



2022 MANUFACTURED HOUSING FACTS

INDUSTRY OVERVIEW

Updated August 2022



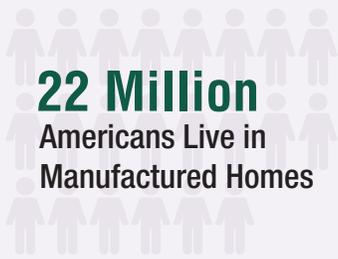
Manufactured Housing in the United States



Made in America



General Profile



Resident Satisfaction



Manufactured Home Communities



- 43,000+** Land-Lease Communities
- 4.3 Million** Estimated Homesites in Communities
- 4.2%** Average Annual Site Rent Increase
- 51%** of New Homes are Placed in Communities

Affordable Homeownership

Manufactured Homes:

- Appreciate – median value increased 39% compared with 33% for site-built homes.*

Manufactured Homes[†]

\$108,100 Avg. Cost
\$72.21 per sq. ft.
Single Section: **\$72,600**
Multi-Section: **\$132,000**

Site-Built Homes[†]

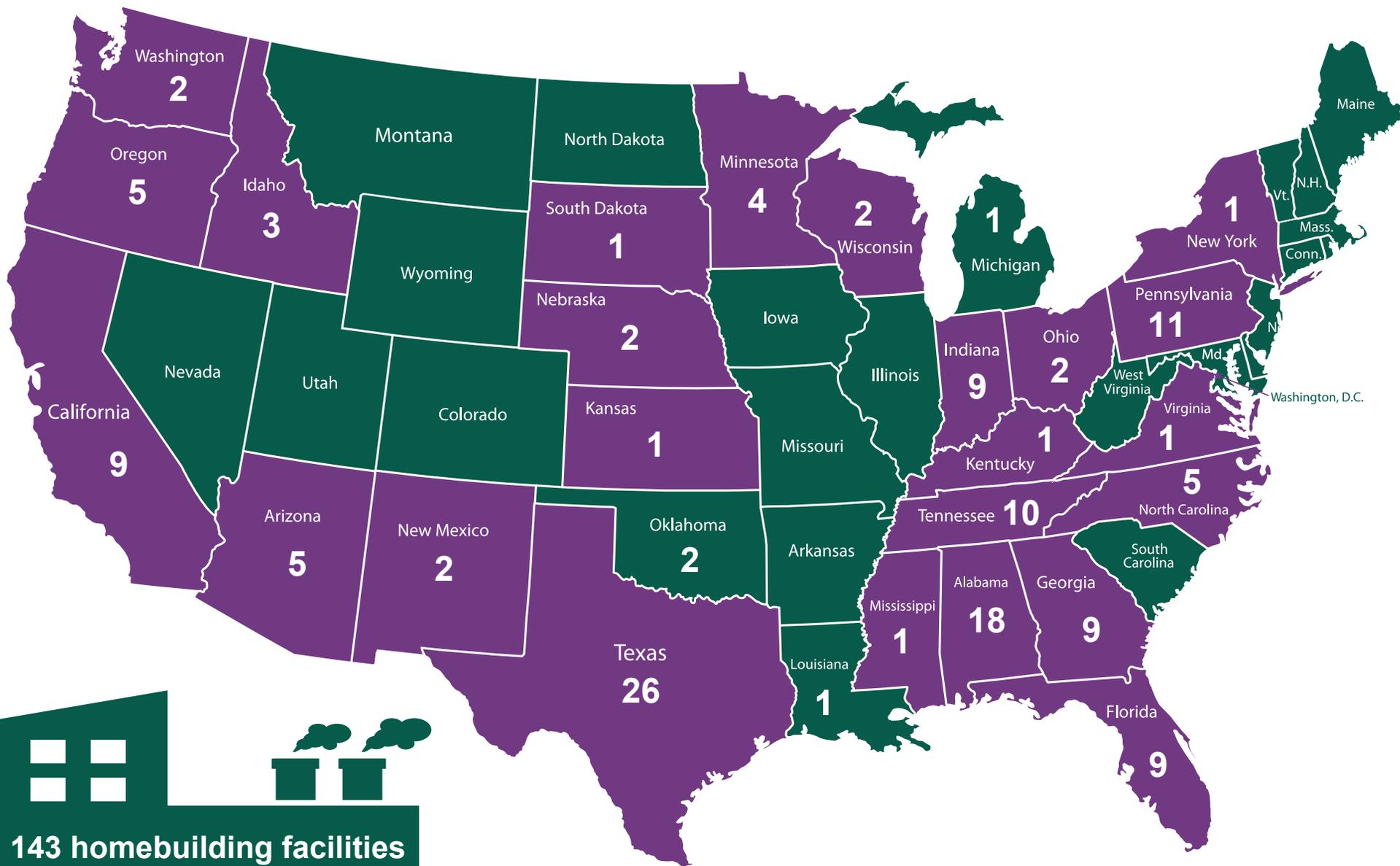
\$365,904 Avg. Cost
\$143.83 per sq. ft.

[†]Without Land



Sources: American Community Survey 2016-2020 5-Year Estimates. U.S. Census Bureau and HUD Manufactured Housing Survey, U.S. Bureau Labor of Statistics, MHI 2018 Consumer Research, Datacomp/JTL, *LendingTree

MANUFACTURED HOME PRODUCTION IN THE UNITED STATES: Homebuilding Facilities by State

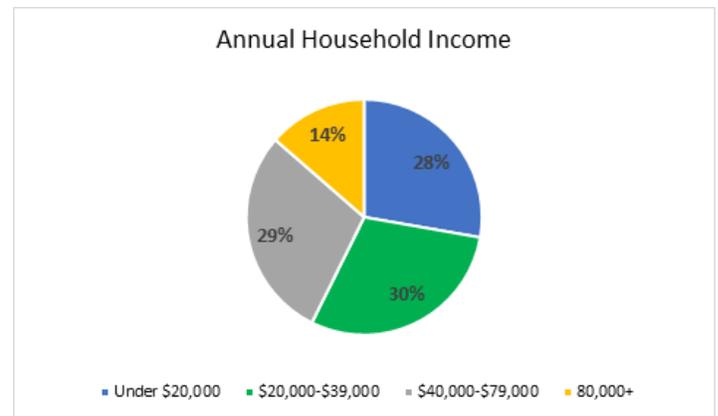
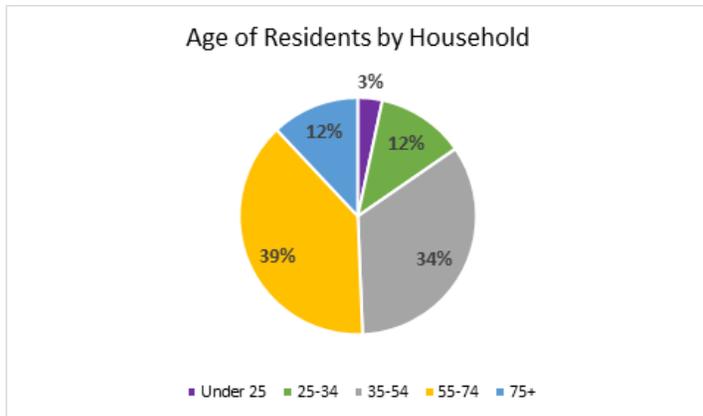


**143 homebuilding facilities
across the country**

No production facilities in Alaska or Hawaii.

Source: Institute for Building Technology and Safety (March 2022)

Manufactured Housing Facts



Source: U.S. Census Bureau, 2019 American Community Survey

Production:

- The manufactured housing industry produced 105,772 new homes in 2021, approximately 9% of new, single-family home starts.
- The average sales price of a new manufactured home without land is \$108,100.
- 49% of new manufactured homes are placed on private property and 51% are placed in manufactured home communities.
- All aspects of construction are continually inspected by professionally trained third-party inspectors.
- Manufactured homes are constructed to adhere to the federal HUD Code since 1976. The HUD Code, regulates home design and construction, strength and durability, fire resistance and energy efficiency. HUD revised the building code in the early 1990's to enhance energy efficiency and ventilation standards and to improve the wind resistance of manufactured homes in areas prone to hurricane-force winds.

Amenities:

- Floor plans are available that range from basic to elaborate – vaulted or tray ceilings, fully-equipped kitchens, walk-in closets and luxurious bathrooms.
- A variety of exterior siding is available – metallic, vinyl, wood or hardboard and stucco.
- Our industry has also launched a new class of homes known as CrossMod® that are indistinguishable from site-built homes, with pitched roofs with shingles and gabled ends, porches, garages, permanent foundations, and more.

Safety:

- The building materials in today's manufactured homes are the same as those in site-built homes.
- The homes are engineered for wind safety and energy efficiency.
- Manufactured homes are among the safest housing choices available today due to federal laws requiring smoke detectors, escape windows and limited combustible materials around furnaces, water heaters and kitchen ranges.

Financing:

- Manufactured homes can be financed as personal property. Even when the home and land are financed together, the home can be secured as personal property and the land as real property. Traditional manufactured home personal property lenders offer land-and-home financing.
- Homebuyers may also finance their home and land together as real property using conventional mortgage financing obtained through a traditional mortgage lender.
- Financing programs are available through Fannie Mae and Freddie Mac for CrossMod® homes that provide borrowers with traditional financing options, lower interest rates, and allow for site-built comparisons in the appraisal process.

Beautiful, Modern Homes



Industry Overview

The need for quality, affordable housing has never been greater. Today's manufactured homes can deliver outstanding quality and performance at prices that are up to 50 percent less per square foot than conventional site-built homes. These savings allow more and more Americans to own their own home, even in the face of an ever-widening housing affordability gap.

The affordability of manufactured housing is due to the efficiencies of the factory-building process. Manufactured homes are constructed with standard building materials, and are built almost entirely off-site in a factory. The controlled construction environment and assembly line techniques remove many of the problems encountered during traditional home construction, such as weather, theft, vandalism, damage to building products and materials, and unskilled labor. Factory employees are trained and managed more effectively and efficiently than the system of contracted labor employed by the site-built home construction industry.

Much like other assembly line operations, manufactured homes benefit from the economies of scale resulting from purchasing large quantities of materials, products and appliances. Manufactured home builders can negotiate substantial savings on many components used in building a home, with these savings passed on directly to the homebuyer.



Today's manufactured homes have experienced an evolution in the types and quality of homes available to buyers. Technological advances allow manufactured home builders to offer a variety of architectural styles and exterior finishes that will suit most any buyer's dreams while allowing the home to blend in seamlessly into most any neighborhood. Two-story and single-family attached homes are but two of the new styles generated by factory-built innovation.

At the same time, greater flexibility in the construction process allows for customization of each home to meet a buyer's lifestyle and needs. Interior features include vaulted ceilings, working fireplaces, state-of-the-art kitchens and baths, and porches, giving the homebuyer all the features found in traditional, site-built homes. Enhanced energy efficiency in manufactured homes, achieved with upgraded levels of insulation and more efficient heating and cooling systems, provide another source of savings for homeowners, especially in this era of rising energy costs. Smart buyers also are turning to EnergyStar-labeled manufactured homes for substantial savings in many aspects of owning and operating home.

Technological advances, evolutionary designs, and a focus on delivering quality homes that families can afford are the driving forces within the manufactured housing industry. That's why more people are turning to manufactured housing to deliver homes that fit their needs and wants, at prices they can afford.



**Cost & Size Comparisons:
New Manufactured Homes and New Single-Family Site-Built Homes
2014 - 2021**

	2021	2020	2019	2018	2017	2016	2015	2014
New Manufactured Homes								
All¹								
Avg. Sales Price	\$ 108,100	\$ 87,000	\$ 81,900	\$ 78,500	\$ 71,900	\$ 70,600	\$ 68,000	\$ 65,300
Avg. Square Feet	1,497	1,471	1,448	1,438	1,426	1,446	1,430	1,438
Avg. Cost per Sq. Ft.	\$ 72.21	\$ 59.14	\$ 56.56	\$ 54.59	\$ 50.42	\$ 48.82	\$ 47.55	\$ 45.41
Single								
Avg. Sales Price	\$ 72,600	\$ 57,300	\$ 53,200	\$ 52,400	\$ 48,300	\$ 46,700	\$ 45,600	\$ 45,000
Avg. Square Feet	1,084	1,085	1,072	1,072	1,087	1,075	1,092	1,115
Avg. Cost per Sq. Ft.	\$ 66.97	\$ 52.81	\$ 49.63	\$ 48.88	\$ 44.43	\$ 43.44	\$ 41.76	\$ 40.36
Double								
Avg. Sales Price	\$ 132,000	\$ 108,500	\$ 104,000	\$ 99,500	\$ 92,800	\$ 89,500	\$ 86,700	\$ 82,000
Avg. Square Feet	1,794	1,760	1,747	1,747	1,733	1,746	1,713	1,710
Avg. Cost per Sq. Ft.	\$ 73.58	\$ 61.65	\$ 59.53	\$ 51.26	\$ 53.55	\$ 51.26	\$ 50.61	\$ 47.95
Housing Starts vs. MH Shipments (Thousands of Units)								
New Single Family								
Housing Starts	1,127	991	888	876	849	782	715	648
Percent of Total	91%	91%	90%	90%	90%	91%	91%	91%
Manufactured Home Shipments								
Shipped	106	94	95	97	93	81	71	64
Percent of Total	9%	9%	10%	10%	10%	9%	9%	9%
Total	1,233	1,085	983	973	942	863	786	678
New Single-Family								
Site-Built Homes Sold (Home and Land Sold as Package)								
Avg. Sales Price	\$ 464,200	\$ 391,900	\$ 383,900	\$ 385,000	\$ 384,900	\$ 360,900	\$ 352,700	\$ 347,700
Derived Average Land Price	\$ 98,296	\$ 83,303	\$ 84,485	\$ 87,253	\$ 91,173	\$ 82,491	\$ 80,246	\$ 84,444
Price of Structure								
Avg. Square Feet	2,544	2,527	2,518	2,602	2,645	2,650	2,724	2,707
Avg. Price per Sq Ft. (excl. land)	\$ 143.83	\$ 122.12	\$ 118.91	\$ 114.43	\$ 111.05	\$ 105.06	\$ 100.02	\$ 97.25
Manufactured Home Shipments								
Total	105,772	94,390	94,615	96,555	92,902	81,136	70,544	64,331
Single-Section	44,755	42,578	42,930	44,979	46,305	38,944	32,210	30,218
Multi-Section	61,017	51,812	51,685	51,576	46,597	42,192	38,334	34,113
New Manufactured Homes Placed (For Residential Use)								
Located in Communities	51%	27%	31%	37%	32%	34%	34%	33%
Located on Private Property	49%	73%	69%	63%	68%	66%	66%	67%
Titled as Personal Property	77%	78%	76%	77%	76%	77%	80%	80%
Titled as Real Estate	19%	19%	19%	17%	17%	17%	14%	13%

¹ Includes manufactured homes with more than two sections.

Note: The Census Bureau has reviewed this data product for unauthorized disclosure of confidential information and has approved the disclosure avoidance practices applied. (Approval ID: CBDRB-FY22-278)

Source: U.S. Census Bureau and U.S. Department of Housing and Urban Development, Survey of Construction, <https://www.census.gov/construction/chars/>; https://www.census.gov/construction/nrc/xls/starts_cust.xls.

Source: U.S. Census Bureau and U.S. Department of Housing and Urban Development, Manufactured Housing Survey.

Manufactured Home Production by Product Mix by State

	2018			2019			2020			2021		
	Single Section	Multi Section	Total									
New England												
Connecticut	*	*	*	*	*	*	*	*	*	*	*	*
Maine	*	*	*	*	*	*	*	*	*	*	*	*
Massachusetts	*	*	*	*	*	*	*	*	*	*	*	*
New Hampshire	*	*	*	*	*	*	*	*	*	*	*	*
Rhode Island	*	*	*	*	*	*	*	*	*	*	*	*
Vermont	*	*	*	*	*	*	*	*	*	*	*	*
Subtotal	*	*	*	*	*	*	*	*	*	*	*	*
Middle Atlantic												
New Jersey	*	*	*	*	*	*	*	*	*	*	*	*
New York	*	*	*	*	*	*	*	*	*	*	*	*
Pennsylvania	2,240	3,101	5,341	2,342	3,006	5,342	1,967	2,578	4,545	2,278	3,212	5,490
Subtotal	2,240	3,101	5,341	2,342	3,006	5,342	1,967	2,578	4,545	2,278	3,212	5,490
East North Central												
Illinois	*	*	*	*	*	*	*	*	*	*	*	*
Indiana	5,884	3,319	9,203	6,106	3,222	9,328	5,827	2,649	8,476	6,069	3,290	9,359
Michigan	*	*	*	*	*	*	*	*	*	*	*	*
Ohio	*	*	*	*	*	*	*	*	*	*	*	*
Wisconsin	*	*	*	*	*	*	*	*	*	*	*	*
Subtotal	5,884	3,319	9,203	6,106	3,222	9,328	5,827	2,649	8,476	6,063	3,290	9,359
West North Central												
Iowa	*	*	*	*	*	*	*	*	*	*	*	*
Kansas	*	*	*	*	*	*	*	*	*	*	*	*
Minnesota	681	502	1,183	487	578	1,065	430	578	1,008	446	736	1,182
Missouri	*	*	*	*	*	*	*	*	*	*	*	*
Nebraska	*	*	*	*	*	*	*	*	*	*	*	*
North Dakota	*	*	*	*	*	*	*	*	*	*	*	*
South Dakota	*	*	*	*	*	*	*	*	*	*	*	*
Subtotal	681	502	1,183	487	578	1,065	430	578	1,008	446	736	1,182
South Atlantic												
Delaware	*	*	*	*	*	*	*	*	*	*	*	*
District of Columbia	*	*	*	*	*	*	*	*	*	*	*	*
Florida	658	2,747	3,405	661	2,687	3,348	564	2,243	2,807	573	2,962	3,535
Georgia	2,461	4,141	6,602	2,629	4,198	6,827	2,720	4,623	7,343	2,727	5,403	8,130
Maryland	*	*	*	*	*	*	*	*	*	*	*	*
North Carolina	1,626	2,237	3,863	1,536	2,287	3,823	1,541	2,293	3,834	1,310	3,186	4,496
South Carolina	*	*	*	*	*	*	*	*	*	*	*	*
Virginia	*	*	*	*	*	*	*	*	*	*	*	*
West Virginia	*	*	*	*	*	*	*	*	*	*	*	*
Subtotal	4,745	9,125	13,870	4,826	9,172	13,998	4,825	9,159	13,984	4,610	1,151	16,161
East South Central												
Alabama	6,475	7,179	13,654	6,459	7,429	13,888	6,756	8,046	14,802	7,190	9,120	16,310
Kentucky	*	*	*	*	*	*	*	*	*	*	*	*
Mississippi	*	*	*	*	*	*	*	*	*	*	*	*
Tennessee	7,242	7,058	14,300	6,810	6,613	13,423	6,886	7,814	14,680	6,480	8,911	15,391
Subtotal	13,717	14,237	27,954	13,269	14,042	27,311	13,622	15,860	29,482	13,670	18,031	31,701
West South Central												
Arkansas	*	*	*	*	*	*	*	*	*	*	*	*
Louisiana	*	*	*	*	*	*	*	*	*	*	*	*
Oklahoma	*	*	*	*	*	*	*	*	*	*	*	*
Texas	12,225	9,325	21,550	10,382	9,300	19,682	10,822	10,015	20,837	12,075	11,498	23,573
Subtotal	12,225	9,325	21,550	10,382	9,300	19,682	10,822	10,015	20,837	12,075	11,498	23,573
Mountain												
Arizona	719	2,113	2,832	663	2,505	3,168	688	2,111	2,799	506	2,247	2,753
Colorado	*	*	*	*	*	*	*	*	*	*	*	*
Idaho	350	1,111	1,461	415	1,175	1,590	248	976	1,224	255	1,168	1,423
Montana	*	*	*	*	*	*	*	*	*	*	*	*
Nevada	*	*	*	*	*	*	*	*	*	*	*	*
New Mexico	*	*	*	*	*	*	*	*	*	*	*	*
Utah	*	*	*	*	*	*	*	*	*	*	*	*
Wyoming	*	*	*	*	*	*	*	*	*	*	*	*
Subtotal	1,069	3,224	4,293	1,078	3,680	4,758	936	3,087	4,023	761	3,415	4,176
Pacific												
Alaska	*	*	*	*	*	*	*	*	*	*	*	*
California	496	2,972	3,468	474	3,014	3,488	507	2,380	2,887	480	2,543	3,023
Hawaii	*	*	*	*	*	*	*	*	*	*	*	*
Oregon	410	2,658	3,068	387	2,501	2,888	285	2,463	2,748	321	2,664	2,985
Washington	*	*	*	*	*	*	*	*	*	*	*	*
Subtotal	906	5,630	6,536	861	5,515	6,376	792	4,843	5,635	801	5,207	6,008
Subtotal – U.S.	41,467	48,463	89,930	39,351	48,515	87,866	39,221	48,769	87,990	40,710	56,940	97,650
Canada/Mexico/Puerto Rico	0	0	0	0	0	0	0	0	0	0	0	0
States with *	3,512	3,113	6,625	3,579	3,170	6,749	3,357	3,043	6,400	4,045	4,077	8,122
Total Production	44,979	51,576	96,555	42,930	51,685	94,615	42,578	51,812	94,390	44,755	61,017	105,772

Source: Institute for Building Technology and Safety
States with less than three active manufacturers are indicated with an asterisk (*)
Production figures for these state are not listed in order to protect proprietary information.
Total production for these states is reported on the line labeled "States with *"