



# 2021 MANUFACTURED HOUSING FACTS

INDUSTRY OVERVIEW

Updated May 2021



# Manufactured Housing in the United States



## General Profile



**22 Million**

People live in manufactured homes



**9%**

Of new single-family home starts



**\$81,900**

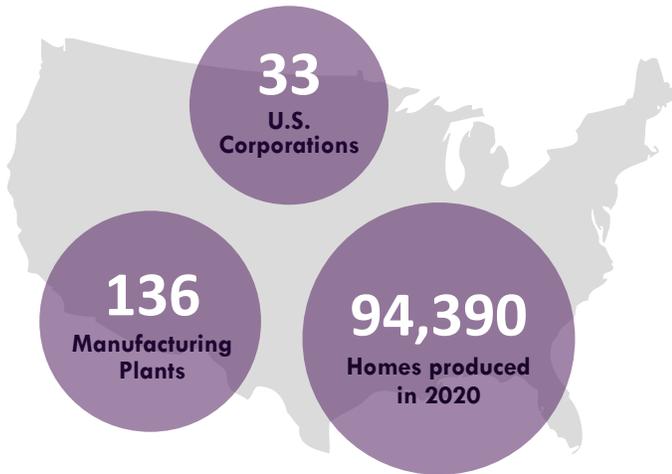
Average new home sales price



**76%**

Of new manufactured homes titled as personal property (chattel)

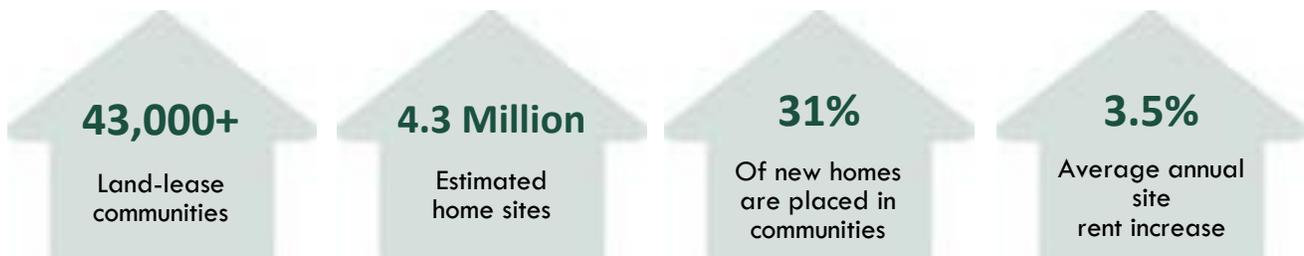
## Made in America



## Affordable Homeownership



## Manufactured Home Communities



## Resident Satisfaction



**90%**

Of people are satisfied with their homes



**71%**

Of residents cite affordability as a key driver for choosing manufactured housing



**62%**

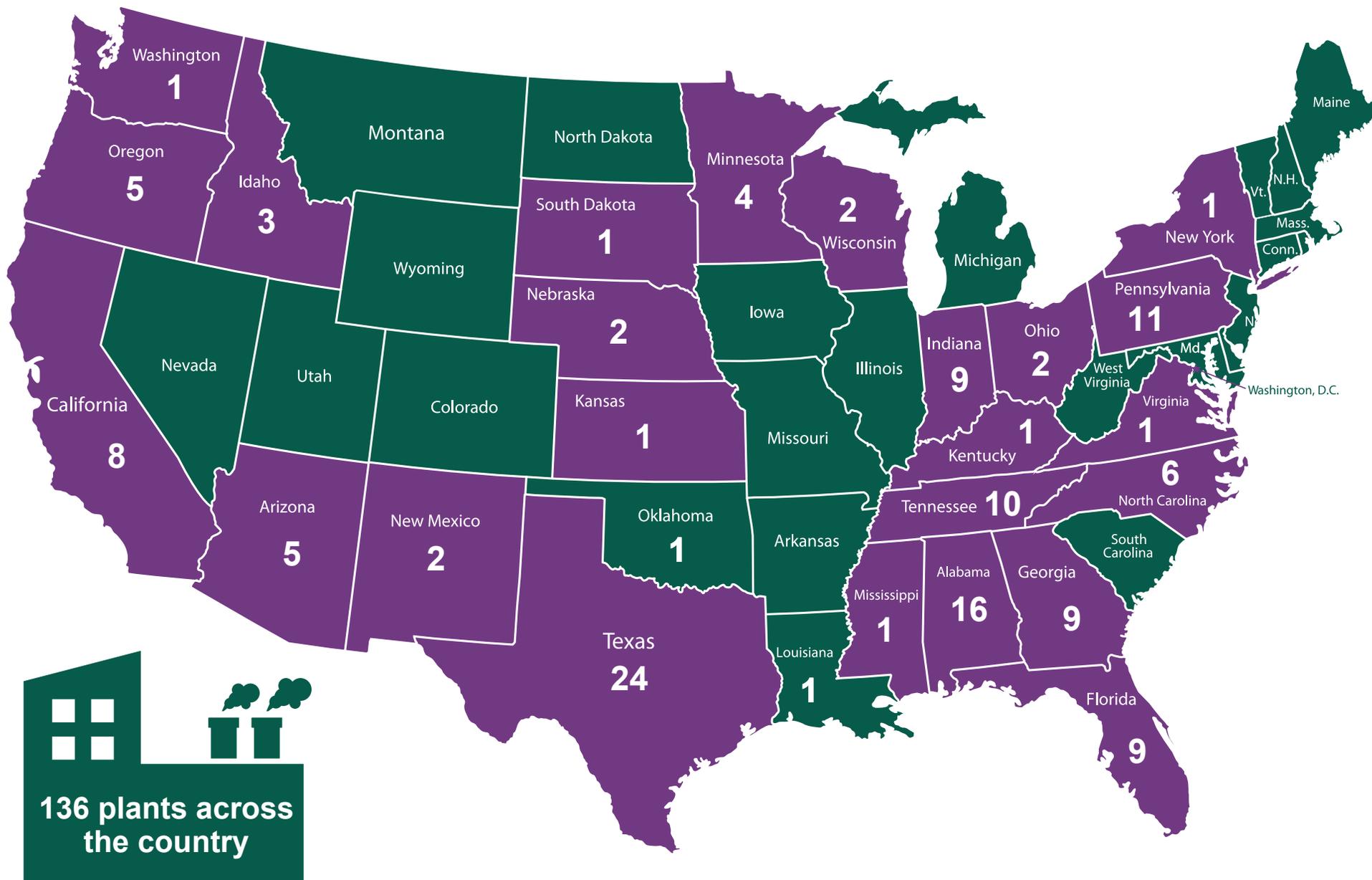
Of all residents anticipate living in their homes for more than 10 years



**38%**

Don't anticipate ever selling their home

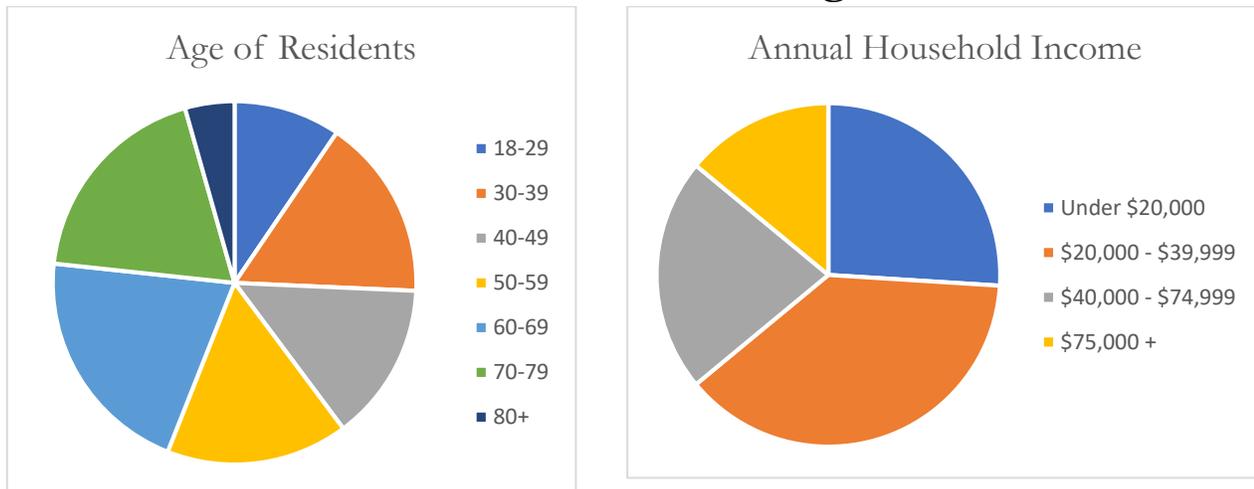
# MANUFACTURED HOME PRODUCTION IN THE UNITED STATES: Plants by State



No production facilities in Alaska or Hawaii.

Source: Institute for Building Technology and Safety (April 2021)

# Manufactured Housing Facts



Source: *Manufactured Homes: Market Facts 2018*, by Trifecta Research

## Production:

- The manufactured housing industry produced almost 95,000 new homes in 2020, approximately 9% of new, single-family home starts.
- The average sales price of a new manufactured home without land is \$81,900.
- 69% of new manufactured homes are placed on private property and 31% 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  
(2019-2014)**

	2019	2018	2017	2016	2015	2014
<b><i>New Manufactured Homes</i></b>						
<b>All<sup>1</sup></b>						
Avg. Sales Price	\$ 81,900	\$ 78,500	\$ 71,900	\$ 70,600	\$ 68,000	\$ 65,300
Avg. Square Feet	1,448	1,438	1,426	1,446	1,430	1,438
Avg. Cost per Sq. Ft.	\$ 56.56	\$ 54.59	\$ 50.42	\$ 48.82	\$ 47.55	\$ 45.41
<b>Single</b>						
Avg. Sales Price	\$ 53,200	\$ 52,400	\$ 48,300	\$ 46,700	\$ 45,600	\$ 45,000
Avg. Square Feet	1,072	1,072	1,087	1,075	1,092	1,115
Avg. Cost per Sq. Ft.	\$ 49.63	\$ 48.88	\$ 44.43	\$ 43.44	\$ 41.76	\$ 40.36
<b>Double</b>						
Avg. Sales Price	\$ 104,000	\$ 99,500	\$ 92,800	\$ 89,500	\$ 86,700	\$ 82,000
Avg. Square Feet	1,747	1,747	1,733	1,746	1,713	1,710
Avg. Cost per Sq. Ft.	\$ 59.53	\$ 51.26	\$ 53.55	\$ 51.26	\$ 50.61	\$ 47.95
<b><i>Housing Starts vs. MH Shipments</i></b> <i>(Thousands of units)</i>						
<b>New Single Family</b>						
Housing Starts	888	876	849	782	715	648
Percent of Total	90%	90%	90%	91%	91%	91%
<b>Manufactured Home Shipments</b>						
Shipped	95	97	93	81	71	64
Percent of Total	10%	10%	10%	9%	9%	9%
<b>Total</b>	<b>983</b>	<b>973</b>	<b>942</b>	<b>863</b>	<b>786</b>	<b>678</b>
<b><i>New Single-Family</i></b>						
<b>Site-Built Homes Sold</b> <i>(Home and Land Sold as Package)</i>						
Avg. Sales Price	\$ 383,900	\$ 385,000	\$ 384,900	\$ 360,900	\$ 352,700	\$ 347,700
Derived Average Land Price	\$ 84,485	\$ 87,253	\$ 91,173	\$ 82,491	\$ 80,246	\$ 84,444
<b>Price of Structure</b>						
Avg. Square Feet	2,518	2,602	2,645	2,650	2,724	2,707
Avg. Price per Sq Ft. (excl. land)	\$ 118.91	\$ 114.43	\$ 111.05	\$ 105.06	\$ 100.02	\$ 97.25
<b><i>Manufactured Home Shipments</i></b>						
Total	94,615	96,555	92,902	81,136	70,544	64,331
Single-Section	42,930	44,979	46,305	38,944	32,210	30,218
Multi-Section	51,685	51,576	46,597	42,192	38,334	34,113
<b><i>New Manufactured Homes Placed</i></b> <i>(for Residential Use)</i>						
Located in Communities	31%	37%	32%	34%	34%	33%
Located on Private Property	69%	63%	68%	66%	66%	67%
Titled as Personal Property	76%	77%	76%	77%	80%	80%
Titled as Real Estate	19%	17%	17%	17%	14%	13%

<sup>1</sup> Includes manufactured homes with more than two sections.

**Source:** These data are produced by the U.S. Commerce Department's Census Bureau from a survey sponsored by the U.S. Department of Housing and Urban Development.

## Manufactured Home Production by Product Mix by State

	2018			2019			2020		
	Single Section	Multi Section	Total	Single Section	Multi Section	Total	Single Section	Multi Section	Total
<b>New England</b>									
Connecticut	*	*	*	*	*	*	*	*	*
Maine	*	*	*	*	*	*	*	*	*
Massachusetts	*	*	*	*	*	*	*	*	*
New Hampshire	*	*	*	*	*	*	*	*	*
Rhode Island	*	*	*	*	*	*	*	*	*
Vermont	*	*	*	*	*	*	*	*	*
Subtotal	*	*	*	*	*	*	*	*	*
<b>Middle Atlantic</b>									
New Jersey	*	*	*	*	*	*	*	*	*
New York	*	*	*	*	*	*	*	*	*
Pennsylvania	2,240	3,101	5,341	2,342	3,006	5,342	1,967	2,578	4,545
Subtotal	2,240	3,101	5,341	2,342	3,006	5,342	1,967	2,578	4,545
<b>East North Central</b>									
Illinois	*	*	*	*	*	*	*	*	*
Indiana	5,884	3,319	9,203	6,106	3,222	9,328	5,827	2,649	8,476
Michigan	*	*	*	*	*	*	*	*	*
Ohio	*	*	*	*	*	*	*	*	*
Wisconsin	*	*	*	*	*	*	*	*	*
Subtotal	5,884	3,319	9,203	6,106	3,222	9,328	5,827	2,649	8,476
<b>West North Central</b>									
Iowa	*	*	*	*	*	*	*	*	*
Kansas	*	*	*	*	*	*	*	*	*
Minnesota	681	502	1,183	487	578	1,065	430	578	1,008
Missouri	*	*	*	*	*	*	*	*	*
Nebraska	*	*	*	*	*	*	*	*	*
North Dakota	*	*	*	*	*	*	*	*	*
South Dakota	*	*	*	*	*	*	*	*	*
Subtotal	681	502	1,183	487	578	1,065	430	578	1,008
<b>South Atlantic</b>									
Delaware	*	*	*	*	*	*	*	*	*
District of Columbia	*	*	*	*	*	*	*	*	*
Florida	658	2,747	3,405	661	2,687	3,348	564	2,243	2,807
Georgia	2,461	4,141	6,602	2,629	4,198	6,827	2,720	4,623	7,343
Maryland	*	*	*	*	*	*	*	*	*
North Carolina	1,626	2,237	3,863	1,536	2,287	3,823	1,541	2,293	3,834
South Carolina	*	*	*	*	*	*	*	*	*
Virginia	*	*	*	*	*	*	*	*	*
West Virginia	*	*	*	*	*	*	*	*	*
Subtotal	4,745	9,125	13,870	4,826	9,172	13,998	4,825	9,159	13,984
<b>East South Central</b>									
Alabama	6,475	7,179	13,654	6,459	7,429	13,888	6,756	8,046	14,802
Kentucky	*	*	*	*	*	*	*	*	*
Mississippi	*	*	*	*	*	*	*	*	*
Tennessee	7,242	7,058	14,300	6,810	6,613	13,423	6,886	7,814	14,680
Subtotal	13,717	14,237	27,954	13,269	14,042	27,311	13,622	15,860	29,482
<b>West South Central</b>									
Arkansas	*	*	*	*	*	*	*	*	*
Louisiana	*	*	*	*	*	*	*	*	*
Oklahoma	*	*	*	*	*	*	*	*	*
Texas	12,225	9,325	21,550	10,382	9,300	19,682	10,822	10,015	20,837
Subtotal	12,225	9,325	21,550	10,382	9,300	19,682	10,822	10,015	20,837
<b>Mountain</b>									
Arizona	719	2,113	2,832	663	2,505	3,168	688	2,111	2,799
Colorado	*	*	*	*	*	*	*	*	*
Idaho	350	1,111	1,461	415	1,175	1,590	248	976	1,224
Montana	*	*	*	*	*	*	*	*	*
Nevada	*	*	*	*	*	*	*	*	*
New Mexico	*	*	*	*	*	*	*	*	*
Utah	*	*	*	*	*	*	*	*	*
Wyoming	*	*	*	*	*	*	*	*	*
Subtotal	1,069	3,224	4,293	1,078	3,680	4,758	936	3,087	4,023
<b>Pacific</b>									
Alaska	*	*	*	*	*	*	*	*	*
California	496	2,972	3,468	474	3,014	3,488	507	2,380	2,887
Hawaii	*	*	*	*	*	*	*	*	*
Oregon	410	2,658	3,068	387	2,501	2,888	285	2,463	2,748
Washington	*	*	*	*	*	*	*	*	*
Subtotal	906	5,630	6,536	861	5,515	6,376	792	4,843	5,635
Subtotal – U.S.	41,467	48,463	89,930	39,351	48,515	87,866	39,221	48,769	87,990
Canada/Mexico/Puerto Rico	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
Total Production	44,979	51,576	96,555	42,930	51,685	94,615	42,578	51,812	94,390

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 \*\*"