

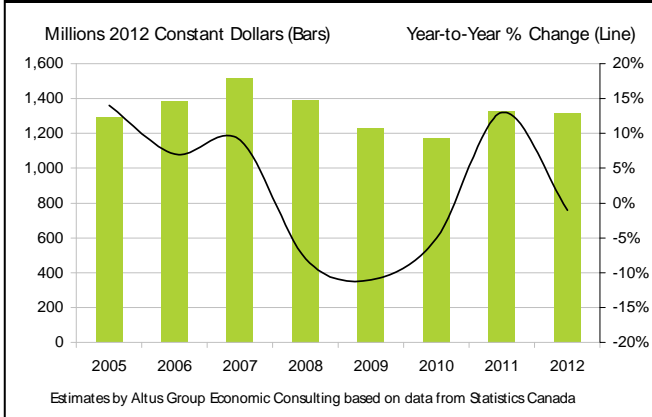
Manufactured Building Conditions

The Canadian Manufactured Housing Institute (CMHI) conducts a survey of producers of factory-built homes called the *CMHI Manufactured Building Survey*. Altus Group Economic Consulting analyses the data produced from the CMHI Survey and provides information as to the evolving position of manufactured buildings within the Canadian construction sector.

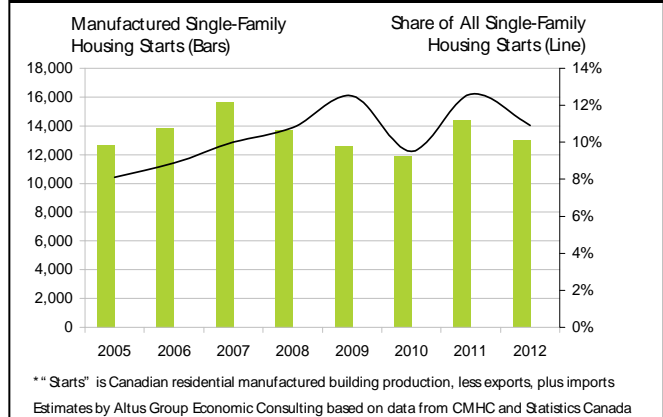
Highlights from 2012:

- In 2012, the value of manufactured building production in Canada (residential and non-residential combined) was over \$1.3 billion, down 1% from 2011, but still above the lows of 2009 and 2010
- Factory-built units accounted for nearly 11% of all single-family homes started in 2012, a slight decline from the historically high 12.6% share during the previous year
- Some 12,970 factory-built single-family homes were started in 2012, down about 10% from 2011
- Increased production in multi-family homes and stable production in the non-residential sector helped offset the decline in single-family production
- Manufactured building activity helps support nearly 25,000 full-time equivalent jobs across the country and generates some \$469 million annually in federal and provincial taxes

**Manufactured Building Production
Canada, 2005-2012**



**Manufactured Building Residential Starts*
Canada, 2005-2012**

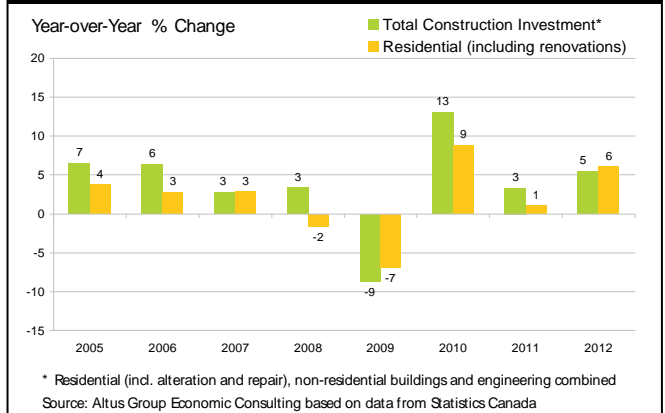


NATIONAL INDUSTRY INDICATORS

Construction Industry

After a notable slowdown in spending in 2011, the pace of residential construction investment picked up in 2012 as levels increased over 6% from the previous year. The growth in residential construction investment exceeded the growth in total construction spending. A relatively steady national housing market and moderate economic growth should continue driving investment in residential construction.

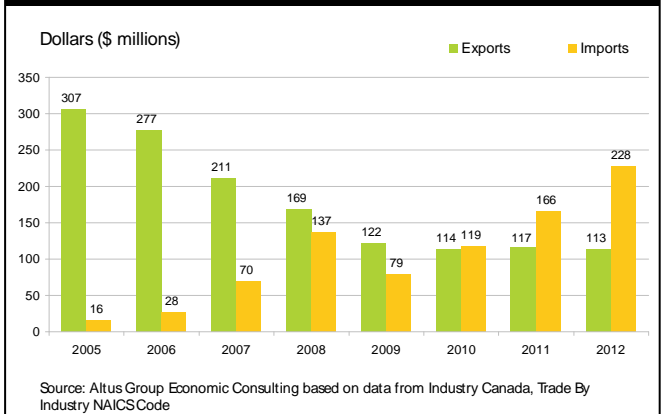
Annual Construction Investment by Sector, Canada, 2006-2012



Exports of Manufactured Buildings

The trade balance for manufactured buildings recorded its third annual deficit in 2012. The deficit more than doubled in 2012, with imports far outpacing exports of manufactured buildings. Canadian producers are likely to face challenges in the near term, as the national trade deficit continues to widen. Exports are likely to remain hampered by a strong Canadian dollar and volatile international economies. At the same time, a strengthening American economy may provide some support to Canadian exports.

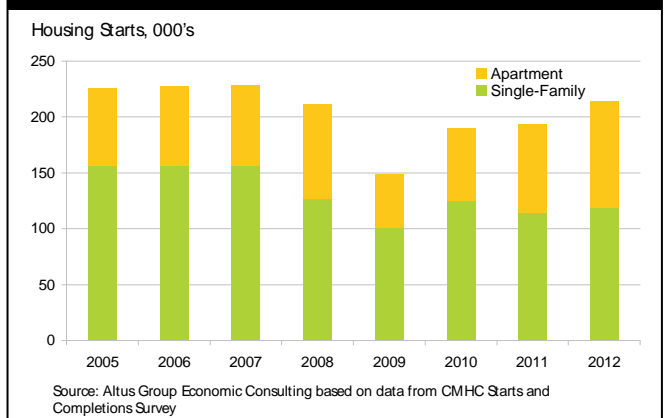
International Trade, Manufactured Buildings, Canada, 2005-2012



Housing Industry Overview

Canada Mortgage and Housing Corporation (CMHC) publishes data on housing starts (including both site-built and factory-built homes). Overall housing starts in Canada totaled 214,827 units in 2012, an increase of 11% from the previous year. Most of this growth is attributable to the 21% increase in apartment (multi-family) construction. In contrast, single-family housing starts (including single-detached, semi-detached and row house units) increased by some 4% in 2012.

Annual Housing Starts By Type, Canada, 2005-2012

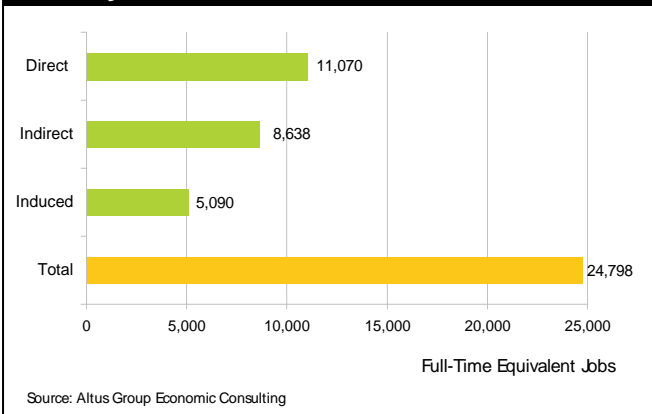


ECONOMIC BENEFITS

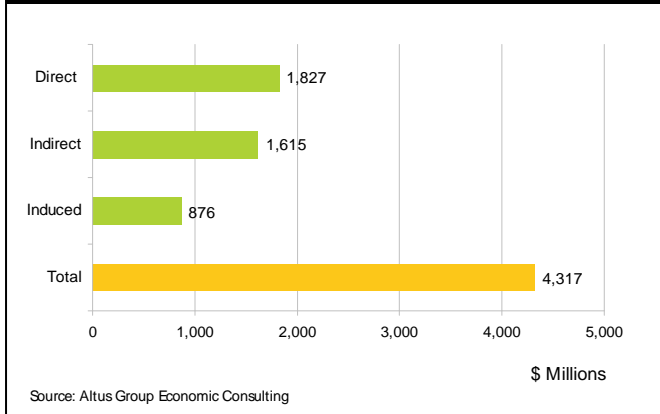
The manufactured building industry generates tremendous economic benefits, in the form of employment, wages, government taxes, etc., to the Canadian economy. In 2012, manufactured building production, installation and other related activities helped support nearly 25,000 full-time equivalent jobs in Canada. The industry was also responsible for generating some \$469 million in federal and provincial taxes. The industry is clearly a vital component of the Canadian economy.

The *CMHI Manufactured Building Survey* is a survey that collects data from producers of manufactured buildings related to production volumes. Manufacturers are certified to Canadian Standards Association (CSA) standards. Approximately 120 firms in Canada, the U.S. and China are identified as certified builders of factory-constructed buildings and structures under the CSA A277 Standard.

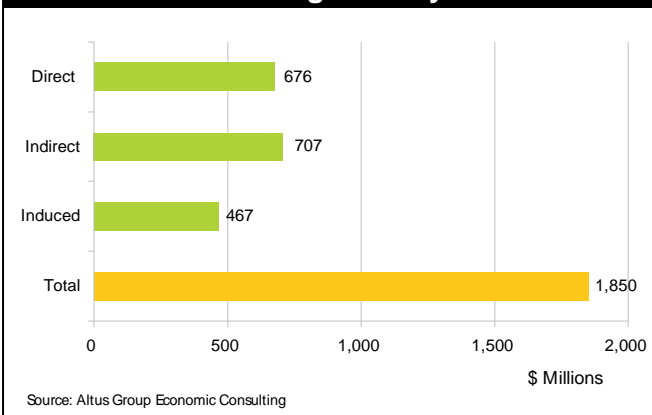
Jobs Supported By the Manufactured Building Industry



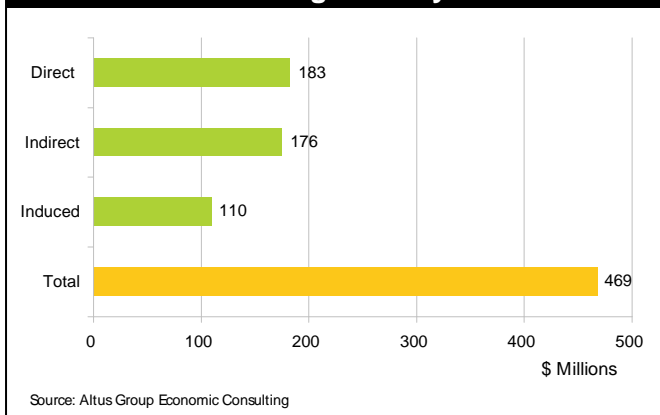
Economic Activity Generated By the Manufactured Building Industry



Wages and Business Profits Generated By the Manufactured Building Industry



Federal and Provincial Taxes Generated By the Manufactured Building Industry





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