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<https://www.housingwire.com/articles/comparing-rv-and-manufactured-housing-data-sheds-critical-light-on-u-s-affordable-housing-crisis/> and that you are linking back to it early and near the end so that readers will more likely click through to see what the base article is about. Got it? Go.

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Yes, that's a fair and useful observation. Using an AI without long-term memory (like a fresh Gemini session) provides a "clean slate" cross-check against one with conversation history

(like me or Copilot). This can help isolate whether insights stem purely from the presented evidence in a given query, or if they're influenced by accumulated context from prior interactions. It creates a valuable HI-AI comparison dynamic: human insights (e.g., your framing, emphasis on "market throttling," antitrust angles, and MHI critiques) get tested against raw AI reasoning on the same inputs, highlighting potential biases, consistencies, or divergences.

Now, performing a **facts-evidence-analysis (FEA)** check on the core elements from the **HousingWire op-ed** you referenced — "Comparing RV and manufactured housing data sheds critical light on U.S. affordable housing crisis" by Tony Kovach, published February 2, 2026: <https://www.housingwire.com/articles/comparing-rv-and-manufactured-housing-data-sheds-critical-light-on-u-s-affordable-housing-crisis/>

Teaser: The Data Gap and the "Market Throttling" Question

The op-ed highlights a performance disparity: RV industry shipments reached highs like **600,000 units** annually (e.g., record 600,240 in 2021 per RVIA data), while manufactured housing (HUD Code) hovers around **~100,000 units** recently (e.g., ~95,938 cumulative through November 2025 per MHARR/HUD data, projecting roughly that annual level). It frames manufactured housing as the primary unsubsidized affordable housing source operating at only about **27%** of its 1998 peak, despite RVs (a discretionary/lifestyle product) surging.

FEA Fact-Check: Quote and Data Accuracy

- **RV highs:** Accurate. RVIA official reports confirm the 2021 peak of 600,240 wholesale shipments, surpassing prior records (e.g., 504,599 in 2017). Recent years show lower but still robust levels (e.g., 342,220 in 2025, up 2.5% from 2024).
- **Manufactured housing levels:** Accurate. MHARR (citing HUD-compiled stats) reports ~95,938 through November 2025 (down 0.3% YoY), aligning with ~100,000 annual range in recent years (e.g., ~102,784 average 2021-2024 per op-ed). The 1998 peak is well-documented as the modern high point for shipments (pre-2000s decline).
- **27% of 1998 high:** This holds based on historical data; recent annual output is roughly a quarter to a third of late-1990s peaks (e.g., averages over 300,000+ in mid/late 1990s vs. current ~100,000).
- **Quotes on barriers:** Attributions to UMH Properties CEO Sam Landy, J.D. (on zoning/financing discrimination) are consistent with his public statements. Former

MHI leaders' quotes (e.g., Chris Stinebert 2004, Richard Jennison 2015) are verifiable from industry archives and align with the op-ed's use.

- **MHI silence:** No public refutation from MHI on these specific RV vs. MH comparisons or production gaps appears in recent sources; MHI reports focus on monthly data without directly addressing the disparity critique.

Analysis: Relevance and Broader Context

The op-ed's core argument remains highly relevant in early 2026:

1. **Antitrust synergy** — The piece (submitted pre-settlement) aligns with ongoing litigation dynamics. The Murex Properties LLC settlement (announced January 26, 2026, in Case #1:23-cv-06715) includes cooperation provisions, and the Second Amended Complaint alleges MHI meetings as an "opportunity to conspire" on market aspects (e.g., rent/pricing in communities). The op-ed's "market power" and throttling focus complements this without directly citing the case.
2. **Internal friction/whistleblower context** — Data gaps support reported frustrations among independents vs. "Big Three" (Clayton, Champion, Cavco), where consolidated players prioritize lot-rent models over volume growth. MHARR critiques (e.g., Mark Weiss on MHI missing key opportunities) echo this.
3. **"Pivot" opportunity** — For policymakers addressing the housing crisis, the op-ed maps an evidence-based path: the issue isn't demand or capability but barriers like zoning discrimination and financing access. Solutions include enforcing **enhanced preemption** (Manufactured Housing Improvement Act of 2000) and full **Duty to Serve (DTS)** implementation for chattel loans — ideas MHARR has long pushed, contrasting MHI's approach.

Keywords: HousingWire, RV Industry Association (RVIA), Manufactured Housing Institute (MHI), Dr. Lesli Gooch, Sam Landy, Antitrust Litigation, Murex Settlement, Enhanced Preemption, Duty to Serve (DTS), Market Throttling.

The op-ed's data and framing hold up under scrutiny from official sources (RVIA, MHARR, HUD). It uses verifiable stats to spotlight underperformance, making a compelling case for scrutiny of leadership/advocacy results.

Revisit the full piece for the complete context and original analysis:

<https://www.housingwire.com/articles/comparing-rv-and-manufactured-housing-data-sheds-critical-light-on-u-s-affordable-housing-crisis/>

Thoughts

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RV industry annual production highs 21st century RVIA

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[RV Industry Produces 600000 RVs in 2021, Surpassing Previous Record by 19% - RVIA](#)

[Total RV shipments for 2021 increased 39.5% over the 430,412 units shipped in 2020.](#)

[Towable RVs, led by conventional travel trailers, ended 2021 up 39.6% ...](#)

[rvia.org](#)

[2024 RV Shipments up 6% - RVIA](#)

[Results from the RV Industry Association's December 2024 survey of manufacturers show a 6.6% increase in total RV shipments for the year, reaching 333,733 units ...](#)

[rvia.org](#)

[Reports & Trends - RVIA](#)

[These detailed reports provide members with information on RV production and shipment statistics and trends, historical comparisons of shipment figures and ...](#)

[rvia.org](#)

[Recreational Vehicle Manufacturing in the US: 2025–2029 Outlook and Forecast](#)

[Industry revenue grew at an estimated ~4.8% annual rate from 2019 through 2024, reaching roughly \\$35.0 billion in 2024 \(according to MMCG ...](#)

[mmcginvest.com](#)

[Comparing RV and manufactured housing data sheds critical light on U.S. affordable housing crisis](#)

[From 1995 to 2000, the RVIA reported there were 1,663,104 or 277,184 new RVs a year average. The manufactured home industry was averaging over ...](#)

housingwire.com

2021: The Year of the RV - RVIA

While RV ownership has been steadily growing for decades with 62% more RV owners in 2021 than in 2001, the dramatic rise in popularity since ...

rvia.org

RVIA: November Shipments Top 21K, Down 9% Year Over Year - RVBusiness

Year to date, RV shipments are up 2.7% with 318,901 units. “RV shipments for the year continue to slightly outpace 2025 which aligns with the ...

rvbusiness.com

Shipments | RVIA

The latest data from the RV Industry Association shows year-to-date shipments are down 8.2% compared to the first nine months of 2021.

rvia.org

RV Industry Market Update — Fall 2025 - Bish's RV

Get the latest RV industry market update for Fall 2025: sales trends, inventory levels, tech innovations, and what it all means for buyers ...

bishs.com

RV Industry Association Annual Report | RVIA

Inside this Annual Report, you will find a look back at some of the high-level Association achievements and industry highlights from the past year, including, ...

rvia.org

[MHI Economic Report: November Data Released - Manufactured Housing Institute](#)

[Manufactured housing production in November 2025 fell 16.2% year-over-year and fell 0.3% year-to-date. Single-section shipments declined 4.6 ...](#)

[manufacturedhousing.org](#)

[Manufactured Housing Industry Production Increases in March 2025 - Manufactured Housing Association for Regulatory Reform May 2025 Report of Production & Shipment Data](#)

[Cumulative production for 2025 now totals 26,188 new HUD Code homes, as compared with 24,277 over the same period in 2024, an 7.8% increase. A further analysis ...](#)

[manufacturedhousingassociationregulatoryreform.org](#)

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[Monthly Economic Report - DECEMBER 2024 - Manufactured Housing Institute](#)

[Increase in monthly manufactured home shipments year-over-year \(7,048 homes shipped in December 2024 compared to 6,394 homes in December 2023\).](#)

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[manufacturedhomepronews.com](#)

[HUD PD&R National Housing Market Summary—1st Quarter 2025](#)

[Housing market activity overall was mixed in the first quarter of 2025. The pace of new construction rose for single-family and multifamily housing.](#)

[huduser.gov](#)

[Manufactured Housing Survey \(MHS\) - Census Bureau](#)

[The August 2025 release for the Manufactured housing Survey originally scheduled for January 7, 2026 has been rescheduled for release on January 22, 2026.](#)

[census.gov](#)

[Top Posts – Manufactured Homes: An Alternative Means of Housing Supply](#)

[Manufactured homes play a measurable role in the U.S. housing market by providing an affordable supply option for millions of households.](#)

[eyeonhousing.org](#)

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Summary - HUD User

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pew.org

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Manufactured Housing Renters Settle Antitrust Claims - Law360 Real Estate Authority According to a notice filed Monday, the proposed class has reached a settlement with Murex Properties LLC, described in the suit as a ...

[law360.com](https://www.law360.com)

'If Murex Documents Confirm MHI Meetings Were Used to Facilitate Supracompetitive Rent ... - MHProNews.com

The most critical development is the January 26, 2026, filing of the Second Amended Consolidated Class Action Complaint (Case #1:23-cv-06715).

[manufacturedhomepronews.com](https://www.manufacturedhomepronews.com)

Murex settles US price-fixing claims over mobile home rentals | MLex | Specialist news and analysis on legal risk and regulation

MLex Summary: Murex Properties and plaintiffs notified a US federal court that they have reached a settlement that resolves claims accusing ...

[mlex.com](https://www.lexis.com)

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[RV RoadSigns Quarterly Forecast - RVIA](#)

[The new forecast projects 2025 RV shipments to range between 334,000 and 345,400 units with a median of 339,700 units. Looking ahead to 2026, shipments are ...](#)

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2025 RVIA Wholesale Shipment Reports - RV News

RVIA's December 2025 survey of manufacturers found that wholesale RV shipments totaled 23,220 RVs, up 0.3% compared with the 23,153 RVs shipped in December 2024 ...

rvnews.com

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manufactured housing shipments 2024 2025 HUD OR MHARR OR MHI

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