



CHANGING
THE WAY THE WORLD
BUILDS

GREENER
FASTER
SMARTER

Our Mission // As the Voice of Commercial Modular Construction™, MBI expands the use of offsite construction through innovative construction practices, outreach and education to the construction community and customers, and recognition of high-quality modular designs and facilities.



@rethinkmodular
www.modular.org



About MBI:

International Association
-320 member companies
-70% United States
-20% Canada
-10% Various Countries
-90 North American
modular manufacturers



@rethinkmodular
www.modular.org

North American Segments: Relocatable vs. Permanent

5



Relocatable (Industrialized) Buildings

- About half of the industry revenue is generated from the sale or lease of temporary space.
- Provides market with instant relief for space needs.
- **Generally 1 – 7 year requirements on a site.**
- Lower cost/price driven.
- Stock/fleet space often available.
- Economy and speed of delivery are key.
- Design considerations are lower.



Permanent Modular Construction (PMC)

- About half of the industry builds permanent space.
- Provides markets with permanence and performance of conventional construction in roughly half the time.
- **Permanent installation with a life cycle expectancy identical to conventional.**
- Competitively priced with site built
- Design considerations are higher.
- Can be wood (70%), steel (25%), or concrete (5%).

MBI's 5 in 5 Initiative

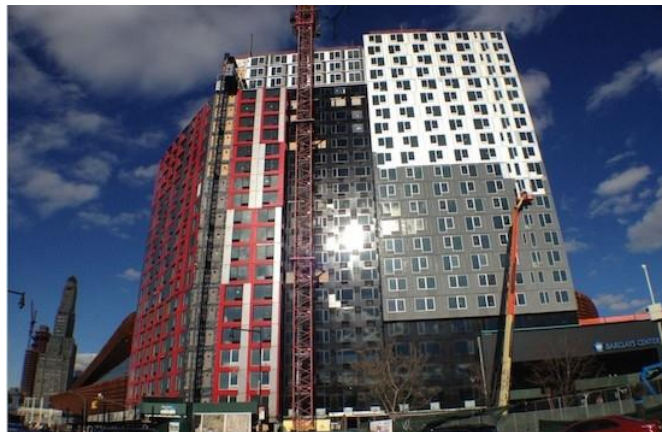
4

- Goal is to grow the commercial modular market share to 5% of new construction starts in North America in the next 5 years in key modular markets.
- Currently about 3%.
- Key markets include:
 - ▣ Education
 - ▣ Healthcare
 - ▣ Office/Administrative
 - ▣ Multi family/Commercial housing
 - ▣ Commercial/retail
 - ▣ Institutional/Industrial

Case Study – Multi family

5

Multi Family Housing – 32-story Pacific Park, Brooklyn, NY



Case Study – Multi family

6

Multi Family Housing – More common five story wood frame



Case Study - Education

7

□ Educational Facilities



Case Study - Education

8

□ Educational Facilities



Case Study - Hospitality

9

□ Marriott Hotels



Case Study - Retail

10

□ Retail/Commercial



Case Study - Healthcare

11

□ Dental Clinic



Case Study - Institutional

12

□ Industrial Workforce Housing/Camp



Challenges in North America

13

- North American modular industry is still largely fragmented with over 200 modular (and no dominant) manufacturers.
- Manufacturers build for multiple markets in multiple geographies and climates.
- No standardized “processes” – each factory does it there way.
- No standard prototypes or floor plans – each project is custom designed.

Challenges in North America

14

- All construction codes and contracts written for in-situ/on-site built environment. Modular must meet the site-built code.
- U.S. Government not addressing /recognizing construction industry challenges.
- Biggest challenge is perception of modular! Many people hear “modular” and think this:



Opportunities

15

- MBI is working with various groups to remove barriers and promote growth including:
 - ▣ International Code Council – developing guidelines and code language specific to modular industry.
 - ▣ Working with administrative agencies to standardize and streamline the approval process for modular.
 - ▣ American Institute of Architects (AIA) – developing a design guideline for architects considering modular.
 - ▣ Working with traditional general contractors to educate them about scheduling, insurance, transportation, and legal considerations.
 - ▣ International case studies and best practices – knowledge exchanges within the industry.

Opportunities to Share Best Practices

16

- MBI recently launched its “European Advisory Council” to better engage its membership in that part of the world.
- Currently about a dozen members with plans to meet in September in *Munich, Germany*.
- Networking, idea and knowledge exchange, leadership opportunities within MBI.
- MBI’s Awards of Distinction Contest & Project Database



2019 World of Modular

17

2019 WORLD OF MODULAR

ANNUAL CONVENTION & TRADESHOW

Las Vegas, Nevada | March 15-18, 2019





Thank you!

www.modular.org

944 Glenwood Station Lane, Suite 204

Charlottesville, Virginia 22901 USA

Ph: 434.296.3288 | Toll-free: 888.811.3288

info@modular.org

