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The Data Behind the Demand

Ed Hudson, *Home Innovation Research Labs*

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Introduction

Ed Hudson

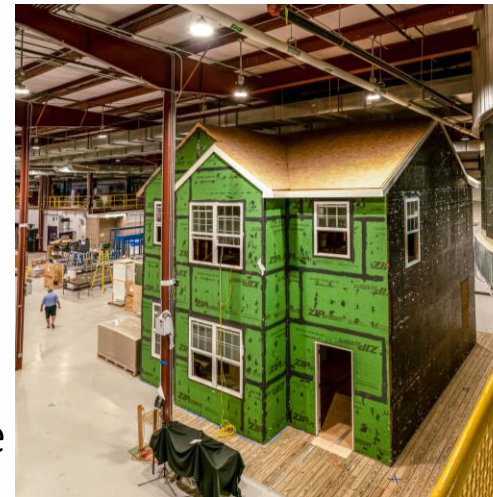
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About Us

Home Innovation Research Labs has been assisting manufacturers develop and commercialize new building technologies since 1964. As independent, third-party researchers, we deliver everything you need under one roof:

- **Market research** through market demand data, qualitative & quantitative research, and observational studies
- **Building science** and real-world applied research
- **Laboratory testing** & product certification
- Relationships with code organizations and officials to help navigate and fast-track product certification & listing

Home Innovation is also the accrediting agency and standard developer of the National Green Building Standard and the #1 residential green home certifier in the U.S. — more than 120,000 homes certified in 2025.



Data Sources for Presentation

- **Section 1:** Trends in building components, materials, and offsite construction methods and more
 - 2020 - 2026 Annual Builder Practices Surveys
 - 1,000+ builders participated each year
- **Section 2:** Attitudinal surveys on components and construction challenges
 - Future use of components and offsite methods, from 2019 – 2026
 - Challenges with costs & cycle time delays, June 2026
 - Barriers and accelerators to the adoption of wall panels, August 2026

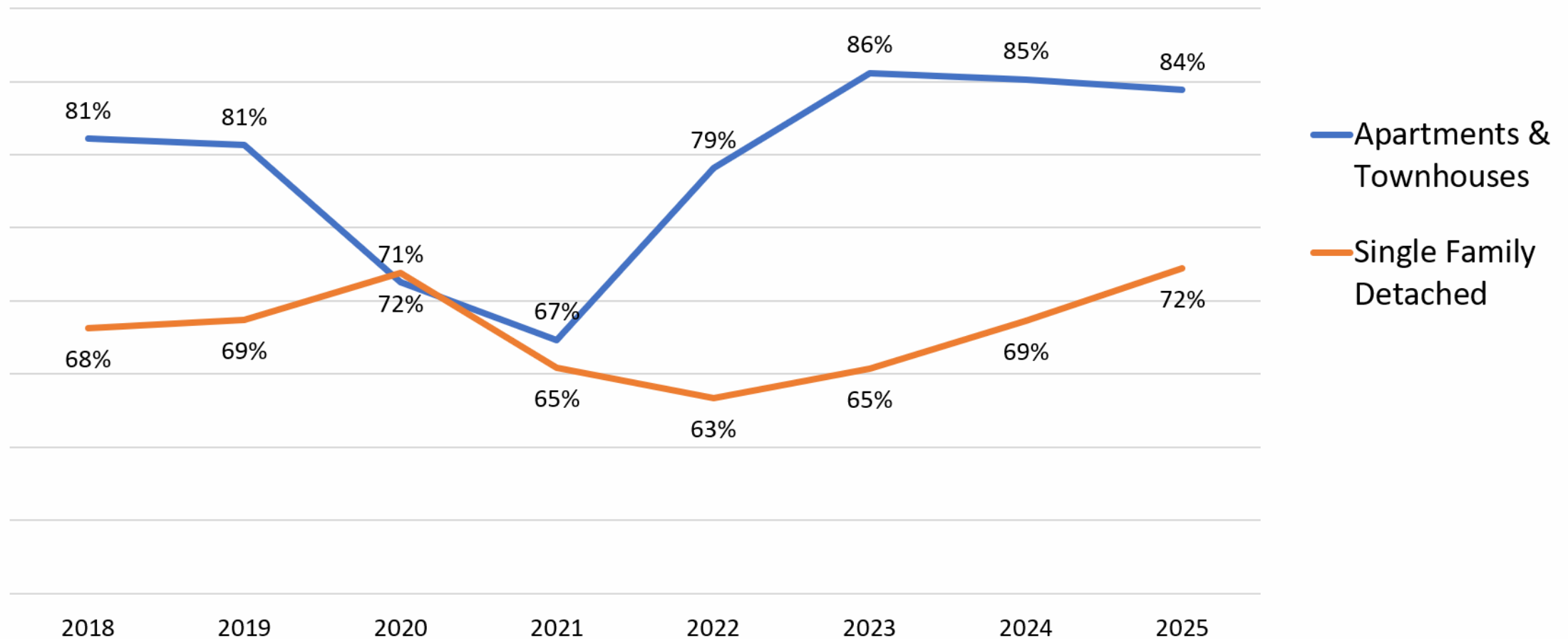


Section One

Trends in Components Usage in New Home Construction



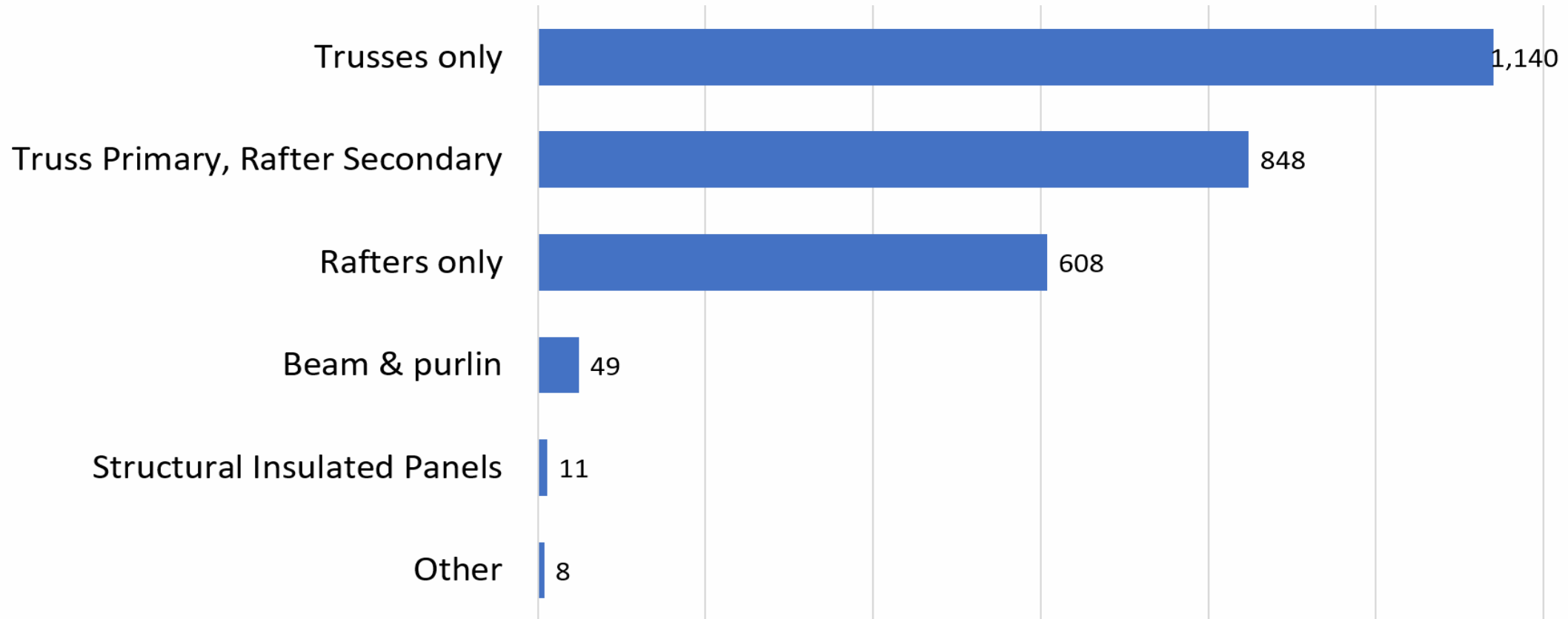
Percentage of New US Homes with Trusses as Primary Roof Structure



Source: Annual Builder Practices Reports, Home Innovation Research Labs

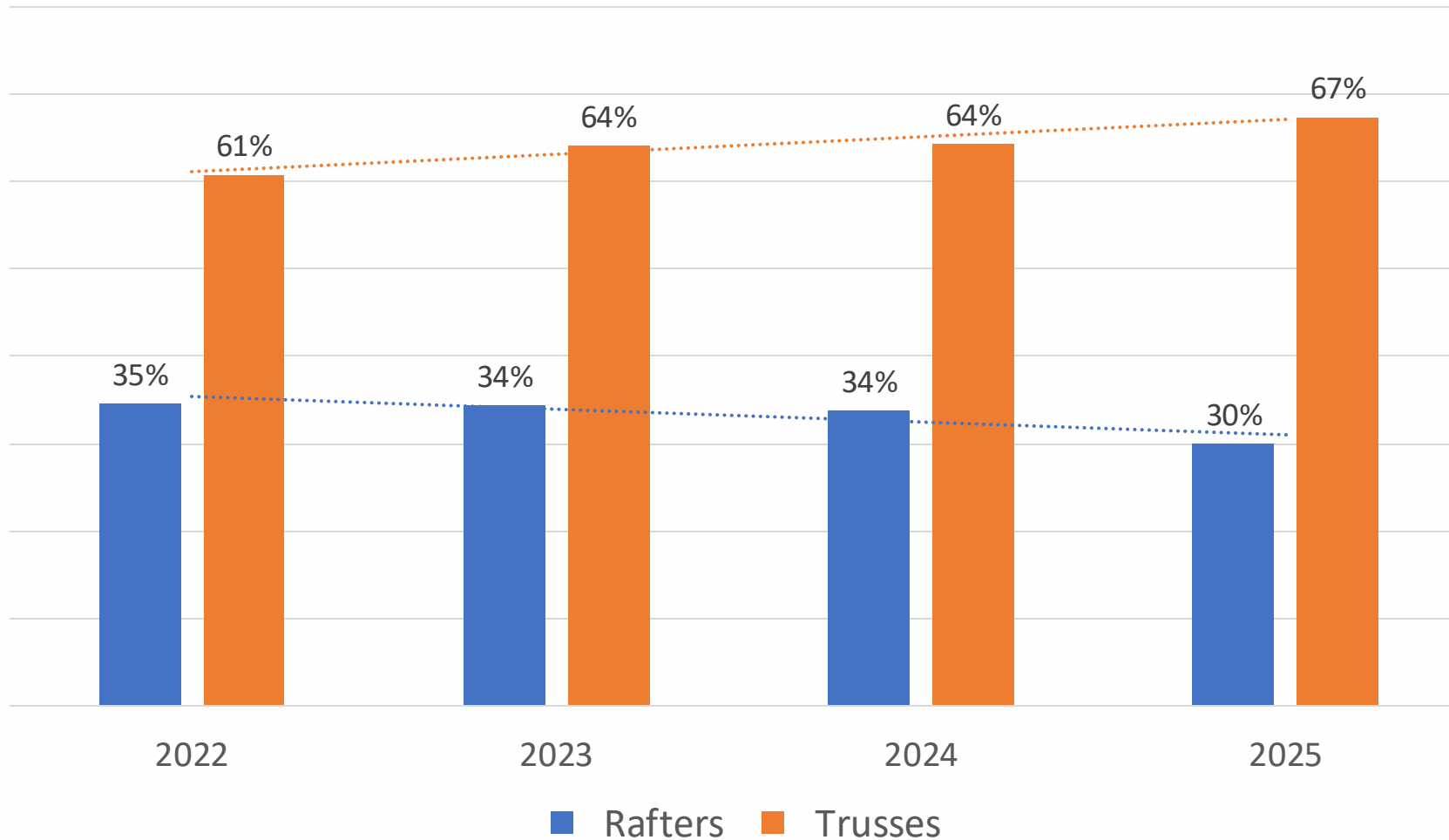
Volume of Roof Structures in New Homes, 2025

(millions of sq.ft. of roof footprint)



Source: Annual Builder Practices Reports, Home Innovation Research Labs

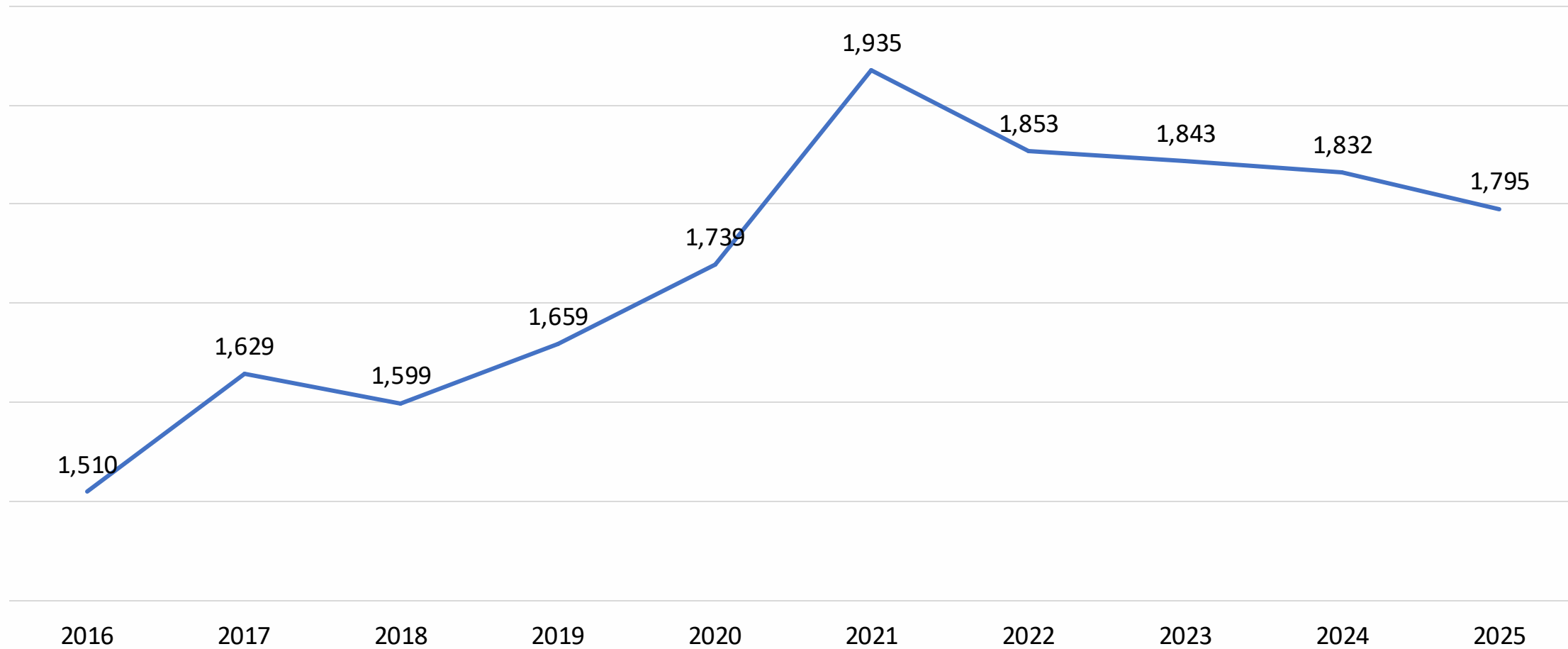
Shares of Roof Structure for New SF & MF Homes (combination or “hybrid” roofs distributed)



Source: Annual Builder Practices Reports, Home Innovation Research Labs



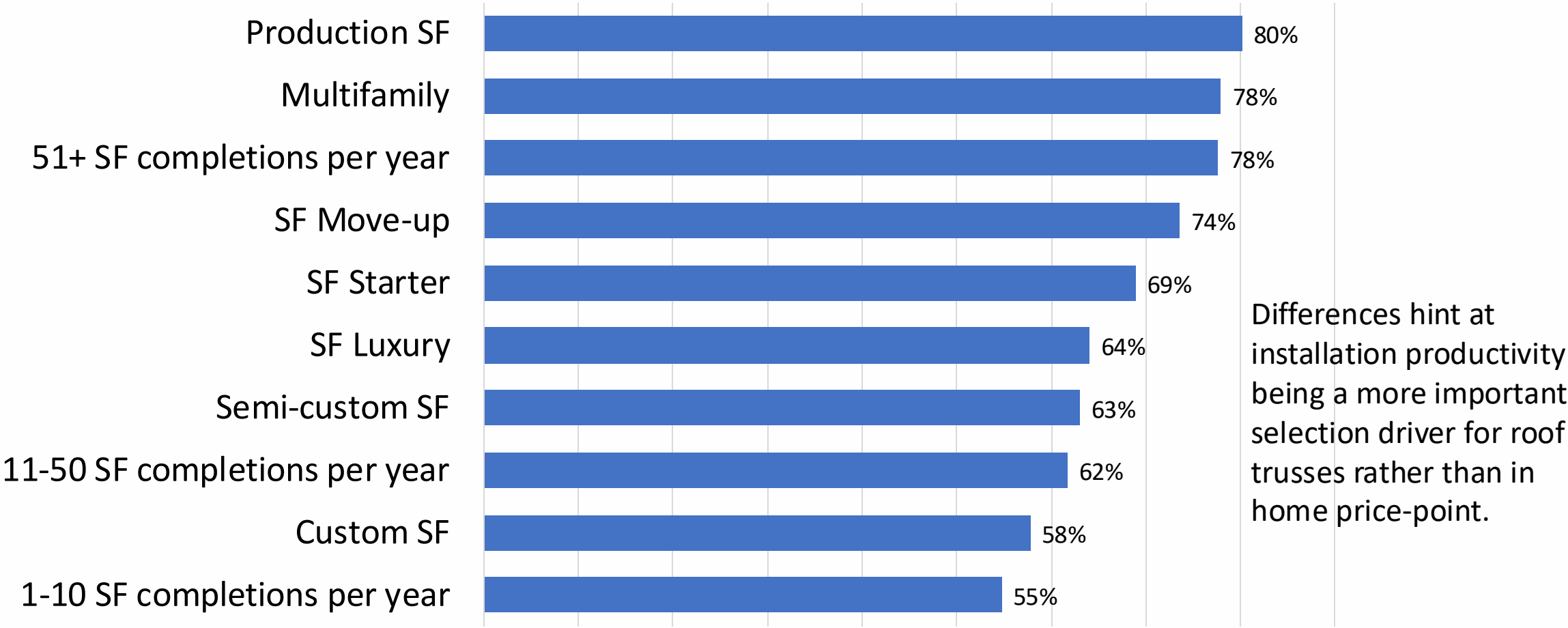
Footprint of Roof Trusses in New Homes (millions of sq.ft.)



Source: Annual Builder Practices Reports, Home Innovation Research Labs

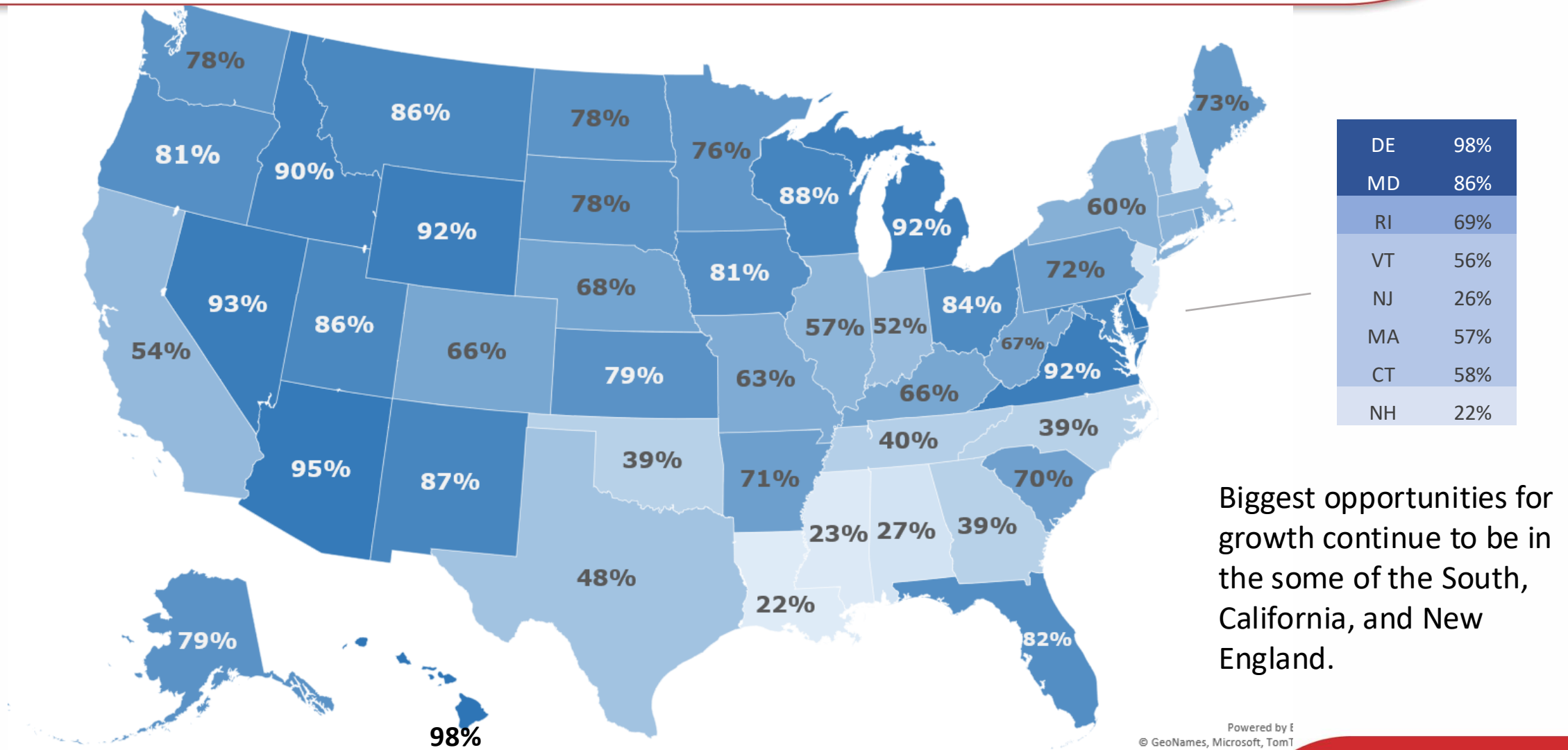
Who is More Likely to Spec Roof Trusses?

Percentage of Trussed Homes by Home & Builder Types, 2025



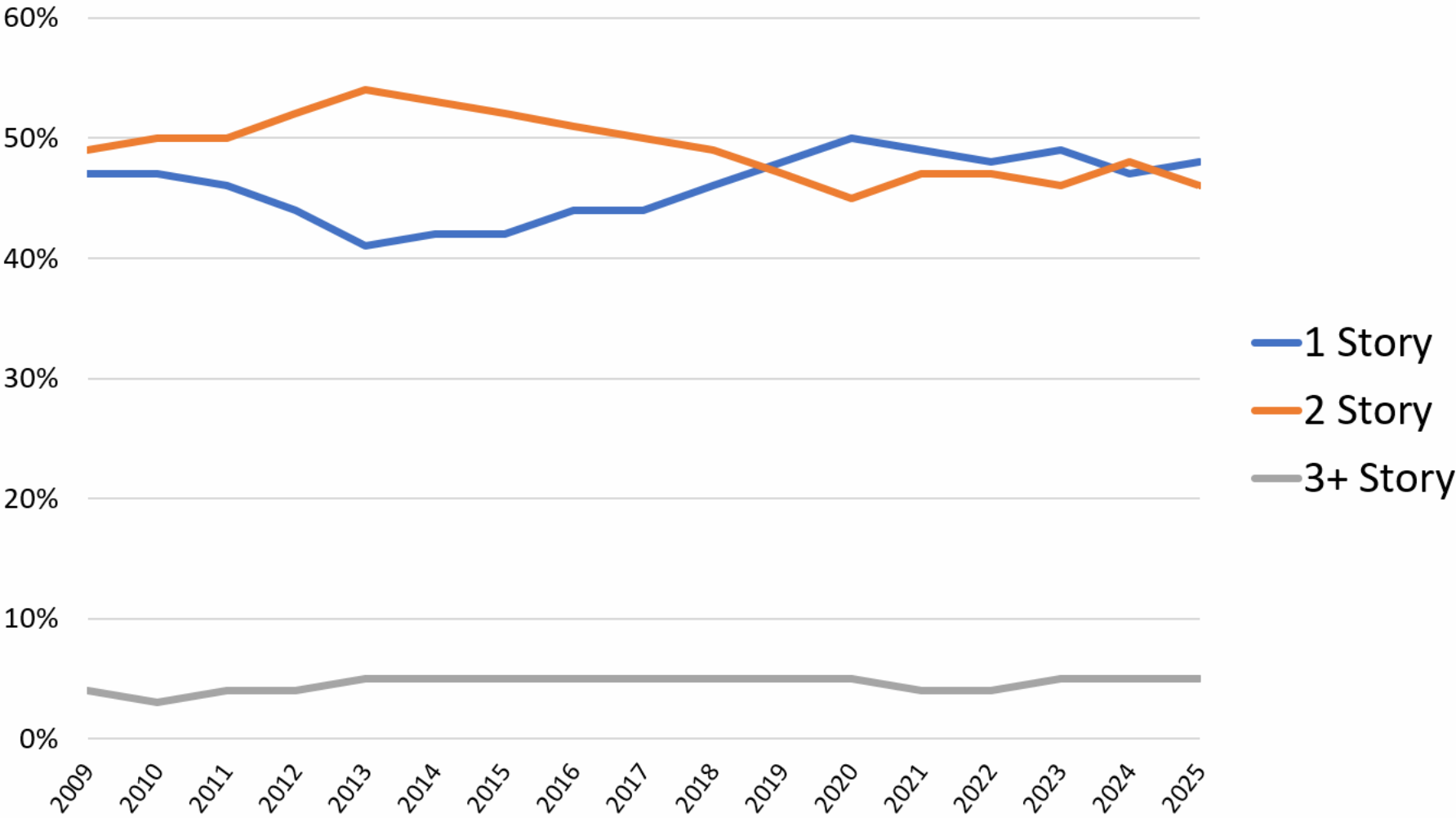
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Local Practices Vary Widely: Truss Shares in New Homes (2023 – 2025 Average)



Source: Annual Builder Practices Reports, Home Innovation Research Labs

Outlook for SF Single vs. Multistory Construction

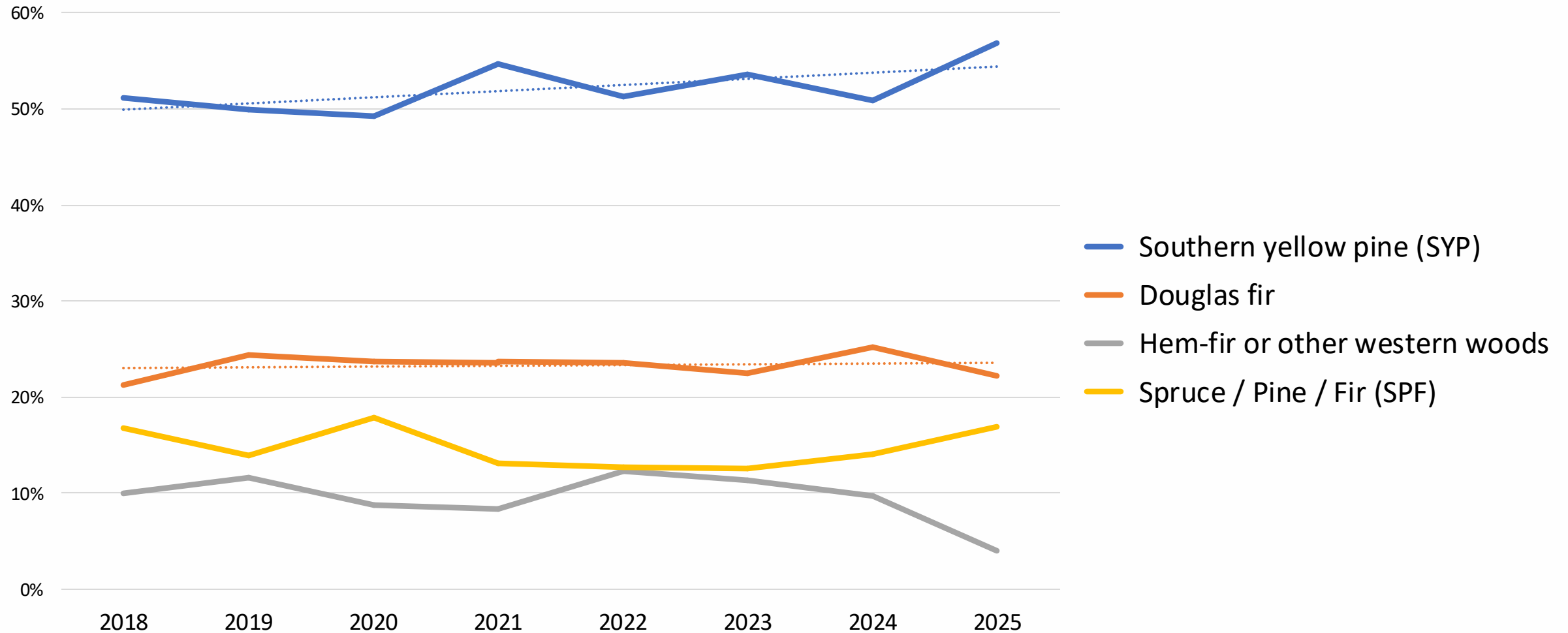


Single-level homes favor roof truss volume but disfavor floor trusses.

Demographics may be trending in favor of single-level as population ages and migrates away from Northeast.

Source: Annual Builder Practices Reports, Home Innovation Research Labs

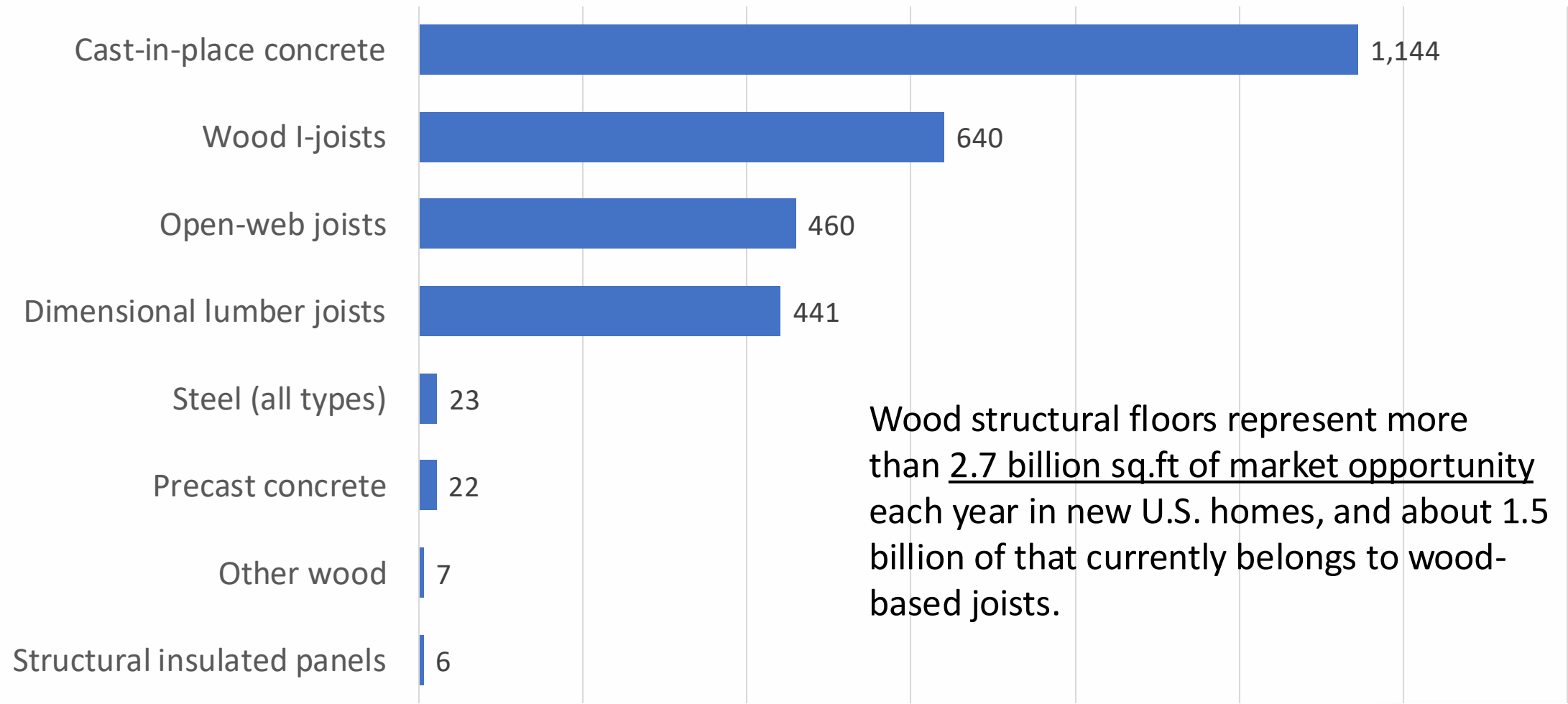
Lumber Species of Roof Trusses in New Single-Family Homes



Source: Annual Builder Practices Reports, Home Innovation Research Labs

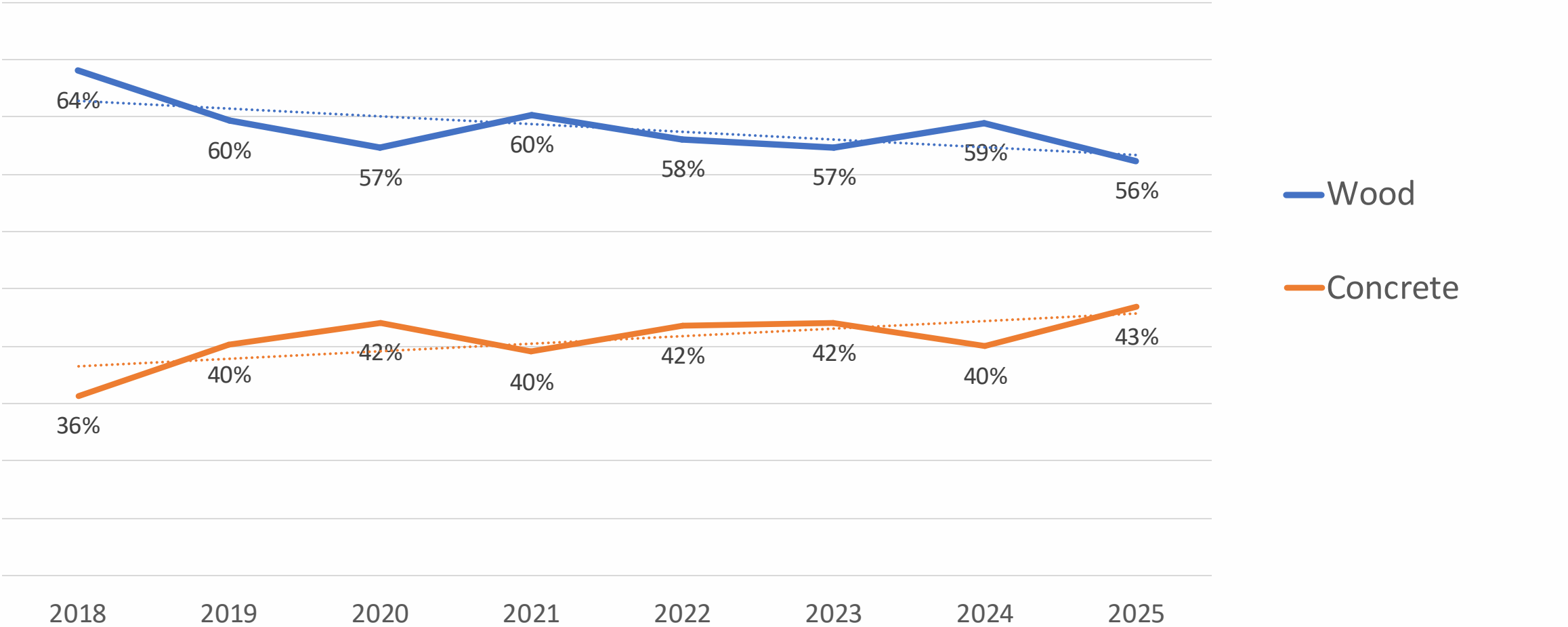
Structural Floor Area in New U.S. Homes, 2025

(millions of sq.ft.)



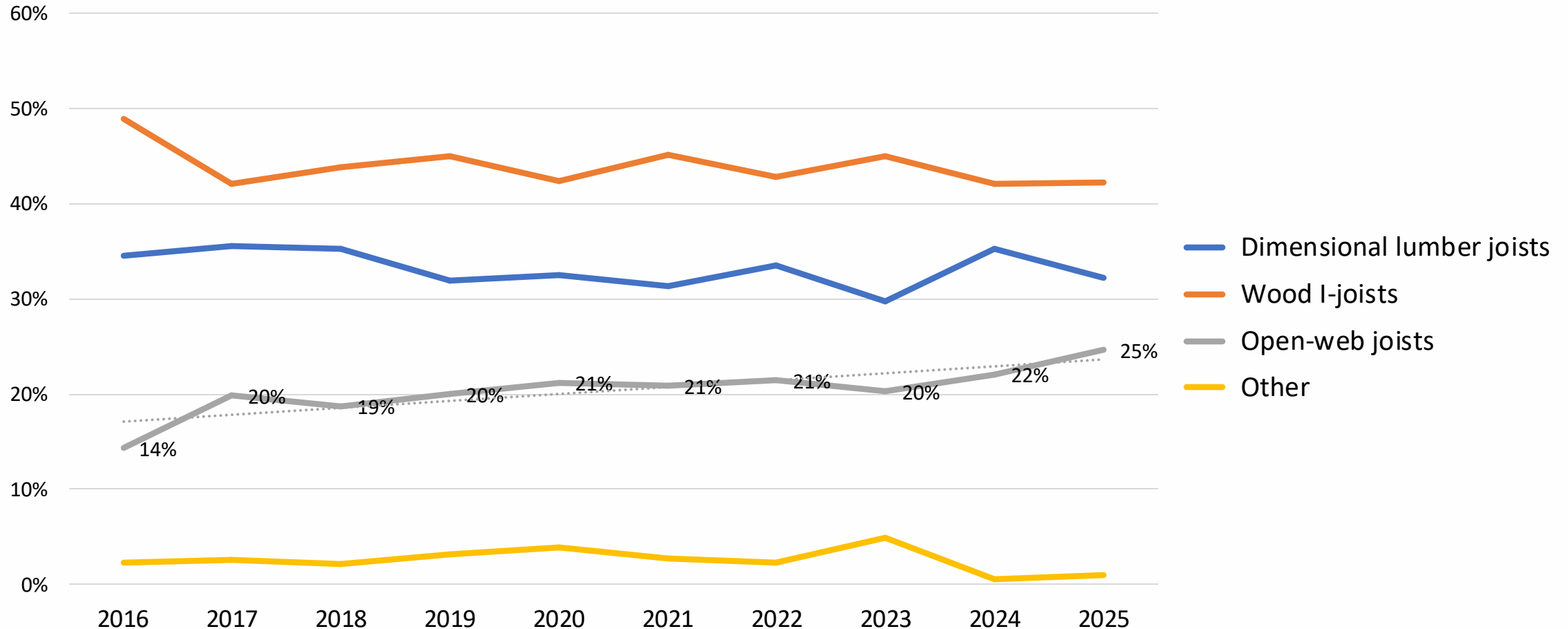
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Concrete Continues to Displace Wood Products as a Structural Floor Material in Single Family Homes



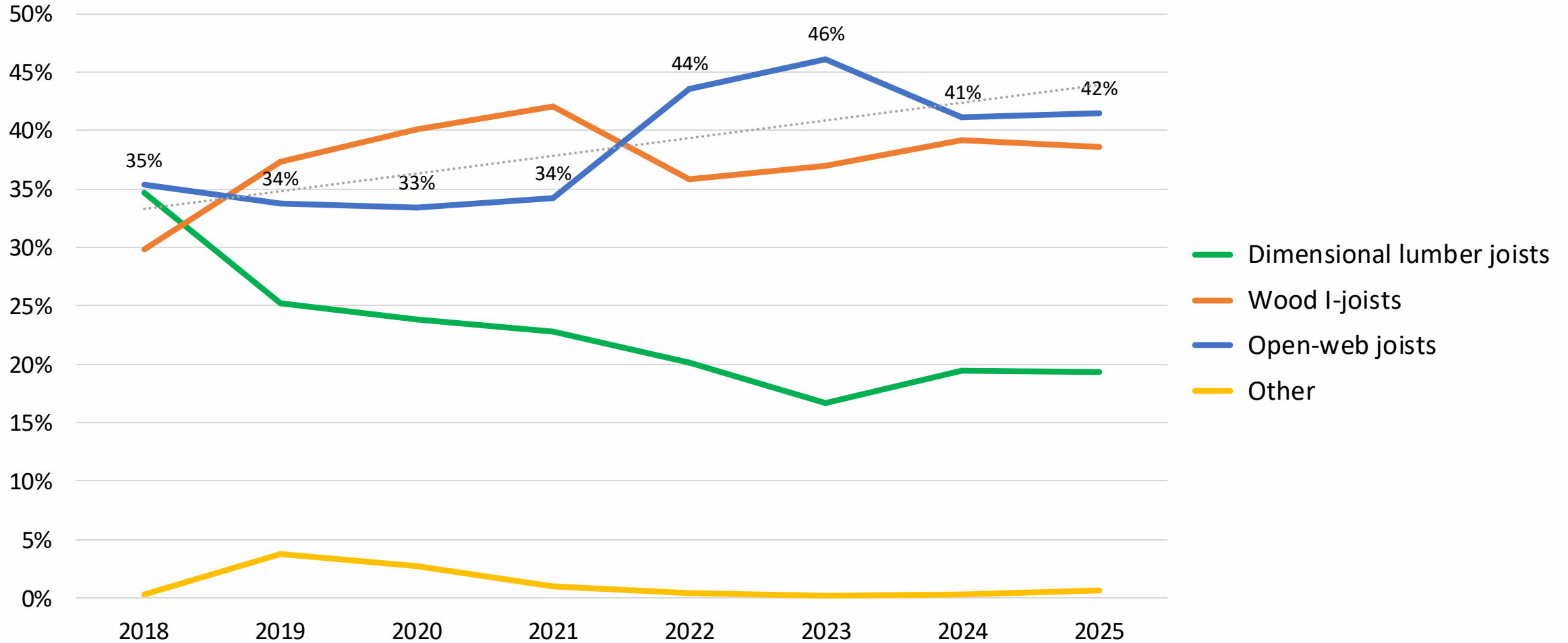
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Wood Structural Floor Materials in New Single Family Detached Homes



Source: Annual Builder Practices Reports, Home Innovation Research Labs

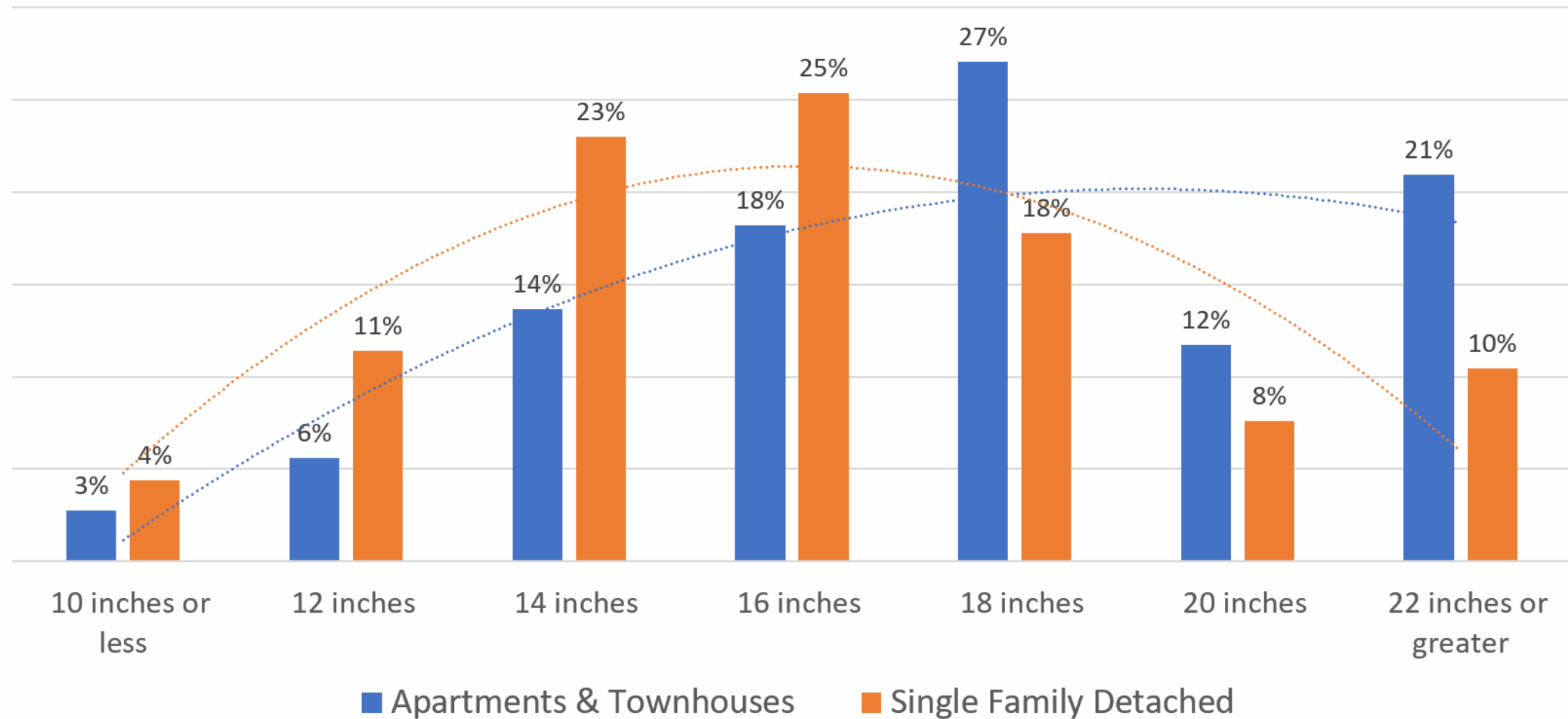
Wood Structural Floor Materials in New U.S. Apartments & Townhouses



Source: Annual Builder Practices Reports, Home Innovation Research Labs

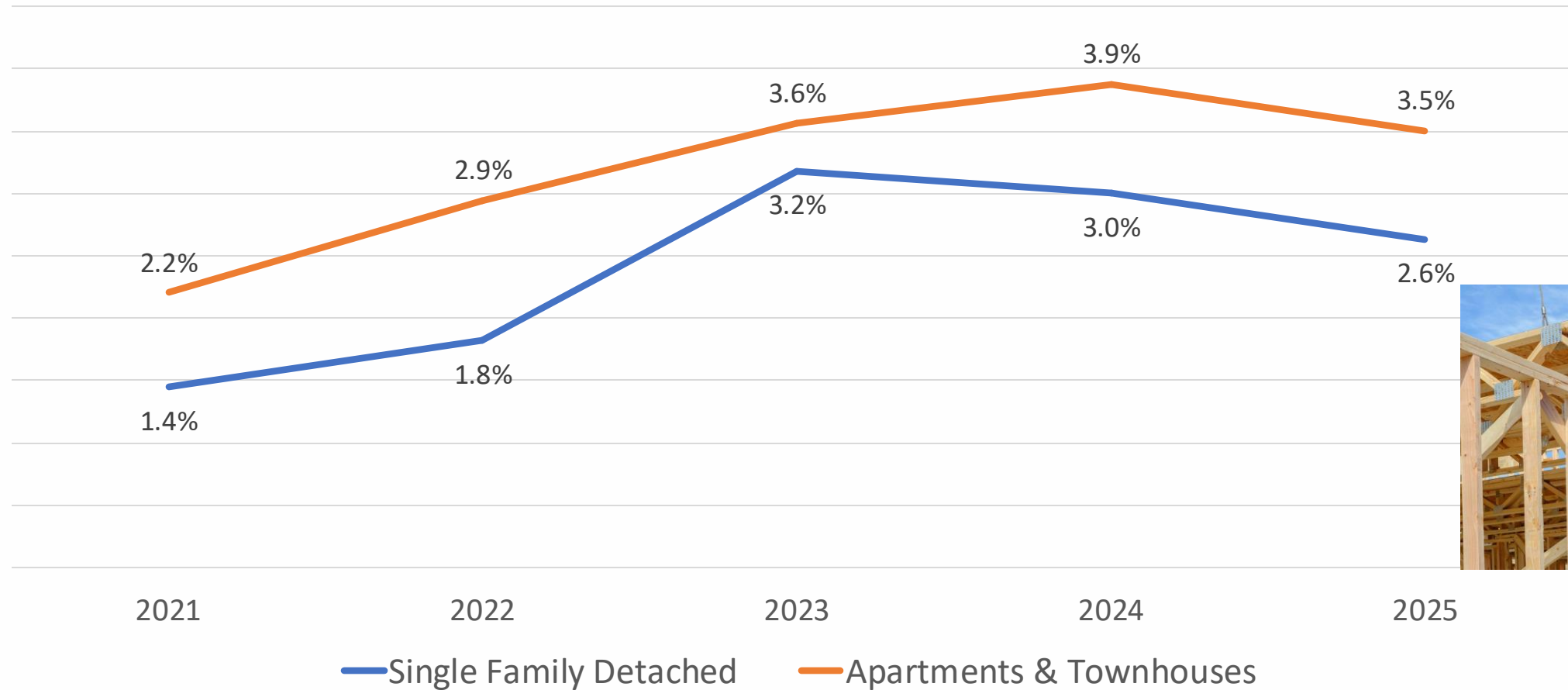


Depth of Open Web Floor Trusses in New Homes, 2025



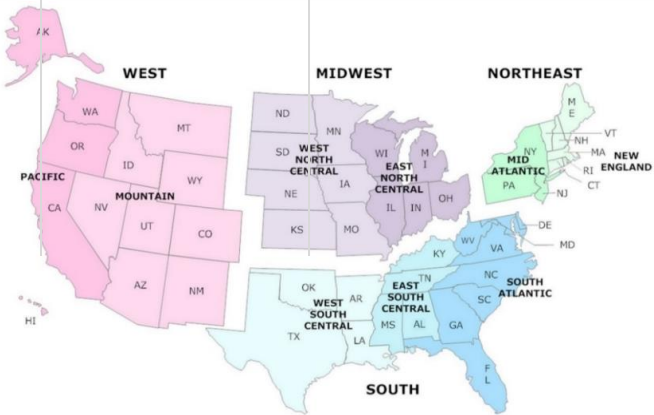
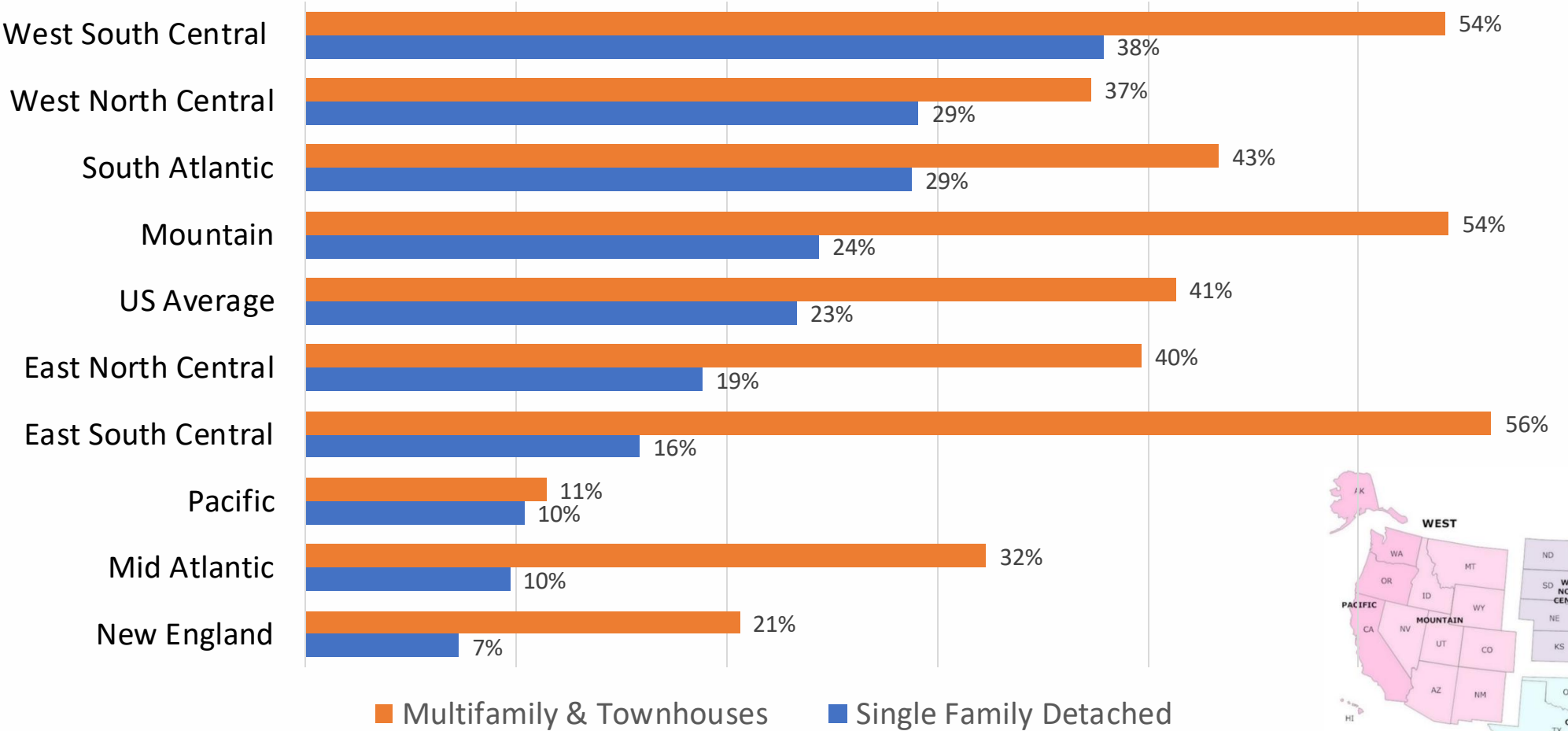
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Percentage of New Homes Using Prefabricated Floor Cassettes



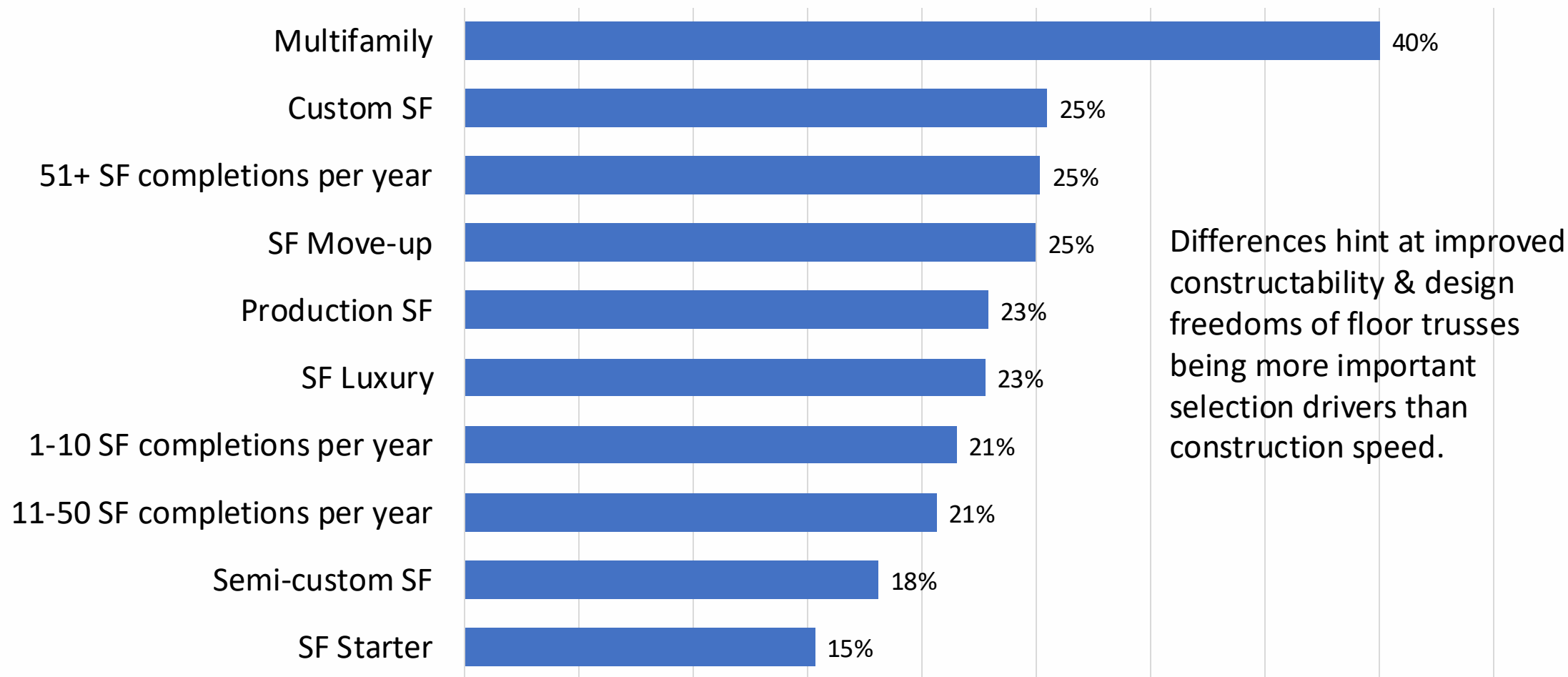
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Truss Share of Structural Wood Floors in New Homes (2024 – 2025 Average)



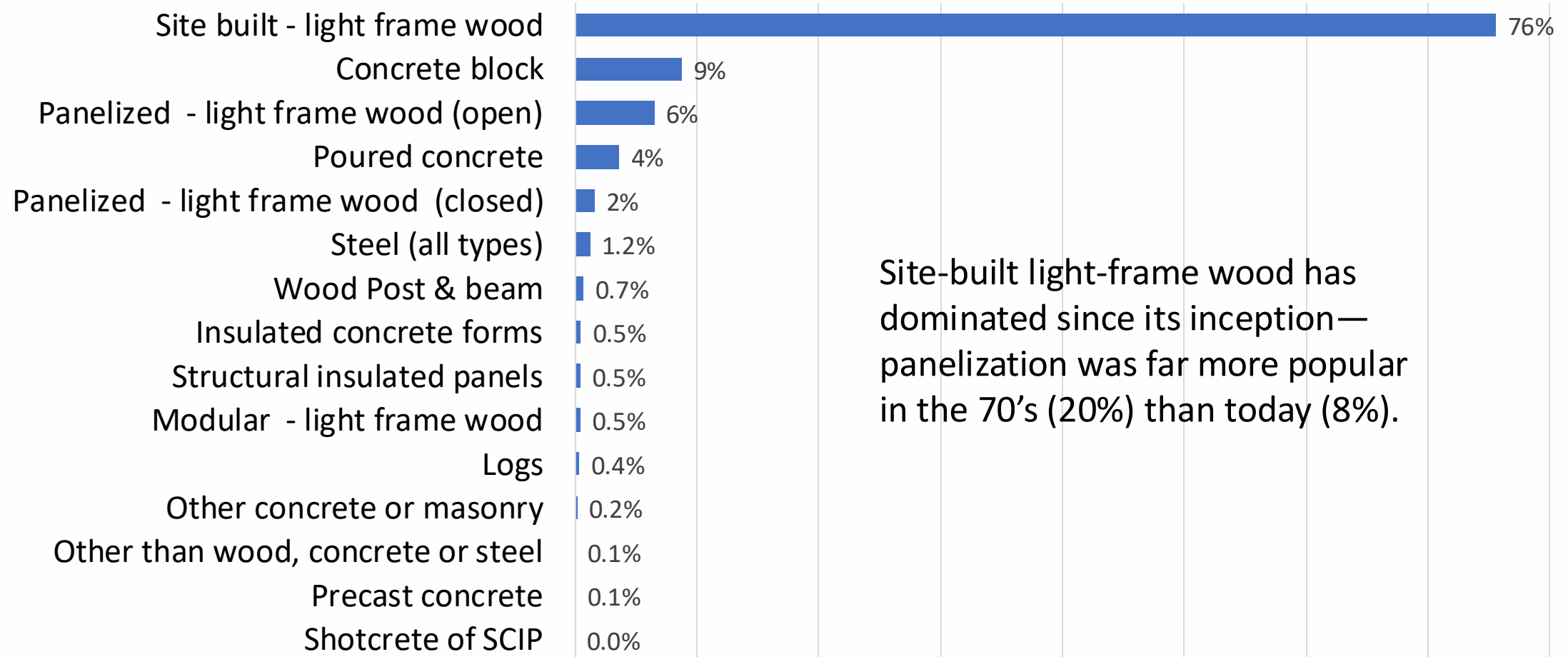
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Share of Floor Truss Usage by Builder Category, 2025



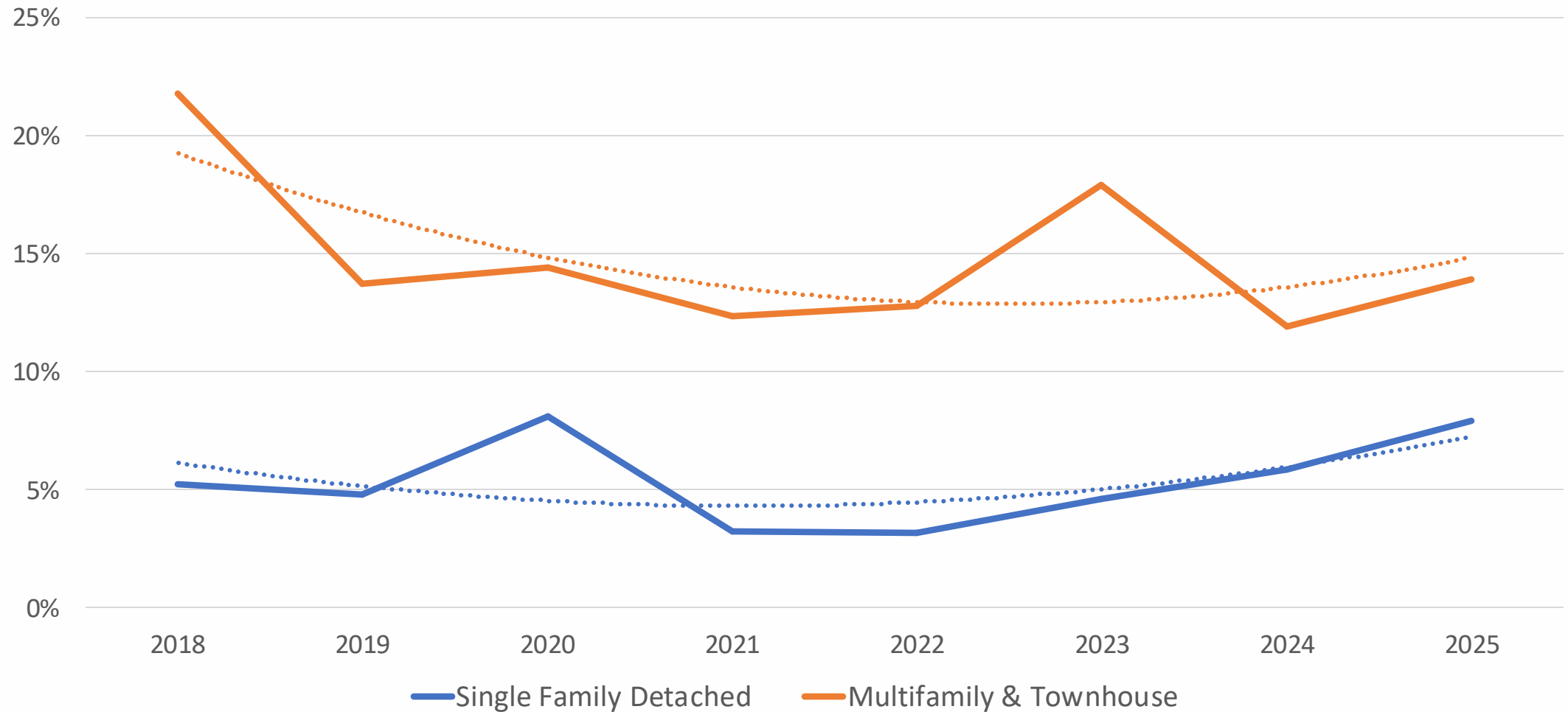
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Prevalence of Above-Grade Wall Construction Materials & Methods in New U.S. Homes, 2025



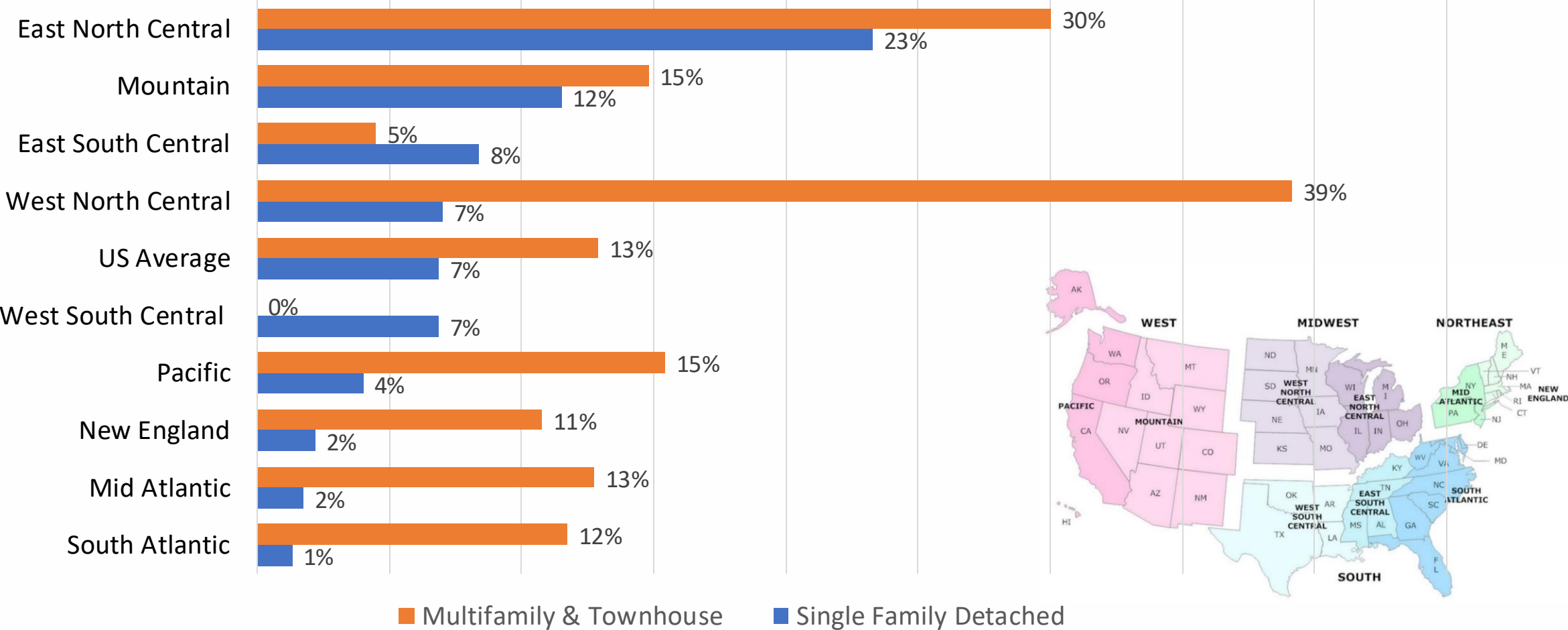
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Share of New Homes Constructed with Factory-Built Wall Panels:



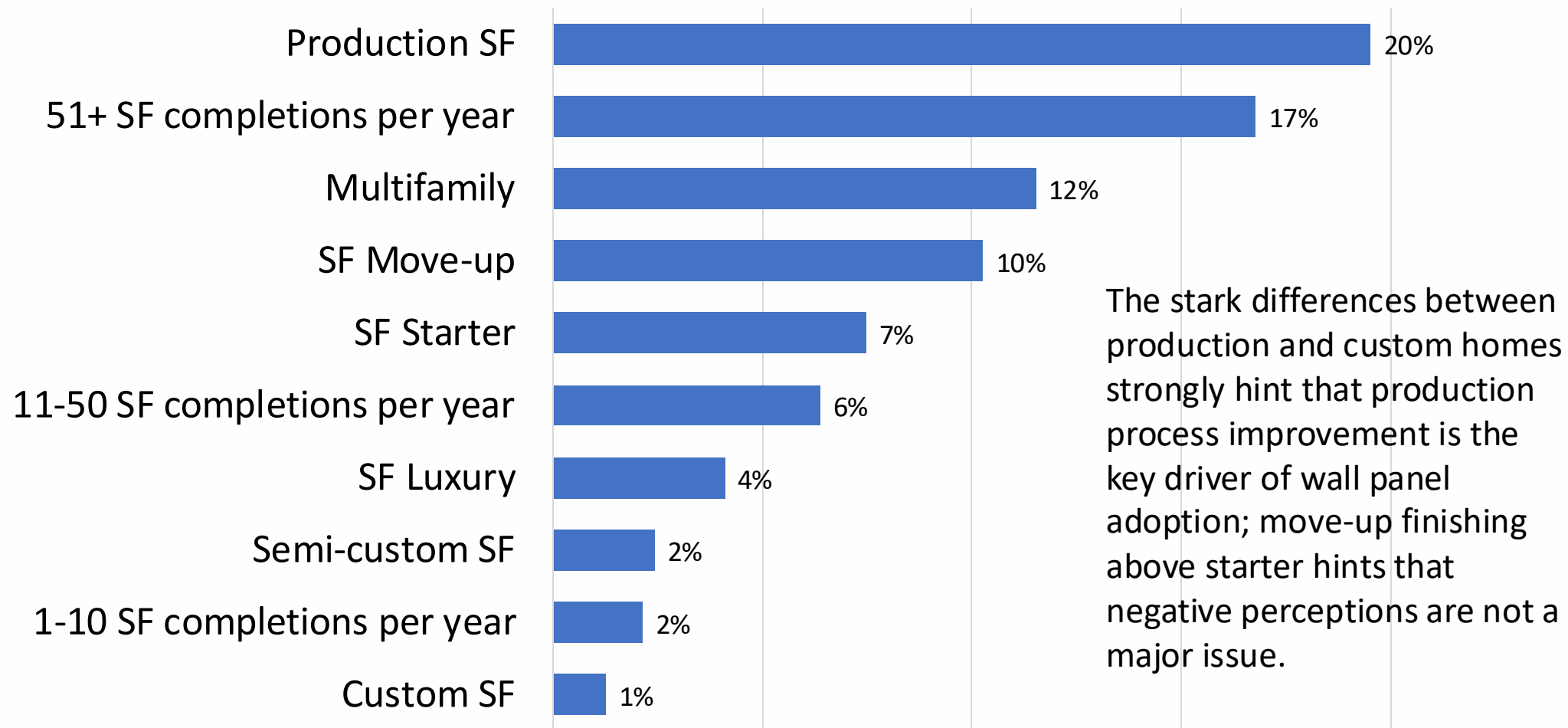
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Market Penetration of Prefabricated Wall Panels in New Homes (Average 2024 - 2025)



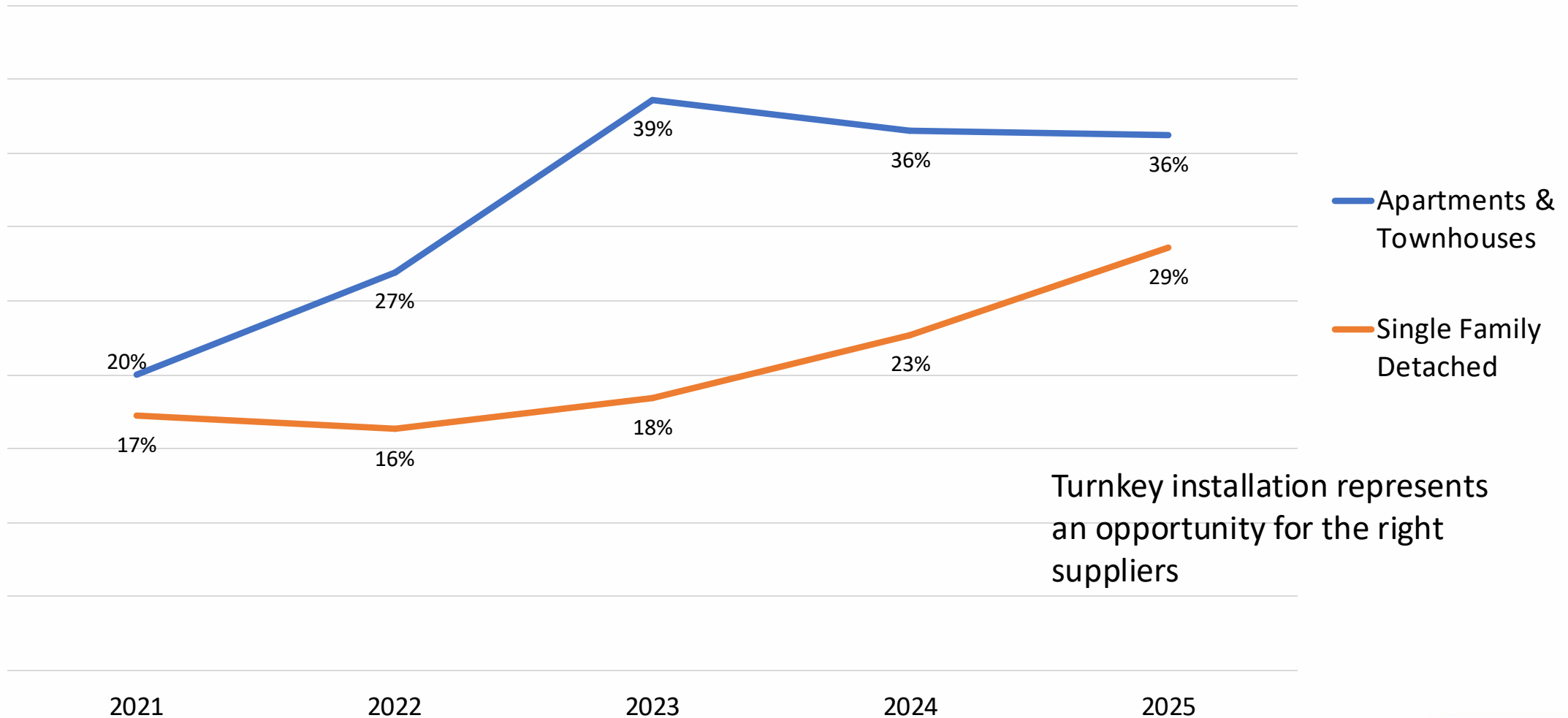
Source: Annual Builder Practices Reports, Home Innovation Research Labs

Share of Wall Panel Usage by Builder Category, 2025



Source: Annual Builder Practices Reports, Home Innovation Research Labs

Percentage of Homes Built Using Turnkey Framing Contractor



Turnkey installation represents an opportunity for the right suppliers

Source: Annual Builder Practices Reports, Home Innovation Research Labs

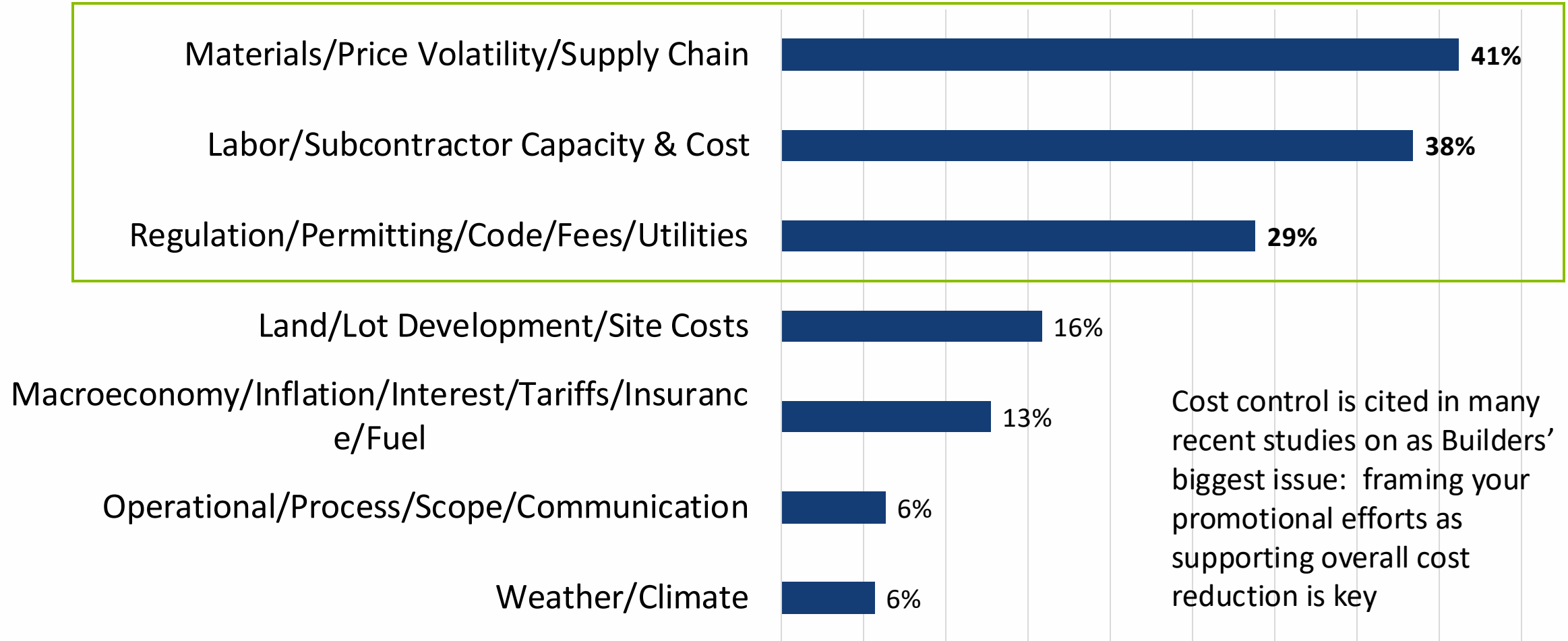


Section Two

Builder Attitudes: Components and Offsite Construction Methods



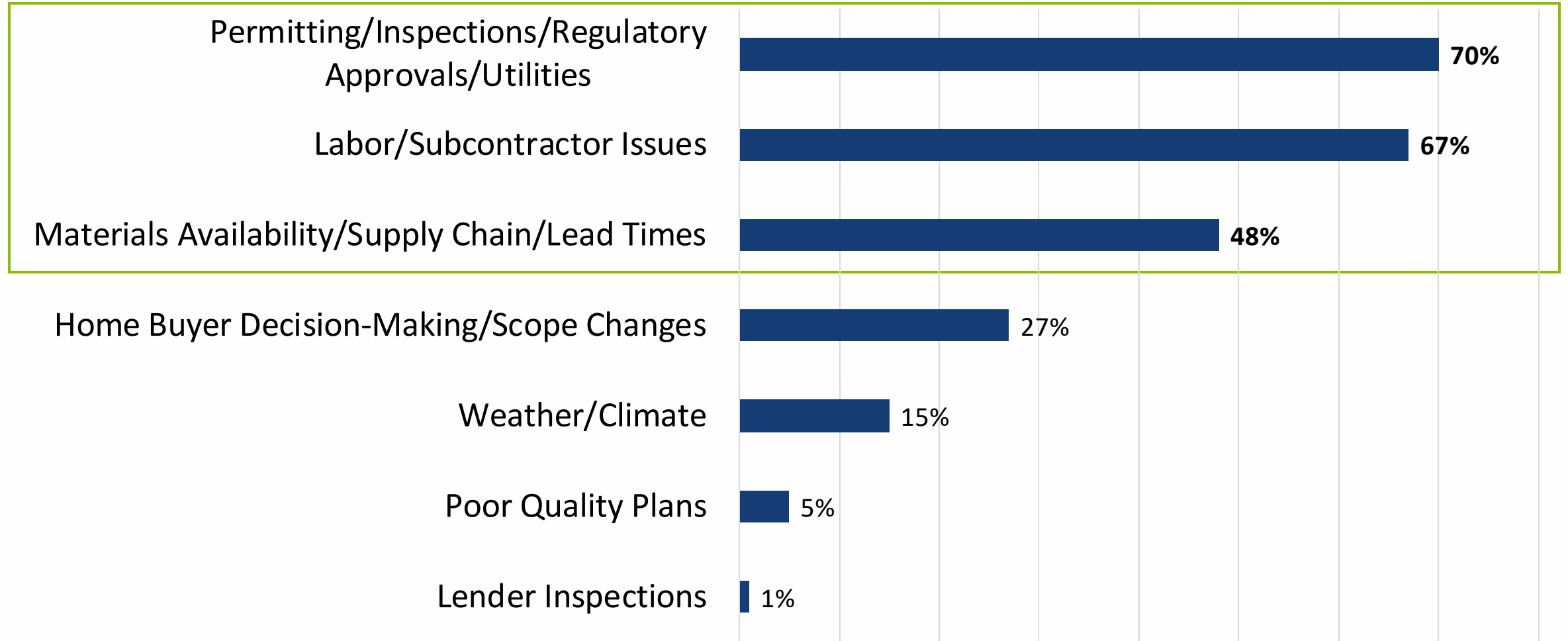
Top Construction Cost Challenges: Open-end responses grouped into related categories (June 2026, Home Innovation Research Labs)



Q1: Thinking about your new home projects over the past year, what is the biggest challenge you have had that increases construction costs and makes it more difficult to offer affordable housing options to homebuyers? (open-ended)

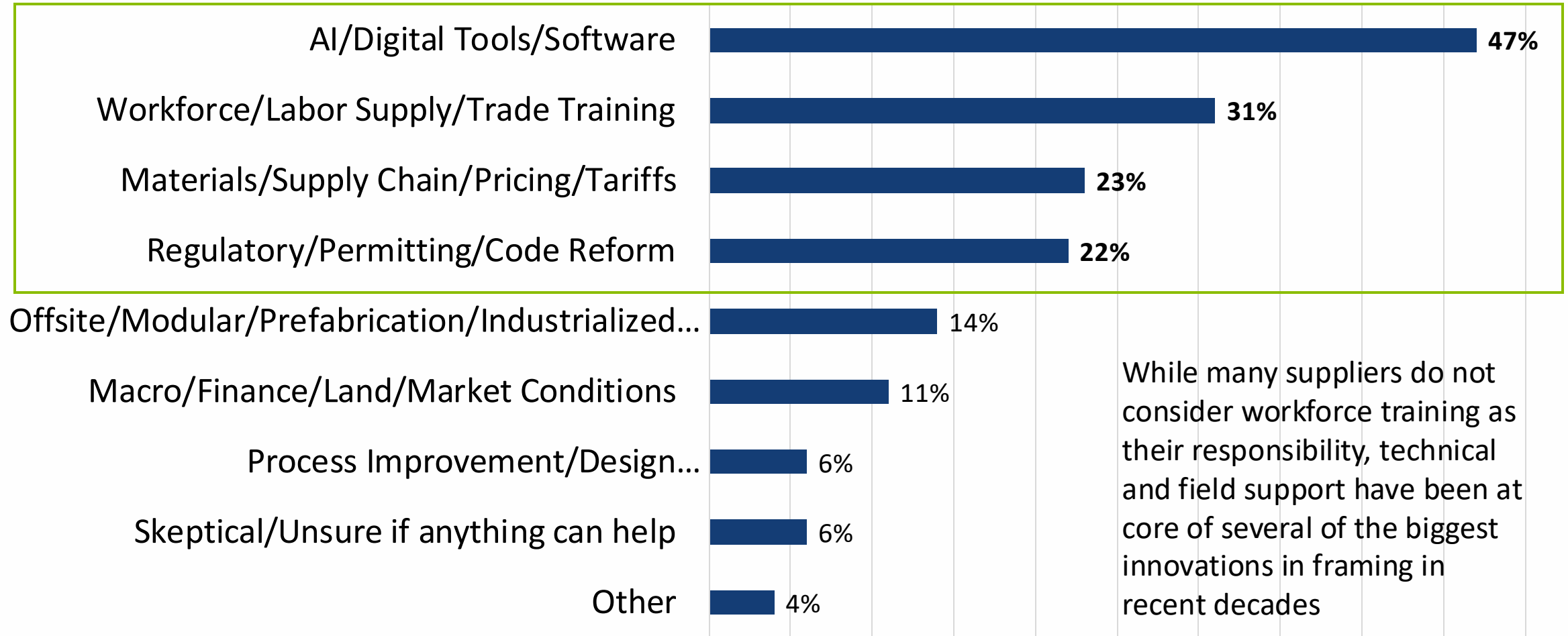
Top Issues Increasing Home Construction Time

(June 2026, Home Innovation Research Labs)



Q2: Thinking about your new home projects over the past year, what is the biggest challenge you have had that slows down the construction process? (open-ended)

Top Opportunities Mentioned to Reduce Construction Costs or Build Time (June 2026, Home Innovation Research Labs)

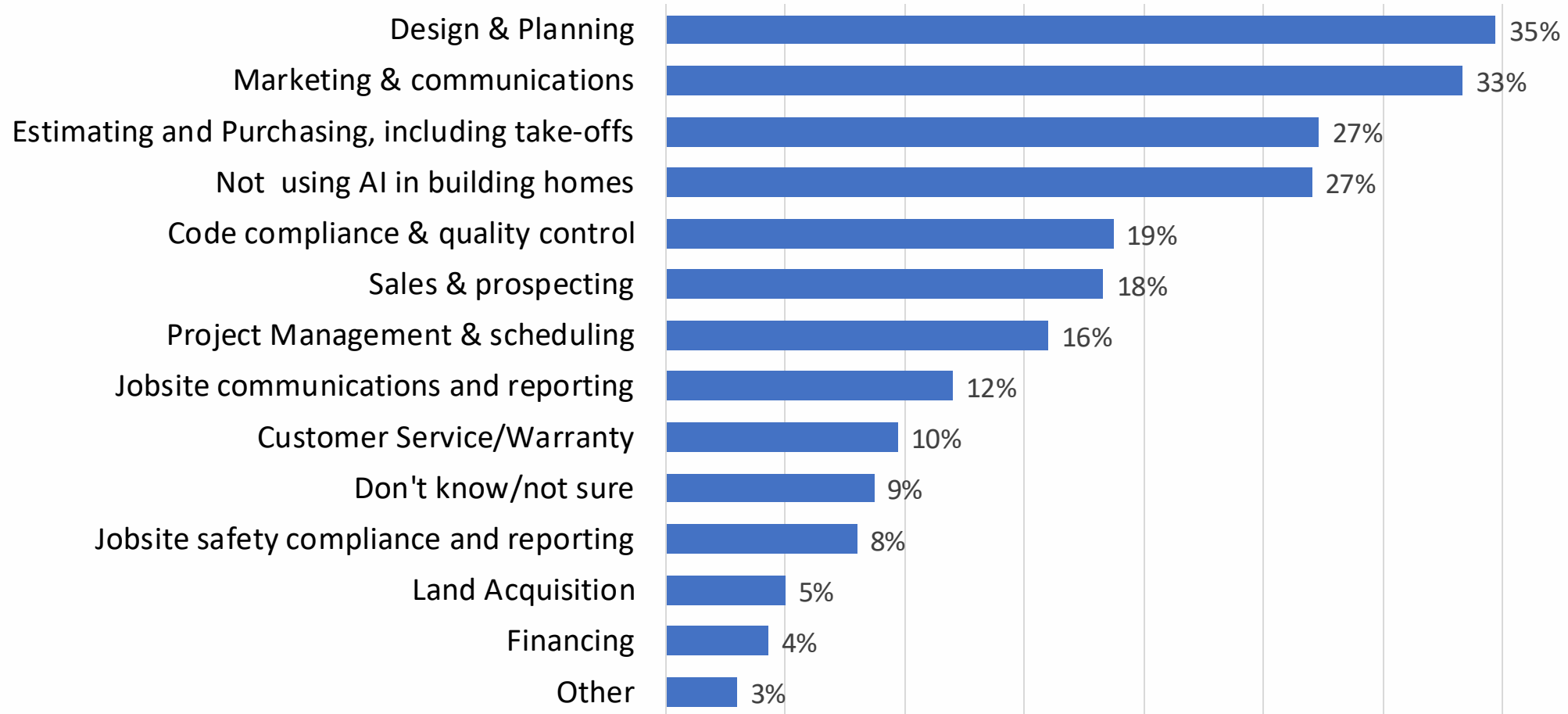


Q3: Looking ahead, what product, technology, or process improvement do you believe could have the biggest impact on reducing construction costs or construction cycle times for your company over the next few years? (open-ended)

How are Builders Currently Using AI?

(September 2026, n=300)

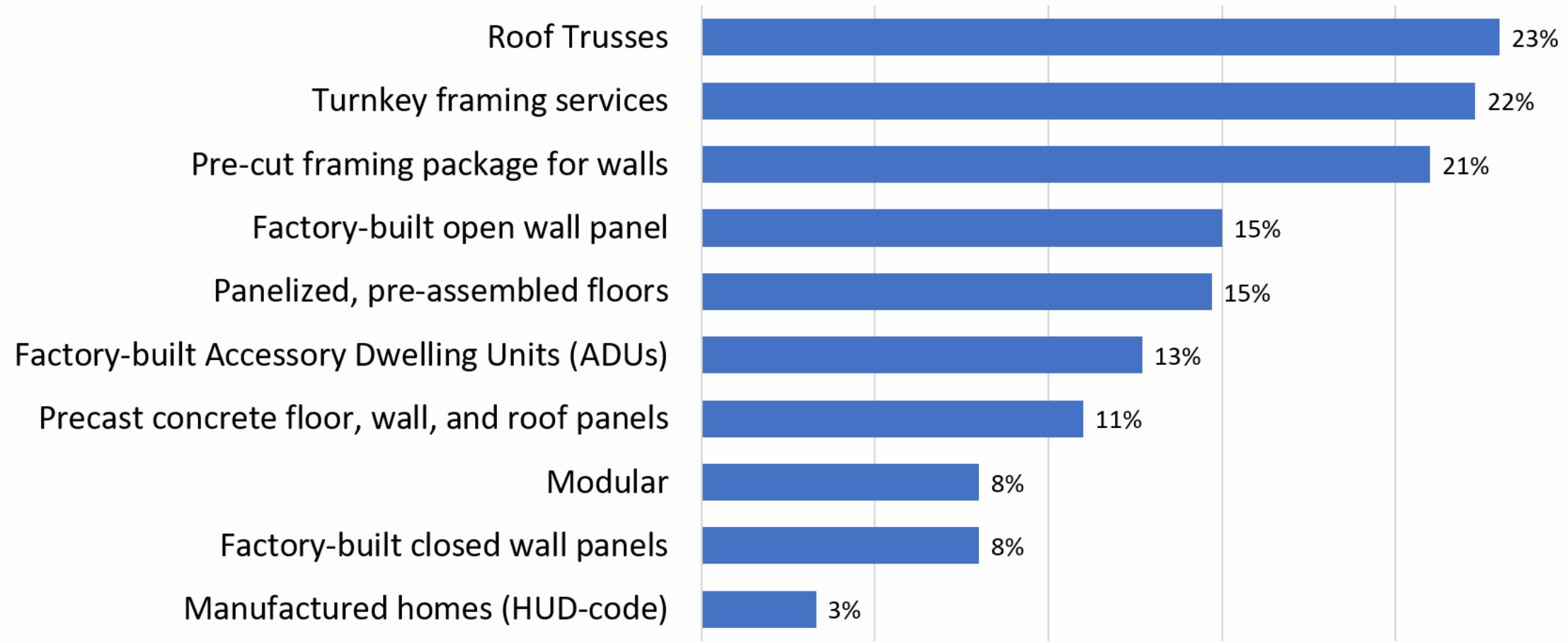
Q. How is your company using Artificial Intelligence (AI)?



Source: Home Innovation Research Labs

More Likely to Begin Using Open Wall Panels, or Increase Usage, 5 years into the Future (September 2026, n=300)

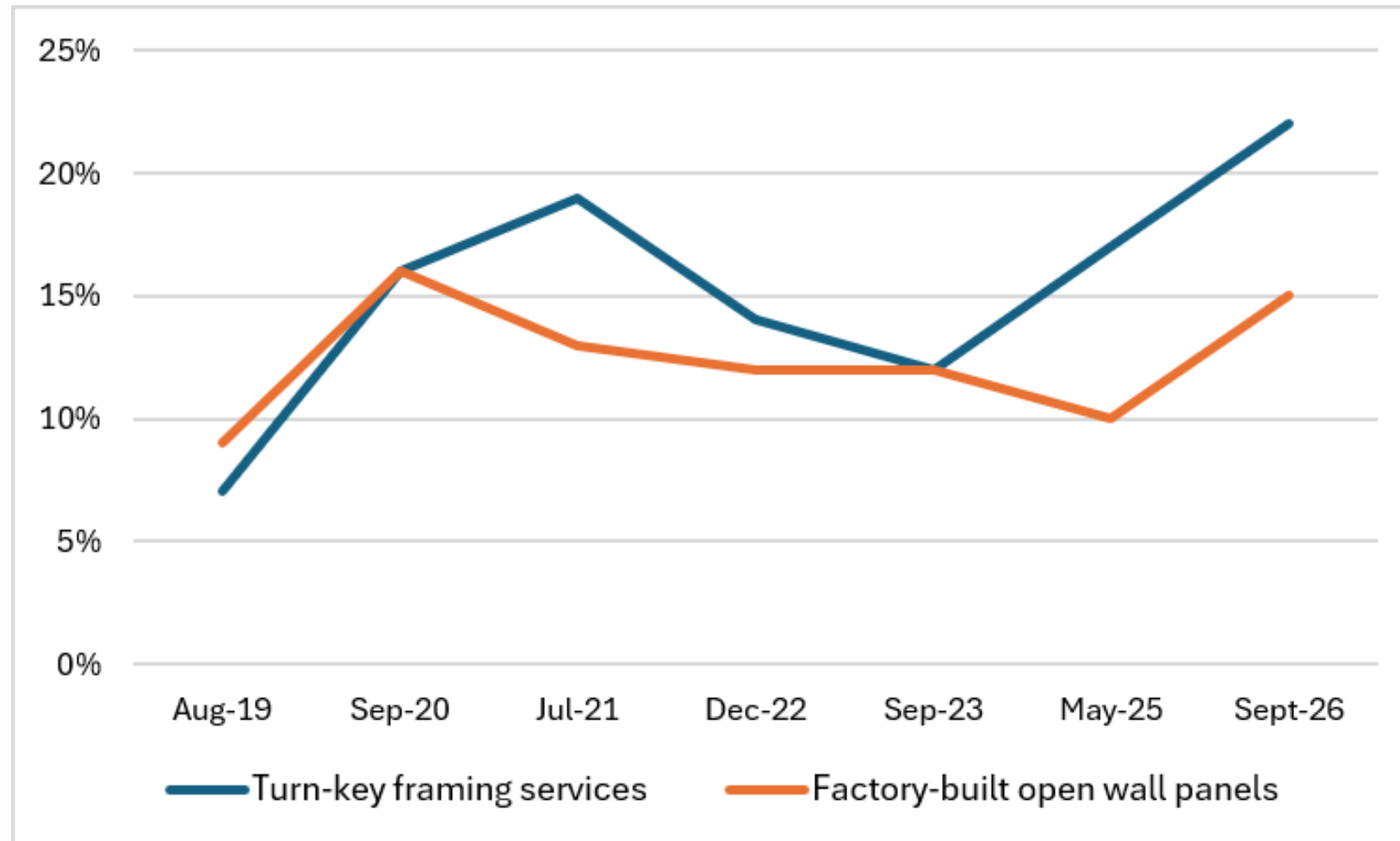
Q. Considering only the new homes your company builds, how often do you anticipate using the following construction practices or building types five years from now compared to the past year? (% **planning to use more often**)



Source: Home Innovation Research Labs

Builders Expecting Increased Usage in Coming 5 Years: Trend (n=300)

Q. Considering only the new homes your company builds, how often do you anticipate using the following construction practices or building types five years from now compared to the past year? (% **planning to use more often**)

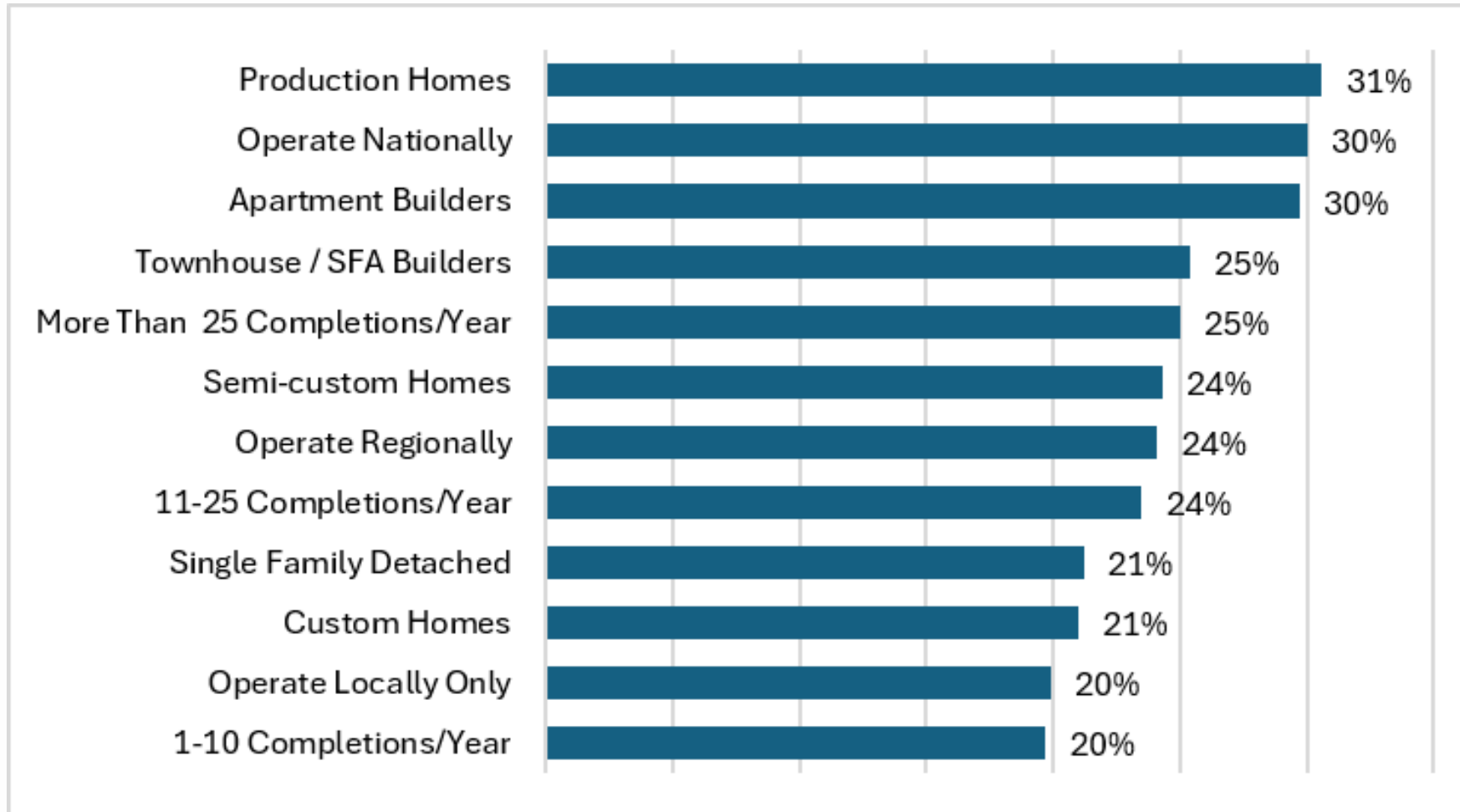


Source: Home Innovation Research Labs

Builders Expecting Increase in Use of Open Wall Panels in Coming 5 Years

(September 2026, n=300)

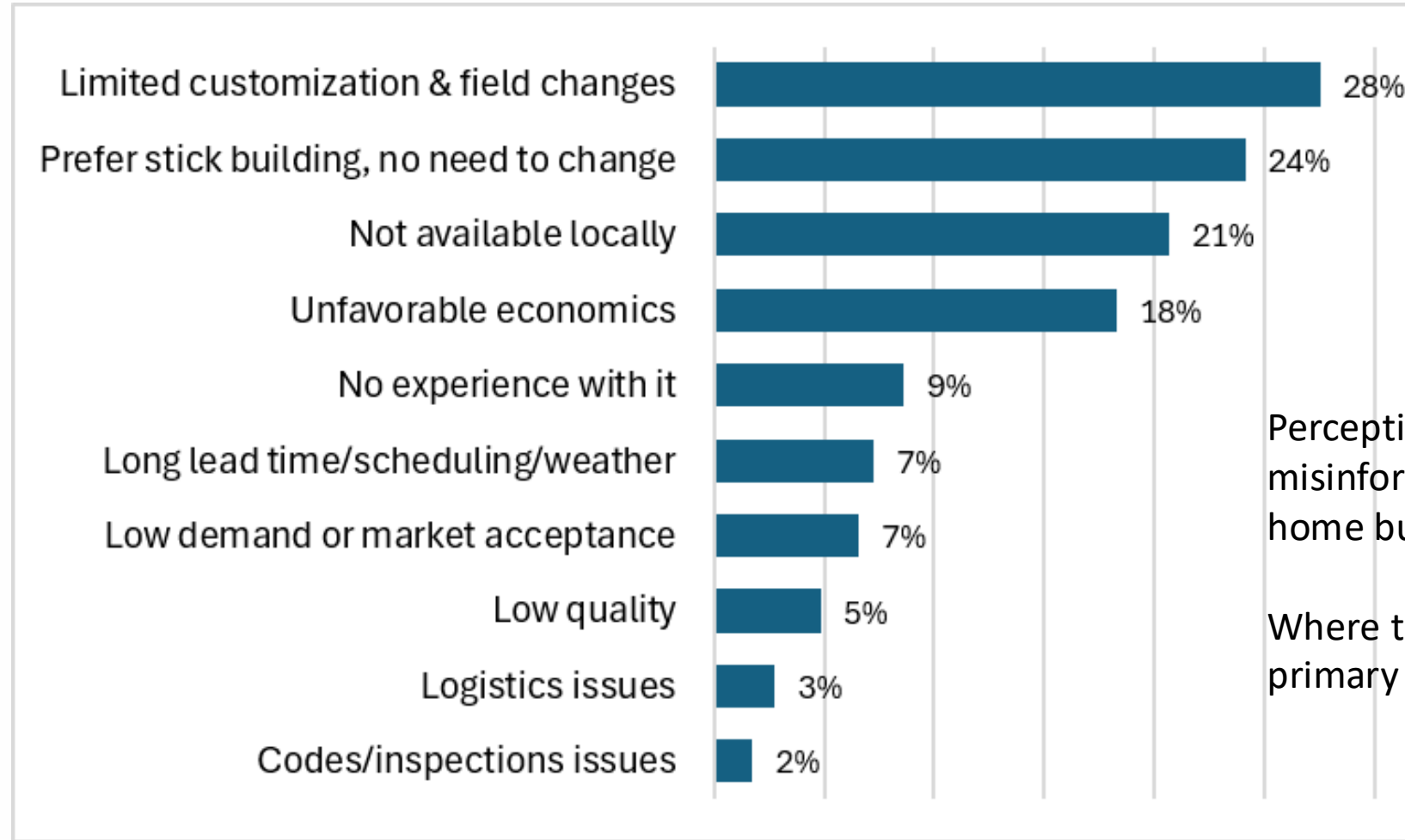
Q. Considering only the new homes your company builds, how often do you anticipate using the following construction practices or building types five years from now compared to the past year? (% planning to use more often)



Source: Home Innovation Research Labs

Barriers to Adoption of Prefabricated Open Wall Panels (September 2026, n=300)

Q. What are primary reasons your company does not adopt (or adopt more fully) prefabricated open-wall panels for building homes?



Perceptions, even when
misinformed, represent a
home builder's "reality."

Where this is the case, the
primary task is education

Source: Home Innovation Research Labs

Examples of Survey Question Responses

"...our plans are too complex and customized, using prefab would be far too complex to get things correct"

"...homeowner wants to make slight changes to interior walls as the house is framed (when) they see design issues"

"90 percent of our homes are custom built, and changes are still incorporated by Owner after plans are finalized and walls are in place"

"We are an old-school, hands-on, site-built company. If it ain't broke, do not fix it!"

"Our labor is reliable and local if something is done wrong, we know and control the costs and quality"

"...most of my work is custom and will have a fair amount of field changes"

Examples of Survey Question Responses

- "Not readily available in my market, not price competitive with stick framed"
- "It is not available. Too expensive to transport also"
- "Not enough qualified providers"
- "Availability issues primarily. Lead times are another"
- "Simply not familiar with a supplier in this area. No salesperson has presented an opportunity to learn about these products"
- "Currently cost prohibitive, however as time goes on and skilled labor shortages arise in framing, this may be a logical step forward"
- "We don't get enough credit from the framer to make it a (lower cost method)"
- "Subs don't give me any price break"

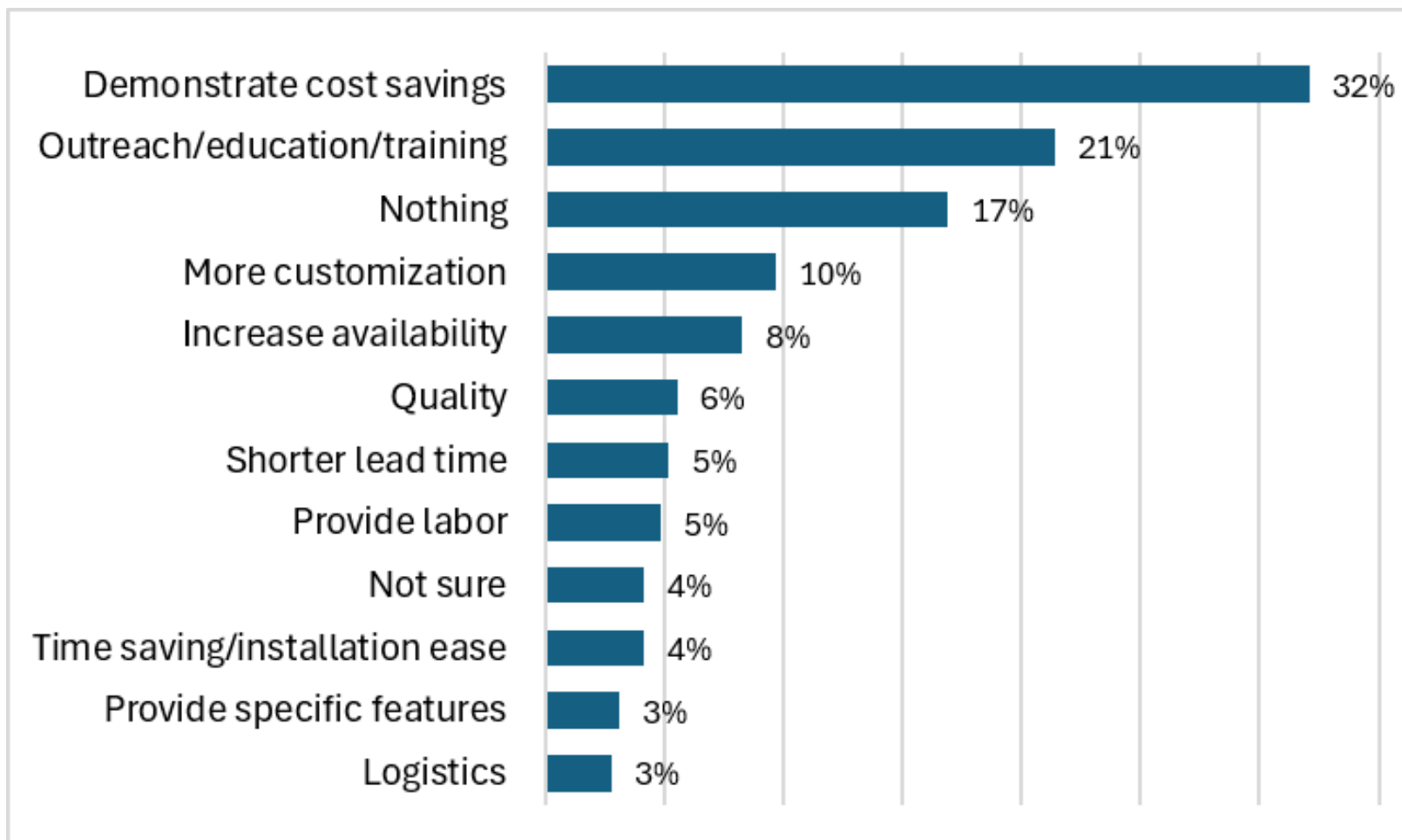
Examples of Survey Question Responses

- "The required lead times exceeds our scheduling. Area companies are running at capacity and labor issues inhibit their ability to hire to expand their workforce"
- "The carpentry contractor we use does not recommend"
- "Not familiar with the product nor the labor method(s) needed for proper assembly. Continuing ed classes may change my positions"
- "Lack of knowledge on the product. Also there's a learning curve for the framers. We'd be open to looking into it. I just need to know more about the product and services."
- "Assembly problems....fit and finish"
- "The cost is not offset by labor savings"
- "We are just starting to explore that now and will be visiting factories this fall. For next year we are thinking we will be all prefab"

Facilitators of Open Wall Panel Market Adoption

(September 2026, n=300)

Q. What could a components supplier do to increase your company's likelihood of adopting or expanding its use of prefabricated wall panels?



Source: Home Innovation Research Labs

Examples of Survey Question Responses

- "Show us it can save us money and time...and not limit our designs"
- "Show me the value and speed of install"
- "We use them but getting cost down is biggest factor..."
- "Incorporate wiring channels next to the baseboards and/or near the ceilings"
- "Approach us and offer training"
- "Better visibility, communication, and quicker pricing"
- "A lumber company should be able to produce these very inexpensively considering they are dealing with commodities (studs and OSB). It is not a premium product offering."
- "Try a girl sales person!"

Examples of Survey Question Responses

- "Teach me!"
- "Visit our office, get our lumber company involved"
- "Work with local lumber yards to supply and train builders on how to incorporate these products"
- "Ability to design panels from any house plan accurately without effort. Ability to change the designs if the buyer changes what they want"
- "Reduce shipping costs and have more flexibility with the design somehow"
- "Build a manufacturing facility in or very near my city"
- "Local manufacturer and fast turnaround"
- "More qualified providers would bring pricing down and would also increase quality and consistency"

Examples of Survey Question Responses

- "Have experienced affordable sub contractor recommendations, ways to reduce assembly time"
- "Supply install labor and material as a package"
- "Send the crews from the factory to install"
- "Help me find installation labor that discounts their labor pricing for prefab wall panels"
- "A better job of reviewing blueprints and verifying final dimensions"
- "Build the panels with all the blocking, bearing points and other blocking requirements. Build them correctly"
- "The amount of errors on prior projects keeps us from trying them again"
- "Lead times of less than a week from fabrication to delivery"

Examples of Survey Question Responses

- "Get word out to our customers about the benefits of prefab walls"
- "Market in my area"
- "Meet with us firsthand to show us what the company is capable of providing and how they can overcome some of our concerns as well as an understanding of the benefits"
- "Educate the buying public on factory built walls etc. usually done in a control environment with quality control! I am sold!"
- "I would just need to be contacted directly"
- "More training in the installation of this product"
- "Not common to hear about information classes dealing with cost /product quality etc. Might be more interested if we hear more"
- "Local trained installers"

Q&A

Education Session
Evaluation

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