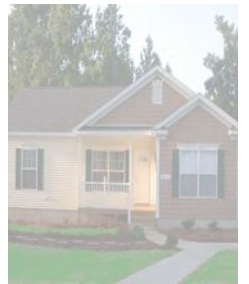




NMHC's Quarterly Modular Housing Report



SECOND QUARTER ISSUE - 2011

Issued August 2011

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National Modular Housing Council's QUARTERLY MODULAR HOUSING REPORT Second Quarter 2011

National trends

The National Modular Housing Council's actual shipments report indicates that **3,339 new modular homes were shipped in the second quarter of 2011**, down 14.8 percent from the same quarter in 2010.¹ Relative to Q2 2010, state shipment results for the second quarter 2011 showed increases for five states, reductions in 19 states and five states with no significant change (defined as less than or equal to ± 5 shipments). Shipment changes by state are shown on the table below.

Shipment Changes by State—2ND QUARTER 2011

	State	Current quarter	Same quarter prior year	Change	% Change
Increase	Virginia	320	292	28	9.6%
	New York	348	329	19	5.8%
	Missouri	73	57	16	28.1%
	Illinois	76	61	15	24.6%
	Michigan	132	119	13	10.9%
Flat	Texas	93	88	5	5.7%
	West Virginia	73	72	1	1.4%
	Nebraska	68	69	-1	-1.4%
	Rhode Island	6	8	-2	-25.0%
	Vermont	28	31	-3	-9.7%
Decrease	New Hampshire	33	40	-7	-17.5%
	Georgia	12	20	-8	-40.0%
	Connecticut	40	49	-9	-18.4%
	Delaware	39	48	-9	-18.8%
	Florida	54	65	-11	-16.9%
	Tennessee	36	48	-12	-25.0%
	Wisconsin	98	119	-21	-17.6%
	New Jersey	140	167	-27	-16.2%
	Colorado	58	85	-27	-31.8%
	Maryland	72	101	-29	-28.7%
	Ohio	47	77	-30	-39.0%
	Minnesota	76	111	-35	-31.5%
	Massachusetts	95	131	-36	-27.5%
	Iowa	102	141	-39	-27.7%
	South Carolina	56	100	-44	-44.0%
	Indiana	41	100	-59	-59.0%
	Pennsylvania	303	378	-75	-19.8%
	Maine	62	138	-76	-55.1%
	North Carolina	340	436	-96	-22.0%

¹ Modular housing statistics provided by the National Modular Housing Council are from state and national surveys conducted by Hallahan Associates of Baltimore, MD. Hallahan Associates is a business planning and marketing firm specializing in the home building industry, with a special focus upon market opportunities for factory based building systems.

Shipments fell in seven divisions, with the New England states realizing the largest percent loss, a 33.5 percent decline compared with the second quarter of last year. Shipments were essentially flat in one division, the West South Central. None of the divisions posted a gain in the quarter.

Division Shipments—2ND QUARTER 2011

Region	2 nd Quarter		Increase (Decrease)	% Change
	2011	2010		
West South Central	93	88	5	5.7%
East South Central	36	48	-12	-25.0%
Mountain	58	85	-27	-31.8%
West North Central	319	378	-59	-15.6%
East North Central	394	476	-82	-17.2%
Middle Atlantic	791	874	-83	-9.5%
New England	264	397	-133	-33.5%
South Atlantic	966	1,134	-168	-14.8%
Pacific	-	-	-	-
* Other states	418	440	-22	-5.0%
Total	3,339	3,920	-581	-14.8%

† Data is collected for twenty nine states.

* Shipments for states denoted by an asterisk (*) on the tables in this report are aggregated into a single national figure.

Table 1: Modular Home Shipments by Census Division and State

	Quarter 2			Year-To-Date		
	2010	2011	% Change	2010	2011	% Change
<i>New England</i>						
Connecticut	49	40	-18.4%	82	61	-25.6%
Maine	138	62	-55.1%	203	103	-49.3%
Massachusetts	131	95	-27.5%	212	172	-18.9%
New Hampshire	40	33	-17.5%	68	68	0.0%
Rhode Island	8	6	-25.0%	17	17	0.0%
Vermont	31	28	-9.7%	46	36	-21.7%
Subtotal (region)	397	264	-33.5%	628	457	-27.2%
<i>Middle Atlantic</i>						
New Jersey	167	140	-16.2%	286	305	6.6%
New York	329	348	5.8%	525	702	33.7%
Pennsylvania	378	303	-19.8%	560	503	-10.2%
Subtotal (region)	874	791	-9.5%	1,371	1,510	10.1%
<i>East North Central</i>						
Illinois	61	76	24.6%	124	138	11.3%
Indiana	100	41	-59.0%	171	83	-51.5%
Michigan	119	132	10.9%	208	220	5.8%
Ohio	77	47	-39.0%	117	73	-37.6%
Wisconsin	119	98	-17.6%	144	132	-8.3%
Subtotal (region)	476	394	-17.2%	764	646	-15.4%
<i>West North Central</i>						
Iowa	141	102	-27.7%	188	167	-11.2%
* Kansas	-	-	-	-	-	-
Minnesota	111	76	-31.5%	147	105	-28.6%
Missouri	57	73	28.1%	85	110	29.4%
Nebraska	69	68	-1.4%	96	90	-6.3%
* North Dakota	-	-	-	-	-	-
* South Dakota	-	-	-	-	-	-
Subtotal (region)	378	319	-15.6%	516	472	-8.5%
<i>South Atlantic</i>						
Delaware	48	39	-18.8%	94	70	-25.5%
* District of Columbia	-	-	-	-	-	-
Florida	65	54	-16.9%	117	115	-1.7%
Georgia	20	12	-40.0%	31	23	-25.8%
Maryland	101	72	-28.7%	179	140	-21.8%
North Carolina	436	340	-22.0%	794	585	-26.3%
South Carolina	100	56	-44.0%	175	107	-38.9%
Virginia	292	320	9.6%	518	540	4.2%
West Virginia	72	73	1.4%	114	108	-5.3%
Subtotal (region)	1,134	966	-14.8%	2,022	1,688	-16.5%

(continued)

Table 1 (Continued): Modular Home Shipments by Census Division and State

	Quarter 2			Year-To-Date		
	2010	2011	% Change	2010	2011	% Change
<i>East South Central</i>						
* Alabama	-	-	-	-	-	-
* Kentucky	-	-	-	-	-	-
* Mississippi	-	-	-	-	-	-
Tennessee	48	36	-25.0%	71	70	-1.4%
Subtotal (region)	48	36	-25.0%	71	70	-1.4%
<i>West South Central</i>						
* Arkansas	-	-	-	-	-	-
* Louisiana	-	-	-	-	-	-
* Oklahoma	-	-	-	-	-	-
Texas	88	93	5.7%	161	148	-8.1%
Subtotal (region)	88	93	5.7%	161	148	-8.1%
<i>Mountain</i>						
* Arizona	-	-	-	-	-	-
Colorado	85	58	-31.8%	133	92	-30.8%
* Idaho	-	-	-	-	-	-
* Montana	-	-	-	-	-	-
* Nevada	-	-	-	-	-	-
* New Mexico	-	-	-	-	-	-
* Utah	-	-	-	-	-	-
* Wyoming	-	-	-	-	-	-
Subtotal (region)	85	58	-31.8%	133	92	-30.8%
<i>Pacific</i>						
* Alaska	-	-	-	-	-	-
* California	-	-	-	-	-	-
* Hawaii	-	-	-	-	-	-
* Oregon	-	-	-	-	-	-
* Washington	-	-	-	-	-	-
Subtotal (region)	-	-	-	-	-	-
Subtotal (U.S.)	3,480	2,921	-16.1%	5,666	5,083	-10.3%
States with *	440	418	-5.0%	811	730	-10.0%
Total Shipments	3,920	3,339	-14.8%	6,477	5,813	-10.3%

* Indicates no individual data is available for state
 Source: NMHC/Hallahan Associates

**Table 2: Shipments of Modular Homes by State
Ranked from Highest to Lowest
2nd Quarter 2011**

	Current Quarter			Same Quarter Last Year		
	Shipments	% of Total	Rank	Shipments	% of Total	Rank
New York	348	10.4%	1	329	8.4%	3
North Carolina	340	10.2%	2	436	11.1%	1
Virginia	320	9.6%	3	292	7.4%	4
Pennsylvania	303	9.1%	4	378	9.6%	2
New Jersey	140	4.2%	5	167	4.3%	5
Michigan	132	4.0%	6	119	3.0%	9
Iowa	102	3.1%	7	141	3.6%	6
Wisconsin	98	2.9%	8	119	3.0%	9
Massachusetts	95	2.8%	9	131	3.3%	8
Texas	93	2.8%	10	88	2.2%	15
Minnesota	76	2.3%	11	111	2.8%	11
Illinois	76	2.3%	11	61	1.6%	21
West Virginia	73	2.2%	13	72	1.8%	18
Missouri	73	2.2%	13	57	1.5%	22
Maryland	72	2.2%	15	101	2.6%	12
Nebraska	68	2.0%	16	69	1.8%	19
Maine	62	1.9%	17	138	3.5%	7
Colorado	58	1.7%	18	85	2.2%	16
South Carolina	56	1.7%	19	100	2.6%	13
Florida	54	1.6%	20	65	1.7%	20
Ohio	47	1.4%	21	77	2.0%	17
Indiana	41	1.2%	22	100	2.6%	13
Connecticut	40	1.2%	23	49	1.3%	23
Delaware	39	1.2%	24	48	1.2%	24
Tennessee	36	1.1%	25	48	1.2%	24
New Hampshire	33	1.0%	26	40	1.0%	26
Vermont	28	0.8%	27	31	0.8%	27
Georgia	12	0.4%	28	20	0.5%	28
Rhode Island	6	0.2%	29	8	0.2%	29
States with *	418	12.5%	-	440	11.2%	-
Total Shipments	3,339	100.0%		3,920	100.0%	

Source: NMHC/Hallahan Associates

Table 3: Modular Home Shipments and Building Permits by Census Division and State**

	2nd Quarter 2011		
	Modular Shipments	Building Permits	Modular as % of Building Permits
<i>New England</i>			
Connecticut	40	904	4.4%
Maine	62	668	9.3%
Massachussets	95	2,318	4.1%
New Hampshire	33	562	5.9%
Rhode Island	6	183	3.3%
Vermont	28	386	7.3%
<i>Middle Atlantic</i>			
New Jersey	140	3,786	3.7%
New York	348	7,359	4.7%
Pennsylvania	303	4,328	7.0%
<i>East North Central</i>			
Illinois	76	3,086	2.5%
Indiana	41	3,000	1.4%
Michigan	132	2,586	5.1%
Ohio	47	3,463	1.4%
Wisconsin	98	3,560	2.8%
<i>West North Central</i>			
Iowa	102	2,458	4.1%
* Kansas	*	*	*
Minnesota	76	2,435	3.1%
Missouri	73	2,631	2.8%
Nebraska	68	1,569	4.3%
* North Dakota	*	*	*
* South Dakota	*	*	*
<i>South Atlantic</i>			
Delaware	39	805	4.8%
* District of Columbia	*	*	*
Florida	54	10,604	0.5%
Georgia	12	4,924	0.2%
Maryland	72	2,449	2.9%
North Carolina	340	8,252	4.1%
South Carolina	56	4,222	1.3%
Virginia	320	5,263	6.1%
West Virginia	73	466	15.7%

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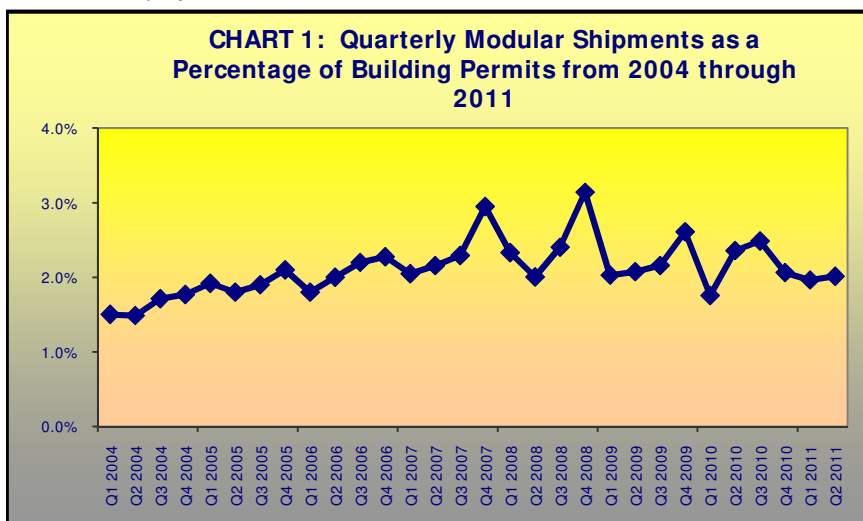
Table 3 (Continued): Modular Home Shipments and Building Permits by Census Division and State

	2nd Quarter 2011		
	Modular Shipments	Building Permits	Modular as % of Building Permits
East South Central			
* Alabama	*	*	*
* Kentucky	*	*	*
* Mississippi	*	*	*
Tennessee	36	3,457	1.0%
West South Central			
* Arkansas	*	*	*
* Louisiana	*	*	*
* Oklahoma	*	*	*
Texas	93	26,008	0.4%
Mountain			
* Arizona	*	*	*
Colorado	58	3,406	1.7%
* Idaho	*	*	*
* Montana	*	*	*
* Nevada	*	*	*
* New Mexico	*	*	*
* Utah	*	*	*
* Wyoming	*	*	*
Pacific			
* Alaska	*	*	*
* California	*	*	*
* Hawaii	*	*	*
* Oregon	*	*	*
* Washington	*	*	*
Subtotal (U.S.)	2,921	115,138	2.5%
States with *	418	50,712	0.8%
Total	3,339	165,850	2.0%

Source: NMHC/Hallahan Associates/U.S. Census Bureau

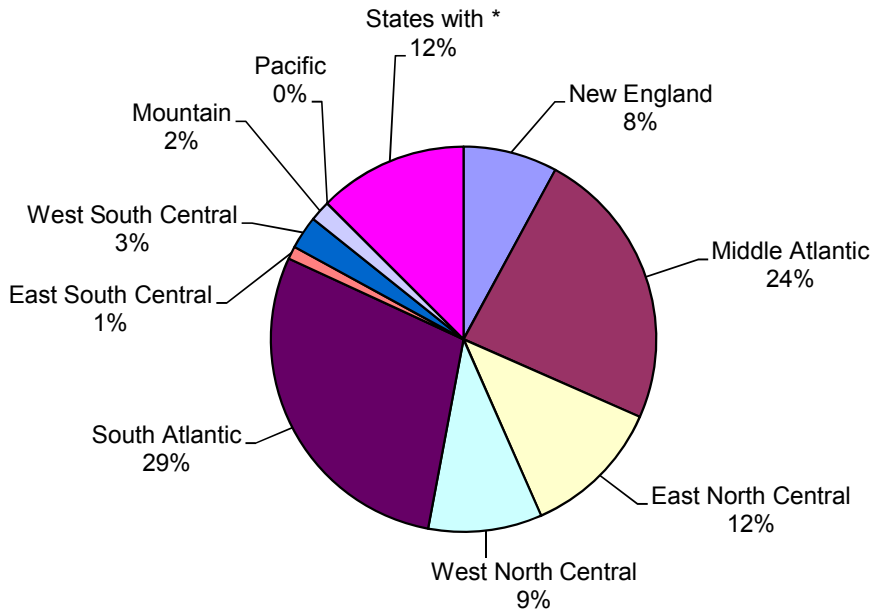
* Indicates no individual data is available for state

** Not seasonally adjusted



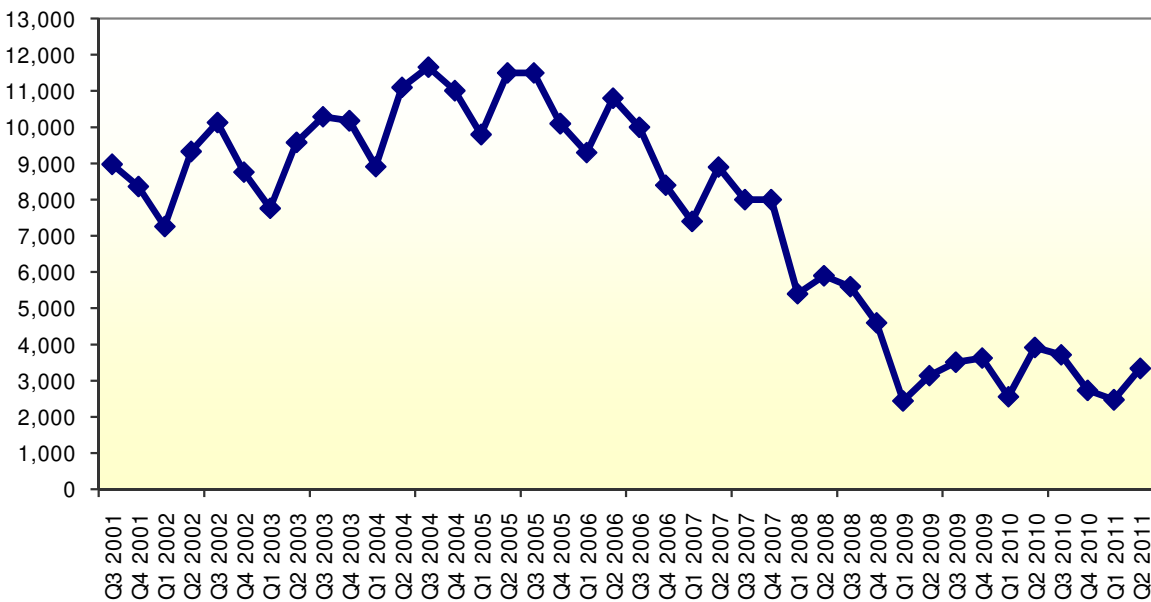
Source: NMHC/Hallahan Associates/U.S. Census Bureau

CHART 2: 2nd Quarter 2011 Regional Shipment Market Share



Source: NMHC/Hallahan Associates/U.S. Census Bureau

CHART 3: Quarterly Modular Shipments 2001 through 2011



Source: NMHC/Hallahan Associates/U.S. Census Bureau

