



Smart off-site  
Association

NOVEMBER 2024

# 3D MODULAR CAPACITY SURVEY



**CONSTRUCTION  
INDUSTRY  
FEDERATION**

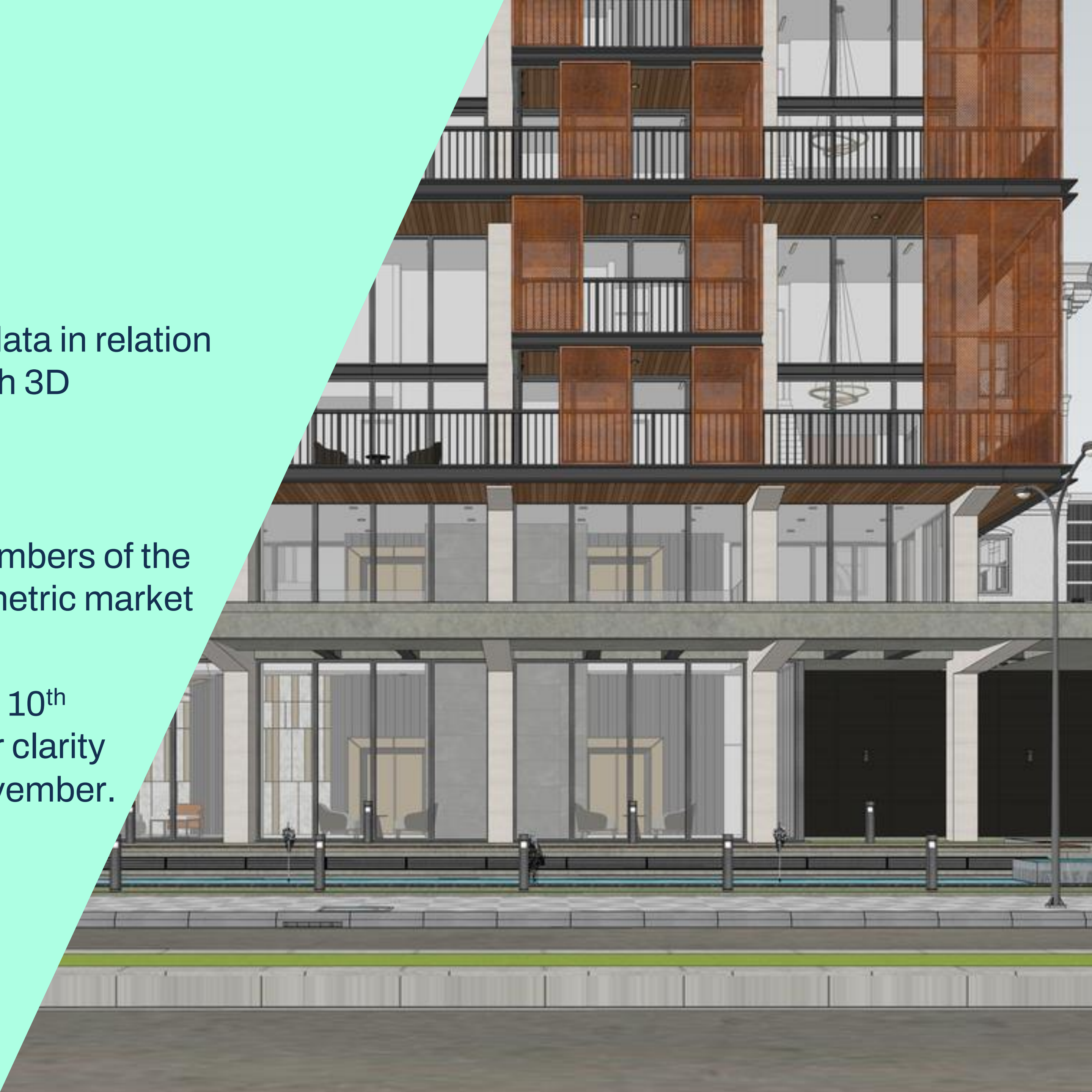
## BACKGROUND AND OBJECTIVES

The purpose of this survey was to provide baseline data in relation to the excess capacity that currently exists in the Irish 3D volumetric Market.

## METHODOLOGY

Research was conducted via an online survey. 7 members of the Smart Off-site Association operating in the 3D volumetric market took part.

The survey was conducted between 17<sup>th</sup> August and 10<sup>th</sup> September 2024. A second survey was re-issued for clarity purposes. This took place between 12<sup>th</sup> and 18<sup>th</sup> November.





# MODULAR CAPACITY



HOW MANY MODULES COULD YOUR COMPANY MANUFACTURE ON  
A YEARLY BASIS AT FULL CAPACITY?

3,907 UNITS

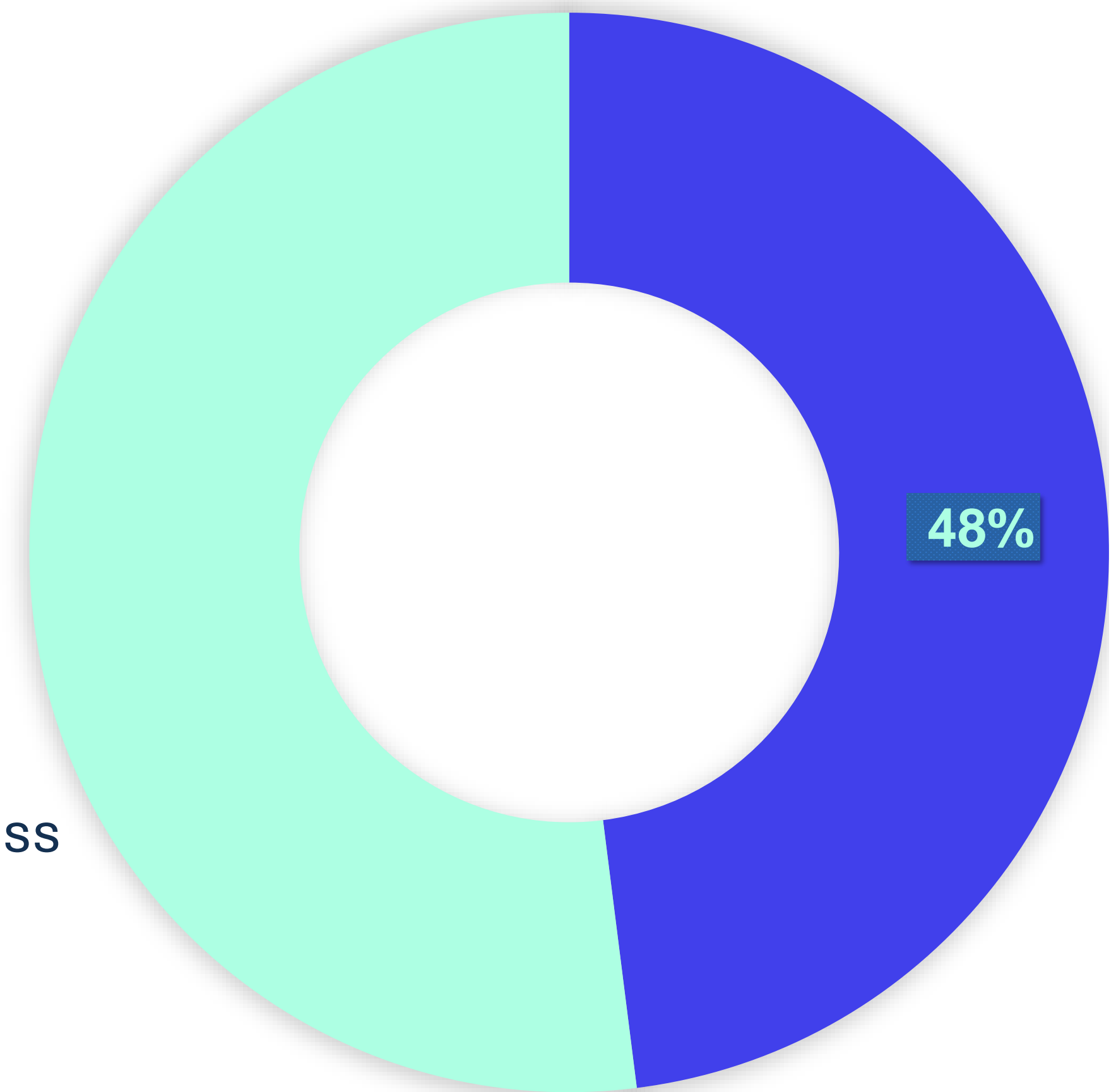
HOW MANY MODULES DID YOUR COMPANY  
MANUFACTURE IN 2023?

1,864 UNITS

PERCENTAGE CAPACITY UTILISED:

48%

From the 7 companies surveyed, the average amount of excess  
capacity that exists in the current 3D volumetric market in  
Ireland is 52%.

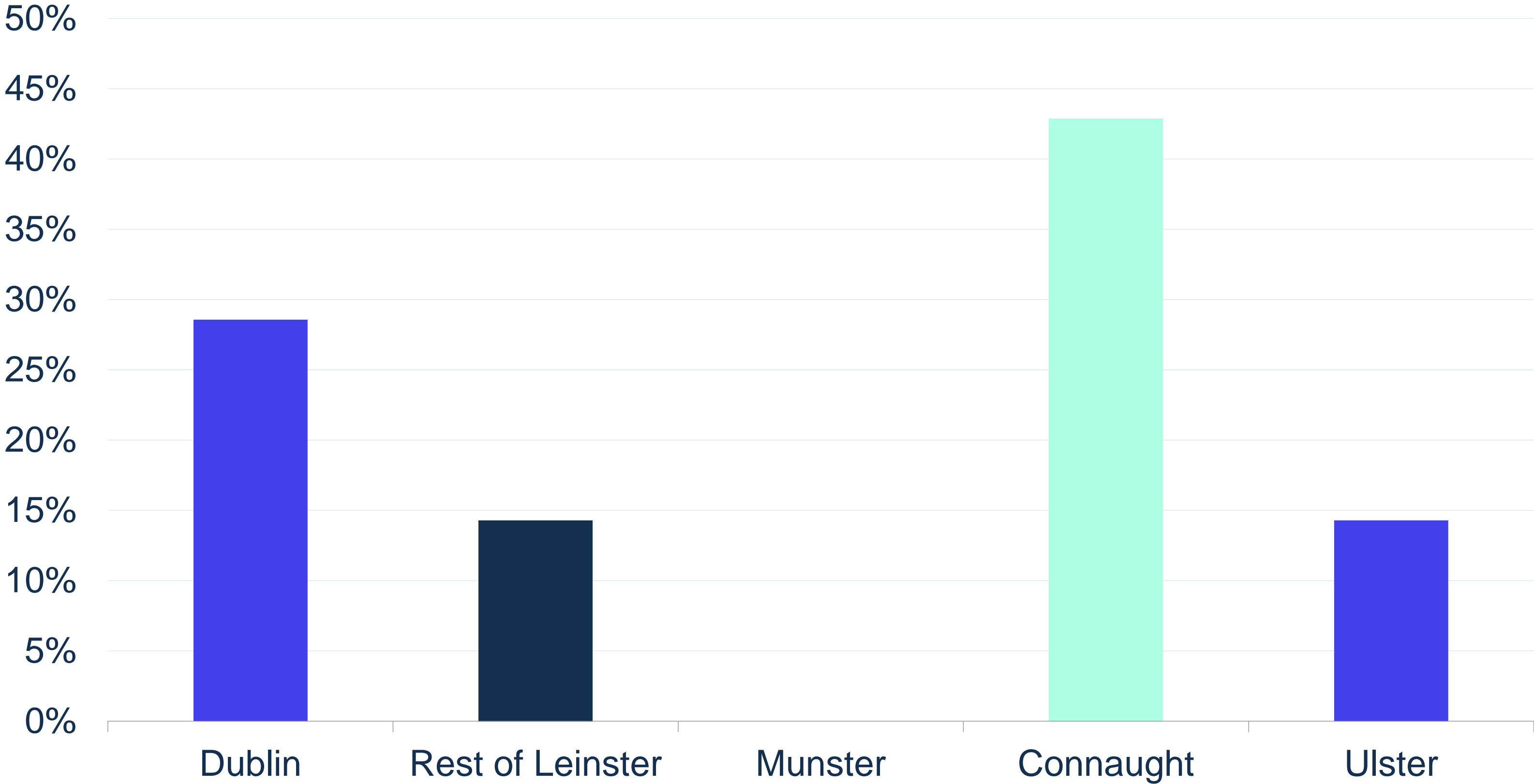




# LOCATION



# WHERE IN IRELAND IS YOUR COMPANY BASED?



From the 7 companies surveyed, 3 are based in Connaught, 2 are based in Dublin, 1 in the Rest of Leinster and 1 in Ulster

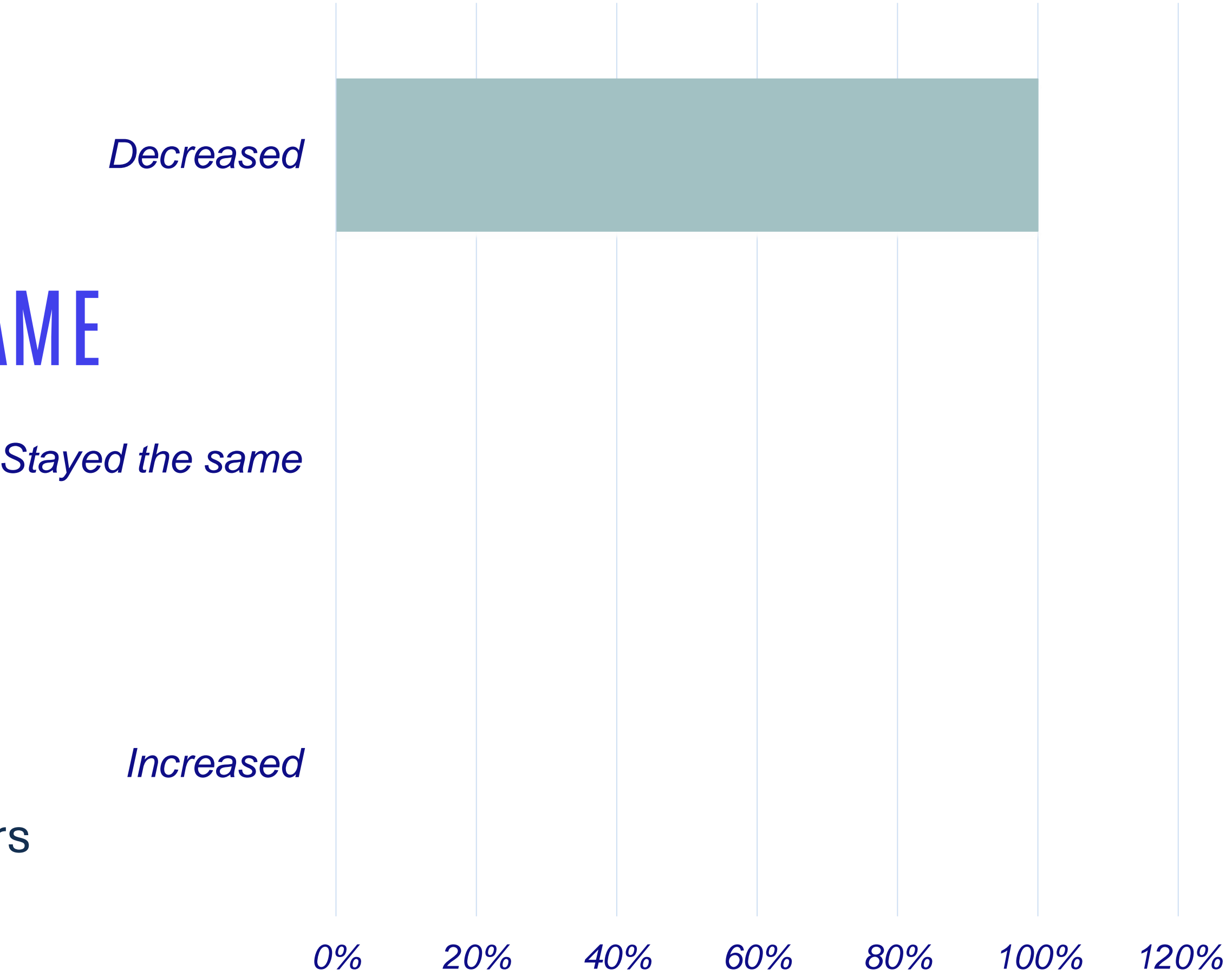


# REVENUE



IN THE LAST 3 MONTHS HAS THE TOTAL REVENUE  
GENERATED BY NEW ORDERS FOR YOUR  
COMPANY FOR THE PERIOD  
INCREASED, DECREASED, OR STAYED THE SAME  
COMPARED WITH THE  
SAME PERIOD IN 2023?

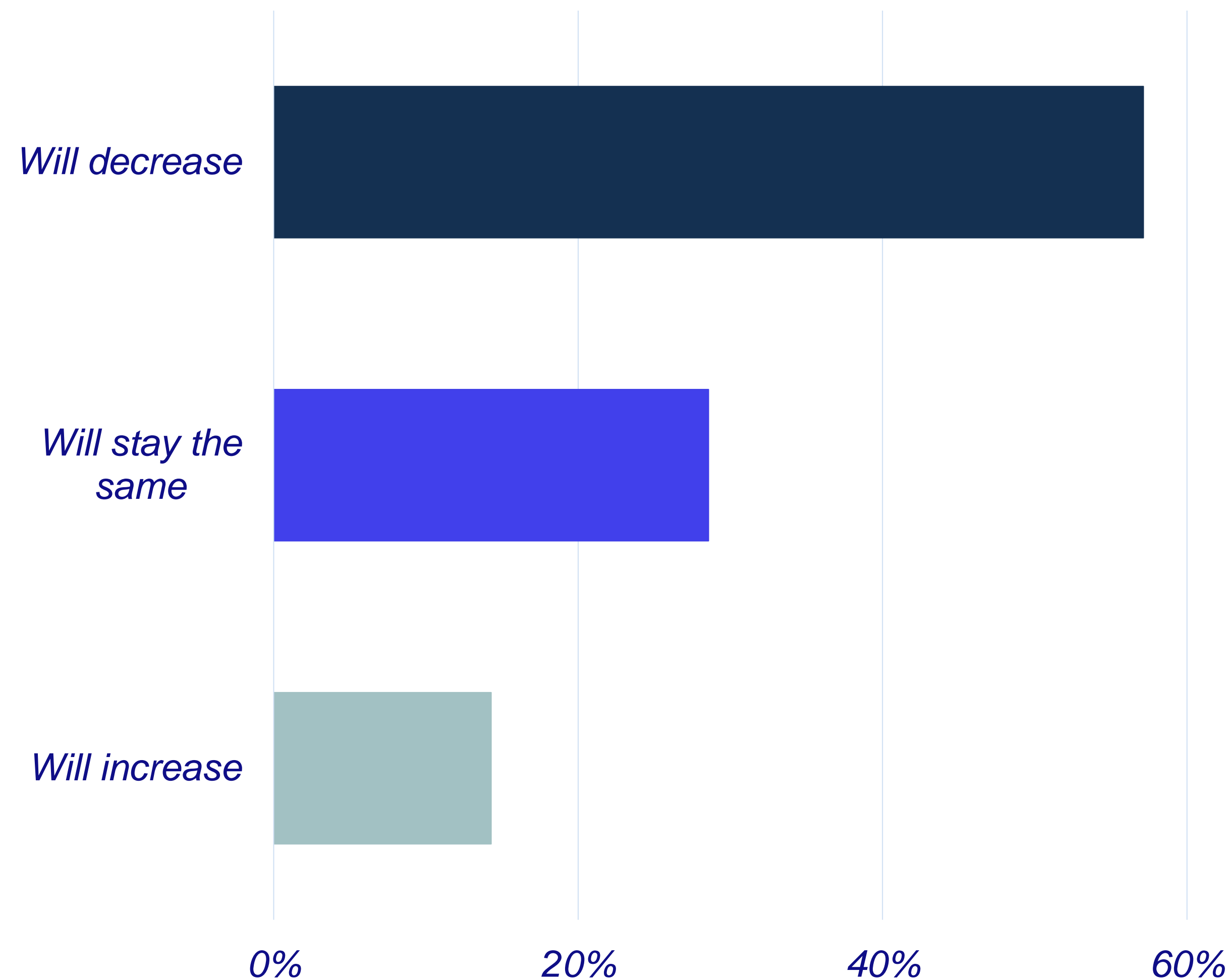
All members survey have experienced a decrease in orders  
by comparison to the same period in 2023.





IN THE NEXT 3-MONTH PERIOD  
(SEPTEMBER TO DECEMBER)  
DO YOU EXPECT THE TOTAL REVENUE  
GENERATED BY NEW ORDERS  
FOR YOUR COMPANY TO INCREASE,  
DECREASE, OR STAY THE SAME  
COMPARED WITH THE LAST 3 MONTHS?

From September 2024 to December 2024, 57.14% companies expect revenue generated by new orders to decrease compared to the previous 3 months; 28.57% expect revenues generated by new orders to stay the same; and 14.39% expect new orders to increase.

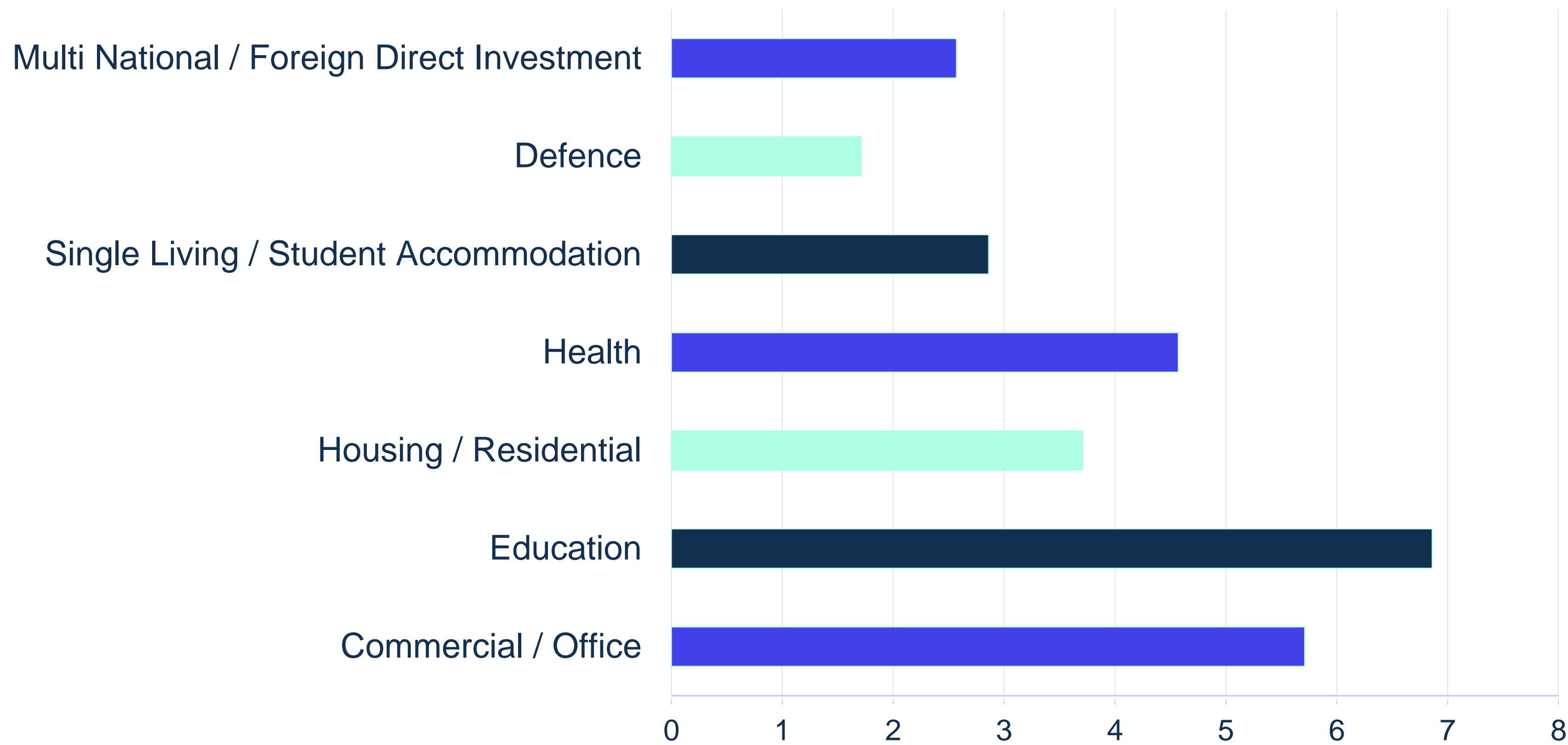


# MARKETS



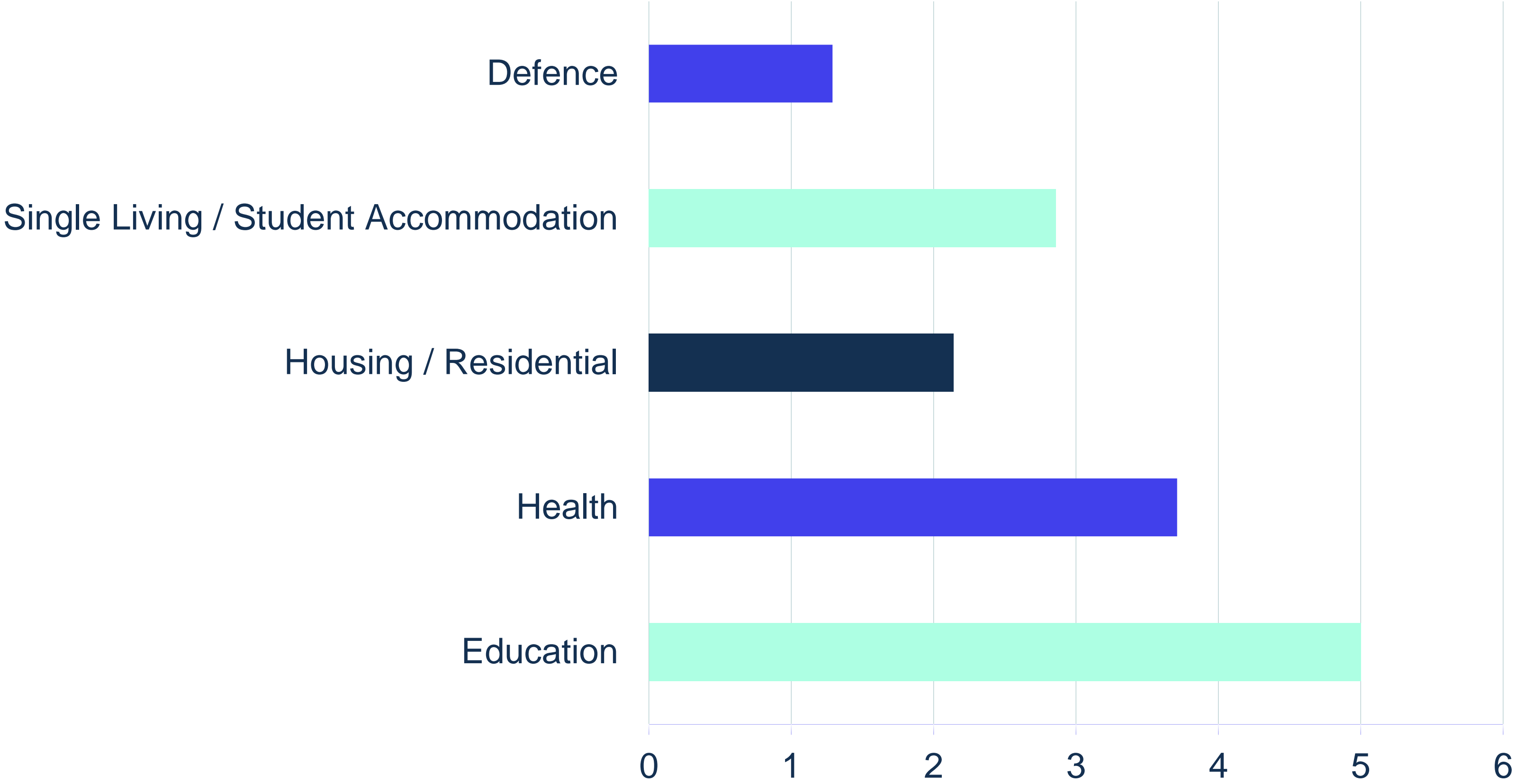


# PLEASE RANK IN ORDER, BASED ON VOLUME, THE SECTORS THAT YOUR COMPANY HAS SERVICED IN RELATION TO 3D VOLUMETRIC IN THE PAST 3 YEARS?



Education is the main sector that respondents have secured pipeline during the past three years. This is followed by Commercial / Office and Health respectively.

# PLEASE RANK IN ORDER OF PREFERENCE THE AREAS OF THE PUBLIC SECTOR YOU SEE AS PRFERENTIAL IN THE IMMEDIATE TERM TO DEVELOP THE GROWTH OF THE 3D VOLUMETRIC MARKET IN IRELAND

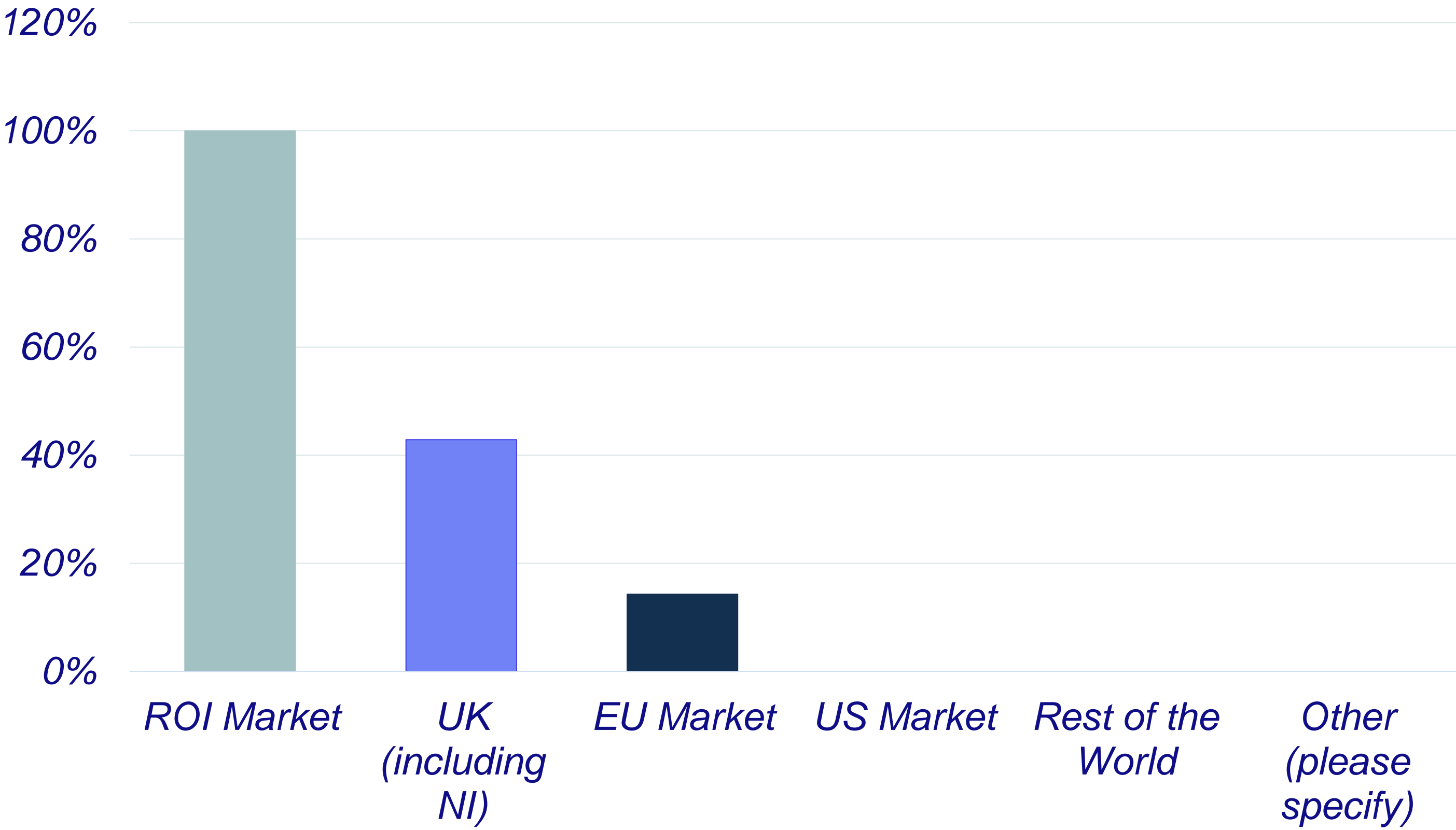


Participants ranked education and health as the preferred sectors of the construction industry for immediate growth. This is followed by Single / Living Student Accommodation.



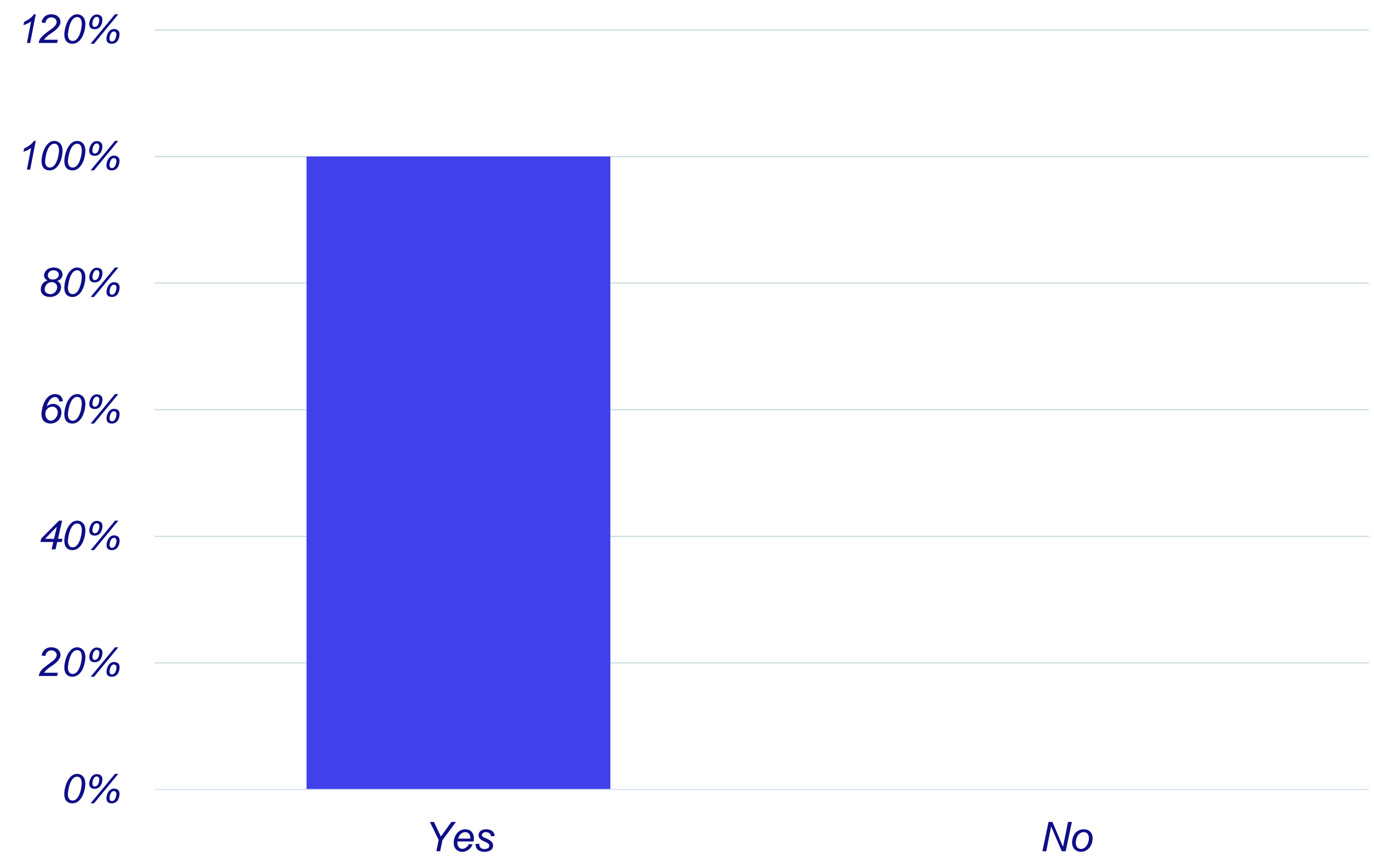
# TO WHICH OF THE FOLLOWING MARKETS IS YOUR ORGANISATION CURRENTLY PROVIDING PRODUCTS / SERVICES?

All companies are operating the ROI market. 3 companies are operating in the UK Market including NI and 1 company is operating the EU Market.



# HAS YOUR COMPANY CONSIDERED ENTERING INTO AN EXPORT MARKET OUTSIDE OF THE ROI IF IT HAS NOT ALREADY DONE SO?

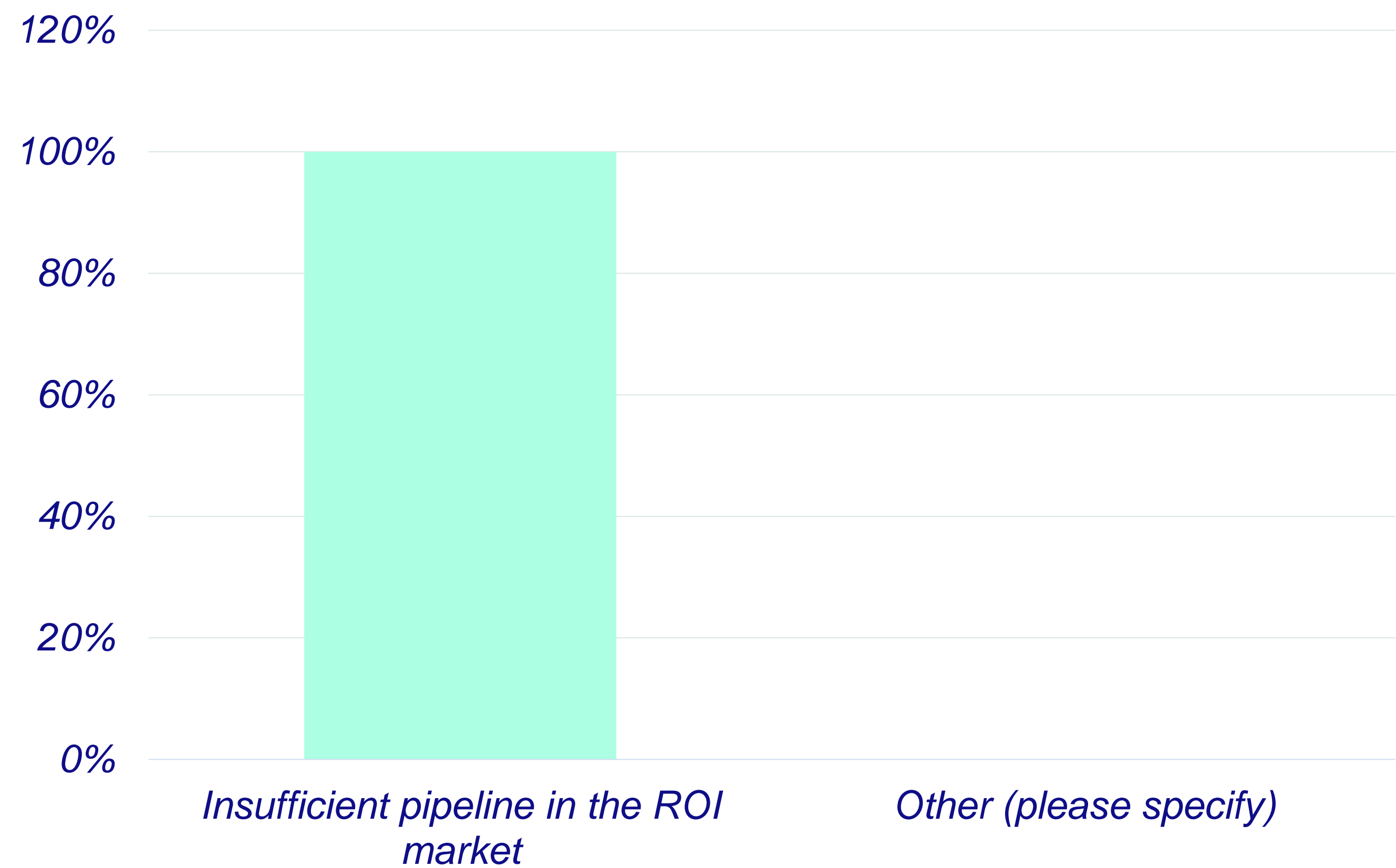
All companies surveyed have considered entering into an export market.





# IF YOUR COMPANY HAS CONSIDERED ENTERING INTO AN EXPORT MARKET WHAT WAS THE MAIN REASON FOR EXPLORING THIS OPTION?

The reason all companies surveyed have considered exporting has been due to insufficient pipeline in the ROI market.



# EMPLOYMENT







**APPROXIMATELY HOW MANY FULL TIME EMPLOYEES DOES YOUR ORGANISATION CURRENTLY EMPLOY?**

**409 EMPLOYEES**

**IF YOUR FACTORY WAS OPERATING AT FULL CAPACITY, APPROXIMATELY HOW MANY FULL TIME EMPLOYEES WOULD YOUR COMPANY EMPLOY?**

**671 EMPLOYEES**

**THE PERCENTAGE INCREASE:**

**39%**

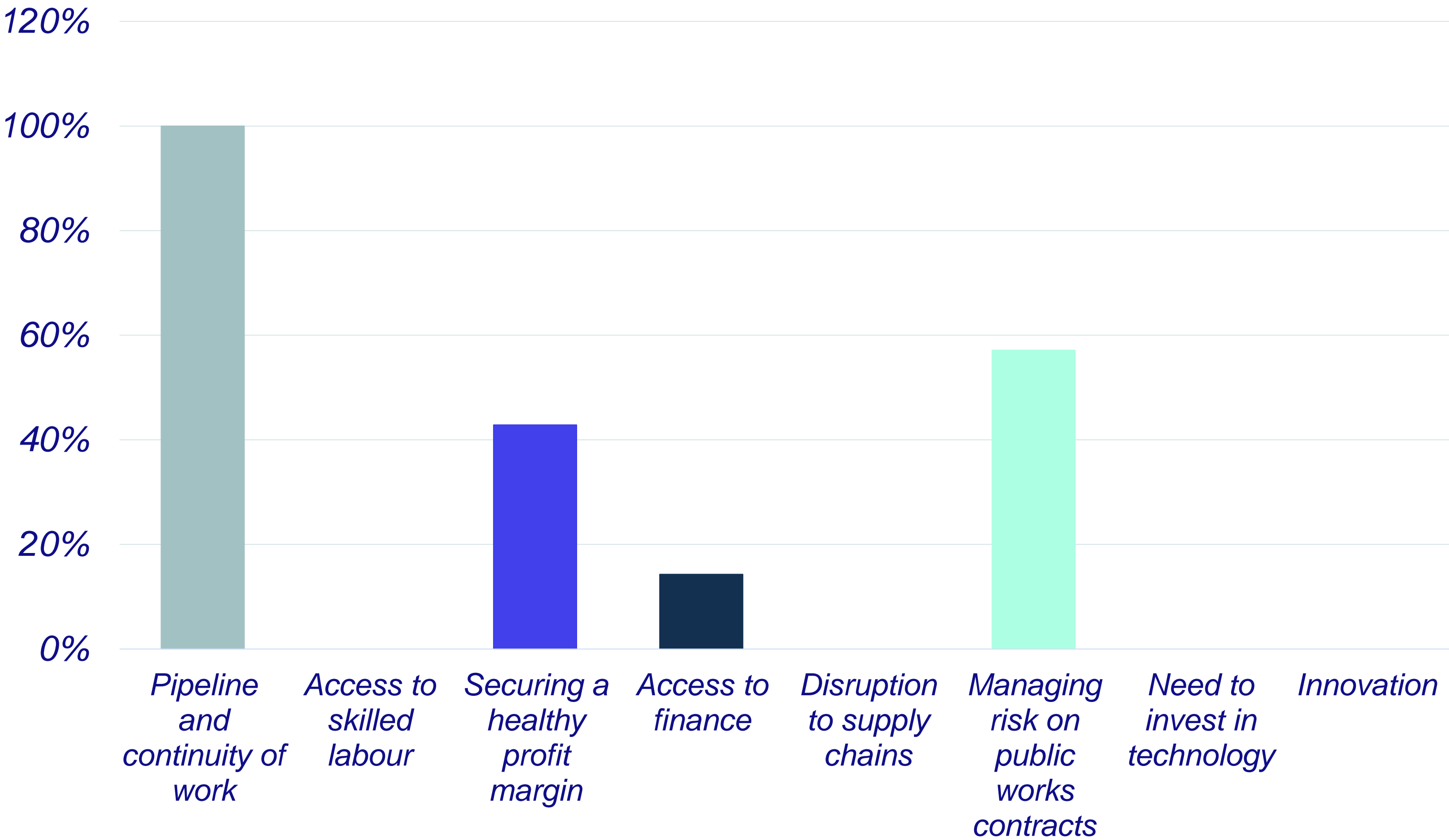
If the 52% excess capacity that currently exists in the market was utilised, the 7 responding organisations would employ an additional 262 employees. Considering that most 3D volumetric suppliers operate in regional areas this is a substantial increase in employment.

# CHALLENGES



# WHAT, IF ANY, ARE THE KEY CHALLENGES FACING YOUR BUSINESS OVER THE NEXT 3 - 6 MONTHS?

100% of members reported that the key challenge facing their businesses over the next 3 – 6 months is pipeline and continuity of work. This was followed by managing risk on public works contracts; securing a healthy profit margin; and access to finance.

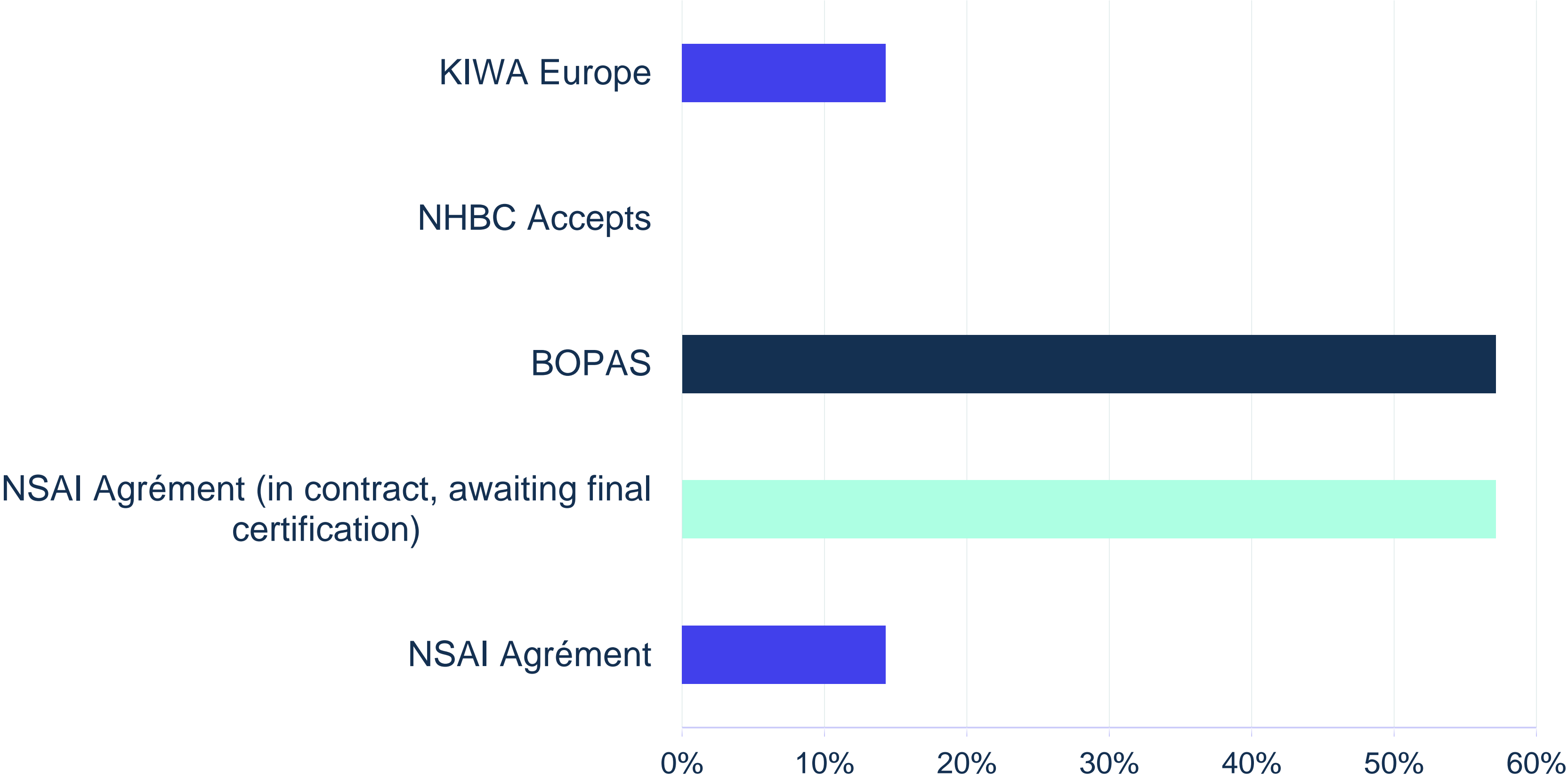




# CERTIFICATION

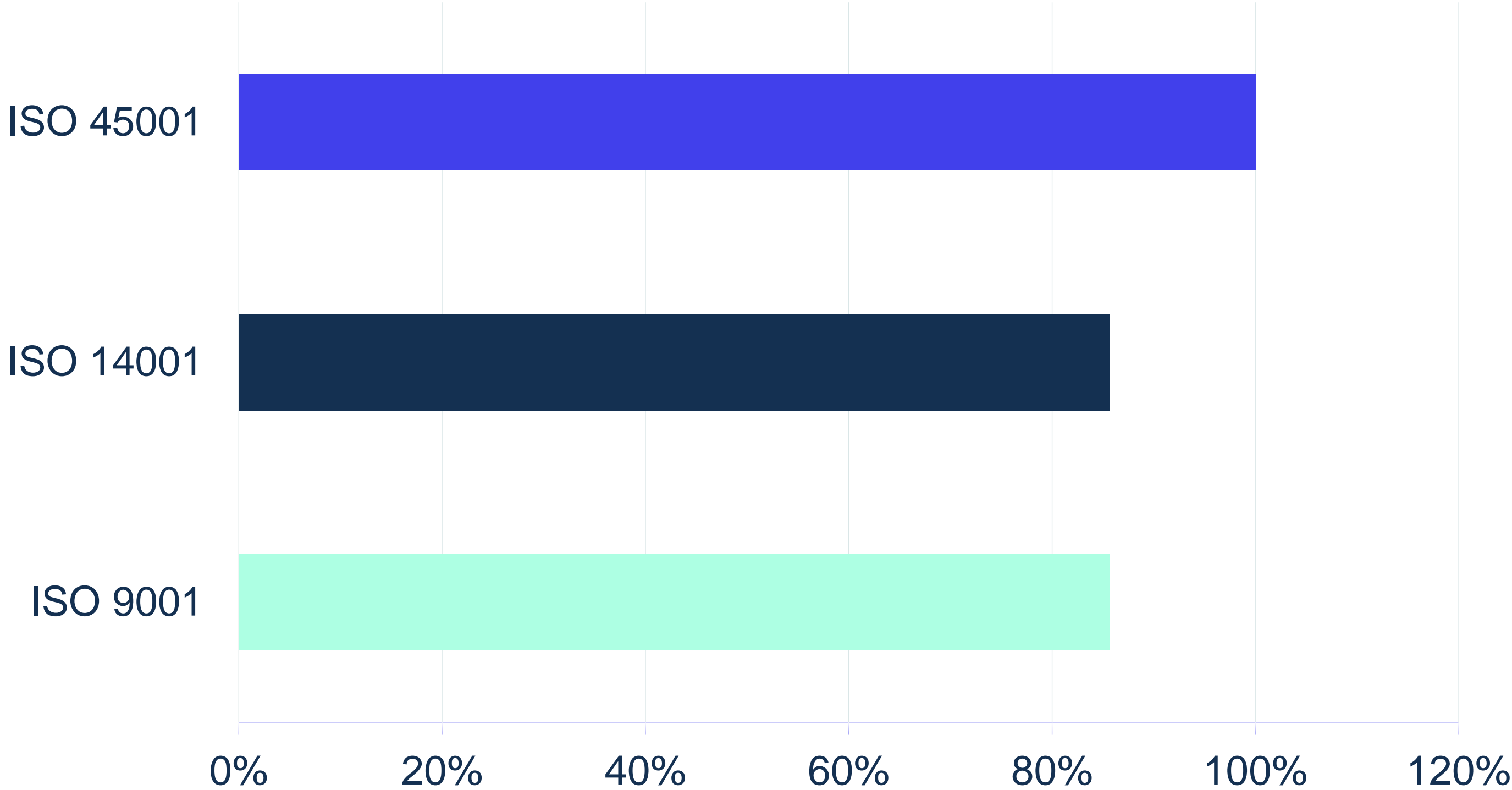


# WHAT PRODUCT CERTIFICATION DOES YOUR BUSINESS CURRENTLY HAVE?



Four of the seven respondents are currently in the process of securing NSAI Agrément Certification. One respondent reported that they have Agrément certification. Four respondents have BOPAS Certification.

# WHAT MANAGEMENT CERTIFICATION DOES YOUR BUSINESS CURRENTLY HAVE?



All respondents have ISO 45001 Certification. 6 respondents have ISO 14401 Certification; and 6 respondents have ISO 90001 Certification



# VOLUME CAPACITY IN TERMS OF HOUSING



HOW MANY HOUSES/APARTMENTS USING  
3D VOLUMETRIC WAS YOUR ORGANISATION  
INVOLVED IN DELIVERING IN 2023? **314**  
**UNITS**

HOW MANY SCHEME HOUSES USING 3D  
VOLUMETRIC WITH A PMV OF 60% +  
COULD YOUR COMPANY  
DELIVER IF ITS FULL CAPACITY WAS  
ASSIGNED TO HOUSING?\* **1178 UNITS**

\* Assume 4 modules per house at 30 square meters per module.



# CONCLUSIONS

- There is currently 52% excess capacity in the Irish 3D Volumetric Market
- Revenue generated by companies has decreased by comparison with the same 3-month period in 2023
- All companies are considering entering into an export market due to lack of pipeline in the ROI
- Participants consider the education and health sectors as preferential for the growth of the 3D volumetric industry in the immediate term
- Lack of pipeline is the key challenge reported by 3D volumetric suppliers over the next 3 to 6 months.





# THANK YOU

## Get in Touch

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