GEORGIA INSTITUTE OF TECHNOLOGY
OFFICE OF CONTRACT ADMINISTRATION
SPONSORED PROJECT INITIATION

Date: 7/21/78

Project Title: Profit Opportunities for Manufacturing Prefabricated Houses in Liberty County

Project No: A-2164

Project Director: Ms. S. G. Daniell

Sponsor: Liberty County Industrial Development Authority

Agreement Period: From 6/1/78 Until 7/31/78

Type Agreement: Standard Industrial

Amount: $3,600

Reports Required: Final Report

Sponsor Contact Person(s):

Technical Matters

Contractual Matters

(thru OCA)

Mr. John W. Winn
Executive Director
Liberty County Industrial Development Authority
100 Commerce Street
Hinesville, GA 31313

Defense Priority Rating: None

Assigned to: Technology and Development Laboratory (School/Laboratory)

COPIES TO:

Project Director
Division Chief (EES)
School/Laboratory Director
Dean/Director—EES
Accounting Office
Procurement Office
Security Coordinator (OCA)
Reports Coordinator (OCA)

Library, Technical Reports Section
EES Information Office
EES Reports & Procedures
Project File (OCA)
Project Code (GTRI)
Other:

CA-3 (3/78)
GEORGIA INSTITUTE OF TECHNOLOGY
OFFICE OF CONTRACT ADMINISTRATION
SPONSORED PROJECT TERMINATION

Date: June 5, 1979

Project Title: Profit Opportunities for Manufacturing Prefabricated Houses in Liberty County

Project No: A-2164

Project Director: Ms. S. G. Daniell

Sponsor: Liberty County Industrial Development Authority

Effective Termination Date: 9/30/79

Clearance of Accounting Charges: 9/30/79

Grant/Contract Closeout Actions Remaining:

- X Final Invoice and Closing Documents
- Final Fiscal Report
- Final Report of Inventions
- Govt. Property Inventory & Related Certificate
- Classified Material Certificate
- Other

Assigned to: Technology & Development (School/Laboratory)

COPIES TO:

- Project Director
- Division Chief (EES)
- School/Laboratory Director
- Dean/Director—EES
- Accounting Office
- Procurement Office
- Security Coordinator (OCA)
- Reports Coordinator (OCA)

Library, Technical Reports Section
EES Information Office
Project File (OCA)
Project Code (GTRI)
Other
A PRELIMINARY INVESTIGATION OF
PROFIT OPPORTUNITIES FOR MANUFACTURING
PREFABRICATED HOUSES
IN LIBERTY COUNTY

Final Report

Prepared for
the Liberty County
Industrial Development Authority

by
Sallie G. Daniell
Project Director

GEORGIA INSTITUTE OF TECHNOLOGY
Engineering Experiment Station
Technology and Development Laboratory
Economic Development Division
May 1979
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</tr>
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<td>15</td>
</tr>
<tr>
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</tr>
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</tr>
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</tr>
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<td>30</td>
</tr>
</tbody>
</table>
Preface

The attached document is a study prepared for the Liberty County Industrial Development Authority. The purpose of the study is to provide the initial investigation to identify the profit opportunities available to a manufacturer of prefabricated houses with a Liberty County location. It is stressed that this is only an initial investigation and as such does not present analysis or conclusions. The data were originally compiled in the summer of 1978; however, at the request of the sponsor, the final report has been delayed.
Executive Summary

This study presents a preliminary investigation to identify the profit opportunities available to a manufacturer of prefabricated houses with a Liberty County location. Specific items discussed include description of the products and the industry, markets for prefabricated houses, production by the industry, typical plant profile, and locational needs of manufacturers.

For purposes of this study, prefabricated houses are described as complete prefabricated residential buildings in a panel, section, or modular form produced at a factory away from the permanent sites for the buildings. In 1972, 56,800 units or 47% of the quantity of industry shipments were stationary residential single family buildings sold as complete units and shipped in panel form, 27% were multifamily units, 14% were precut packages of single family buildings sold as complete units, and 12% were single family buildings sold and shipped as complete units.

In 1972, establishments of the prefabricated houses industry were located 40% in the North Central Region, 28% in the South Region, 18% in the Northeast Region, and 14% in the West Region. The average number of employees per establishment was 81, of which 75% were production workers with average hourly earnings of $3.56. The industry as a whole had a cost of materials and payrolls per dollar of shipments of $.77. The average annual payroll per plant was $635,873.

The general housing industry experienced a downturn in sales in the period 1974-75. This lack of demand for housing also was experienced by the prefabricated wood building industry, resulting in significant closings of plants with many being forced completely out of business. However, 1976-77 showed improvements in the overall economy of the industry, and forecasts show more improvements for 1978.
The U. S. wood prefab building industry volume output is expected to rise at a compound annual rate of 7.1% from the present to 1982. This is a faster rate of growth than is forecast for all housing starts during these years, indicating a rise in market share for the industry. Demand both for complete housing units and for components is expected to be strong.

Specific local (Liberty County) market demand includes the 15,000+ personnel increase at Fort Stewart/Hunter Army Airfield and the 5,000 personnel increase at Kings Bay in Camden County, as well as the normal population increases.

Transportation costs limit the market area for a particular plant. In 1977 there were in Georgia approximately 18 producers of prefabricated housing, only one of which was within 100 miles of Liberty County, and five others within 150 miles. Therefore a Liberty County location should have a market advantage.

The study survey showed the major criteria for establishing a new plant would be the availability of a good market, followed by the availability of a good labor supply. Other strong motivations include economic conditions, taxation, and community living conditions. Seventy percent of those questioned expressed a desire to expand their business by establishing a new plant. The average acreage required would be about 25, but this would vary considerably from 5 to 70 acres.

The establishment of a prefabricated houses plant in Liberty County could help to alleviate the critical housing shortage in the area, provide employment for military dependents, utilize the resources of the area, and provide additional payroll for the community.
INTRODUCTION

The Liberty County Industrial Development Authority is charged with the industrial development of Liberty County. As part of its comprehensive program to accelerate industrial development, the Authority has identified the prefabricated housing industry as one which would derive a competitive advantage by operating in the county and which at the same time, would provide and improve employment and other economic opportunities in the area. Having identified prefabricated houses as the possible candidate industry, the solicitation of that industry should not be undertaken until an analysis is undertaken of the profit opportunities available to a manufacturer of prefabricated houses in Liberty County. Sufficient profit opportunities must be shown to exist in order to interest the prospect. The initial investigation of this element in successful industrial development for the Liberty County Industrial Development Authority's program for industrial solicitation is provided in this report.

The program of work utilizes published statistical and other resource data and direct contact with knowledgeable individuals in the prefabricated housing industry and the Liberty County area.
PREFABRICATED HOUSING INDUSTRY

This industry segment produces complete prefabricated residential buildings in a panel, section, or modular form at a factory away from the permanent sites for the buildings.

Primary Products

Identification of the primary products of the industry segment covered in this study is derived from data reported in the 1972 Census of Manufactures. Relative importance in 1972 of each product is shown as a percentage of production volume for the industry segment in Table 1.

Table 1
PREFABRICATED RESIDENTIAL BUILDINGS: 1972

<table>
<thead>
<tr>
<th>Product Code</th>
<th>Product</th>
<th>Total Product Shipments Including Interplant Transfers 1/</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Quantity (thousand units)</td>
</tr>
<tr>
<td>2452 2 21</td>
<td>Precut packages for stationary residential buildings sold as complete units</td>
<td>17.3</td>
</tr>
<tr>
<td>2452 3 33</td>
<td>Stationary residential single family, including town houses, buildings sold as complete units and shipped in panel form (2 dimensional)</td>
<td>56.6</td>
</tr>
<tr>
<td>2452 3 35</td>
<td>Stationary residential multi-family buildings sold as complete units and shipped in panel form (2 dimensional)</td>
<td>25.8</td>
</tr>
<tr>
<td>2452 4 43</td>
<td>Stationary residential single family, including town houses, buildings shipped in 3-dimensional assemblies</td>
<td>14.9</td>
</tr>
<tr>
<td>2452 4 45</td>
<td>Stationary residential multi-family buildings shipped in 3-dimensional assemblies</td>
<td>7.1</td>
</tr>
</tbody>
</table>

| Total        | 121.9 | 804.0 | 100 |

1/ These figures include quantity and value of the products reported, not only by establishments classified in this industry, but also by establishments classified in other industries, and shipping these products as "secondary" products.

The intensity of production of prefabricated buildings by type of product and by geographic area is shown in Table 2. The figures include value of the products reported not only by establishments classified in this industry, but also by establishments classified in other industries and shipping these products as "secondary" products. The data indicate that the industry is established and accepted by the market in the state and region.

<table>
<thead>
<tr>
<th>Product Code</th>
<th>Product and Geographic Area</th>
<th>Value of Shipments (million dollars)</th>
<th>Percent of U. S. Shipments</th>
</tr>
</thead>
<tbody>
<tr>
<td>24522</td>
<td>Precut Packages for Stationary Buildings (Sold as Complete Units)</td>
<td>United States: 157.7</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South Region: 29.1</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South Atlantic Division: 13.7</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Georgia: 2.0 to 4.9</td>
<td>2</td>
</tr>
<tr>
<td>24523</td>
<td>Stationary Buildings Sold as Complete Units and Shipped in Panel Form (2-Dimensional)</td>
<td>United States: 455.7</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South Region: 153.1</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South Atlantic Division: 94.6</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Georgia: 23.0</td>
<td>5</td>
</tr>
<tr>
<td>24524</td>
<td>Stationary Buildings Shipped in 3-Dimensional Assemblies</td>
<td>United States: 241.2</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South Region: 53.6</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South Atlantic Division: 38.5</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Georgia: 5.0 to 9.9</td>
<td>3</td>
</tr>
</tbody>
</table>

Total Prefabricated Buildings Sold as Complete Units

<table>
<thead>
<tr>
<th></th>
<th>Value of Shipments (million dollars)</th>
<th>Percent of U. S. Shipments</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>854.6</td>
<td>100</td>
</tr>
<tr>
<td>South Region</td>
<td>235.8</td>
<td>26</td>
</tr>
<tr>
<td>South Atlantic Division</td>
<td>146.8</td>
<td>17</td>
</tr>
<tr>
<td>Georgia</td>
<td>33.9</td>
<td>4</td>
</tr>
</tbody>
</table>

1/ These figures include value of the products reported not only by establishments classified in this industry, but also by establishments classified in other industries and shipping these products as "secondary" products.

Source: Derived from U. S. Bureau of the Census data.
Industry Description

Most prefabricated residential buildings are produced by plants classified in SIC 2452, Prefabricated Wood Buildings and Components. A small number of prefabricated residential buildings are produced by plants classified in SIC 2451, Mobile Homes; SIC 3272, Concrete Products N.E.C.; and SIC 3448, Prefabricated Metal Buildings and Components. In addition to complete homes, SIC 2452 produces some non-residential buildings and components for homes and other buildings. Conventional home builders or stick builders who prefabricate on-site or in temporary, relocatable plants are classified as construction industries in SIC's 1521, 1522, and 1531. The 1972 Census of Manufactures shows a primary product specialization ratio\(^1/\) of 97% and a coverage ratio\(^2/\) of 96% for SIC 2452. These ratios are considered very high, and therefore in much of this analysis, SIC 2452 is considered as an approximation of the entire industry segment.

The 1972 Standard Industrial Classification Manual provides the following definitions for these industries:

1521 - General Contractors--Single-Family Houses
General contractors primarily engaged in construction (including new work, additions, alterations, remodeling, and repair) of single-family houses.

1522 - General Contractors--Residential Buildings, Other Than Single Family
General contractors primarily engaged in construction (including new work, additions, alterations, remodeling, and repair) of residential buildings other than single-family houses.

1531 - Operative Builders
Builders primarily engaged in construction of single-family houses and other buildings for sale on their own account rather than as contractors.

\(^1/\) The proportion of product shipments (both primary and secondary) of the industry represented by primary products.

\(^2/\) The proportion of primary products shipped by the establishments classified in the industry to total shipments of such products by all manufacturing establishments.
2451 - Mobile Homes
Establishments primarily engaged in manufacturing mobile homes. These mobile homes are generally over 35 feet long, at least 8 feet wide, do not have facilities for storage of water or waste, and are equipped with wheels. These products may also have nonresidential uses, such as classrooms or offices. Trailers that are generally 35 feet long or less, 8 feet wide or less and with self-contained facilities are classified in Industry 3792. Portable buildings not equipped with wheels are classified in Industry 2452.

2452 - Prefabricated Wood Buildings and Components
Establishments primarily engaged in manufacturing prefabricated wood buildings, sections, and panels. Establishments primarily engaged in fabricating buildings on the site of construction are classified in Division C, Construction.

3272 - Concrete Products, Except Block and Brick
Establishments primarily engaged in manufacturing concrete products, except block and brick, from a combination of cement and aggregate. Contractors engaged in concrete construction work are classified in the construction industries, and establishments primarily engaged in mixing and delivering ready-mixed concrete in Industry 3273.

3448 - Prefabricated Metal Buildings and Components
Establishments primarily engaged in manufacturing prefabricated and portable metal buildings and parts, and prefabricated exterior metal panels.

Other general statistics for the industry are given for a fuller understanding of the industry in Table 3.
Table 3, Item 1
SELECTED GENERAL STATISTICS AND OPERATING RATIOS
FOR INDUSTRY 2452, PREFABRICATED WOOD BUILDINGS: 1972

<table>
<thead>
<tr>
<th>Category</th>
<th>1972</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establishments</td>
<td>315</td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>With 20 Employees or More</td>
<td>250</td>
</tr>
<tr>
<td>All Employees</td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>25,500</td>
</tr>
<tr>
<td>Payroll</td>
<td>$200,300,000</td>
</tr>
<tr>
<td>Production Workers</td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>19,200</td>
</tr>
<tr>
<td>Man-hours</td>
<td>35,300,000</td>
</tr>
<tr>
<td>Wages</td>
<td>$125,500,000</td>
</tr>
<tr>
<td>Value Added by Manufacture</td>
<td>$460,800,000</td>
</tr>
<tr>
<td>Cost of Materials, Fuels, etc.</td>
<td>$618,600,000</td>
</tr>
<tr>
<td>Value of Industry Shipments</td>
<td>$1,058,700,000</td>
</tr>
<tr>
<td>Capital Expenditures, New</td>
<td>$30,000,000</td>
</tr>
<tr>
<td>Specialization Ratio</td>
<td>97%</td>
</tr>
<tr>
<td>Coverage Ratio</td>
<td>96%</td>
</tr>
<tr>
<td>Payroll Per Employee</td>
<td>$7,647</td>
</tr>
<tr>
<td>Production Worker as Percent of Total Employment</td>
<td>75%</td>
</tr>
<tr>
<td>Annual Man-hours of Production Workers</td>
<td>1,843</td>
</tr>
<tr>
<td>Average Hourly Earnings of Production Workers</td>
<td>$3.56</td>
</tr>
<tr>
<td>Cost of Materials Per Dollar of Shipments</td>
<td>$0.58</td>
</tr>
<tr>
<td>Cost of Materials and Payrolls Per Dollar of Shipments</td>
<td>$0.77</td>
</tr>
<tr>
<td>Value Added Per Employee</td>
<td>$18,004</td>
</tr>
<tr>
<td>Payrolls as Percent of Value Added</td>
<td>43%</td>
</tr>
<tr>
<td>Value Added Per Man-hour of Production Worker</td>
<td>$12.73</td>
</tr>
</tbody>
</table>

Note: The relationship of establishments to companies is as follows: A company, as the term is used in the census of manufactures, is a business organization consisting of one establishment or more under common ownership or control. For 1972, there are 268 companies for industry 2452.

Some figures have been rounded.

### Table 3, Item 2
SELECTED GENERAL STATISTICS AND OPERATING RATIOS FOR INDUSTRY 2452, PREFABRICATED WOOD BUILDINGS: 1972

<table>
<thead>
<tr>
<th>Industry and Geographic Area</th>
<th>Establishments</th>
<th>Production Workers</th>
<th>Value Added by Manufacture</th>
<th>Cost of Materials</th>
<th>Value of Shipments</th>
<th>Capital Expenditures, New (million dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total (number)</td>
<td>Number/ (1,000)</td>
<td>(million dollars)</td>
<td>(million dollars)</td>
<td>(million dollars)</td>
<td>(million dollars)</td>
</tr>
<tr>
<td>United States</td>
<td>315</td>
<td>250</td>
<td>25.5</td>
<td>200.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northeast Region</td>
<td>58</td>
<td>45</td>
<td>5.5</td>
<td>46.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>North Central Region</td>
<td>125</td>
<td>96</td>
<td>9.0</td>
<td>77.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Region</td>
<td>87</td>
<td>78</td>
<td>8.2</td>
<td>53.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Atlantic Division</td>
<td>47</td>
<td>45</td>
<td>4.8</td>
<td>32.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maryland</td>
<td>6</td>
<td>6</td>
<td>CC</td>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Virginia</td>
<td>11</td>
<td>9</td>
<td>1.8</td>
<td>11.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>North Carolina</td>
<td>6</td>
<td>6</td>
<td>.6</td>
<td>3.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Georgia</td>
<td>13</td>
<td>13</td>
<td>1.1</td>
<td>8.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Florida</td>
<td>9</td>
<td>9</td>
<td>.4</td>
<td>2.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>East South Central Division</td>
<td>22</td>
<td>20</td>
<td>2.0</td>
<td>12.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tennessee</td>
<td>4</td>
<td>4</td>
<td>BB</td>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alabama</td>
<td>13</td>
<td>12</td>
<td>1.1</td>
<td>7.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mississippi</td>
<td>3</td>
<td>3</td>
<td>BB</td>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>West South Central Division</td>
<td>10</td>
<td>13</td>
<td>1.4</td>
<td>8.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Louisiana</td>
<td>4</td>
<td>4</td>
<td>BB</td>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oklahoma</td>
<td>5</td>
<td>5</td>
<td>CC</td>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Texas</td>
<td>9</td>
<td>4</td>
<td>.6</td>
<td>4.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>West Region</td>
<td>45</td>
<td>31</td>
<td>2.7</td>
<td>23.3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1/ General statistics for some producing areas are withheld to avoid disclosing figures for individual companies. However, for such areas with 150 employees or more, the number of establishments is shown and the employment size range is indicated by one of the following symbols:

BB--250 to 499 employees  CC--500 to 999 employees.

2/ (D) = Withheld to avoid disclosing figures for individual companies.

<table>
<thead>
<tr>
<th>Item</th>
<th>Establishments (number)</th>
<th>All Employees</th>
<th>Production Workers</th>
<th>Value Added by Manufacture (million dollars)</th>
<th>Cost of Materials (million dollars)</th>
<th>Value of Shipments (million dollars)</th>
<th>Capital Expenditures, New (million dollars)</th>
<th>End of Year Inventories (million dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Number (1,000) dollars</td>
<td>Number (1,000)</td>
<td>Man-hours (millions)</td>
<td>Wages (million dollars)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establishments, Total</td>
<td>315</td>
<td>25.5</td>
<td>200.3</td>
<td>19.2</td>
<td>35.3</td>
<td>125.5</td>
<td>460.8</td>
<td>618.6</td>
</tr>
<tr>
<td>Establishments with an Average of:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 to 4 Employees</td>
<td>8</td>
<td>(Z)</td>
<td>.2</td>
<td>(Z)</td>
<td>(Z)</td>
<td>.1</td>
<td>.5</td>
<td>.7</td>
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<tr>
<td>5 to 9 Employees</td>
<td>19</td>
<td>.1</td>
<td>1.0</td>
<td>.1</td>
<td>.2</td>
<td>.6</td>
<td>4.0</td>
<td>3.2</td>
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<tr>
<td>10 to 19 Employees</td>
<td>38</td>
<td>.6</td>
<td>4.8</td>
<td>.4</td>
<td>.9</td>
<td>3.2</td>
<td>10.7</td>
<td>16.6</td>
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<tr>
<td>20 to 49 Employees</td>
<td>93</td>
<td>3.0</td>
<td>24.5</td>
<td>2.3</td>
<td>4.1</td>
<td>14.9</td>
<td>51.7</td>
<td>82.9</td>
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<tr>
<td>50 to 99 Employees</td>
<td>76</td>
<td>5.1</td>
<td>40.6</td>
<td>4.0</td>
<td>7.2</td>
<td>26.6</td>
<td>87.1</td>
<td>132.5</td>
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<tr>
<td>100 to 249 Employees</td>
<td>63</td>
<td>9.6</td>
<td>72.0</td>
<td>7.4</td>
<td>13.4</td>
<td>46.1</td>
<td>137.2</td>
<td>237.2</td>
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<tr>
<td>250 to 499 Employees</td>
<td>15</td>
<td>7.1</td>
<td>57.2</td>
<td>5.0</td>
<td>9.5</td>
<td>14.0</td>
<td>169.6</td>
<td>145.4</td>
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<tr>
<td>500 to 999 Employees</td>
<td>2</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
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<tr>
<td>1,000 to 2,499 Employees</td>
<td>1</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
<td>(D)</td>
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</tr>
</tbody>
</table>

1/ (Z) = Less than half of the unit of measurement shown (under 50 thousand dollars or man-hours; under 50 employees).

2/ (D) = Withheld to avoid disclosing figures for individual companies. Data for this item are included in the underscored figures above.

Plant Characterizations. Insight into the industry can be obtained by examining the composition and characteristics of the plants which compose the sector. In 1975, there were 354 SIC 2452 establishments employing 15,650 persons. Most employment was in employment size range from 20 to 499, with 91% of all employees being employed by establishments with 20 or more employees. Sixty-two percent of all employees are employed by establishments with 50 to 249 employees. (See Table 4.)

Table 4
PREFABRICATED WOOD BUILDING PLANTS, NUMBER AND EMPLOYMENT SIZE: 1975

<table>
<thead>
<tr>
<th>Employment Size Category</th>
<th>Number of Establishments</th>
<th>Number of Employees</th>
<th>Percent of All Employees</th>
<th>Percent of Establishments</th>
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</thead>
<tbody>
<tr>
<td>All (United States)</td>
<td>354</td>
<td>15,650</td>
<td>100</td>
<td>100</td>
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<tr>
<td>1 - 4 Employees</td>
<td>77</td>
<td>154</td>
<td>22</td>
<td>1</td>
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<tr>
<td>5 - 9 Employees</td>
<td>39</td>
<td>322</td>
<td>11</td>
<td>2</td>
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<tr>
<td>10 - 19 Employees</td>
<td>64</td>
<td>961</td>
<td>18</td>
<td>6</td>
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<tr>
<td>20 - 49 Employees</td>
<td>78</td>
<td>2,600</td>
<td>22</td>
<td>16</td>
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<tr>
<td>50 - 99 Employees</td>
<td>50</td>
<td>3,701</td>
<td>14</td>
<td>24</td>
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<tr>
<td>100 - 249 Employees</td>
<td>40</td>
<td>5,894</td>
<td>11</td>
<td>38</td>
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<tr>
<td>250 - 499 Employees</td>
<td>6</td>
<td>2,018</td>
<td>2</td>
<td>13</td>
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</table>


The 1972 industry concentration ratios showed that the top four firms of 263 total firms accounted for 33% of the industry shipments, and the top 50 producers, 71%. Thus, 71% of total production was accounted for by 19% of the firms.

The National Association of Home Manufacturers\(^1\) provides information on United States and regional production of all housing, including panelized and modular housing units, and separates the

\(^1\) The National Association of Home Manufacturers (address: 1619 Massachusetts Avenue, N.W., Washington, D.C. 20036; telephone: 202-234-1374; executive vice president: Don L. Gilchrist) seeks to improve the design, engineering, production, and marketing of modular, prefabricated, panelized, and other forms of manufactured buildings.
market for these units into single unit and multi-unit segments.

Unit production of modular and panelized factory-built housing rose in all regions in 1976. (See Table 5.) The South Region increased total factory-built housing by 28%, compared with a 27% increase in the nation. Panelized housing increased by 25% and modular by 41% in the South, as compared with 25% and 31% in the nation. The greatest percent increase in industry production was 112% for modular multi-family housing in the South.

Table 5
ANNUAL SURVEY MODULAR AND PANELIZED HOME PRODUCTION: 1976

<table>
<thead>
<tr>
<th></th>
<th>Single Family</th>
<th></th>
<th>Multi-Family</th>
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<tr>
<td></td>
<td>1976</td>
<td>1975</td>
<td>% Change</td>
<td>1976</td>
</tr>
<tr>
<td>All U.S. Private2/</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Housing Starts</td>
<td>1,536,700</td>
<td>1,160,500</td>
<td>+32</td>
<td>1,162,900</td>
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<tr>
<td>Total Factory Built</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Housing</td>
<td>254,400</td>
<td>200,800</td>
<td>+27</td>
<td>191,500</td>
</tr>
<tr>
<td>Panelized3/</td>
<td>196,000</td>
<td>156,300</td>
<td>+25</td>
<td>146,400</td>
</tr>
<tr>
<td>Modular 4/</td>
<td>58,400</td>
<td>44,500</td>
<td>+31</td>
<td>45,100</td>
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<tr>
<td>Regional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>East</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Panelized</td>
<td>42,200</td>
<td>33,600</td>
<td>+26</td>
<td>35,500</td>
</tr>
<tr>
<td>Modular</td>
<td>11,000</td>
<td>8,900</td>
<td>+24</td>
<td>10,000</td>
</tr>
<tr>
<td>Central</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Panelized</td>
<td>99,700</td>
<td>81,300</td>
<td>+23</td>
<td>75,600</td>
</tr>
<tr>
<td>Modular</td>
<td>90,800</td>
<td>75,800</td>
<td>+24</td>
<td>15,000</td>
</tr>
<tr>
<td>South</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Panelized</td>
<td>74,800</td>
<td>58,400</td>
<td>+28</td>
<td>54,500</td>
</tr>
<tr>
<td>Modular</td>
<td>13,700</td>
<td>9,700</td>
<td>+41</td>
<td>12,000</td>
</tr>
<tr>
<td>West</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Panelized</td>
<td>37,700</td>
<td>27,500</td>
<td>+37</td>
<td>25,900</td>
</tr>
<tr>
<td>Modular</td>
<td>12,000</td>
<td>10,400</td>
<td>+23</td>
<td>8,100</td>
</tr>
</tbody>
</table>

1/ Complete dwelling units: exclusive of mobile homes.
2/ Construction Reports, U. S. Department of Commerce.
3/ Factory-built wall, floor, roof or mechanical core components (or precut lumber) for a complete dwelling unit.
4/ Factory-built, three-dimensional sections, or rooms, or modules to form a complete dwelling.

Source: National Association of Home Manufacturers.
Distribution Practices. Firms in this market are engaged in activities ranging from the operation of local building supply to large numbers of prefab plants with nationwide distribution facilities. Transportation costs limit the market area for a particular plant. Manufactured housing, including panelized, modular, and components, are sold in various ways. Some modulars are sold by mobile home dealers, but most are sold through dealer/erectors, directly to consumers or to developers. Panelized units are sold to developer/contractors, consumers, dealer/erectors, and governmental agencies. In some cases, the manufacturer may also be the developer. Component sales usually go directly to contractors or developers.

Trends in the Industry. The general housing industry experienced a downturn in sales in the period 1974-75. This lack of demand for housing also was experienced by the prefabricated wood building industry, resulting in significant closings of plants with many being forced completely out of business. However, 1976-77 has shown improvements in the overall economy of the industry. The U. S. Industrial Outlook forecast a 16% gain in the value of shipments for the industry in 1978 to a high of $2 billion. Additional industry detail for the period 1972 to 1976 is shown in Table 6.

<table>
<thead>
<tr>
<th>Table 6</th>
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</thead>
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<tr>
<td>INDUSTRY PROFILE, PREFABRICATED WOOD BUILDINGS: 1972-1976</td>
</tr>
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</table>

<table>
<thead>
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<th></th>
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<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Total Employment (000)</td>
<td>25.2</td>
<td>25.6</td>
<td>19.8</td>
<td>15.8</td>
<td>16.8</td>
</tr>
<tr>
<td>Man-hours (000,000)</td>
<td>34.8</td>
<td>34.9</td>
<td>24.9</td>
<td>20.4</td>
<td>22.9</td>
</tr>
<tr>
<td>Value Added ($ million)</td>
<td>457.1</td>
<td>484.2</td>
<td>402.3</td>
<td>350.3</td>
<td>432.8</td>
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<tr>
<td>Cost of Materials ($ million)</td>
<td>609.2</td>
<td>742.7</td>
<td>650.4</td>
<td>546.8</td>
<td>662.6</td>
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<tr>
<td>Value of Shipments (million)</td>
<td>1046.1</td>
<td>1232.6</td>
<td>1061.4</td>
<td>904.3</td>
<td>1099.4</td>
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Current to Previous Ratios

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<tr>
<td>Total Employment (x)</td>
<td>1.6</td>
<td>-22.7</td>
<td>-20.2</td>
<td>6.3</td>
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<tr>
<td>Value of Shipments (x)</td>
<td>17.8</td>
<td>-13.9</td>
<td>-14.8</td>
<td>21.6</td>
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<tr>
<td>Inventories (x)</td>
<td>9.3</td>
<td>-17.5</td>
<td>-14.0</td>
<td>9.0</td>
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</table>

In recent years the harmonization of codes and standards has been improved for prefabs. The adoption in most states of statewide building codes for prefab homes during the last several years has permitted the placement of a unit, built to meet a state's code, anywhere in the state, despite local building code previsions. Factory and on-site inspection procedures are part of these laws. Current efforts to standardize the differing state codes will further benefit the industry.

Major Manufacturers

Identification of the major manufacturers of the industry is derived from data reported in the July 1978 issue of Professional Builder, the 1978 Thomas Register, the 1977 Georgia Manufacturing Directory, and Automation in Housing and Systems Building News. The Georgia Manufacturing Directory lists 18 plants under SIC 2452. The map illustrates the location of these plants, and the following listing from the Directory details the specific products, employment, and location of each plant. (See Exhibits 1, 2, 3, 4, and 5.)
Exhibit 1
PRODUCERS OF PREFABRICATED HOUSING IN GEORGIA: 1977

245217 - Components for Stationary Buildings-Residential and Nonresidential

Imperial Homes, Inc.
P. O. Box 35
Griffin 30223
Spalding County
Date Est. 1960 Market..Regional
Panelized Manufactured Homes 245217
404 228-8477
Emp 33M 5F 38T

Ryland Group, Inc.
P. O. Box 1956
Peachtree City 30269
Fayette County
Date Est. 1972 Market..District
Roof Trusses 243905
Wall Sections 249961
Building Components 245217
404 461-8131
Emp 14M 1F 15T

S. I. Storey Lumber Company
Rt. 1
Armuchees 30105
Floyd County
Date Est. 1919 Market..Regional
Softwood Lumber, Dressed 242122
Prefabricated Bldg. Components 245217
Wood Preserving 249111
Millwork 243183
404 234-1605
Emp 46M 7F 53T

Whitmer Mobile Homes Products
P. O. Box 1414
Valdosta 31601
Date Est. 1969 Market..Regional
Utility Buildings 344822
Mobile Home Room Additions 245217
Mobile Home Room Additions 344825
912 242-1015
Emp 10M OF 1OT

245222 - Precut Packages for Stationary Buildings, Residential & Nonresidential

Bray Lumber Co., Inc.
P. O. Box 520
Valdosta 31601
Lowndes County
Date Est. 1888 Market..Regional
Prefabricated Houses 245222
912 244-2970
Emp 57M 9F 66T

Centennial Custom Builders, Inc.
P. O. Box 385
Americus 31709
Sumter County
Date Est. 1976 Market..Regional
Custom Cabinets 243421
Vacation Homes 245222
Offices 245222
Utility Buildings 245222
912 924-2936
Employment not available

Georgia Wood Industries, Inc.
P. O. Box 336
Thomasville 31792
Thomas County
Date Est. 1973 Market..District
Softwood Dressed Lumber 242122
Roof Trusses 243905
Prefab Housing 245244
Storage Buildings 245222
912 226-7219
Emp 10M OF 1OT

Georgia Wood Industries, Inc.
P. O. Box 336
Thomasville 31792
Thomas County
Date Est. 1973 Market..District
Softwood Dressed Lumber 242122
Roof Trusses 243905
Prefab Housing 245244
Storage Buildings 245222
912 226-7219
Emp 10M OF 1OT

Whitmer Mobile Homes Products
P. O. Box 1414
Valdosta 31601
Date Est. 1969 Market..Regional
Utility Buildings 344822
Mobile Home Room Additions 245217
Mobile Home Room Additions 344825
912 242-1015
Emp 10M OF 1OT

245222 - Precut Packages for Stationary Buildings, Residential & Nonresidential

Bray Lumber Co., Inc.
P. O. Box 520
Valdosta 31601
Lowndes County
Date Est. 1888 Market..Regional
Prefabricated Houses 245222
912 244-2970
Emp 57M 9F 66T

Personality Home Manufacturers, Inc.
1135 Shallowford Road
Route 6
Marietta 30060
Cobb County
Date Est. 1970 Market..District
Panelized Homes 245222
Roof Trusses 243905
Engineering Grade Stakes 249959
404 926-6491
Emp 33M 3F 36T

-13-
<table>
<thead>
<tr>
<th>Company Name</th>
<th>Address</th>
<th>City, State Code</th>
<th>Date Est.</th>
<th>Market</th>
<th>Products</th>
<th>Phone Number</th>
<th>Employment</th>
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</thead>
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<tr>
<td>Porta-Build, Inc.</td>
<td>100 Industrial Boulevard</td>
<td>Washington, 30673</td>
<td>1967</td>
<td>Regional</td>
<td>Mobile Homes, Mobile Classrooms</td>
<td>404 678-2193</td>
<td>90M 4F 94T</td>
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<tr>
<td></td>
<td></td>
<td>Wilkes County</td>
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<td>Portable Buildings</td>
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<td></td>
<td>Emp 90M 4F 94T</td>
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<td>Richards Lumber Company</td>
<td>P. O. Box 306</td>
<td>Carrollton, 30117</td>
<td>1940</td>
<td>District</td>
<td>Dressed Fine Lumber, Modular Housing</td>
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<td>Carroll County</td>
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<td>Roof Trusses, Pallets</td>
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<td>404 632-6376</td>
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<td>Emp 16M 2F 18T</td>
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<td>Trendsetter Homes Corporation</td>
<td>P. O. Drawer 68</td>
<td>Fitzgerald, 31750</td>
<td>1976</td>
<td>Regional</td>
<td>Sectional Homes</td>
<td>912 423-5451</td>
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<td>Ben Hill County</td>
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<td>National Homes Corporation</td>
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<td>1940</td>
<td>Regional</td>
<td>Prefab Homes</td>
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<td>McDuffie County</td>
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<td>Emp 95M 75F 170T</td>
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<td>Adrian Housing Corporation</td>
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<td>Adrian, 31002</td>
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<td>Arabi Homes, Inc.</td>
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<td>1973</td>
<td>Regional</td>
<td>Modular Houses</td>
<td>912 273 6050</td>
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<td>Georgia Wood Industries, Inc.</td>
<td>P. O. Box 338</td>
<td>Thomasville, 31792</td>
<td>1973</td>
<td>District</td>
<td>Softwood Dressed Lumber, Roof Trusses, Prefab Housing, Storage Buildings</td>
<td>912 226-7219</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Georgia Department of Industry and Trade. 1977 Georgia Manufacturing Directory
Exhibit 2
LOCATION OF PRODUCERS OF PREFABRICATED HOUSING IN GEORGIA: 1977

Radiants = 50 mile increments
● = Plant Locations

Source: Derived from data in 1977 Georgia Manufacturing Directory.
Exhibit 3
PREFABRICATED HOUSES MANUFACTURERS: 1977

ALABAMA
Blount, Inc.
4620 Executive Park Drive
Montgomery, AL 36111
Modular Homes AAA
205 272-8020

ARIZONA
Forest Homes, Inc.
1313 West McKelips Road
Mesa, AZ 85201
Prefabricated Homes X
602 962-9161

Timberbeam Homes, Inc.
100 Ess Butler Avenue
Flagstaff, AZ 86001
Prefabricated Homes AAA
602 774-0605

Tumuru Trades, Inc.
Bildale Utah Industrial Park
Colorado City, AZ 86021
Module Homes A
801 874-2252

CALIFORNIA
Albens Manufacturing Company
P. O. Box 156
Artesia, CA 90701
Pre-Engineered AA
213 865-3664

D. G. Shelter Products Company
1 Maritime Plaza
San Francisco, CA 94111
Paneling AAA
415 362-8972

Porta House, Inc.
717-727 Kevin Court
Oakland, CA 94621
Portable Modular Buildings AAAA
415 638-0100

CONNECTICUT
Gold Star Homes
32 New Road
Madison, CT 06443
Portable Homes AAA
203 245-7337

INSILCO Corporation
Miles Homes Company Division
1000 Research Parkway
Meriden, CT 06450
Pre-Cut Do-It-Yourself Homes AAAA
203 634-2000

INDIANA
All American Homes, Inc.
225 South 13th Street
Decatur, IN 46733
Prefabricated Houses X
219 724-9129

American Fidelity, Inc.
P. O. Box 566
Bristol, IN 46507
Modular Homes A
219 825-9130

FLORIDA
Jacksonville Box and Woodwork Company, Inc.
5011 Buffalo Avenue
Jacksonville, FL 32206
Panelized Houses A
904 354-1441

Panelfab International Corporation
2000 Northeast 146th Street
North Miami, FL 33181
Prefabricated Buildings AAAA
305 946-1411

Zimmer Homes Corporation
777 Southwest 12th Avenue
Pompano Beach, FL 33060
Leisure Homes AAAA
305 943-7600

GEORGIA
National Homes Manufacturing Corporation
P. O. Box 31
Thomson, Georgia 30824
Factory Built Houses and Apartments AAAA
404 595-2310

ILLINOIS
Bullock Company, Inc.
P. O. Box 646
Danville, IL 61832
Prefabricated Buildings X
217 446-9414

Cahpple Company
593 York Road
Elmhurst, IL 60126
Prefabricated Homes X
312 626-2400

Creative Buildings
1101 East University Avenue
Urbana, IL 61801
Prefabricated Houses X
217 328-3661

GBH - Way Homes, Inc.
Walnut, IL 61376
Prefabricated Houses AAA
815 379-2166
Exhibit 3 (continued)

Croydon Homes Corporation
P. O. Box 610
Middlebury, IN 46540
Modular Homes X
219 825-2182

National Homes Corporation
401 Earl Avenue
LaFayette, IN 47902
Prefabricated Houses AAAA
317 448-2000

New Castle Homes, Inc.
432 North Memorial Drive
New Castle, IN 47362
Modular Homes A
317 521-0788

New Century Homes, Inc.
LaFayette, IN 47902
Prefabricated Homes AAAA
317 447-2174

IOWA

Advance Industries
2303 Bridgeport Drive
Sioux City, IO 51102
Shelters AA
712 252-4101

Modcomp Homes, Inc.
12 Street, Northeast
Independence, IO 50644
Modular Homes X
319 334-6041

Trademark Homes, Inc.
214 North 2nd Street
Guttenberg, IO 50252
Modular Homes AAA
319 252-1740

KANSAS

Acrodome Industries, Inc.
901 North Broadway
Wichita, KA 67214
Prefabricated Buildings
316 262-7305

Kit Manufacturing Company
Sierra Homes Division
P. O. Box 649
McPherson, KA 67460
Modular Homes
316 241-5230

Whelans, Inc.
715 East 4th Street
Topeka, KA 66607
Component Houses AAAA
913 357-0321

KENTUCKY

Coleman Homes, Inc.
Industrial Drive
Morgantown, KY 42261
Sectional Homes AAA
502 526-3388

LOUISIANA

Hanover Modular Homes, Inc.
Ferry Road
St. Joseph, LA 71366
Prefabricated Homes X
318 766-4503

MAINE

Ward Cabin Company
Houlton Airbase
Houlton, ME 04730
Log Buildings A
207 532-6531

MASSACHUSETTS

Acorn Structures, Inc.
P. O. Box 250
Concord, MA 01742
Prefabricated Houses AAAA
617 369-4111

Deck House, Inc.
930 Main Street, Route 27
Acton, MA 01720
Prefabricated Houses AAAA
617 259-9450

Belco Corporation
74 Belco Drive
North Billerica, MA 01862
Modular Buildings A
617 667-7711

MICHIGAN

Aladdin Company
901-T Saginaw Street
Bay City, MI 48706
Ready-Cut Houses AAA
517 895-8545

Dickinson Homes
1500 West Brieutung Avenue
Iron Mountain, MI 49801
Prefabricated Homes X
906 774-5800

Manufactured Homes, Inc.
330 South Kalamazoo Street
Marshall, MI 49068
Prefabricated Houses X
616 781-2887

Squires Manufacturing Company, Inc.
607 County Street
Milan, MI 48160
Custom Leisure Homes AA
313 439-2414

Travelo Homes Corporation
P. O. Box 1427
Saginaw, MI 48605
Modular Homes X
517 781-2660
Exhibit 3 (continued)

MINNESOTA
Miles Homes Products
4500 Lyndale Avenue
Minneapolis, MN 55412
Pre-Cut Do-It-Yourself Homes AAAA
612 588-9700

MISSOURI
Home Building Corporation
Sedalia, MO 65301
Prefabricated Houses X
816 826-4550

O'Fallon Lumber and Supply
126 West Elm
O'Fallon, MO 63366
AAAA
314 272-6226

Wood Tech. Corporation
303 Barrett Station
Kirkwood, MO 63122
Prefabricated Wooden Buildings B
314 966-2132

NEBRASKA
Carhart Lumber Company, Inc.
105 Main Street
Wayne, NE 68787
Wood Components AAAA
402 375-2110

Geer Company
P. O. Box 1706
Grand Island, NE 68801
Sectionalized Housing AAAA
308 382-9250

NEW HAMPSHIRE
Continental Homes of New England
P. O. Box 727
Nashua, NH 03060
Modular Homes AAAA
603 868-2191

Key-Loc Corporation
P. O. Box 226
Suncook, NY 03275
Modular Homes AAAA
603 465-7131

Westville Homes Corporation
Railroad Avenue
Westville, NY 03892
Modular Homes X
603 382-6506

Yankee Barn Homes
Drawer A
Grantham, NH 03753
Barn Type Homes X
603 863-4545

NEW JERSEY
Adirondack Homes, Inc.
Route 22
Bound Brook, NJ 08805
Cottages AAAA
201 469-3636

Geodesic Structures, Inc.
P. O. Box 176
Roosevelt, NJ 08555
Geodesic Dome Houses X
609 443-4440

Pompton Lakes Building Supply Company
41 Colfax Avenue
Pompton Lakes, NJ 07442
Wood Fabricators AAA
201 839-1000

Rustic Furniture Company, Inc.
Williamstown, NJ 08094
Cabins B
609 629-6479

NEW YORK
Abcofab Industries
P. O. Box 825
Flushing, NY 11354
Prefabricated Structures AAA
212 463-2100

Dome East Corporation
325T Duffy Avenue
Hicksville, NY 11801
Geodesic Structures AAAA
516 936-0545

Ivon R. Ford, Inc.
McDonough, NY 13801
Prefabricated Homes AAAA
607 647-5221

Northern Homes, Inc.
10 LaCrosse
Hudson Falls, NY 12839
Sectionalized Houses AAAA
518 747-4128

NORTH CAROLINA
American Classic Industries, Inc.
3600 Raeford Road
Fayetteville, NC 28305
Prefabricated Houses X
919 484-2191

OHIO
Albee Homes, Inc.
931 Summit
Niles, OH 44466
Modular House Units AAAA
216 652-5861

Crystal Park Lumber Company
1902-1 Mahoning Road, Northeast
Canton, OH 44705
Prefabricated AAA
216 453-0187
Exhibit 3 (continued)

RAD Associates
782 South Broadway
Salem, OH 44460
Air Supported Buildings A
216 337-9937

Scholz Homes, Inc.
2001 North Westwood
Toledo, OH 43607
Prefabricated Homes AAAA
419 531-1601

Van-Ler Homes, Inc.
505 South 2nd Street
Tipp City, OH 45371
Prefabricated Houses X
513 667-2414

Vindale Corporation
630 Hay Avenue
Brookville, OH 45309
Modular Homes AAAA
513 833-4091

Weakley Manufacturing Company
925 Buckeye Avenue
Newark, OH 43055
Prefabricated Houses X
614 323-0515

OKLAHOMA

Tandy Industries, Inc.
525 South Troost Avenue
Tulsa, OK 74120
Industrial Houses AAAA
918 585-5611

OREGON

D and M Wood Products
11322 North East Marx
Portland, OR 97220
Prefabricated Houses AAAA
503 252-1473

Niedermeyer-Martin Company
P. O. Box 3768
Portland, OR 97208
Commercial Housing AAAA
503 287-2412

PENNSYLVANIA

Capital Housing, Inc.
P. O. Box 326
Avis, PA 17721
Sectional Homes X
717 398-2062

Evans Products Company
Homes Group
One Plymouth Meeting
Plymouth Meeting, PA 19462
Prefabricated Homes X
215 825-4330

Haven Homes, Inc.
Beech Creek, PA 16822
Modular Homes A
717 962-2912

Heavenly Homes, Inc.
2808 Liberty Way
Liberty Boro, PA 15133
Prefabricated A
412 664-7168

Poloron Homes of Pennsylvania, Inc.
74 Ridge Road
Middleburg, PA 17842
Modular Homes AAAA
717 837-0051

Rinella Lumber and Supply Company
P. O. Box 190
Greenville, PA 16125
Prefabricated Homes C
412 646-2271

Swift Industries, Inc.
1 Chicago Avenue
Elizabeth, PA 15037
Prefabricated Houses AAAA
412 892-0700

SOUTH DAKOTA

Midwestern Homes, Inc.
P. O. Box 640
Rapid City, SD 57701
Prefabricated House Packages AAAA
605 394-5000

TEXAS

Majestic Industries, Inc.
P. O. Box 5577
Texarkana, TX 75501
Manufactured Housing AAAA
214 838-7585

Morgan Portable Building Corporation
P. O. Box 22261
Dallas, TX 75222
Modular Buildings AAAA
214 369-2311

VIRGINIA

Miller Manufacturing Company, Inc.
P. O. Box 1356-T
Richmond, VA 23211
Wooden Homes AAAA
804 232-4551

Nationwide Homes, Inc.
1100 River Road
Martinsville, VA 24112
Prefabricated Homes AAAA
703 632-7101

Timber Truss Housing Systems, Inc.
P. O. Box 966
Salem, VA 24153
Building Components AAAA
703 387-0273

-19-
Exhibit 3 (continued)

WASHINGTON

West Coast Mills
Chehalis, WA 98532
Prefabricated Homes A
206 748-3351

WISCONSIN

C. M. Christiansen Company
Phelps, WI 54554
Prefabricated Cabins and Vacation Homes AAA
715 545-2333

Design Homes, Inc.
P. O. Box 367
Prairie Du Chien, WI 53821
Prefabricated Homes AA
608 326-6041

Tri-state Homes, Inc.
Hwy. 51 South
Mercer, WI 54547
Prefabricated Homes X
715 476-2451

Wisconsin Homes, Inc.
Marshfield, WI 54449
X
715 384-2161

1/ Companies are listed alphabetically by state in the following form:
   Name of Company    Address     Product       Asset Rating2/
   Telephone Number

2/ Approximate Minimum Total Tangible Assets are shown by the following codes:

   Asset Rating—

<table>
<thead>
<tr>
<th>Asset Rating</th>
<th>Minimum Total Tangible Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAAA</td>
<td>over $1,000,000</td>
</tr>
<tr>
<td>AAA</td>
<td>over $500,000</td>
</tr>
<tr>
<td>AA</td>
<td>over $300,000</td>
</tr>
<tr>
<td>A</td>
<td>over $100,000</td>
</tr>
<tr>
<td>B</td>
<td>over $50,000</td>
</tr>
<tr>
<td>C</td>
<td>over $25,000</td>
</tr>
<tr>
<td>D</td>
<td>over $10,000</td>
</tr>
<tr>
<td>X</td>
<td>no estimate</td>
</tr>
</tbody>
</table>

Source: Thomas Register 1978
<table>
<thead>
<tr>
<th>Company Name, Address, Business Code</th>
<th>Chief Officer</th>
<th>Dollar Volume, ^{2/}sf = single family; mj = multi family.</th>
<th>Number of Units</th>
<th>Type of Housing Built, Chief Purchasing Officer's Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryan Homes, Inc. 100 North Wren Drive, Pittsburgh, PA 15243</td>
<td>Malcolm M. Prine, President &amp; Chairman</td>
<td>$298.8 million</td>
<td>6,897</td>
<td>6,326 sf, 571 mj, all factory built with cores. Carl Hall, V.P. Mfg. &amp; Purchasing</td>
</tr>
<tr>
<td>City Investing Co. 9100 Wilshire Blvd, Beverly Hills, CA 90212</td>
<td>G. T. Scharffenberger, Chairman</td>
<td>$295 million</td>
<td>12,500 mobile homes, 1,000 modular homes, 4,000 site built units. Note: Includes Guardon Industries, Inc., Louisville.</td>
<td></td>
</tr>
<tr>
<td>Fleetwood Enterprises, Inc. 3125 Myers Street, Riverside, CA 92522</td>
<td>William W. Weide, President &amp; C.E.O.</td>
<td>$244 million</td>
<td>19,800</td>
<td>Most mobile and some modular homes. Larry F. Meyers, V.P. Supply.</td>
</tr>
<tr>
<td>Wick Building Systems, Inc. 211 South Central, Marshfield, WI 54449</td>
<td>John F. Wick, Chairman of Board</td>
<td>$210 million</td>
<td>12,565</td>
<td>All sf, 9,456 mobile homes, 3,106 manufactures homes.</td>
</tr>
<tr>
<td>Maaca Homes, Inc. P.O. Box 1204, Maaca, WI 54401</td>
<td>Marvin C. Schuette, President</td>
<td>$131.3 million</td>
<td>6,595</td>
<td>Richard Windorak, Dir. Eng. &amp; Materials.</td>
</tr>
<tr>
<td>Forest City Enterprises, Inc. 10800 Brook Park Road, Cleveland, OH 44130</td>
<td>Sam H. Miller, Vice Chairman of Board</td>
<td>$130 million</td>
<td>4,000</td>
<td>5298.8 million</td>
</tr>
<tr>
<td>Boise Cascade Corp. P.O. Box 8358, Boise, ID 83705</td>
<td>John Fery, C.E.O.</td>
<td>$129.5 million</td>
<td>9,769</td>
<td>6,300 sf, 250 mj.</td>
</tr>
<tr>
<td>National Homes Corp. Earl Ave. at Wallace St., Lafayette, In 47902</td>
<td>David R. Price, President</td>
<td>$120.3 million</td>
<td>8,802</td>
<td>8,802 sf, 4,807 sf. Gerry Kinneer, V.P. Purchasing</td>
</tr>
<tr>
<td>Inland Steel Urban Development Corp. 30 West Monroe Street, Chicago, IL 60603</td>
<td>W. E. Rothfelder, President</td>
<td>$104 million</td>
<td>7,455</td>
<td>All sf, 6,000 mobile homes, 836 fact. utilizing floor trusses, wall panels &amp; sub assemblies. Note: Includes Scholz Homes, Inc., Schult Homes Corp &amp; Remanco, Inc.</td>
</tr>
<tr>
<td>Evans Products Company P.O. Box 3295, Portland, OR 97208</td>
<td>Monford A. Oroff, Chairman &amp; C.E.O.</td>
<td>$103 million</td>
<td>3,768</td>
<td>All sf. &quot;Finish it yourself&quot; precut housing.</td>
</tr>
<tr>
<td>Atro International 1210 Dairy Ashford Road, Houston, TX 77079</td>
<td>J. G. Scott, President</td>
<td>$90 million</td>
<td>15,000</td>
<td>80% modular home units, 20% other factory built units. Note: Company headquarters is 615 18th St., S.E., Calgary, Alberta, Canada.</td>
</tr>
<tr>
<td>Crest Communities 11440 Hamilton Avenue, Cincinnati, OH 45231</td>
<td>Robert Hafer, Marketing Director</td>
<td>$68 million</td>
<td>1,530</td>
<td>1,350 sf, 180 sf, all precut. Don Creelman, Purchasing Manager</td>
</tr>
<tr>
<td>Midland Housing Industries Corp. 2029 Century Park East, Los Angeles, CA 90067</td>
<td>Gerald M. Lushing, President</td>
<td>$54 million</td>
<td>1,468</td>
<td>912 mobile homes, 36 modular homes, 520 site built homes using roof trusses.</td>
</tr>
<tr>
<td>Zimmer Homes Corp. 777 S.W. 12th Avenue, Pompano Beach, FL 33060</td>
<td>Paul H. Zimmer, President &amp; Chairman</td>
<td>$53.3 million</td>
<td>4,476</td>
<td>4,457 sf, 189 mj, sf are mobile home units, mj are factory built units using open panels.</td>
</tr>
<tr>
<td>Wyllain, Inc. 17255 Dallas Parkwy, Dallas, TX 75248</td>
<td>C. E. Kuhn, Chairman of the Board</td>
<td>$38.1 million</td>
<td>2,061</td>
<td>All sf, 1,587 modulars, 240 factory built units with open panels.</td>
</tr>
<tr>
<td>Miles Homes 4500 Lindale Ave., N. Minneapolis, MN 55412</td>
<td>Herb Kahler, President &amp; C.E.O.</td>
<td>$37 million</td>
<td>1,900</td>
<td>All factory precut. Mostly do-it- Cash Burzynski, V.P. Purchasing.</td>
</tr>
</tbody>
</table>
Exhibit 4 (continued)

1/ As ranked by Automation in Housing and Systems Building News.

2/ Companies are ranked by gross sales dollar volume on homes and apartments only. Income from other sources such as land sales, shopping centers, rentals, etc., is not included in the ranking. All ranked companies are not included here, only those who produce prefabricated housing.

3/ (I) = Production Builder. A large volume home builder who site-builds using some components. Some produce homes or components in factories. All generally sell their homes directly to the buyers (i.e., not through a builder/dealer network).
   (II) = Home Manufacturer. Also called prefabricated home manufacturer. Builds homes inside factories and almost invariably sells his homes through a network of builder/dealers.
   (III) = Mobile Home Manufacturer. Builds mobile homes in factories conforming to the "HUD Mobile Home Construction & Safety Standards," but may also build modular units. Almost always sells his homes through mobile/modular dealers.
   (IV) = Modular Home Manufacturer. Builds in factories mostly modular homes conforming to BOCA, ICBO, SBCC or similar "conventional" building codes. Generally sells through builder/dealers.

Note: Many companies are combinations of these four categories, and more than one Roman numeral will appear behind their names. Note also that component manufacturers are not included in this listing as the majority of their output of roof trusses, wall panels, floor trusses and other components are sold to the above four types of complete home producers.

Source: Automation in Housing and Systems Building News, July/August 1978.
<table>
<thead>
<tr>
<th>Name of Company, Location, and Principal Officer</th>
<th>Gross Total (Dollar Volume)</th>
<th>Gross Manufactured Housing (Dollar Volume)</th>
<th>Number of Manufactured Housing Units</th>
<th>Total Operating Plan of Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boise Cascade Corp., P.O. Box 50, Boise, Idaho 83728</td>
<td>132,000,000</td>
<td>132,000,000</td>
<td>9,769</td>
<td>For 1977, BC's Manufactured Housing Division estimates a 20% increase in sales volume for manufactured housing as compared with the previous year. That estimate includes 3,548 single-family modular units and 6,721 single-family panelized units. The publicly held corporation has 12 manufactured housing plants in Ala., Colo., Idaho, Iowa, Mont., Okla., Pa., Utah, and Va. In its latest fiscal year ending Feb. 28, 1977, Boise closed on 6,394 single-family panelized units for a sales volume of $129,001,521. And it completed 162 multi-family panelized units for $2,499,080. In addition, the privately held firm built 39 commercial units for a volume of $305,517. Building on scattered lots, 75% of its activities are in Wis., Minn., Iowa, Ill., and Ind. The additional 25% includes midwestern and western states. Subsidiaries are Weston Homes Div., and Augusta Homes Inc., in Iowa. A subsidiary of Jim Walter Corp. of Tampa, Fla., the company's entire volume for fiscal year ending June 30, 1977 was received from the construction and sale of 9,316 single-family detached units. Using all pre-cut packages the firm is now active in 20 states.</td>
</tr>
<tr>
<td>Wausau Homes Inc., 1777 Walton Road, P.O. Box 22601, Wausau, Wis. 54401</td>
<td>131,187,118</td>
<td>131,081,601</td>
<td>6,556</td>
<td>The publicly held company sold 8,802 single-family prefabricated homes and 3,623 multifamily prefabricated homes and 199 non-residential for $111,074,000. Real estate and residential construction accounted for $7,579,000 in sales. Land sales were $1,679,000. The firm has builder dealers in 39 states, and the Rockies. Not included in gross revenue are 2,726 mobile homes sold. In early 1978 National discontinued its mobile home manufacturing division which had eight plants. The subsidiary of Evans Products Co. does business under labels of Capp Homes and Ridge Homes. A total of 3,768 units were sold in 1977, with net profits of 7% to 9%. Pre-cut components built on site for finish-it-yourself homes. The firm does 40% of its sales in W.T., Pa., Ill., Minn., and S.C., Tenn. The privately held company closed on 9,459 mobile homes for $109,672,000 in its latest fiscal year ending April 1, 1978. The firm also built 3,106 single-family panelized units for $81,894,000. Other revenues came from the construction of ag-building for $16,762,000. Subsidiary operations include Custom Homes Division, Manufactured Homes Division, and an Agricultural Division.</td>
</tr>
<tr>
<td>National Homes Corp., Earl Ave. &amp; Wallace Lafayette, Inc., 14704 Hilliard Medway</td>
<td>120,332,000</td>
<td>110,000,000</td>
<td>12,425</td>
<td>Publicly held with fiscal year ending October 31, 1977. Most volume from 1,902 single-family panelized units selling for $47,803,000. Also sold 35 conventional detached units. Net profit was in 10% to 14% range. Active in Fla. (85%), Calif. (15%). Recent projects include Century Village East and American Homes in Fla., and Crystal Homes in Calif. Divisions include Century Village East and Pacific Coast Properties.</td>
</tr>
<tr>
<td>Evans Products Co. Homes Group, 4300 Lyndale Ave. North Minneapolis, Minn. 55412</td>
<td>105,879,000</td>
<td>105,879,000</td>
<td>3,768</td>
<td>The publicly held company discontinued the conventional home building operations of its Continental Homes of Indiana Division effective April 1, 1978. But figures for calendar year 1977 included $8,277,000 for 234 single-family houses built on site. Modular units totaled $26,147,000. Pre-cut production reached 240 units for $2,192,000. Non-residential construction accounted for $78,000. Firm builds in 27 states throughout the Midwest, Mid-Atlantic, and New England areas. Modular and panelized products are made in Booneville, Va., and Natchez, N.H., and only modular components are made in Halden, Mo. All under the Continental Homes name.</td>
</tr>
<tr>
<td>Jim Walter Homes Inc., P.O. Box 22601, Wausau, Wis. 54401</td>
<td>130,103,208</td>
<td>130,103,208</td>
<td>9,316</td>
<td>The publicly held company sold 8,802 single-family prefabricated homes and 3,623 multifamily prefabricated homes and 199 non-residential for $111,074,000. Real estate and residential construction accounted for $7,579,000 in sales. Land sales were $1,679,000. The firm has builder dealers in 39 states, and the Rockies. Not included in gross revenue are 2,726 mobile homes sold. In early 1978 National discontinued its mobile home manufacturing division which had eight plants. The subsidiary of Evans Products Co. does business under labels of Capp Homes and Ridge Homes. A total of 3,768 units were sold in 1977, with net profits of 7% to 9%. Pre-cut components built on site for finish-it-yourself homes. The firm does 40% of its sales in W.T., Pa., Ill., Minn., and S.C., Tenn. The privately held company closed on 9,459 mobile homes for $109,672,000 in its latest fiscal year ending April 1, 1978. The firm also built 3,106 single-family panelized units for $81,894,000. Other revenues came from the construction of ag-building for $16,762,000. Subsidiary operations include Custom Homes Division, Manufactured Homes Division, and an Agricultural Division.</td>
</tr>
<tr>
<td>Wick Building Systems Inc., 211 S. Central Ave., Marshfield, Miss. 54449</td>
<td>210,328,000</td>
<td>83,894,000</td>
<td>3,106</td>
<td>Publicly held with fiscal year ending October 31, 1977. Most volume from 1,902 single-family panelized units selling for $47,803,000. Also sold 35 conventional detached units. Net profit was in 10% to 14% range. Active in Fla. (85%), Calif. (15%). Recent projects include Century Village East and American Homes in Fla., and Crystal Homes in Calif. Divisions include Century Village East and Pacific Coast Properties.</td>
</tr>
<tr>
<td>Canvill Communities, Inc., 49000,000</td>
<td>47,803,000</td>
<td>1,902</td>
<td></td>
<td>Subsidiary of Insilico Corp. of Meriden, Conn. Figures are company estimates for calendar 1977. Firm sold approximately 1,900 pre-cut house packages for entire volume. Units sold throughout continental U.S. except Ariz., Calif., Nev., Ore., Utah, and Wash.</td>
</tr>
<tr>
<td>Miles Homes, Inc., 4500 Lyndale Ave. North Minneapolis, Minn. 55412</td>
<td>40,000,000</td>
<td>40,000,000</td>
<td>1,900</td>
<td></td>
</tr>
</tbody>
</table>
Market Projections

In order to attract housing producers, Liberty County should have some basic estimate of the demand for housing. A housing market analysis may be described briefly as a process of determining present and prospective housing demand/supply relationships in a local housing market subject to change because of unforeseen developments. Its principal objective is the estimation of housing demand in quantitative and qualitative terms for the housing market as a whole and for major geographical submarkets.

To determine the whole housing market for a Liberty County location, the major submarkets must be recognized and quantified. These major submarkets include the impacts from the buildups at Fort Stewart, Hunter Army Airfield, and King's Bay.

Fort Stewart/Hunter Army Airfield. Fort Stewart, a U. S. Army base, is located with its main gate adjacent to the City of Hinesville in Liberty County. It dominates approximately one-half of the land area of Bryan County, one-third of Liberty County, and one-fifth of Long County. Covering 285,000 acres, it is the largest Army base east of the Mississippi River. The activation, in 1974, of the 24th Infantry Division, headquartered at Fort Stewart, has had and will continue to have much impact on the surrounding community. In 1973, the Fort Stewart/Hunter Army Airfield complex had an installation population of 3,000 personnel. This military strength was increased to 15,869 by December 1977, increased to 17,457 by September 1978, and is projected to continue to increase. (See Table 7.)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Stewart</td>
<td></td>
<td></td>
<td></td>
<td>11,746</td>
<td>13,360</td>
</tr>
<tr>
<td>Hunter</td>
<td>4,123</td>
<td>4,097</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>3,000</td>
<td>6,501</td>
<td>11,917</td>
<td>15,869</td>
<td>17,457</td>
</tr>
</tbody>
</table>

Source: Fort Stewart Comptroller
An active construction program exists at the Stewart/Hunter complex. This construction has in the past been the construction of barracks, bachelor officers' quarters, family housing units, support units, and administration areas. Exhibit 6 shows past, present, and future military construction at the Stewart/Hunter complex.

Exhibit 6

FORT STEWART/HUNTER ARMY AIRFIELD MILITARY CONSTRUCTION PROGRAM

<table>
<thead>
<tr>
<th>Activities</th>
<th>Amounts (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction prior to 1975</td>
<td>$126.9</td>
</tr>
<tr>
<td>Total Construction Accomplished</td>
<td></td>
</tr>
<tr>
<td>June 1975-December 1977</td>
<td>97.2</td>
</tr>
<tr>
<td>Construction in Progress</td>
<td>58.5</td>
</tr>
<tr>
<td>Approved Construction</td>
<td>12.5</td>
</tr>
<tr>
<td>Projected Construction* (FY79-84)</td>
<td>138.5</td>
</tr>
<tr>
<td>Long Range Construction* (Beyond FY84)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>158.0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$591.6</td>
</tr>
</tbody>
</table>

Source: Fort Stewart Comptroller

*Projected figures subject to change due to 5-year defense budget planning

There is no question as to the continued permanency of the Fort Stewart/Hunter Army Airfield. The Army's consolidation program forces the utilization of military installations which can support a division-level troop strength. Fort Stewart consists of approximately 280,000 acres of varied terrain for all types of mechanized and infantry training and maneuverability activities. Fort Stewart is among the very limited number of military installations activated during peacetime. The current Department of Defense dollar investment in construction alone far sur-
passes the point where it would be in the best interests of the Department of Defense or of Congress to consider phasing out activity at Fort Stewart/Hunter Army Airfield.\(^1\)

Despite the new construction, the waiting list for on-post housing numbers in the hundreds, and there is not enough on-post housing units for those who are eligible. This creates problems for lower ranking enlisted personnel with families who cannot get on-post and cannot afford new homes off-post. There existed an estimated 3,684-unit shortfall of housing units in the impact area as of December 31, 1977, as is illustrated on the housing shortfall chart (Exhibit 7).

Exhibit 7
HOUSING SHORTFALL: 1977

| On-Post Housing Available Total | 2,049 units |
| Fort Stewart                   | 1,543 units |
| Hunter AAF                     | 506 units   |
| Estimated Housing Shortfall Total | 3,684 units |
| Fort Stewart                   | 3,018 units |
| Hunter AAF                     | 666 units   |

Source: Fort Stewart Comptroller

These data do not mean that persons in the impact area are going unhoused. However, some families are living in substandard dwellings or beyond a 60-mile radius from Fort Stewart.

As a result of the activation of the 24th Infantry Division and supporting units, communities in close proximity to Fort Stewart have grown in support of the personnel at the Fort. Estimates of the increased population and forecasts of future populations have been made. See Table 8. However, these estimates do not take into account the

\(^1\) See Fort Stewart Expansion and Liberty County Growth, Coastal Area Planning and Development Commission, and A Presentation of Community Impacts Resulting from the Fort Stewart Military Expansion, Fort Stewart Impact Coordinating Committee and the Coastal Area Planning and Development Commission, for further details.
projected 12,000 troop increase in the 1979-84 time frame. Liberty County has and is expected to continue to absorb most of the growth resulting from the build-up.

Table 8

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Bryan County</td>
<td>6,539</td>
<td>8,128</td>
<td>8,300</td>
<td>8,500</td>
<td>9,700</td>
</tr>
<tr>
<td>Liberty County</td>
<td>17,569</td>
<td>20,461</td>
<td>27,223</td>
<td>40,000</td>
<td>45,000</td>
</tr>
<tr>
<td>Long County</td>
<td>3,746</td>
<td>3,451</td>
<td>3,700</td>
<td>3,900</td>
<td>3,900</td>
</tr>
<tr>
<td>City of Glennville</td>
<td>3,541</td>
<td>3,328</td>
<td>4,225</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Source: Fort Stewart Impact Coordination Office

The past few years of rapid growth have produced a significant increase in new construction building permits in the area. High interest rates, high building costs, and concern for the stability of the Fort Stewart level of activity have discouraged investors from building multi-family units. Low-cost rental housing, even publicly assisted, is virtually nonexistent, despite the great need.

Kings Bay. In January 1978, the Secretary of the Navy issued a formal announcement that Kings Bay in Camden County, Georgia, had been confirmed by the U. S. Congress as the East Coast Fleet Ballistic Missile Submarine Support Base. Submarine Squadron Sixteen will be withdrawn from Rota, Spain, and relocated at Kings Bay by July of 1979. Camden County, which is approximately 50 miles south of Liberty County, is now faced with some 4,800 people relocating in the area by 1980. Among a multitude of other demands, there will be demand for additional housing in the county.

The Navy originally planned to provide on-base family housing units at Kings Bay; however, funding for these units was removed from the fiscal year 1979 budget. Currently, there are approximately 50 vacant housing units which are suitable for occupancy in Camden County. The Navy estimates that without on-base housing, some 950 units will be required for its personnel.
National Market. The U. S. Industrial Outlook forecasts the manufactured housing market to continue to grow for the next five years. Part of this growth will reflect recovery from the 1975 housing recession and part will be a continued penetration into the conventionally built housing market.

The wood prefab building industry volume output is expected to rise at a compound annual rate of 7.1% from the present to 1982. This is a faster rate of growth than is forecast for housing starts during these years, indicating a rise in market share for the industry. Demand both for complete housing units and for components is expected to be strong.

An important factor that will tend to improve the market for manufactured housing in the early 1980s is the price advantage. Other factors include factory quality control, speed of delivery and erection, and the trend toward more uniform standards and codes. As prefab units become more like conventionally built housing in size and appearance, demand for them is likely to increase.

Factors that may restrict industry growth include consumer acceptance, craft union, and code uniformity problems.

Trends and projections for the industry are shown in Table 9.

Table 9
PREFABRICATED WOOD BUILDINGS AND COMPONENTS: TRENDS AND PROJECTIONS: 1972-1978
(in millions of dollars except as noted)

<table>
<thead>
<tr>
<th>Percent change</th>
<th>Percent change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry2/</td>
<td></td>
</tr>
<tr>
<td>Value of shipments</td>
<td>1,059</td>
</tr>
<tr>
<td>Total employment(000)</td>
<td>26</td>
</tr>
<tr>
<td>Production workers(000)</td>
<td>19</td>
</tr>
<tr>
<td>Value added</td>
<td>461</td>
</tr>
<tr>
<td>Value added per production worker-hour($)</td>
<td>13.05</td>
</tr>
<tr>
<td>Product3/</td>
<td></td>
</tr>
<tr>
<td>Value of Shipments</td>
<td>1,002</td>
</tr>
<tr>
<td>Value of exports</td>
<td>3</td>
</tr>
</tbody>
</table>

1/ Estimated by Bureau of Domestic Commerce
2/ Value of all products and services sold by the Prefabricated Wood Buildings and Components Industry (SIC 2452)
3/ Value of shipments of prefabricated wood buildings and components made by all industries

International Market. The U. S. Industrial Outlook estimates exports of prefab wood buildings totaled $38.3 million in 1976, 82% above 1975. About 65% of this total went to Saudi Arabia. Other leading customers included Iran, Canada, Guatemala, and the United Arab Emirates. Exports in 1977 are expected to have grown to a total of about $90 million, well over double the 1976 value. Additional export data is shown in Table 10.

Table 10

EXPORTS OF PREFABRICATED WOOD BUILDINGS, SIC 2452: 1977

| Value of all industry shipments ($ million) | 1,700 |
| Exports as a percent of product shipments | 5     |
| Compound average annual rate of growth     |       |
| 1967-76 (percent):                        |       |
| Exports                                  | 51.6  |
| Value of product shipments                | 19.0  |

Source: U. S. Industrial Outlook

INDUSTRY LOCATIONAL NEEDS

Survey of Major Manufacturers

In order to give the Liberty County Industrial Development Authority an understanding of the locational needs for a prefabricated housing manufacturer, a survey of large, established firms in the industry was undertaken. The firms to be surveyed by phone were identified through Professional Builder magazine, Thomas Register, and various state manufacturing directories.

The results of the survey show that the major criteria for establishing a new plant would be the availability of a good market, followed by the availability of a good labor supply. Other strong motivations include economic conditions, taxation, and community living conditions. Seventy percent of those questioned expressed a desire to expand their businesses by establishing a new plant. The average acreage required would be about 25, but this would vary considerably from 5 to 70 acres.

The survey questions and summary of answers are found in Exhibit 8.
Exhibit 8

SURVEY QUESTIONS AND SUMMARY ANSWERS

1. If you were interested in establishing a new plant, what would be your major criteria for doing so?

80% - Market, market area, or market demand
10% - Labor force
5% - Population density
5% - Wage structure

2. What else would motivate you to establish a new plant?

60% - Labor, labor force, labor supply, cheap labor, or nonunion labor
10% - Architecture prevalent in the area
10% - Property
10% - Proximity to a metropolitan area/suppliers
10% - Profit potential

3. Are there other factors which would motivate your inclination to establish a new plant?

20% - Economic conditions, or long-range economy
20% - Tax breaks, taxation, or tax situation
15% - Livable town for management, or locality
10% - Nonunion labor
10% - Personnel
5% - Funding for construction or leasing
3% - Availability of raw materials
3% - Availability of trucking
3% - Access to major highways

4. Are you interested in expansion by way of establishing a new plant?

70% - Yes
20% - No

5. What size acreage would your plant need?

Answers averaged 25 acres, but varied from 5 to 70 acres.