

2026

CANADIAN PERMANENT MODULAR CONSTRUCTION INDUSTRY REPORT



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The images in this report represent some of the entries in the Modular Building Institute's 2026 Awards of Distinction. To see the complete list of winners and learn more about each project, visit modular.org/awards.

ABOUT THE MODULAR BUILDING INSTITUTE

Founded in 1983, the Modular Building Institute (MBI) is the only international nonprofit trade association serving the commercial modular construction industry. For more than 40 years, MBI has promoted the advantages of modular construction while advocating for the removal of barriers that limit growth opportunities. MBI represents more than 700 member companies in 34 countries, including 72 member companies in Canada, serving as an information clearinghouse for end-users and an advocate for the industry on public policy matters.

As the Voice of Commercial Modular Construction®, it is MBI's mission to expand the use of offsite and modular construction through innovative

construction practices, outreach and education to the construction community and customers, and recognition of high-quality modular designs and facilities.

In partnership with FMI Consulting, MBI has released this report to provide a comprehensive analysis of Canadian construction activity and the evolving role of permanent modular construction. The findings point to a construction market that is stable but constrained, alongside a modular sector positioned for long-term growth despite near-term headwinds.

This report focuses specifically on the Canadian market, with references to the overall North American outlook, and includes greater regional data based on two geographic regions: Eastern and Western Canada. A separate report specific to the U.S. market is also available.

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Cover Image: Prince Rupert 5-Storey Multifamily, Prince Rupert, BC, Canada. A 40-module, 28,500-sq. ft. multifamily project designed by Steenhof Building Services Group.

FOREWORD: A DEFINING MOMENT FOR MODULAR CONSTRUCTION IN CANADA

Canada's modular construction sector is experiencing exciting momentum, strengthened by growing alignment across federal, provincial, and institutional stakeholders. Modular construction is emerging as a key solution to some of Canada's most pressing challenges—housing affordability, infrastructure delivery, labor shortages, and climate resilience. Today, modular is increasingly recognized not only for its efficiency and cost certainty, but for its ability to deliver scalable, high-quality solutions at the speed and volume Canada requires.

At the national level, this traction is being catalyzed by the federal government's commitment to scale modern methods of construction, with the Build Canada Homes (BCH) initiative as its cornerstone policy. With significant investment committed to accelerating housing supply, BCH represents a clear and strategic federal endorsement of modular and modern methods of construction. BCH is in its initial investment stage and is expected to become a federal Crown Corporation in Summer 2026. While financing alignment and procurement execution remain areas of active refinement, the direction is clear: modular construction is moving to the forefront of Canada's housing strategy, supported by long-term policy intent and growing capital deployment.

Parallel to this, large-scale institutional procurements are reinforcing confidence in the sector. The Canadian Forces Housing Agency's phased approach to modernizing military housing represents a notable example of how modular construction is being integrated into national infrastructure priorities. By leveraging offsite construction methods for defense-related housing programs, the federal government is demonstrating both trust in the model and a willingness to deploy it at scale. These multi-year, programmatic

procurements are critical—not only for delivering needed assets but also for providing a consistent project pipeline. This stability enables manufacturers to invest, expand capacity, and innovate.



At the provincial and territorial level, adoption is broadening across multiple asset classes. Governments are increasingly turning to modular construction to deliver not only housing, but also schools, healthcare facilities, community infrastructure, and to rebuild after disasters. This shift reflects a growing understanding of modular's value proposition: faster project delivery, reduced disruption to communities, improved quality control, and enhanced sustainability performance. From rapidly deployable classrooms in growing urban centers, to healthcare facilities and critical infrastructure for Indigenous communities, to housing that addresses labor gaps in rural and remote regions, modular solutions are helping provinces respond more effectively to diverse and urgent needs.

Importantly, these efforts are reinforced by advances in regulatory harmonization. Modular standard CSA A277 will be enshrined in the National Building Code in the coming months, and federal, provincial, and territorial officials are collaborating to harmonize other codes and regulations that have historically been barriers to broader modular adoption.

Taken together, these developments point to a sector that is not only growing but maturing. Market fundamentals remain strong and stakeholder sentiment is increasingly optimistic, underpinned by rising backlog confidence and a growing pipeline of both public and private sector opportunities.

While challenges remain—particularly in financing structures, education, and design integration—the trajectory of the industry is unmistakably positive. Canada is moving toward a more modern, industrialized construction ecosystem, and modular construction is at the center of that transformation.

The opportunity is clear: momentum is building, confidence is strengthening, and further action—across policy, procurement, and project delivery—is underway. MBI will continue to champion policy and regulatory improvements across all orders of government to unlock opportunities for the modular sector and help turn this momentum into tangible results.



**Lynn Fripps Two-Storey
Permanent Modular Addition,
Langley Twp, BC. An 18-module,
9,900-sq. ft. educational facility
built by Fort Modular Inc.**

The Modular Industry Doesn't Move Itself Forward. You Do.

The Modular Advocacy Program is MBI's evergreen initiative to fund the resources necessary to move the modular construction industry forward.



THE PROBLEM MAP WAS BUILT TO SOLVE

We know that modular construction is faster, cleaner, and more efficient than conventional building. So why isn't it the default? Because codes, procurement rules, workforce pipelines, and public perception haven't caught up. MBI is leading those change efforts, and MAP support is critical.

Launched as a ongoing funding campaign, MAP works across four fronts. Each are aimed at expanding what's possible for the commercial modular construction industry.

WHAT DOES MAP SUPPORT?

- 1 POLICY & LEGISLATION**
Shaping building codes, procurement standards, and government programs at the state and federal level.
- 2 BUSINESS DEVELOPMENT**
Opening doors with developers, municipalities, and agencies that need modular — but don't yet know it.
- 3 DESIGN COMMUNITY OUTREACH**
Proactively engaging and bringing architects, engineers, and code officials into the modular conversation earlier.
- 4 WORKFORCE DEVELOPMENT**
Attracting the next generation of workers — including non-traditional talent — into modular careers.

Primarily, MBI's Modular Advocacy Program is leveraged by MBI's government affairs team. They are experienced, well-connected, and active at the state, provincial, and federal levels. A working committee of dozens of modular industry professionals meets regularly to advise on legislative barriers and emerging opportunities.

"Within the last 10+ years that I have been involved, I've had the privilege of watching this industry evolve and expand. It is exciting to see industry gain momentum and we are committed to playing our part in advancing its future. I encourage all suppliers to support this initiative and support our friends in the industry."

— **Cortney Milbourne, VP • BT Modular**

WHAT'S AT STAKE?

Modular-friendly bills don't pass on their own, and harmful ones don't get stopped without someone in the room. Building codes determine where modular can be built and whether it's treated as an equal to site-built construction. MBI works to make those standards fair and consistent. Developers, architects, and government agencies represent enormous untapped demand, and MBI builds those relationships before an RFP lands. **Fragmented industries lose policy fights; with the aid of MAP funding, MBI is able to show up organized, funded, and ready to advocate for its own future.**



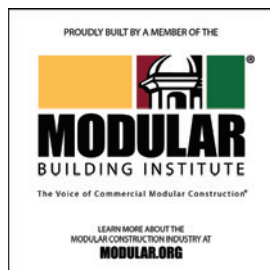
MODULAR BUILDING INSTITUTE

Every Module Is A Statement. Make It Count.

MBI is the world's largest trade association for
the commercial modular construction industry.



HOW DO I PARTICIPATE?



MBI SEALS

A 4-inch marker affixed inside each module you manufacture. It tracks the industry's output, signals quality, and shows that modular takes itself seriously. The cost is structured to pass through to your customers — net-zero impact to your bottom line. Available to manufacturers, architects, contractors, developers, and fleet owners.

\$20 per module • Order at modular.org/industry-seals



ANNUAL MAP SPONSORSHIP

The direct way to fund the advocacy work that protects and grows the industry — ideal for companies not producing modules. Sponsors receive logo placement in every MBI printed publication, recognition at the World of Modular conference, and inclusion in dedicated member communications.

\$1,000 per year • contact dave@modular.org

INDUSTRY-WIDE PARTICIPATION MATTERS

Individual companies can't move policy. A coordinated industry can. MAP gives manufacturers, suppliers, contractors, and design professionals a single, funding mechanism to do together what is impossible alone; change and guide the regulatory or cultural environment that modular construction operates.

Full member participation is what makes our wins possible and makes the next round of wins much more likely.

2026 MODULAR ADVOCACY PROGRAM SUPPORTERS



LEARN MORE



modular.org/modular-advocacy-program

ABOUT MODULAR CONSTRUCTION

Modular construction can be considered a hybrid between the construction and manufacturing industries. The modular process involves constructing buildings offsite in a factory-controlled environment and then transporting them to the final site for assembly, incorporating elements of both industries:

Construction: Modular construction involves traditional construction practices such as designing the building, planning the site, and assembling the modules into the final structure. Site preparation, foundation work, and utility connections are also part of the construction process.

Manufacturing: The fabrication of building components such as walls, floors, and roofs occurs in a factory setting using assembly-line production methods. This approach allows for standardized processes, quality control, and efficient use of materials and labor.

In essence, modular construction bridges the gap between traditional construction and manufacturing by leveraging the benefits of both industries to streamline the building process.

For the purposes of this report, the term modular refers to volumetric, three-dimensional boxes (or modules) fabricated at an offsite location. The modular construction industry is regulated at the provincial and local levels by building code administrators and authorities having jurisdiction.

Prince Rupert
5-Storey Multifamily,
Prince Rupert, BC,
Canada. A 40-module,
28,500-sq. ft. multifamily
project designed by
Steenhof Building
Services Group.



KEY ADVANTAGES

Cost Savings and Certainty

Many variables associated with construction projects can impact overall cost. According to 2024 research by the U.S. Department of Energy's Advanced Building Construction Initiative (DOE/ABC), total project costs can be reduced by up to 20 percent for modular construction projects. In a recent survey, 91 percent of general contractors and construction managers reported cost reduction in their modular construction projects—53 percent of which saw greater than a 10 percent reduction.

In a recent 2023 study from the University of Nebraska's Durham School of Architectural Engineering and Construction, Professor Kevin Groskopf found construction costs for site-built projects in his study averaged \$251 per square foot. The cost for modular projects averaged \$243 per square foot, or approximately 4 percent less than site-built construction. Other studies have demonstrated overall cost savings of 5-10 percent versus comparable site-built projects.

Numerous factors impact costs:

- The availability and cost of onsite labor is a key factor. In larger urban areas where labor is scarce and/or more expensive, shifting construction to an offsite (often rural) location can yield significant cost savings.
- The overall efficiency of the process also can lead to cost savings. Work completed in a controlled factory setting can better leverage labor inputs, yielding more "product" or output per hour.
- The compressed modular construction schedule reduces the time needed for a construction loan and can dramatically advance a project's occupancy date—critical considerations for revenue-generating businesses such as hotels and fast-food restaurants. Quicker occupancy equals quicker return on investment.

- Site-built construction contracts, including firm, fixed-price contracts, usually have change orders and a contingency for unforeseen conditions. By comparison, modular contracts, which typically make up 40 percent or more of a project, are "locked in" prior to construction, with greatly reduced (or eliminated) change orders and contingencies. The modular manufacturer can also consolidate the markups and contingencies of several subcontractors.

Schedule Savings and Certainty

McKinsey & Company's "Modular Construction: From Projects to Products" is still the most cited quantitative benchmark study in the industry. Below are a few key quantified findings from the report:

- Modular projects can accelerate schedules by 20-50 percent.
- Leading firms can achieve 20 percent or greater construction cost savings at scale.
- Critical insight: Modular succeeds best where repeatability and scale exist.

According to the previously referenced DOE/ABC study, modular construction project schedules are compressed by 20-50 percent. In a recent survey, 88 percent of general contractors and construction managers saw schedule compression in their modular construction projects—45 percent of which saw greater than 10 percent compression.

Quality Control and Assurance

It can be helpful to think of the term "modular" as referring to a construction process rather than a building type. A modularly constructed building simply means that the materials were delivered to an offsite location (the modular manufacturing facility), assembled into components or three-dimensional building modules, and then transported to the final site for assembly. A building constructed in this

manner must still meet all the same building codes and requirements—most commonly a version of the International Building Code in the U.S. or the National Building Code in Canada—as if it were built onsite.

There is no specific or unique modular building code. The industry is regulated primarily at the provincial and local levels through administrative agencies that implement and enforce the rules for building in that jurisdiction. The administrative rules of each agency provide for quality control, quality assurance, safety standards, and inspection procedures for industrialized building construction, design, and manufacture. The purpose of these rules is to provide minimum requirements to safeguard public health, safety, and general welfare, and to address societal and industry challenges for the inspection and regulatory compliance of offsite construction. Once a factory has been approved to build in a jurisdiction, four stages make up a modular building project:

1. Design approval by the end-user and regulating authorities.
2. Fabrication of module components in a controlled factory environment.
3. Transportation of modules to the final building destination.

4. Assembly of modular units to form a finished building and approval by local authorities.

Buildings constructed using the modular process must comply with all applicable building code requirements, including wind, snow, and seismic conditions where the building will ultimately be located—not the fabrication location.

Because most elements of the building, including electrical and plumbing, are completed and considered closed construction (i.e., concealed behind the drywall when leaving the factory) the inspection protocols must be clear, concise, and coordinated between provincial and local authorities.

A design package consisting of the aggregate of all plans, designs, specifications, and documentation, including the compliance control manual and the onsite construction documentation, is submitted by the manufacturer to the design review agency for compliance review. Where required by the authority having jurisdiction, construction documents and other documentation will bear the signature and seal of the registered design professional.

Once the plans are approved, the building components can be fabricated. One of the key advantages of modular



Saint John Museum - Staff Room, Saint John, NB. An 2-module, 1,740-sq. ft. staff gathering facility built by Kent Homes.

construction is that the building modules can be inspected by the staff quality assurance/quality control manager at each station (framing, electrical, plumbing, drywall, etc.), with any mistakes corrected before the modules arrive onsite.

In-plant inspections are conducted by a third-party inspection agency on behalf of a provincial agency to verify that construction is in compliance with the approved construction documents. Once each modular or panelized unit in a phase of construction has been inspected for compliance, a data plate is attached to the modular component. The data plate contains identifying information providing the local code official with all pertinent information in an easily accessible location.

An agency decal (insignia, label) issued by the authority having jurisdiction is also permanently attached to the modular component, indicating that it has been constructed to meet or exceed the applicable building code requirements.

These steps are necessary to assure the local code official that the building has been inspected and will meet all local requirements, avoiding destructive inspections of the component onsite.

Once the modules are delivered to the final site (often by third-party transportation companies), other site-related requirements are subject to approval at the local level. These requirements may include land use and zoning, local fire zones, site development, building setback, and side and rear yard specifications. Other aspects subject to approval might include property line requirements, subdivision regulations, subdivision control, review and regulation of architectural and aesthetic requirements, foundation design, utility, and module connections.

Onsite inspections of components verify that the installation is compliant with the approved manufacturer's installation instructions, and that connections performed onsite are compliant with approved construction documents.

Environmental Impact

The U.S. Environmental Protection Agency considers construction waste and debris to be one of the largest contributors to landfills annually. While construction demolition of existing structures represents about 90 percent

of this landfill waste, new construction activity also accounts for 57 million tons of landfill waste.

But it does not have to be this way.

According to a March 2022 article by McKinsey & Company, the world will see a once-in-a-lifetime wave of capital spending on physical assets between now and 2027. This surge of investment—amounting to roughly \$130 trillion—will flood into projects to decarbonize and renew critical infrastructure. Ninety-three percent of CEOs say that sustainability issues are important for the future success of their business, and 54 percent expect sustainability to be embedded in the core business strategies of most companies within the next decade.

From a sustainable and strategic perspective, modular construction has the potential to dramatically change how we build in four key areas:

1. Significant waste reduction
2. Lower carbon footprint
3. The ability to relocate, renovate, and repurpose
4. Greater energy efficiency/tighter building envelope

All together, the previously referenced studies show that modular construction reduces the overall weight of waste generated by up to 83 percent, modular construction saw 30 and 43 percent reductions in greenhouse gas emissions compared to traditional construction, and modular homes use 17 percent less material overall compared to traditionally built homes.

Worker Safety, Productivity, and Diversity

The construction industry has about three times the number of workplace fatalities as the manufacturing industry: 1,008 deaths in construction versus 340 deaths in manufacturing. *(Unless otherwise noted, all data in this section was obtained at BLS.gov).*

In 2020, the latest year for which construction safety data is available, the construction industry accounted for about one in five of all workplace deaths—the highest fatality number of any industry reported and nearly three times the rate of the manufacturing sector.

Modular construction has demonstrated the ability to provide a safer environment for the construction workforce. Simply by shifting large portions of the building construction to an offsite manufacturing setting, the U.S. Bureau of Labor Statistics data suggests that the number of fatalities would drop significantly.

Of the 1,008 construction industry deaths mentioned above, more than one-third are attributable to fall hazards. The ability for workers to construct multistory buildings in modules while remaining on the ground floor of a factory virtually eliminates hazards associated with falls, potentially saving hundreds of lives annually.

The 2023 Groskopf study found:

- Fewer workers and shortened construction schedules result in less noise, traffic, and other disruptions to the surrounding community.
- In contrast to a transient workforce under the control of multiple trade contractors, offsite construction relies on a stable, permanent workforce under a central point of control.
- The repetitive, less specialized nature of prefabrication in a controlled factory setting also allows fabricators to better utilize a diverse workforce.

Modular manufacturing may also provide opportunities for older workers and those with disabilities to extend their careers, given a more comfortable work environment and lesser physical demands. The average age of workers among modular manufacturers surveyed is 35 years, although several workers were over 60. Women comprised 15-20 percent of the offsite workforce. Compared to site-built construction, the higher proportion of women and older workers may be attributed to a less physically challenging work environment. As determined by their respective workers' compensation Experience Modification Rates, offsite worker safety (0.91) was found to be better than onsite worker safety (1.00).

The Dodge Smart Market Report "Prefabrication and Modular Construction 2020" addressed the issue of workplace safety. Of the 203 responses received regarding safety, 89 percent of architects, engineers, and contractors indicated that the use of modular construction demonstrated safety benefits.

The results are even more dramatic among large contractors with annual revenues greater than \$100 million. Among the 18 contractors in that subset, 50 percent said that modular construction had a "very high" impact on worker safety, while 39 percent reported a "high" impact and the remaining 11 percent reported a "medium" impact.

Simply put, the modular construction industry has greater access to a larger number of potential workers—those who might not be able to meet the physical demands on a job site over a long period of time. That means fewer bad backs and knees. It means less exposure to inclement weather, less exposure to heights, and less heavy lifting. It means workers can go home at night, not be physically exhausted, and have a better quality of life. It means a safer workplace environment that leads to greater employee retention and higher productivity.

Below are some other factors to consider regarding safety:

Controlled environment

Modular construction often takes place indoors, which can reduce risks, such as adverse weather conditions, associated with outdoor construction.

Quality control

Factory-controlled construction allows for greater oversight and consistency in materials and construction processes, potentially reducing errors and safety risks associated with onsite construction.

Reduced onsite labor

With a significant portion of construction work completed offsite, the modular method can potentially reduce the number of workers needed onsite, minimizing the risk of accidents and injuries.

Efficiency

The assembly process for modular construction tends to be faster than traditional construction methods, which can reduce the overall duration of onsite construction activities, thereby potentially reducing exposure to safety hazards.

DATA ANALYSIS PROCESS

In Spring 2025, MBI and FMI Consulting initiated a collaborative research effort to deliver timely, data-driven insights into the modular construction industry. This 2026 report represents the latest output of this ongoing partnership and is intended to provide industry stakeholders with a consistent framework for monitoring market performance, identifying trends, and evaluating future growth opportunities.

This report presents both historical and forecasted volume for modular Construction Put-in-Place (CPIP), including:

- Five-year historical data (2020-2024)
- Forecast projections (2026-2029)

Analysis is provided at both the national and regional levels, including Eastern and Western Canada, and is segmented across the following market sectors:

- Commercial
- Education
- Healthcare
- Lodging
- Multifamily
- Office (including data centers)
- Other (including public safety, religious, and transportation)

In addition to quantitative market sizing and forecasting, the report examines the key market dynamics, industry trends, and economic drivers expected to influence the modular construction landscape in the near and medium terms.

The development of these insights incorporated several core research and analytical components:

- **Primary Market Research:** FMI conducted interviews with stakeholders across both the modular construction sector and the broader construction industry. In parallel, quantitative market data was collected through an electronic industry survey to support and refine the market sizing model.
- **Market Modeling and Sizing:** FMI developed a customized market model using a combination of primary research findings, proprietary databases, and industry expertise. Market segmentation and forecast assumptions were validated against available industry benchmarks and comparable market indicators.
- **Secondary Research:** Experienced research analysts conducted an extensive review of publicly available industry information, competitive intelligence, and market data sources across both print and digital media.
- **Analysis and Reporting:** Market observations and strategic insights were developed through a synthesis of research findings and the practical experience of FMI's consulting team.

To develop the market forecast, FMI employed a multisource forecasting methodology designed to assess and validate both market size and directional trends. The following sections outline the methodology applied to each component of the customized forecasts presented in this report.

Quantitative Market Model

Utilizing multiple sources, both historical and forward-looking, FMI generated a baseline CPIP forecast. This has its foundation in activity that influences construction opportunities, such as population growth, existing facilities, gross domestic product, shifts in consumer demand, geographic drivers, etc. This data, which uses a combination of proprietary and public sources, is an input into the forward-looking forecast. The forecast is adjusted based on active and planned projects found through secondary research.

Note: FMI typically forecasts CPiP. To allow comparison to previous MBI data, CPiP can be scaled down by 0.41 to align to starts in magnitude. Where relevant, “starts” refers to this scaled-down value.

Market-Driven Interviews and Research

Thirty-six Canadian-specific survey responses were received out of a total of 187 for the North American market. As expected, modular manufacturers were the largest group

of participants. Qualitative interviews were also conducted with several Canadian modular companies, including ANC Modular, Stack Modular, Buttconn Limited, Northgate Industries, 720 Modular, and Fero International.

Based on interviews, surveys, and research, FMI can estimate the modular market share and growth rates in the various segments. The survey questions discussed in this report cover stakeholder sentiment around the demand for modular, as well as beliefs about how demand will evolve.



Steveston Hwy Affordable Housing, Richmond, BC. A 33-module, 20,750-sq. ft. permanent affordable housing complex built by ROC Modular with affiliate Buttcon Limited.

CANADIAN MODULAR CONSTRUCTION MARKET

Market Size and Growth

The Canadian modular construction market was valued at \$5.5 billion CAD, up from \$5.1 billion in 2024, representing about 5.5 percent of the overall Canadian construction market. Modular construction in Canada is expected to grow at a compound annual growth rate (CAGR) of 5.2 percent through the forecast period, revised slightly upward from 5.0 percent in 2024. This projected CAGR exceeds the overall construction growth rate by 1 percentage point.

Explicit federal support for offsite manufacturing and alternative delivery methods helped address the national housing crisis. That support, combined with a shrinking labor force, has created a strong demand environment for modular construction in Canada.

Segment Insights

The multifamily sector is the strongest modular construction industry market in Canada, generating approximately \$2.48 billion, or nearly half of the nation's projected modular market size. Multifamily also has the highest projected CAGR, at 7.3 percent, driven by growing populations in the major metro areas.

The commercial modular sector was the second-largest market, accounting for \$701 million, followed by the education modular market at \$624 million. The commercial modular segment accounted for 4.8 percent of the overall commercial construction segment, while the education modular market accounted for 7.7 percent of the overall education construction segment.

The lodging modular sector, while smaller at \$235 million, accounted for 10 percent of the overall lodging

construction sector and has a forecasted CAGR of 6.1 percent—nearly 3 percentage points higher than the conventional construction CAGR for this sector.

Market Trends and Opportunities

The Build Canada Homes (BCH) initiative represents a significant potential demand catalyst for Canadian modular companies, with most respondents expecting a moderate to significant positive impact. Realizing that growth, however, will depend on resolving financing gaps, policy alignment, and consistent demand signals.

An initial investment of \$13 billion was made to help drive affordable housing across the country, with modular listed as a preferred delivery method. However, a structural financing mismatch was highlighted by industry stakeholders as a potential barrier for modular manufacturers looking to capitalize on market demand from the BCH initiative. With modules manufactured ahead of project schedule, lenders are often unwilling to disburse funds against assets they cannot lien, leaving manufacturers without access to needed capital. Although bridge financing exists as a workaround, it remains expensive through private lenders and is inconsistently available through government channels.

Trends in Modular Manufacturing

Design integration has emerged as a critical bottleneck. Projects continue to be hindered by incomplete or uncoordinated design at the point of contract—a challenge cited across architects, general contractors, and modular manufacturers. Front-end investment in design coordination helps drive successful modular projects that deliver on speed and cost advantages. A shortage of designers and general contractors with genuine modular experience is

increasingly identified as one of the industry's most pressing unmet needs, providing a target for continued education efforts.

Factory capacity is broadly available across the industry—the constraint on growth is pipeline visibility and financing, not production capacity. Manufacturers who have diversified across multiple segments show greater resilience to volatile market conditions than those built around a single product type or client.

Technology and Industry Modernization

Some industry stakeholders note that full Building Information Modeling (BIM) integration remains limited among Canadian manufacturers. As a result, European competitors operating at higher levels of digital integration and looking to expand into the Canadian market present a competitive risk and an opportunity gap.

Although adoption of artificial intelligence (AI) continues to gain traction as a workflow tool, it is often focused on streamlining administrative tasks and currently has limited use for design, production, or supply chain operations—presenting an opportunity for greater technological integration. Nearly half of study participants report productivity gains from AI, led by general contractors and modular manufacturers. The strongest use cases are reported to be design support and administrative efficiency, reducing some potential front-end friction.

Top Drivers

Speed to market remains the most prominent driver across stakeholder types, followed by cost and product/quality consistency. Education outreach is one of the most prominent talking points across the modular industry, with many study participants citing the need to increase education efforts with general contractors and architects as the immediate next step to facilitating broad modular growth. A reliable project pipeline is noted to be the most-cited obstacle by manufacturers. Without predictable workflow, factories have difficulty investing in automation, staffing, or capacity to scale.

Main Obstacles

Lack of client education and negative perceptions of modular construction are the most significant barriers consistently cited across all stakeholder groups. Additional challenges such as permitting complexity, design limitations, and financing constraints further hinder broader modular adoption.

Beyond perception issues, the modular market's top challenges are primarily financial and market-driven, with cost escalation, economic outlook, and inconsistent project pipeline emerging as the most significant concerns. Financing-related issues, including project financing and interest rates, remain key constraints and limit the ability to advance projects. In comparison, operational and regulatory factors such as efficiency, regulations, and workforce development are viewed as secondary, while areas like technology adoption and supply chain are considered less critical.

Additionally, design inflexibility and coordination challenges among trades are cited as critical pain points across stakeholders, highlighting operational and integration hurdles. Perception issues around quality and limited applicability further constrain adoption, with additional friction from knowledge gaps, logistics, and cost concerns varying by stakeholder type.

Perceptions of modular construction are largely neutral for both appearance and durability, with about half of respondents seeing no meaningful difference when compared with traditional methods. However, negative perceptions slightly outweigh positive responses—particularly for appearance—indicating lingering skepticism.

Stakeholder Sentiment in Canada

Across all regions, sentiment on the broader economy and construction market remains largely neutral, with slight variation by geography. In contrast, the modular market shows consistently more positive expectations in Canada, indicating stronger regional confidence in modular growth.

Backlog Confidence: Modular firms in Canada reported higher-than-expected backlogs for 2025, indicating confidence in demand.

Top Concerns: Political environment and economic uncertainty scored higher among Canadian firms than among U.S. peers.

Tariff Impacts

Manufacturers with cross-border supply chains or export-oriented business models are facing cost pressures from tariff rates with the U.S. and China. In some cases, signed contracts have been canceled due to shifts in tariff rates between negotiation and delivery.

Key Influencers for Adoption

Reduced construction timelines: Identified as the top factor influencing nonusers to consider modular construction. In an environment where delays, labor shortages, and permitting

bottlenecks can be increasingly common, speed is a potential differentiator. Modular's ability to shorten build times offers a meaningful solution to this growing challenge.

Cost savings: Identified as one of the most compelling factors that would influence nonusers to consider modular construction. This can be a challenge for modular firms, as new market entrants often struggle to perform modular cheaper than traditional construction. This area presents educational opportunities for both modular firms and for MBI.

Design repeatability and consistency: Named as a key factor in motivating nonusers to consider modular construction. Modular excels in projects with standardized elements by delivering uniform quality and precision. Stakeholders value the advantages that come with



Hôpital Générale du Lakeshore Modular Complex (Lakeshore General Hospital), Pointe-Claire, QC. A 48-module, 32,000-sq. ft. addition to an existing hospital built by ATCO Structures & Logistics Ltd. with affiliate CIUSSS de L'Ouest-De-L'Île-De-Montréal.

modular, such as greater predictability, reduced weather impact, and a stable production timeline. However, this applies less to segments where custom designs and originality are priorities.

By contrast, decarbonization and the use of recycled materials were ranked among the least influential factors, suggesting that sustainability efforts have yet to gain widespread traction for modular adoption when measured against other factors.

Operational Capacity

Current manufacturing capacity in Canada is being driven by BCH housing demand and multiyear institutional contracts. A fragmented market landscape leaves only a few Canadian manufacturers with the footprint and capital

depth to take on large, multisite residential programs simultaneously, and this is restricting some of the market from taking advantage of growing market opportunities.

European manufacturers are actively exploring Canadian market opportunities, drawn by the government's public commitment to offsite construction. Successful market penetration of foreign entrants will materially change the competitive landscape.

Nearly all modular manufacturers in Canada reported some or significant unused capacity, indicating potential to scale up. Supply chain dynamics and government initiatives are the most influential factors currently shaping project delivery across both modular and traditional construction methods, highlighting the significant impact of broader macroeconomic conditions on the industry.



ADVANCING MODULAR AND OFFSITE CONSTRUCTION: THE ROLE OF CSA GROUP STANDARDS

As Canada's construction sector evolves to address housing demand, labor constraints, and sustainability goals, modular and offsite construction are gaining significant momentum. These innovative approaches can offer increased efficiency, enhanced quality control, and reduced environmental impact.

Supporting this transformation is a growing suite of standards designed and developed by CSA Group to help enable the safe, consistent, and scalable adoption of modular construction across Canada.

The Rise of Modular and Offsite Construction

Despite the advantages modular construction offers in terms of accelerated project timelines, reduced material waste, and improved worker safety, broader adoption has historically been constrained by inconsistent regulatory frameworks and limited standardized technical guidance. CSA Group's standards development efforts are helping to address this gap by providing clear, consensus-based requirements tailored to modern construction methods.

CSA Group's standards development activities to support and advance modular construction date back to 1972 with the publication of **CSA A277 Procedure for Certification of Factory-Built Houses**. This foundational standard established certification processes for factory-built structures and helped lay the groundwork for modern offsite construction practices in



FUZE Woodstock, Woodstock, ON. A 183-module, 92,000-sq. ft. multifamily project designed by Skyhook Modular with affiliates Z Modular Holding Inc, Melloul Blamey Construction, Entuitive, and Quasar.

Canada. Certification to CSA A277 can help streamline the inspection process, as it can reduce the need for building inspectors to approve components built in a certified factory. Now known as **CSA A277 Procedure for Certification of Prefabricated Buildings, Modules, and Panels**, the standard has evolved to reflect advances in construction methods, expanding its scope to include modules and panels.

Expanding the Standards Landscape

In 2020, CSA Group released a research report highlighting the need for additional standards to support the

rapidly growing modular construction sector. This work underscored the importance of strengthening consistency, safety, and efficiency across the industry.

To address these needs, CSA Group introduced key new standards, including:

- **CSA Z250:21 Process for Delivery of Volumetric Modular Buildings:** This standard provides an end-to-end framework for the delivery of modular buildings, addressing aspects of modular construction, such as logistics and transportation, not often

encountered in conventional builds, while supporting consistency across project lifecycle stages. Given the inherently collaborative nature of modular construction, the standard also offers guidance and tools to enhance coordination and communication among interested parties.

- **CSA Z252:23 Guide for Obtaining Volumetric Modular Construction Project Approvals:** Developed to support regulators, inspectors, and project parties, this guide provides best practices for navigating regulatory approval and inspections for permanent modular buildings of all sizes and occupancies.

Together, these documents provide a strong operational and regulatory foundation for modular construction in Canada.

Advancing Structural Design Through CSA Z251

CSA research and engagement with interested parties also identified a critical gap: the absence of a Canadian design standard specifically for volumetric modular construction.

Expected to be published in fall 2026, **CSA Z251 Design of Volumetric Modular Structures** will address this gap by providing dedicated design guidance.

The introduction of CSA Z251 marks a significant step forward for the industry. The standard is expected to:

- **Strengthen industry confidence** by addressing unique structural challenges and risks inherent in modular construction

- **Support designers and engineers** with the tools needed to deliver safe, resilient, and code-compliant modular structures

Building Awareness and Capability

In addition to standards development, CSA Group also supports industry adoption through free online training on modular construction. These training resources help build awareness and improve understanding of key concepts, standards, and best practices, making it easier for interested parties—including regulators, designers, and builders—to effectively implement modular approaches in real-world projects.

Supporting Innovation Through Consensus

CSA Group's modular construction standards are developed through a consensus-based process involving industry experts, regulators, architects, engineers, and manufacturers. This collaborative approach helps ensure that standards reflect real-world practices while enabling innovation.

Importantly, CSA Group standards also serve as a bridge between the modular industry and regulators. By providing clear, technically sound requirements, they help facilitate incorporation into building codes and enable authorities having jurisdiction to confidently assess and approve modular projects.

Enabling Policy and Code Integration

As provinces, territories, and municipalities seek to modernize building codes and accelerate housing

delivery, the integration of modular construction standards becomes increasingly important.

Referencing CSA modular standards can help:

- Provide a consistent and recognized framework for compliance
- Streamline the approval process for modular projects
- Support innovation without compromising safety
- Encourage investment in offsite manufacturing and industrialized construction

In high-demand regions, these benefits can play a meaningful role in addressing housing shortages and improving construction productivity.

Looking Ahead

The future of construction in Canada will increasingly rely on industrialized, scalable solutions. Modular and offsite construction will be central to this shift, and standards will play a critical enabling role.

CSA Group's leadership in developing modular construction standards helps support broader adoption. In addition, the standards help ensure that projects are not only faster and more efficient, but also safe, resilient, and high-quality.

As these standards continue to evolve, they will play a vital role in shaping a modern construction landscape—one that is better equipped to meet Canada's housing, infrastructure, and sustainability challenges.

SEGMENT-SPECIFIC HIGHLIGHTS

Multifamily Residential

Nearly half of the projected modular market size in Canada will be in the multifamily sector. Multifamily also has the highest projected CAGR, at 7.3 percent, driven by growing populations in the major metro areas.

Eastern Canada is expected to see strong urban-driven demand, especially in Ontario and Quebec. Western Canada, notably in British Columbia and Alberta, is also poised for growth due to similar housing pressures. Key drivers of this growth will be the housing affordability crisis and urban migration.

Commercial

Physical retail is more promising for modular, particularly for smaller units and freestanding shops and restaurants surrounding shopping centers, known as “pad sites.” New brick-and-mortar retail sites are commonly integrated with multifamily, lodging, and office projects as part of planned communities.

Both regions are relatively balanced in modular commercial usage (approximately 4.8 percent of segment share). Eastern Canada has more retail/urban pad site applications tied to mixed-use projects. Growth remains modest (0.9 percent) in both Eastern and Western Canada due to a decline in the warehouse subsegment.

Education

Eastern Canada benefits from institutional funding (e.g., public school boards in Ontario and Quebec). Western Canada has lower base volume, but modernization of facilities presents modular opportunities. Modular represents 7.7 percent of this overall segment, but modular CAGR is

expected to be slightly negative at -1.0 percent. That negative rate, however, is still stronger than the overall education construction CAGR for the same period.

Office (Including Data Centers)

This segment represents a smaller share in both regions, although Eastern Canada (Ontario/Quebec) hosts more potential data center developments. Western Canada remains a secondary region in this segment. Modular construction represents about 1.8 percent of this overall sector, but is poised to grow by 3 percent over the next several years, outpacing conventional construction.

Healthcare

In Eastern Canada, modular penetration is limited in healthcare, despite broader policy-driven investments. Western Canada faces facility gaps in rural healthcare, an area in which modular could provide a solution. Lack of access to healthcare for rural residents is an increasing concern among public policymakers, and rural areas often lack the necessary workforce to construct these facilities. This is an area in which modular could display a competitive advantage over traditional construction. The modular market share for the healthcare sector is 1.5 percent of the overall segment and is projected to grow at 3.1 percent.

Lodging

While a smaller sector, lodging represents segment with the highest market share (10 percent) for modular construction as a percentage of the overall sector. With a healthy 6.1 percent modular CAGR over the next five years, this market exceeds the overall construction CAGR by nearly 3 percentage points. Opportunities for modular firms include extended-stay projects, particularly in locations with high labor demand due to large-scale manufacturing and industrial projects.

Other (Transportation, Public Safety, Religious)

Other markets capture about 6 percent of the overall sector and are expected to grow at 6.3 percent over the next five years, which is on par with the traditional construction sector.

Growth Opportunities

The market for multifamily modular has a strong projected growth rate of 7.3 percent. When comparing the modular CAGR in multifamily to the overall construction CAGR for the same market and timeframe, the modular market is expected to exceed overall construction by 1.2 percentage points, indicating a good opportunity for the industry to increase overall market share in Canada.



Mica Dam Studio Dorms, Mica Creek, BC, Canada. A 12-module workforce housing project designed and manufactured by ATCO Structures & Logistics Ltd.

CANADIAN MODULAR PROJECT MAP

Comprised of modular building projects submitted by MBI members across Canada, this map—representing only a small sampling of the industry's total output—shows the incredible breadth and diversity of commercial modular buildings.

From multistory residential buildings to sprawling workforce communities to relocatable mobile offices, commercial modular construction projects contribute to every facet of Canada's building and infrastructure industries.

Explore the complete interactive map—and submit your company's modular building projects—by scanning below:



Prince Rupert 5-Storey Multifamily. *See page 9.*



Esk'etemc First Nation Multi-Plex Homes. *See page 27.*



Steveston Hwy Affordable Housing. *See page 15.*



Lynn Fripps 2-Storey Permanent Modular Addition. *See pages 4-5.*



Mica Dam Studio Dorms. *See page 23.*



Pomeroy Lodging Employee Housing. *See page 30.*



- Education
- Office
- Healthcare
- Retail
- Hotel
- Multifamily
- Dormitory
- Workforce Housing
- Assembly
- Correctional
- Special Application
- Bathroom Pods
- Green Building
- Social & Supportive Housing

Hôpital Générale du
Lakeshore Modular
Complex (Lakeshore
General Hospital).
See pages 18-19.



Saint John Museum
Staff Room. *See page 11.*



Fuze Woodstock.
See page 21.



REGIONAL INITIATIVES

Atlantic Off-Site Housing Innovation Roadmap

The Atlantic Off-Site Housing Innovation Roadmap outlines a regional strategy to increase housing supply in Atlantic Canada through offsite construction and modern methods of construction. Developed by the University of New Brunswick's Off-site Construction Research Centre, the roadmap is based on policy reviews, industry interviews, regional workshops, and data analysis conducted across Atlantic Canada.

The roadmap responds to four major pressures affecting housing delivery in Atlantic Canada:

1. Population growth
2. Rising construction costs
3. Labor shortages
4. Regulatory and delivery constraints

These challenges are identified as key drivers behind the need for more efficient and scalable housing delivery systems. The report positions offsite and modular construction as a practical solution to improve speed, productivity, and housing availability.

Key Focus Areas

The roadmap identifies five strategic focus areas necessary to support broader adoption of offsite construction:

1. **Policy and regulatory systems:** Improve consistency, clarity, and efficiency in approvals, inspections, and permitting processes.
2. **Financing and insurance:** Address cash-flow limitations, valuation challenges, and perceived risks unique to offsite construction projects.
3. **Procurement models and contracts:** Encourage earlier manufacturer involvement and adapt procurement processes to factory-based delivery models.

4. **Skilled workforce and training:** Expand workforce development pathways and support year-round employment opportunities in both factory and site operations.
5. **Transportation and logistics:** Improve planning, permitting, routing, and damage-reduction strategies for modular transportation and delivery.

The roadmap presents a coordinated regional strategy for accelerating housing delivery through offsite construction. Its recommendations focus not only on manufacturing capacity, but also on the supporting ecosystem required for adoption—including regulation, financing, procurement, logistics, workforce development, and public awareness.

The report highlights that successful implementation will require collaboration among governments, manufacturers, developers, financial institutions, educators, and industry organizations. By aligning policies and industry practices, Atlantic Canada can improve housing supply while building a more productive and resilient construction sector.

British Columbia Digitally Accelerated Social Housing (DASH)

DASH is a set of digital tools and permit-friendly, ready-to-use designs to help architects, designers, and housing providers build multifamily homes faster, easier, and more cost-effectively. The initiative works by using standardized designs, prefabricated parts, and a coordinated supply chain, helping to lower costs, save time, and build homes faster.

Where can I learn more about modular construction?

The Modular Building Institute's website at www.modular.org is loaded with case studies, research, articles, and links to companies in your area.

Projects are delivered more quickly and consistently, without sacrificing quality or design. DASH also helps to make better use of public and private funding.

The program was created to address housing issues as a “kit of parts” or panelized solution, rather than full volumetric modular construction. In recent months, several modular manufacturers in the region set aside their competitive nature and collaborated on creating a “proof of concept” modular design to submit for consideration to DASH program administrators. The design’s intent is to create a modular solution that can be built and delivered by multiple modular factories without any proprietary materials, parts, or assemblies.

SUMMARY

The overall modular growth rate in Canada is projected to be about 5.2 percent, outpacing traditional construction growth rates by a full percentage point—a strong indication that the modular market share will continue to grow in Canada for the foreseeable future.



Esk'etemc First Nation Multi-Plex Homes, Williams Lake, BC, Canada. An 8-module multifamily housing structure built by TASU Construction with affiliate Bridge Community Development. 2026 Awards of Distinction Contest Honorable Mention — Permanent Multifamily Under 10,000 sq. ft.

DEFINITIONS

MBI adopted the definitions contained in the ICC/ANSI standard 1200 and 1205 for consistency. Sources for other terms not used in the standard include state administrative programs and the National Institute for Building Sciences.

Accessory dwelling unit (ADU). A smaller, independent residential dwelling unit located on the same lot as a stand-alone (i.e., detached) single-family home. (Source: American Planning Association).

Authority Having Jurisdiction (AHJ). Organization, political subdivision, office, or individual charged with the responsibility of administering and enforcing the provisions of the applicable building code. The authority having jurisdiction shall include a state agency or local building department.

Building Envelope. As the physical separator between the interior and exterior environments of a building, the building envelope serves as the outer shell to help maintain the indoor environment (together with the mechanical conditioning systems) and facilitate its climate control. Building envelope design is a specialized area of architectural and engineering practice that draws from all areas of building science and indoor climate control.

Building Site. A lot, the entire tract, subdivision, or parcel of land on which industrialized housing or buildings are sited.

Building System. The design and/or method of assembly of modules or modular components represented in the plans, specifications, and other documentation, which may include structural, electrical, mechanical, plumbing, fire protection, and other systems affecting health and safety.

Certification Label. A decal, insignia, or alteration decal.

Closed Construction. A building, component, assembly, subassembly, or system manufactured in such a manner that all portions cannot be readily inspected at the installation site without disassembly or destruction thereof.

Commercial Structure. An industrialized building classified by the building codes for occupancy and use groups other than residential for one or more families.

Compliance Assurance Program. Procedures that state the guiding principles and define the framework for ensuring that construction documents approved by a design review agency, or that modular buildings inspected by a third-party inspection agency, comply with the applicable building codes.

Compliance (or Quality) Control Program. The manufacturer's system, documentation, and methods of ensuring that industrialized housing, buildings, and modular components, including their manufacture, storage, handling, and transportation, conform with this chapter.

Component. A subassembly, subsystem, or combination of elements for use as a part of a building system or part of a modular component that is not structurally independent, but may be part of structural, plumbing, mechanical, electrical, fire protection, or other systems affecting life safety.

Data Plate. A plate attached by the manufacturer or installer to a modular building or modular component that contains identifying information, allowing code officials or end-users to determine if the structure is suitable for installation in their jurisdiction, location, or project.

Decal. The approved form of certification issued by the authority having jurisdiction, to be permanently attached to the modular building, modular component, or panelized system, indicating that it has been constructed to meet or exceed the applicable building code requirements.

Deconstruction. The process of taking apart a building or structure, or a portion thereof, with the intent of

repurposing, reusing, recycling, or salvaging as many of the materials, products, components, assemblies, or modules as possible.

Design Package. The aggregate of all plans, designs, specifications, and documentation required by these sections to be submitted by the manufacturer to the design review agency or required by the design review agency for compliance review, including the compliance control manual and the onsite construction documentation. Unique or site-specific foundation drawings and special onsite construction details prepared for specific projects are not a part of the design package.

Erection/Installation/Set. The process of blocking, leveling, and anchoring a modular building unit on the building site upon delivery.

Industrialized Building. A commercial structure constructed in one or more modules, or constructed using one or more modular components, that is built at a location other than the commercial site and designed to be used as a commercial building when the module or modular component is transported to the commercial site and erected or installed.

Industrialized Housing. A residential structure designed for the occupancy of one or more families that is constructed in one or more modules or constructed using one or more modular components, and is built at a location other than the permanent site and designed to be used as a permanent residential structure when the module or modular component is transported to the permanent site and erected or installed on a permanent foundation system.

Insignia. The approved form of certification issued by the authority having jurisdiction to the manufacturer to be attached to the modular building, modular component, or panelized system, indicating that it has been constructed to meet or exceed the applicable building code requirements.

Manufacturer. The entity responsible for the manufacturing of assemblies, panelized systems, modular buildings, or modular components.

Manufacturing Plant. The location, other than the building site, at which modular buildings, modular components, modules, panels, or tiny houses are assembled or manufactured prior to transport to the final construction site.

Marriage Wall/Crossover Connections. The joint between the modules in a complex, commonly called a mate-line or mod-line.

Modular Component. A subassembly, subsystem, or combination of elements, including panelized systems, building shells or bathroom pods, for use as a part of a modular building that is not structurally independent, but is a part of structural, plumbing, mechanical, electrical, fire protection, or other systems affecting life safety.

Offsite Construction. The planning, design, fabrication, and assembly of building elements at a location other than their final installed location to support the rapid and efficient construction of a permanent structure. Such building elements may be prefabricated at a different location and transported to the site or prefabricated on the construction site and then transported to their final location. Offsite construction is characterized by an integrated planning and supply chain optimization strategy. (Source: National Institute of Building Science)

Open Construction. A modular building, modular component, panelized system, or tiny house manufactured in such a manner that all portions can be readily inspected at the building site without disassembly, damage, or destruction thereof.

Permanent Modular Construction (PMC). An innovative, sustainable construction delivery method utilizing offsite, lean manufacturing techniques to prefabricate single- or multistory whole building solutions in deliverable module sections. PMC buildings are manufactured in a safe, controlled setting and can be constructed of wood, steel, or concrete. PMC modules can be integrated into site-built projects or stand alone as a turnkey solution, and can be delivered with mechanical, electrical, and plumbing (MEP); fixtures; and interior finishes in less time, and with less waste and higher quality control than projects utilizing only traditional site construction.

DEFINITIONS

Prefabricated. The manufacture or fabrication of sections of a building at an offsite location that are delivered to and assembled at the building site.

Quality Control. Controls and inspections implemented by the manufacturer, as applicable, to ensure that the material provided and work performed meet the requirements of the approved construction documents and referenced standards-applicable building codes.

Registered Design Professional. An individual who is registered or licensed to practice their design profession, as defined by the statutory requirements of the professional registration laws of the state or jurisdiction in which the project is to be constructed.

Relocatable/Industrialized building. A partially or completely assembled building that complies with applicable codes and state regulations and is constructed in a building manufacturing facility using a modular construction process. Relocatable modular buildings are designed to be reused or repurposed multiple times and transported to different sites.

Site or Building Site. A lot, the entire tract, subdivision, or parcel of land on which industrialized housing or buildings are sited.

Third-Party Inspector. An approved person determined by applicable statutory requirements to be qualified by reason of experience, demonstrated reliability, and independence of judgment to inspect modular buildings, and portions thereof, for compliance with the construction documents, compliance control program, and applicable building codes. A third-party inspector works under the direction of a third-party inspection agency.



Pomeroy Lodging — Employee Housing, AB, Canada. A 36-module employee housing complex built by ROC Modular with affiliate Steenhof Building Services.

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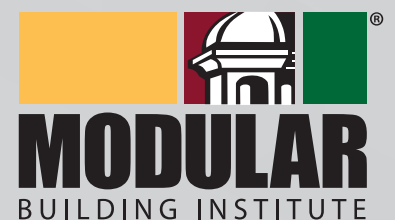


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MODULAR BUILDING INSTITUTE

285 Hydraulic Ridge Rd., Suite 6 | Charlottesville, VA 22901 US

888.811.3288 | Fax: 434.296.3361 | info@modular.org | modular.org

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