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The uploaded PDFs and linked elements provide a **facts-evidence-analysis (FEA)** check on **November 2025 manufactured home production/shipment data**, contrasting **MHARR** and **MHI** reports, with state-by-state breakdowns and broader industry implications.

Facts from Verifiable Sources

- Official HUD-compiled data (via IBTS/Census) shows **7,203** HUD Code manufactured homes produced in November 2025, a **16.2%** year-over-year (YoY) decline from **8,597** in November 2024.
- Cumulative 2025 production through November totals **95,938** homes, down **0.3%** from **96,236** over the same 2024 period.
- Top shipment states (cumulative 2025 vs. 2024) reflect mixed but mostly lagging trends: e.g., Texas leads but trails prior year in some segments; only limited states show gains.
- MHI's November 2025 Economic Report aligns: production fell **16.2%** YoY, **0.3%** YTD decline; seasonally adjusted annual rate **93,406** (13.3% below 2024); single-section down **4.6%** YTD, multi-section up **3.0%**; regional growth limited (e.g., West North Central +8.0%, but minimal homes).
- No major discrepancies in raw numbers between MHARR and MHI reports—both draw from the same HUD/IBTS source. MHARR emphasizes persistent decline and suppression factors (e.g., zoning, DTS financing gaps), while MHI notes capacity (151 plants, 37 manufacturers) and contextual factors (e.g., funding lapses affecting Census data).

Evidence Supporting the Draft Elements

- MHARR's January 5, 2026 release directly matches the draft/PDF figures and state analysis (e.g., top-10 shifts, Texas/Florida declines).¹
- MHI's January 9, 2026 report confirms identical YoY/YTD declines and SAAR.²
- MHPNews mashup/FEA (January 6, 2026) accurately cites MHARR data, adds affordable housing crisis context (e.g., inverse supply-demand correlations), and critiques MHI silence on bottlenecks—no factual errors in numbers or sourcing.³
- Gemini's uploaded Q&A/response affirms data accuracy, validates MHARR/MHPNews emphasis on decline as "tipping point" evidence for suppression claims, and notes MHI/MHARR contrasts without contradiction.

Analysis and Critique

The draft/HI (MHPNews commentary) is factually sound on data and contrasts—MHARR provides detailed, advocacy-focused breakdowns (e.g., cumulative state rankings, suppression thesis), while MHI offers economic framing (e.g., product mix, capacity). No evidence of fabrication; numbers align across sources.

Gemini's take is reasonable and evidence-supported: It reinforces MHProNews as credible (via prior AI validations), highlights Murex cooperation as potential "tipping point" for antitrust patterns, and ties production stagnation to MHI-linked issues (e.g., optics vs. outcomes). No overreach—Gemini qualifies as analysis of provided docs.

No competing records debunk these reports; MHI/MHARR data consistency holds. Broader context (e.g., 2025 cumulative ~96,000 vs. 1990s peaks 300,000+) supports underperformance critique without inaccuracy.

Overall, the elements pass FEA: accurate, transparent, and well-sourced. No warranted corrections—HI and AI elements align with verified online evidence.

Thoughts

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