



*OFF SITE CONSTRUCTION | DIGITALIZATION | SUSTAINABILITY*

# **Barometer on the State of Industrialised Construction in Spain 2026**

# Context: Housing shortage in Spain

Spain is facing a critical housing shortage of 700,000 homes, according to data from the Bank of Spain. This situation calls for urgent and innovative solutions to ensure access to affordable housing for millions of citizens.

## An overview of the housing crisis in Spain Data from the Bank of Spain

### A shortfall of 700,000 homes

The housing shortage particularly affects young people and middle-income families, creating a social crisis that requires an immediate response from the construction sector.

### An urgent need for solutions

Industrialised construction is emerging as a viable alternative for speeding up housing production and reducing costs, thereby helping to meet this urgent demand.



# The REBUILD 2026 Barometer

Organised by REBUILD, Europe's largest trade fair dedicated to advanced construction and architecture, and based on feedback from trade visitors.

## Background and aim of the study

### Methodology

Methodology: a survey of professionals attending the REBUILD 2026 trade fair, including builders, architects, developers and manufacturers in the construction sector.



### Objective

Objective: to analyse the current situation, the progress made, the main challenges and the role of industrialised construction in addressing the housing shortage.



# The sector's view on industrialisation

The REBUILD 2026 Barometer reveals that almost 60% of the sector considers industrialised construction to be key or highly relevant to addressing the housing shortage in Spain.

**60%**

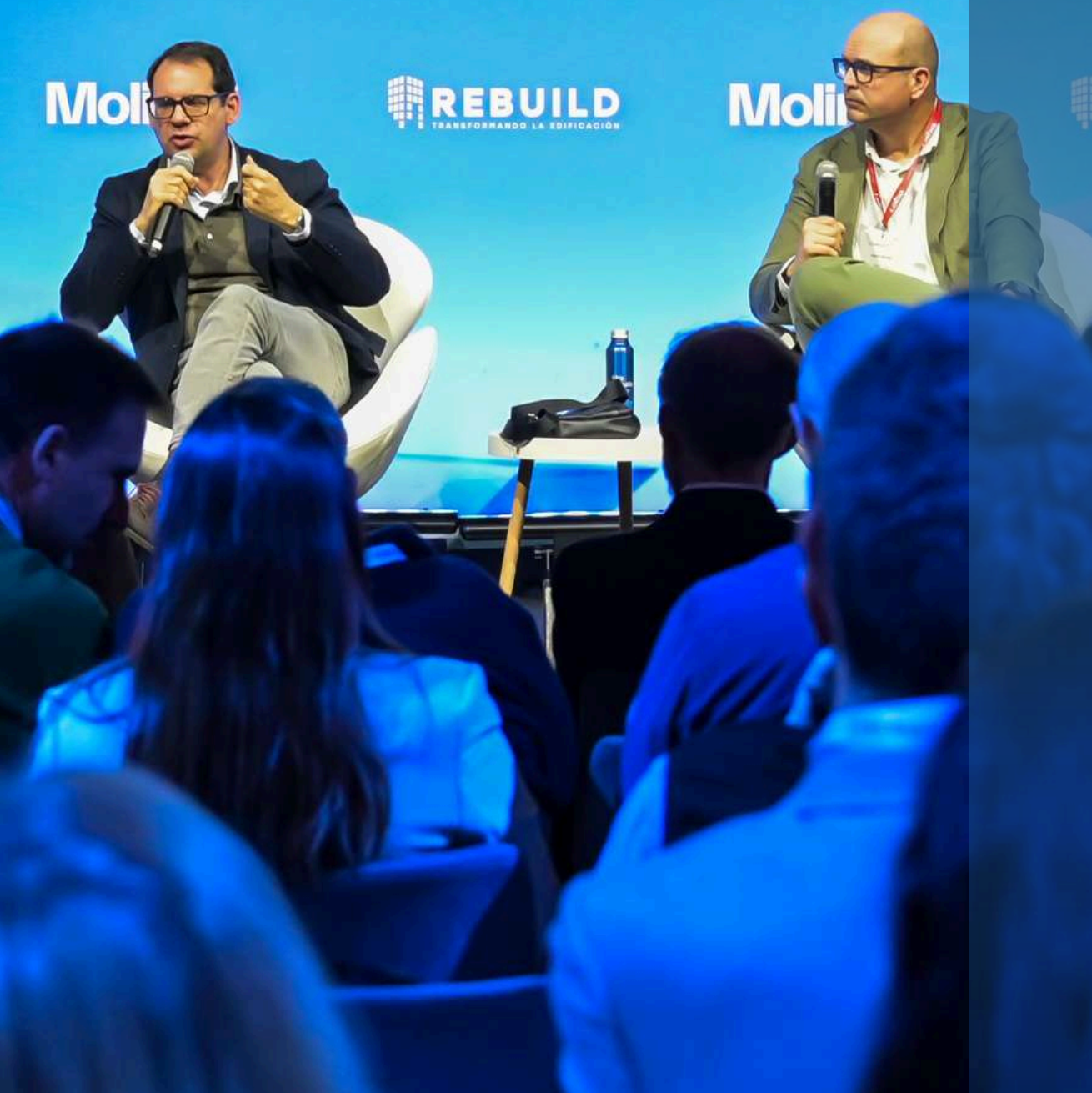
Consider industrialisation to be key to resolving the housing shortage in Spain. A clear majority supports this construction model.

**41,6%**

It defines industrialised construction as a key solution that significantly speeds up the response to the demand for affordable housing.

**18,3%**

It regards this as the main solution to the housing problem, positioning it as the cornerstone of future construction strategy.



# Targets for addressing the housing shortage

The REBUILD 2026 Barometer reveals that the industrialised construction sector is optimistic about the timeframe for resolving the housing crisis in Spain, with estimates suggesting viable solutions within the next decade.

## Estimates for the professional sector

**44,6%**

44.6% of the professionals surveyed believe that the shortfall of 700,000 homes could be met within 5 to 10 years through the widespread adoption of industrialised construction methods.



**5-10 Years**

This approach demonstrates that industrialised construction offers a viable and flexible solution to the housing crisis, enabling ambitious targets to be met before the end of the decade through more efficient processes.



# Growing demand for off-site construction projects

The industrialised construction sector is experiencing a significant increase in demand for projects. Data from the REBUILD 2026 Barometer confirms a sustained positive trend that reflects growing market confidence.

**61.3% confirm an increase in demand**



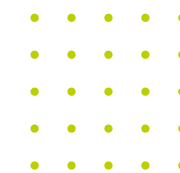
## Significant increase: 32%

A third of the professionals surveyed report a significant increase in demand for prefabricated projects, pointing to a clear trend towards this construction model.



## Moderate increase: 29.3% | Decrease: Just 3.3%

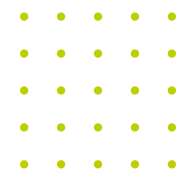
Almost a further third are experiencing moderate growth, whilst only 3.3% report a decline. These figures demonstrate the consolidation of the industrialised construction market.





# Preparing the sector for industrialisation

The Spanish business sector is making progress in adapting to industrialised construction, gradually building up the capacity needed to address the housing shortage.



## Level of business readiness

**51,3%**

51.3% of companies in the sector consider themselves fully or fairly well prepared to undertake industrialised construction projects, demonstrating a solid foundation for growth.



**22,5%**

A further 22.5% are in the early stages of adaptation, gradually incorporating industrialised processes and technologies into their day-to-day operations.





# Key benefits of industrialised construction

Industrialised construction offers significant competitive advantages over traditional methods, positioning itself as the most efficient solution to the current housing crisis in Spain.

These combined benefits enable a flexible and sustainable response to the urgent need for affordable housing, speeding up construction without compromising on quality.



**Reduces construction times**



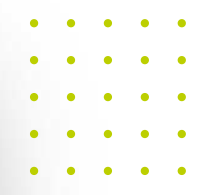
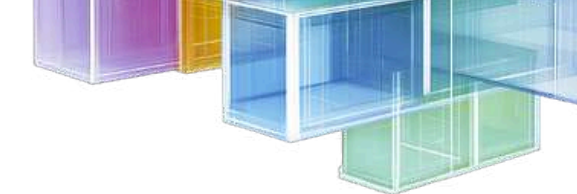
**Reduces costs and lead times**



**Reduces pollutant emissions**



**A swift response to the affordable housing crisis**



# Institutional and market momentum

The industrialised construction sector enjoys strong institutional and business support, which is driving its growth and consolidation in Spain.



**PERTE Housing Industrialisation**



**Regional plans: Eraiki Hub (Basque Country)**



**The rise of off-site companies**

# Growth forecasts up to 2030

## 46.4% expect up to 25% to be industrialised

Almost half of professionals in the sector estimate that up to 25% of Spain's housing stock will incorporate prefabricated elements by 2030, reflecting sustained and realistic growth in this construction model.

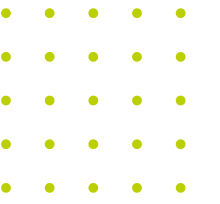


## 32.6% is projected to reach 50%

A third of those surveyed are more optimistic and believe that industrialised construction could account for up to half of the property market, driven by public policy and demand for affordable housing.



# Challenges in legislation and funding



## Regulatory stability: 45.5% bottleneck

The lack of a harmonised regulatory framework is the main obstacle to scaling up industrialised construction. Without regulatory stability, companies cannot plan for long-term investment or achieve economies of scale.



## Access to finance: 43.1% consider this a significant obstacle

"'Without regulatory harmonisation, there will be no scale, and without scale, there will be no industry capable of rising to the challenge' – **Maribel Vergara.**

It is urgent to incorporate industrialised construction into the building regulations.

# The challenge of professionalising talent

The shortage of qualified professionals is one of the main obstacles to the development of industrialised construction in Spain. 90.1% of the sector believes that the lack of a skilled workforce has a direct impact on growth.

✓ 22.2% cite a lack of knowledge as the main obstacle

✓ Fourth key challenge in 2026

✓ 90.1% cite a lack of training as a factor



'Modular construction is the profession of the future'  
– **Julen Pérez, Waugh Thistleton Architects Ltd.**

# Materials and their integration into industrialisation

Industrialised construction makes use of a strategic combination of different materials—wood, steel, concrete and brick—maximising the benefits of each to create more efficient and sustainable buildings.

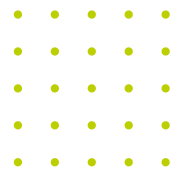
## A clever combination: wood, steel, concrete and brick

### Energy Efficiency

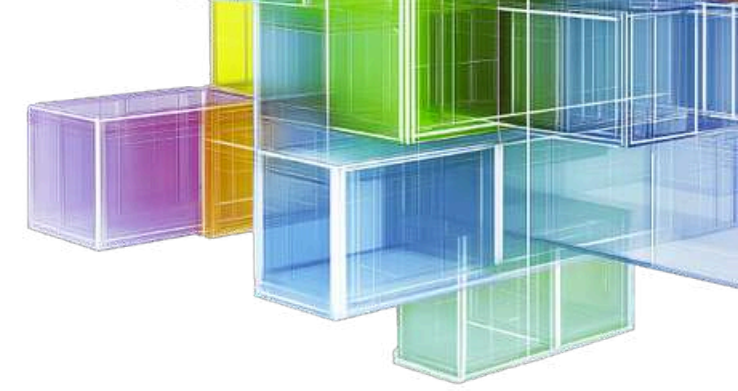
Superior energy efficiency thanks to thermally optimised prefabricated systems. Significant reduction in energy consumption throughout the building's lifespan.

### Accelerated Rehabilitation

Rapid refurbishment of existing buildings using prefabricated modules. Improved liveability and extended service life of the renovated buildings.



# Digital maturity in the sector



Digital transformation is gaining momentum in the industrialised construction sector. 64.7% of companies are at advanced or intermediate levels of digital maturity, establishing technology as a strategic pillar.

## Advanced

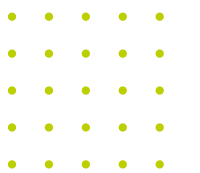
23.7% of companies have integrated technology into almost all aspects of their day-to-day operations, leading the way in the sector's digital transformation.

## In Transition

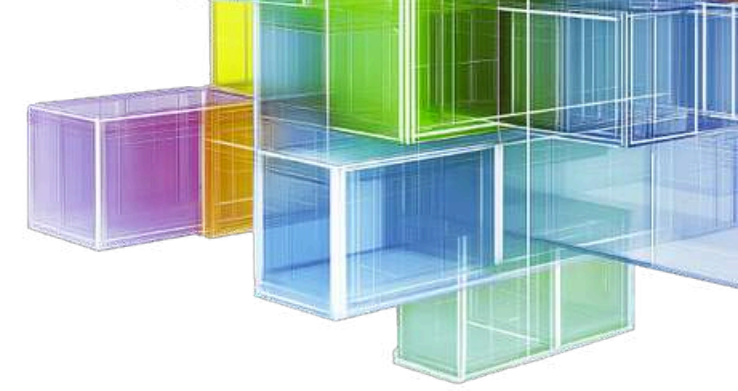
41% of companies are currently undergoing digital transformation, implementing new tools and systems.

## Intermediate

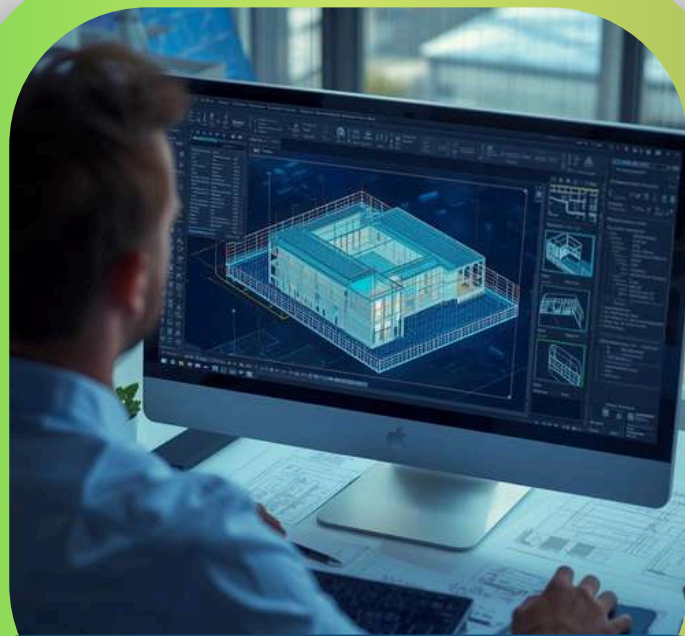
64.7% in total are at advanced or intermediate levels, demonstrating the sector's commitment to technological innovation.



# Key technologies for 2026



BIM and 3D modelling are seen as the top investment priority by 29% of respondents. These technologies enhance competitiveness and coordination among professionals in the industrialised construction sector.



BIM and 3D modelling: a priority investment (29%)



Improving sectoral competitiveness



Improved coordination between professionals




# Conclusions and final reflections

The industrialised construction sector in Spain is accelerating its development in response to the urgent shortage of affordable housing. However, the pace of growth does not yet reflect the model having become fully established.

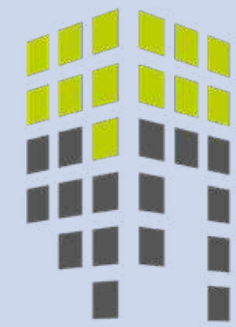
✔ Strengthen the legal and regulatory framework

✔ Facilitate access to finance

✔ Recruit qualified talent



The digital transition is well underway, with 64.7% of companies at intermediate or advanced stages. These factors will be key to the sustained expansion of the industrialised construction model.



# REBUILD

TRANSFORMANDO LA EDIFICACIÓN

**#REBUILD2026**



JOIN US ON SOCIAL MEDIA

[www.rebuildexpo.com](http://www.rebuildexpo.com)

