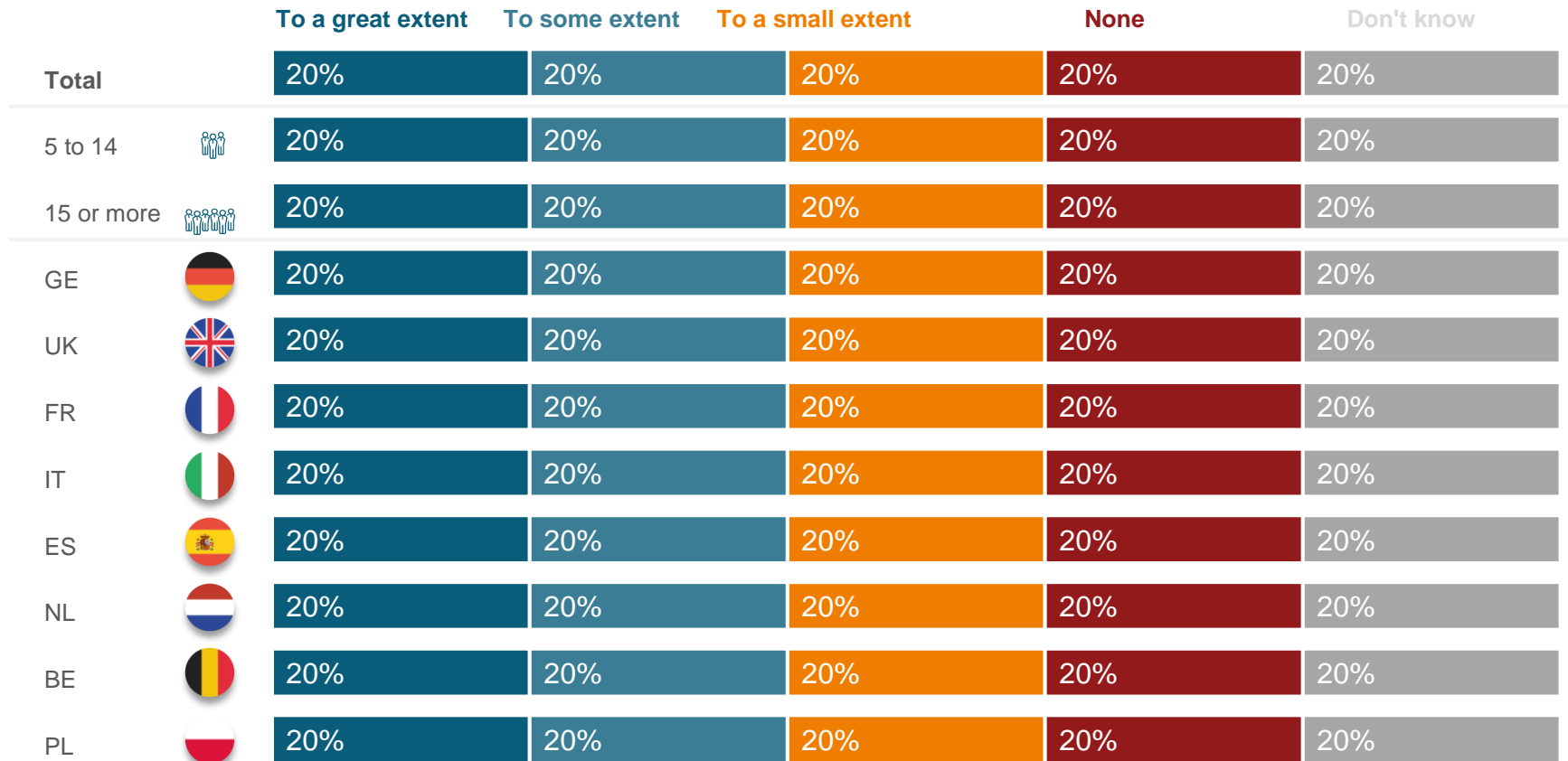
Which structural construction method do you expect the usage of prefab to grow most?



...Conclusion

Emergence of new players in the prefab market

To what degree did you see new players entering the construction market offering prefab only solutions?



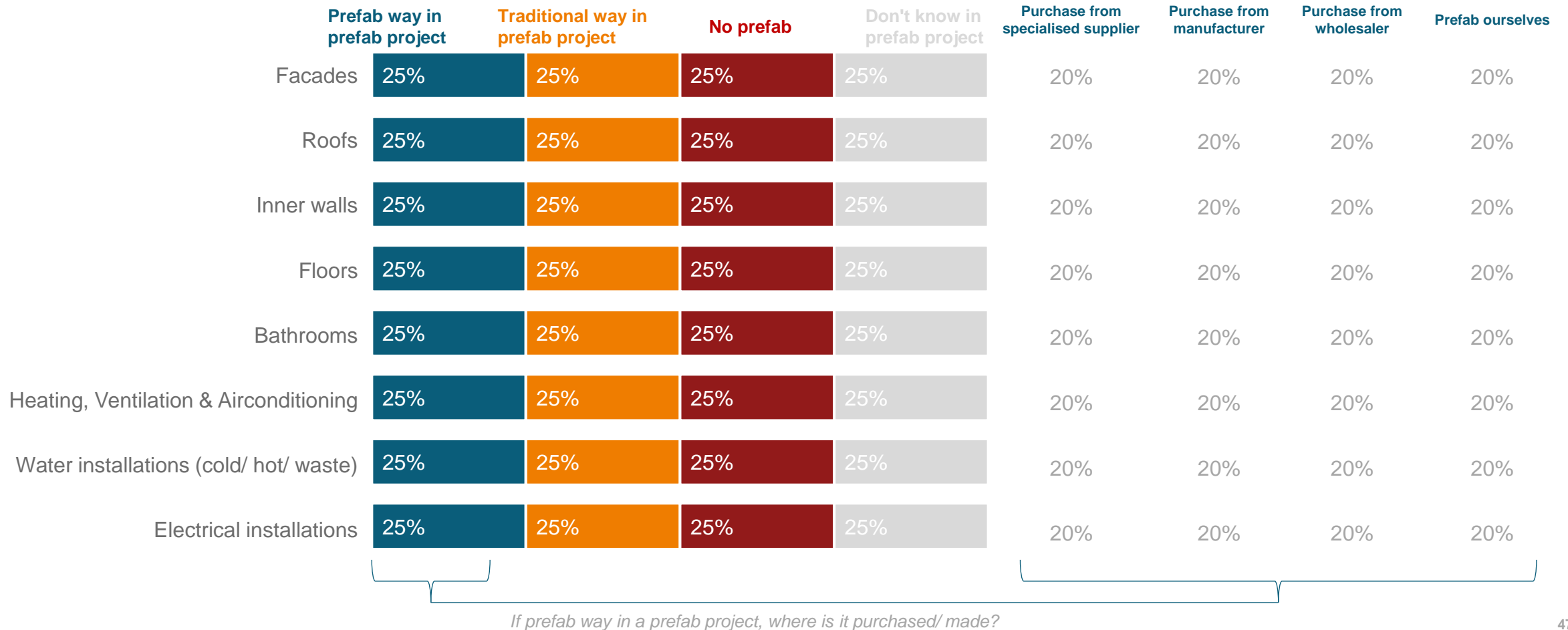
...Conclusion

Most prefabricated elements are bought from either a specialised supplier or a manufacturer. The elements that are mostly prefabricated by contractors themselves are façades and inner walls.

Building components in (prefab) projects

How is your company dealing with the following building components in the majority of the (prefab) projects?











Results are shown for total projects, including the projects that had no prefabricated elements in them (76%).



...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?











Facades	Prefab way in prefab project	Traditional way in prefab project	No prefab	Don't know in prefab project	Purchase from specialist supplier	Purchase from manufacturer	Purchase from wholesaler	Prefab ourselves
Total	25%	25%	25%	25%	20%	20%	20%	20%
5 to 14 	25%	25%	25%	25%	20%	20%	20%	20%
15 or more 	25%	25%	25%	25%	20%	20%	20%	20%
GE 	25%	25%	25%	25%	20%	20%	20%	20%
UK 	25%	25%	25%	25%	20%	20%	20%	20%
FR 	25%	25%	25%	25%	20%	20%	20%	20%
IT 	25%	25%	25%	25%	20%	20%	20%	20%
ES 	25%	25%	25%	25%	20%	20%	20%	20%
NL 	25%	25%	25%	25%	20%	20%	20%	20%
BE 	25%	25%	25%	25%	20%	20%	20%	20%
PL 	25%	25%	25%	25%	20%	20%	20%	20%

If prefab way in a prefab project, where is it purchased/ made?

...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?

Roofs	Prefab way in prefab project	Traditional way in prefab project	No prefab	Don't know in prefab project	Purchase from specialist supplier	Purchase from manufacturer	Purchase from wholesaler	Prefab ourselves
Total	25%	25%	25%	25%	20%	20%	20%	20%
5 to 14 	25%	25%	25%	25%	20%	20%	20%	20%
15 or more 	25%	25%	25%	25%	20%	20%	20%	20%
GE 	25%	25%	25%	25%	20%	20%	20%	20%
UK 	25%	25%	25%	25%	20%	20%	20%	20%
FR 	25%	25%	25%	25%	20%	20%	20%	20%
IT 	25%	25%	25%	25%	20%	20%	20%	20%
ES 	25%	25%	25%	25%	20%	20%	20%	20%
NL 	25%	25%	25%	25%	20%	20%	20%	20%
BE 	25%	25%	25%	25%	20%	20%	20%	20%
PL 	25%	25%	25%	25%	20%	20%	20%	20%











If prefab way in a prefab project, where is it purchased/ made?

Actual N=287: Belgium N=31; France N=15; Germany N=35; Italy N=37; Netherlands N=45; Poland N=45; Spain N=43; United Kingdom N=36; 5-15 FTE N=139; 16+ FTE N=145.

...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?

Inner walls	Prefab way in prefab project	Traditional way in prefab project	No prefab	Don't know in prefab project	Purchase from specialist supplier	Purchase from manufacturer	Purchase from wholesaler	Prefab ourselves
Total	25%	25%	25%	25%	20%	20%	20%	20%
5 to 14 	25%	25%	25%	25%	20%	20%	20%	20%
15 or more 	25%	25%	25%	25%	20%	20%	20%	20%
GE 	25%	25%	25%	25%	20%	20%	20%	20%
UK 	25%	25%	25%	25%	20%	20%	20%	20%
FR 	25%	25%	25%	25%	20%	20%	20%	20%
IT 	25%	25%	25%	25%	20%	20%	20%	20%
ES 	25%	25%	25%	25%	20%	20%	20%	20%
NL 	25%	25%	25%	25%	20%	20%	20%	20%
BE 	25%	25%	25%	25%	20%	20%	20%	20%
PL 	25%	25%	25%	25%	20%	20%	20%	20%











If prefab way in a prefab project, where is it purchased/ made?

Actual N=287: Belgium N=31; France N=15; Germany N=35; Italy N=37; Netherlands N=45; Poland N=45; Spain N=43; United Kingdom N=36; 5-15 FTE N=139; 16+ FTE N=145.

...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?

Floors	Prefab way in prefab project	Traditional way in prefab project	No prefab	Don't know in prefab project	Purchase from specialist supplier	Purchase from manufacturer	Purchase from wholesaler	Prefab ourselves
Total	25%	25%	25%	25%	20%	20%	20%	20%
5 to 14 	25%	25%	25%	25%	20%	20%	20%	20%
15 or more 	25%	25%	25%	25%	20%	20%	20%	20%
GE 	25%	25%	25%	25%	20%	20%	20%	20%
UK 	25%	25%	25%	25%	20%	20%	20%	20%
FR 	25%	25%	25%	25%	20%	20%	20%	20%
IT 	25%	25%	25%	25%	20%	20%	20%	20%
ES 	25%	25%	25%	25%	20%	20%	20%	20%
NL 	25%	25%	25%	25%	20%	20%	20%	20%
BE 	25%	25%	25%	25%	20%	20%	20%	20%
PL 	25%	25%	25%	25%	20%	20%	20%	20%











If prefab way in a prefab project, where is it purchased/ made?

Actual N=287: Belgium N=31; France N=15; Germany N=35; Italy N=37; Netherlands N=45; Poland N=45; Spain N=43; United Kingdom N=36; 5-15 FTE N=139; 16+ FTE N=145.

...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?

Bathroom	Prefab way in prefab project	Traditional way in prefab project	No prefab	Don't know in prefab project	Purchase from specialist supplier	Purchase from manufacturer	Purchase from wholesaler	Prefab ourselves
Total	25%	25%	25%	25%	20%	20%	20%	20%
5 to 14 	25%	25%	25%	25%	20%	20%	20%	20%
15 or more 	25%	25%	25%	25%	20%	20%	20%	20%
GE 	25%	25%	25%	25%	20%	20%	20%	20%
UK 	25%	25%	25%	25%	20%	20%	20%	20%
FR 	25%	25%	25%	25%	20%	20%	20%	20%
IT 	25%	25%	25%	25%	20%	20%	20%	20%
ES 	25%	25%	25%	25%	20%	20%	20%	20%
NL 	25%	25%	25%	25%	20%	20%	20%	20%
BE 	25%	25%	25%	25%	20%	20%	20%	20%
PL 	25%	25%	25%	25%	20%	20%	20%	20%

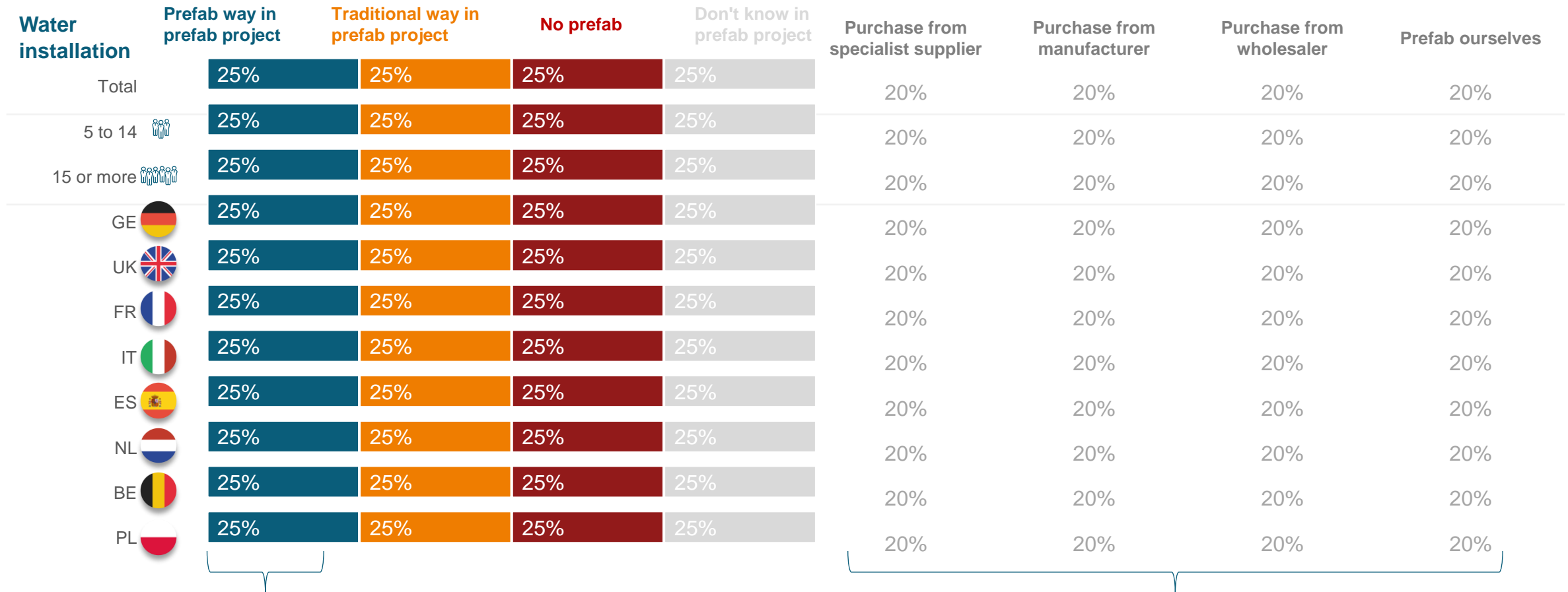
If prefab way in a prefab project, where is it purchased/ made?

Actual N=287: Belgium N=31; France N=15; Germany N=35; Italy N=37; Netherlands N=45; Poland N=45; Spain N=43; United Kingdom N=36; 5-15 FTE N=139; 16+ FTE N=145.

...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?



If prefab way in a prefab project, where is it purchased/ made?

Actual N=287: Belgium N=31; France N=15; Germany N=35; Italy N=37; Netherlands N=45; Poland N=45; Spain N=43; United Kingdom N=36; 5-15 FTE N=139; 16+ FTE N=145.

...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?

HVAC		Prefab way in prefab project	Traditional way in prefab project	No prefab	Don't know in prefab project	Purchase from specialist supplier	Purchase from manufacturer	Purchase from wholesaler	Prefab ourselves
Total		25%	25%	25%	25%	20%	20%	20%	20%
5 to 14		25%	25%	25%	25%	20%	20%	20%	20%
15 or more		25%	25%	25%	25%	20%	20%	20%	20%
GE		25%	25%	25%	25%	20%	20%	20%	20%
UK		25%	25%	25%	25%	20%	20%	20%	20%
FR		25%	25%	25%	25%	20%	20%	20%	20%
IT		25%	25%	25%	25%	20%	20%	20%	20%
ES		25%	25%	25%	25%	20%	20%	20%	20%
NL		25%	25%	25%	25%	20%	20%	20%	20%
BE		25%	25%	25%	25%	20%	20%	20%	20%
PL		25%	25%	25%	25%	20%	20%	20%	20%

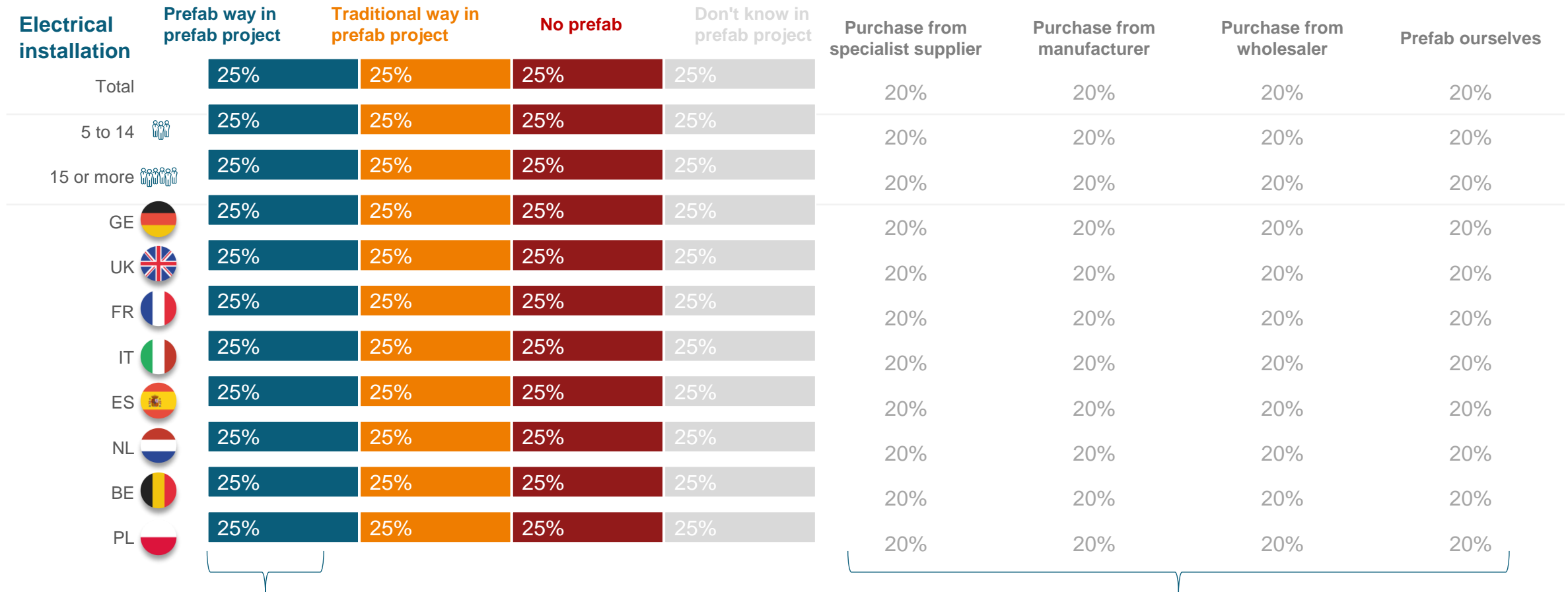
If prefab way in a prefab project, where is it purchased/ made?

Actual N=287: Belgium N=31; France N=15; Germany N=35; Italy N=37; Netherlands N=45; Poland N=45; Spain N=43; United Kingdom N=36; 5-15 FTE N=139; 16+ FTE N=145.

...Conclusion

Building components in prefab projects

How is your company dealing with the following building components in the majority of the prefab projects?



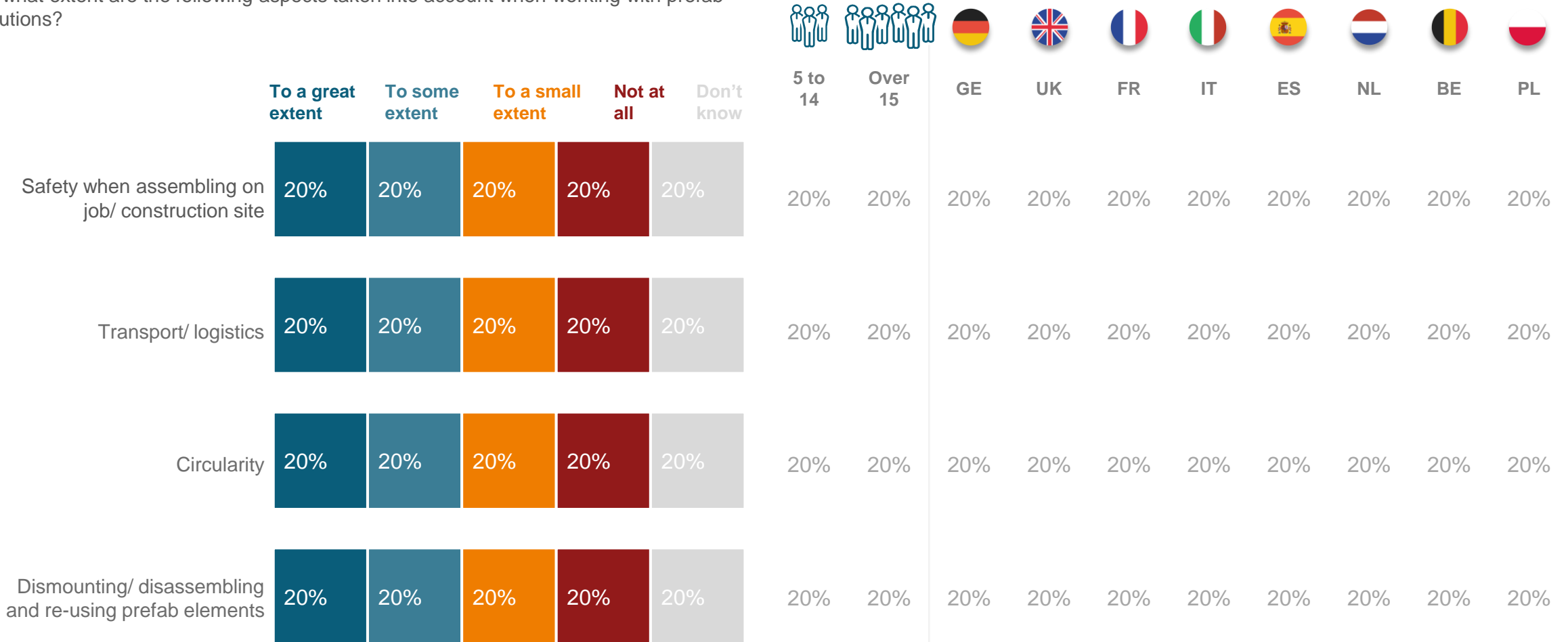
If prefab way in a prefab project, where is it purchased/ made?

Actual N=287: Belgium N=31; France N=15; Germany N=35; Italy N=37; Netherlands N=45; Poland N=45; Spain N=43; United Kingdom N=36; 5-15 FTE N=139; 16+ FTE N=145.

...Conclusion

Safety, transport, circularity and re-usage in prefab projects

To what extent are the following aspects taken into account when working with prefab solutions?



Balance: % to a great/ small extent minus % not at all

...Conclusion

Prefab in current construction parts

What are the most dominant fixing methods within the projects that contained prefab building elements?

	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Mechanical fasteners, using screws, nails, and anchors	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bolting, using bolts, nuts, and washers	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Adhesive bonding, using adhesives or glues	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Grouting and mortaring	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Interlocking joints	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Welding	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

...Conclusion

Prefab in future construction parts

For which fixing method do you expect the usage within prefab solutions will grow the most?

	Total	5 to 14	Over 15	GE	UK	FR	IT	ES	NL	BE	PL
Mechanical fasteners, using screws, nails, and anchors	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bolting, using bolts, nuts, and washers	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Adhesive bonding, using adhesives or glues	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Interlocking joints	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Grouting and mortaring	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Welding	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Dry methods	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

USP Marketing Consultancy

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