INSIGHTS: Prefabricated building imports are growing, but remain small

GEELONG, AUSTRALIA: As the emphasis and debate on prefabrication of buildings and building components rages – especially for dwellings – the data demonstrates imports are unlikely to be a significant element of prefabricated building supply, over the longer term. That is good news for those focussed on improving Australia's capacity to prefabricate buildings, especially dwellings. At least one variable – import competition – is likely to remain relatively small, albeit imports continue to grow.

However, the reality remains, many of the key *components* of prefabrication and other aspects of the much-needed revolution in modern methods of construction (MMC), are more likely to be imported than supplied locally. This is especially the case for the main engineered wood products (EWPs), imports of which continue to grow, against a backdrop of local manufacturing failing to keep case with demand.

Developing reliability and confidence in MMC – including prefabrication of dwellings and dwelling elements – is critical to achieving investment, at scale. Though it is not the only ingredient, one requirement is deepening material input supply chains, including for critical EWPs. The aim needs to be co-location and integration of key manufacturing activities, alongside fabrication activities.

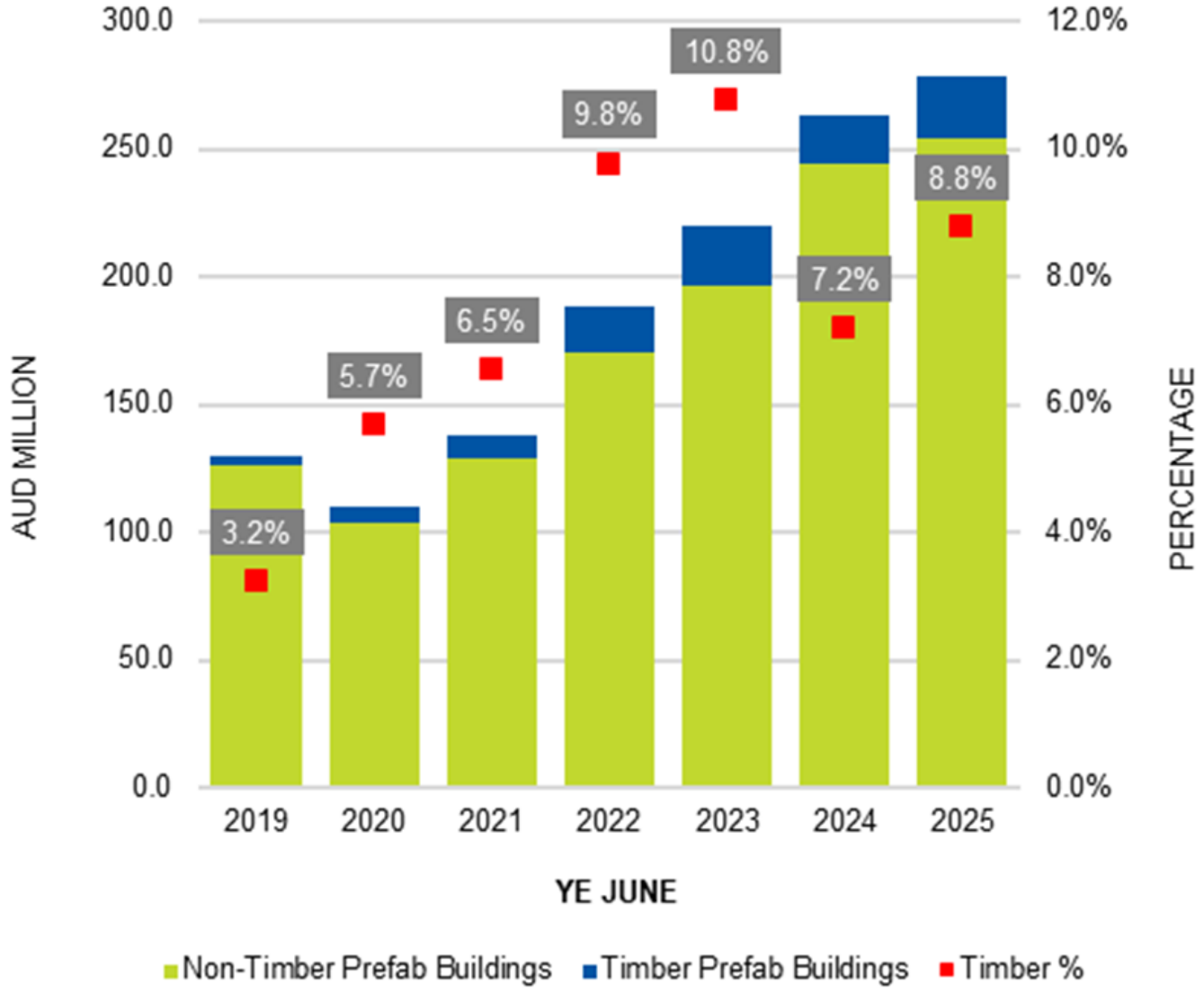
Data Snapshot

- Australia's imports of prefabricated buildings increased 5.8% in 2024-25, rising to a record AUD278.5 million. While import growth has been solid in recent years, imports are negligible compared to the annual value of building in Australia.
- Prefabricated timber building imports have grown faster since 2019 (averaging growth of 34.2% per annum) than the growth in total prefabricated building imports (averaging growth of 13.5% per annum).
- Despite the stronger growth, prefabricated timber building imports accounted for just 8.8% of total imports of prefabricated buildings, measured by value.
- Unsurprisingly, China accounted for 43.0% of total timber prefabricated building imports in 2024-25, however, its share of total prefabricated building imports for the year was 67.8%.

Data details

In FY25, imports of timber-based prefabricated buildings were valued at AUDCif24.4 million. That was a record. But was only marginally higher than the value recorded in FY23. Since FY19, timber prefabricated building imports have increased an average 34.2% per annum, coming from a very low base.

Imports of Prefabricated Buildings by Main Type: FY19 – FY25 (AUDCifM & %)



Source: ABS and IndustryEdge

AUD Million	2019	2020	2021	2022	2023	2024	2025
Timber Prefab Buildings	4.2	6.2	9.0	18.5	23.7	18.9	24.4
Non-Timber Prefab Buildings	126.0	104.0	128.6	170.4	196.4	244.4	254.1
Timber %	3.2%	5.7%	6.5%	9.8%	10.8%	7.2%	8.8%

The total value of imported prefabricated buildings was AUDCif278.5 million in FY25, meaning timber imports were just 8.8% of the total.

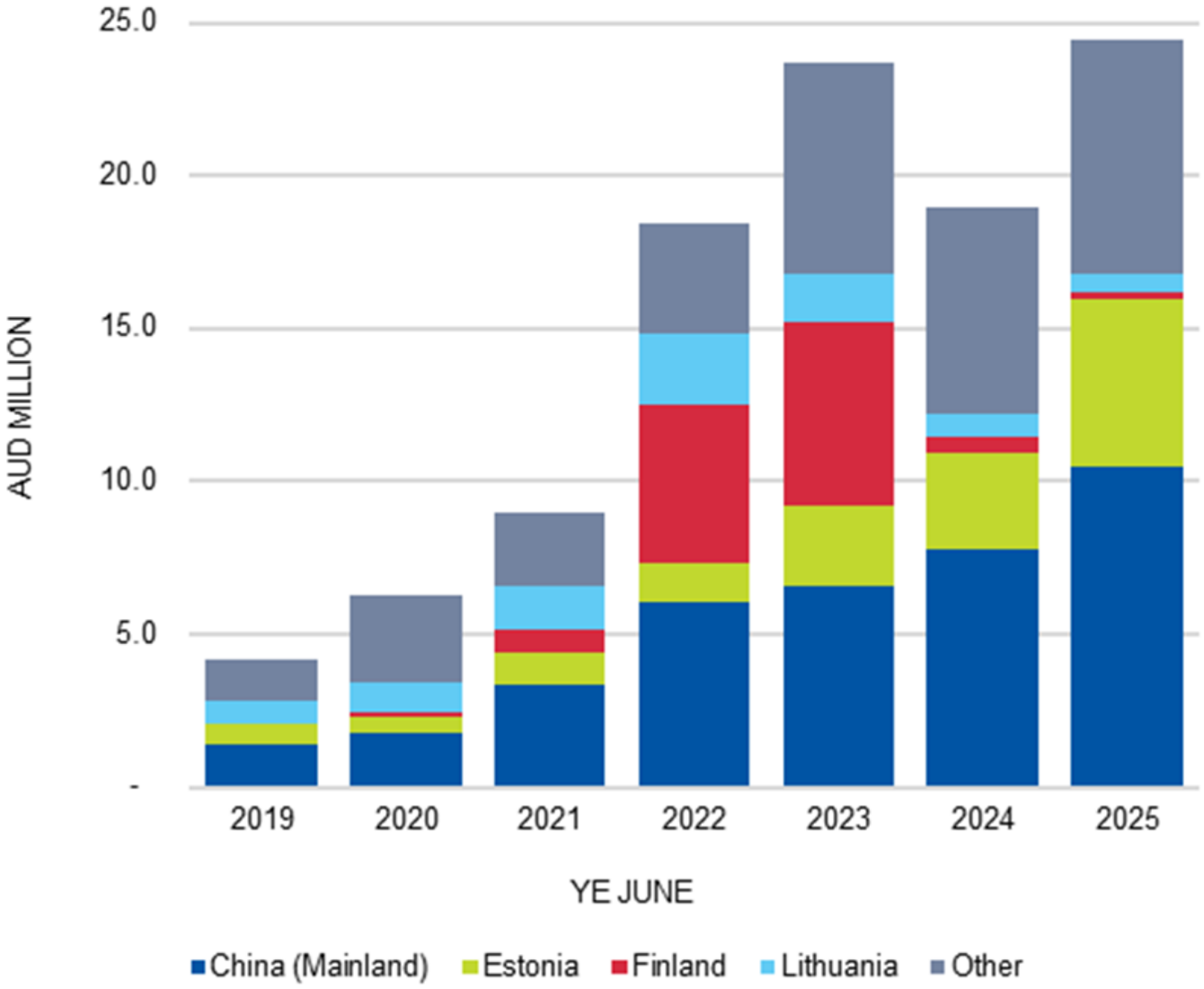
Total prefabricated building imports have continued to rise, increasing an average 12.4% per annum since FY19. That is solid, but compared to the domestic construction sector, is quite minor.

In FY25, Australia received prefabricated timber building imports from 17 countries, but just a few dominated the trade. China dominates supply, accounting for 43% of the value of imports in FY25. Of interest is that European producers hold down the next three places.

The data provides no details, but IndustryEdge suspects there will be real differences in the types of

buildings being imported from China and from Europe.

Imports of Prefabricated Timber Buildings by Country: FY19 – FY25 (AUDCifM)



Source: ABS and IndustryEdge

AUDCifM	2019	2020	2021	2022	2023	2024	2025
China (Mainland)	1.4	1.8	3.4	6.0	6.6	7.8	10.5
Estonia	0.6	0.6	1.1	1.3	2.6	3.2	5.5
Finland	0.0	0.1	0.8	5.2	6.0	0.5	0.2
Lithuania	0.8	1.0	1.4	2.3	1.5	0.8	0.6
Other	1.3	2.8	2.4	3.6	6.9	6.7	7.6
Total	**4.2**	**6.2**	**9.0**	**18.5**	**23.7**	**18.9**	**24.4**

The steady growth in prefabricated building imports tells a small story for Australia, but there is a larger element to this data.

One observation the data invites is that there are significant logistical challenges to importing buildings, even when they are ‘flat-packed’. For an island nation, sea-bound imports of buildings remains more challenging than in other countries, where land import options exist.

About the Data

Prefabricated building trade data is only available by value. There are no ‘volume’ measures, so number of buildings, what they are used for, the weight of buildings and their size are all unknown. Value data is available on both a free-on-board (Fob) and costs, insurance and freight (Cif) basis.

For a confidential discussion about your needs and how IndustryEdge’s data, information and intelligence services can support business decisions, contact us here:

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