

A large yellow tower crane is lifting a precast concrete box unit at a construction site. The crane's lattice boom extends diagonally across the frame, with cables and a hook assembly suspending the box. The box is rectangular with several rectangular openings. In the background, a multi-story concrete building is under construction, with visible scaffolding and red safety railings. The sky is bright blue with scattered white clouds.

slattery

Kaizen: Thinking inside the box

Seven lessons for industrialising construction | October 2026

Introducing industrialised construction

Australia’s construction industry has spent years trying to think outside the box to improve productivity. Industrialised construction asks us to look inside the box instead.

The industry has no shortage of terms for building differently: modern methods of construction (MMC), prefabrication, modular construction, offsite manufacturing and design for manufacture and assembly, among others. They are often used interchangeably.

In this paper, we use the term industrialised construction. This describes something broader than manufacturing more of a building offsite. It means applying greater standardisation, repeatability and integration across the entire process of designing, procuring and delivering it.

As construction becomes more like assembly, attention naturally focuses on what comes out of the factory – the box.

But long before the box rolls out, a lot must line up. Getting industrialised construction right is as much about standardised documentation, procurement, carbon planning, build sequencing, logistics, real-time cost information and risk allocation as it is about manufactured components. These upstream decisions determine whether projects become repeatable systems or remain one-off prototypes.

Slattery sees these upstream decisions play out across thousands of projects every year through cost plans, bills of quantities, procurement strategies, value engineering, design changes, contingencies and post-contract variations.

This thought leadership paper draws on our experience, combining five Slattery case studies with two international examples to distil seven lessons for teams considering industrialised construction. The case studies collectively show the greatest gains come not from manufacturing buildings differently, but from making better decisions earlier and creating the conditions for repeatability.

“ We don’t think of Australia as a manufacturing nation. But construction is manufacturing. We just treat every building as a prototype, the factory moves to each new site and production starts before the design is fully resolved. Thinking inside the box means looking at the whole kit of parts, not just what rolls off the factory floor. Once we do, many of the challenges – labour shortages, skills gaps, cost escalation – become system design problems. ”

Sarah Slattery, Director, Partnerships and Innovation, Slattery

From possibility to practice

Decades of international research and project experience show that, when implemented well, industrialised construction can deliver significant advantages.

Benefit	What the evidence says
Program	International studies consistently report shorter construction programs where off-site manufacturing and on-site works run in parallel.
Quality	Factory production generally delivers more consistent quality and fewer defects through controlled manufacturing environments.
Waste	Most studies report reductions in material waste due to standardisation, precision manufacturing and fewer on-site losses.
Safety	Reduced on-site labour and fewer high-risk activities are associated with improved safety outcomes.
Labour	Labour demand shifts from site-based trades towards manufacturing, logistics and digital coordination.
Carbon	Industrialisation creates opportunities to reduce embodied carbon, depending on structural systems, material choices, transport, energy sources and design decisions.
Cost	Initial projects frequently attract a cost premium, while repeat programs often achieve lower costs through learning, standardisation and economies of scale.
Factory viability	Factory success depends on a consistent pipeline of work. Where factories have failed, fragmented demand is usually a bigger factor than manufacturing capability.

Market movements

Industrialised construction is a complex and fast-moving space. Recent developments across policy, investment, standards and procurement show how the market is evolving.

May 2026

Australian Government backs open-source prefabrication
Funding of \$39.3 million will support a trial of System 600, an open-source prefabricated housing platform developed by the Building 4.0 Cooperative Research Centre (CRC) and Homes NSW. By standardising interoperable building components rather than entire buildings, the platform allows multiple manufacturers to contribute to the same housing system.¹

May 2026

Standards Australia publishes Australia’s first MMC glossary
SA HB 268: Prefabricated building – Glossary of terms establishes consistent terminology for prefabricated and modular construction. The free handbook was developed with industry to support a common language. The emergence of a shared lexicon is a subtle but important sign.²

June 2026

Institutional investor backs MMC for climate resilience
Insurance Australia Group invests \$3 million in modular building company Spacecube to accelerate disaster recovery. The investment follows successful deployment of Spacecube’s modular accommodation after Victorian bushfires, enabling displaced families to remain on their properties while permanent homes were rebuilt.³

August 2026

NSW Government reforms procurement, regulation
A major package of reforms is passed to accelerate MMC includes a competitive tender process for a world-class innovation facility, \$32.3 million to modernise approvals, \$1.6 million for a national certification framework, and \$4 million in grants.⁴ Reforms also commit to embedding MMC within government procurement and linking modular delivery to the NSW Pattern Book.⁵

August 2026

\$220 million backs industrialised housing
The National Reconstruction Fund has committed a \$120 million loan to Built Living’s new manufacturing facility in Neerabup, north of Perth, alongside \$100 million from Wesfarmers.⁶ The investment follows the May announcement of a new Built–Wesfarmers joint venture to develop a national off-site manufacturing business.⁷ The Built–Wesfarmers joint venture expects the facility to produce more than 2,000 apartments a year once operational. Built Living estimates its prefabricated construction system could reduce apartment construction costs by 20% and construction time by 50%.

¹O’Neil, C., 2026.
²Standards Australia, 2026.
³Built Offsite, 2026.
⁴NSW Government, August 2026.
⁵NSW Government, June 2026.
⁶Australian Financial Review, August 2026.
⁷Built, May 2026.

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Case Study 1: European modular construction system

The approach

Slattery benchmarked two industrialised construction approaches against traditional in-situ concrete construction in Australia.

The first was a European factory-manufactured timber building system. This system produces highly finished, integrated building components – essentially a ‘kit of parts’ – that are transported flat and assembled on site. Think finished parts rather than finished boxes.

The second was volumetric modular construction, which effectively ships the room: three-dimensional modules are manufactured and fitted out off site, then transported and assembled on site. This means transporting considerably more volume, including the air inside each module, and introduces different transport, logistics and installation considerations.

Both approaches were tested on the same hypothetical mid-rise residential development: basement, ground-floor retail and seven apartment levels, approximately 5,200 m². The analysis accounted for Australian conditions, including the National Construction Code, fire and acoustic requirements, climate, supply chains and labour markets.

The outcome

The factory-manufactured timber system cost 3.8% less than traditional construction and reduced the program by 43%.

Volumetric modular construction reduced the program by 23% but came with an 8.5% cost premium.

In other words, one method delivered both cost and time benefits; the other traded higher cost for time.

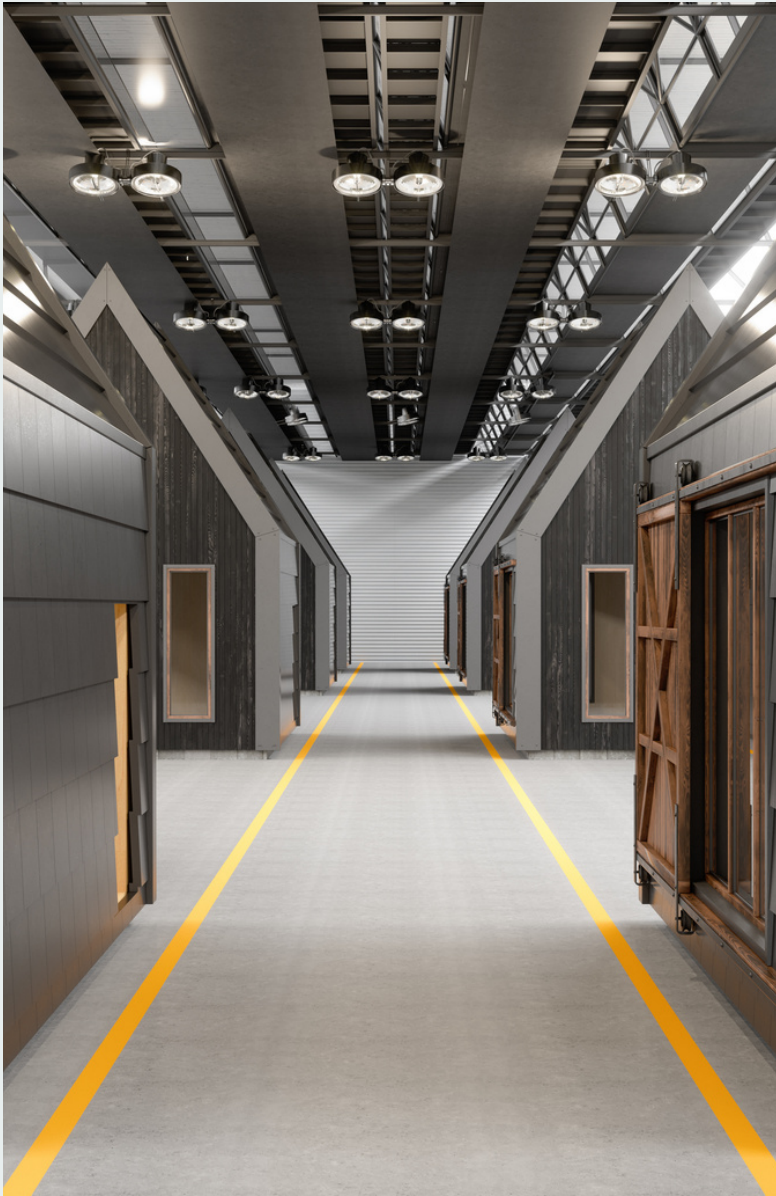
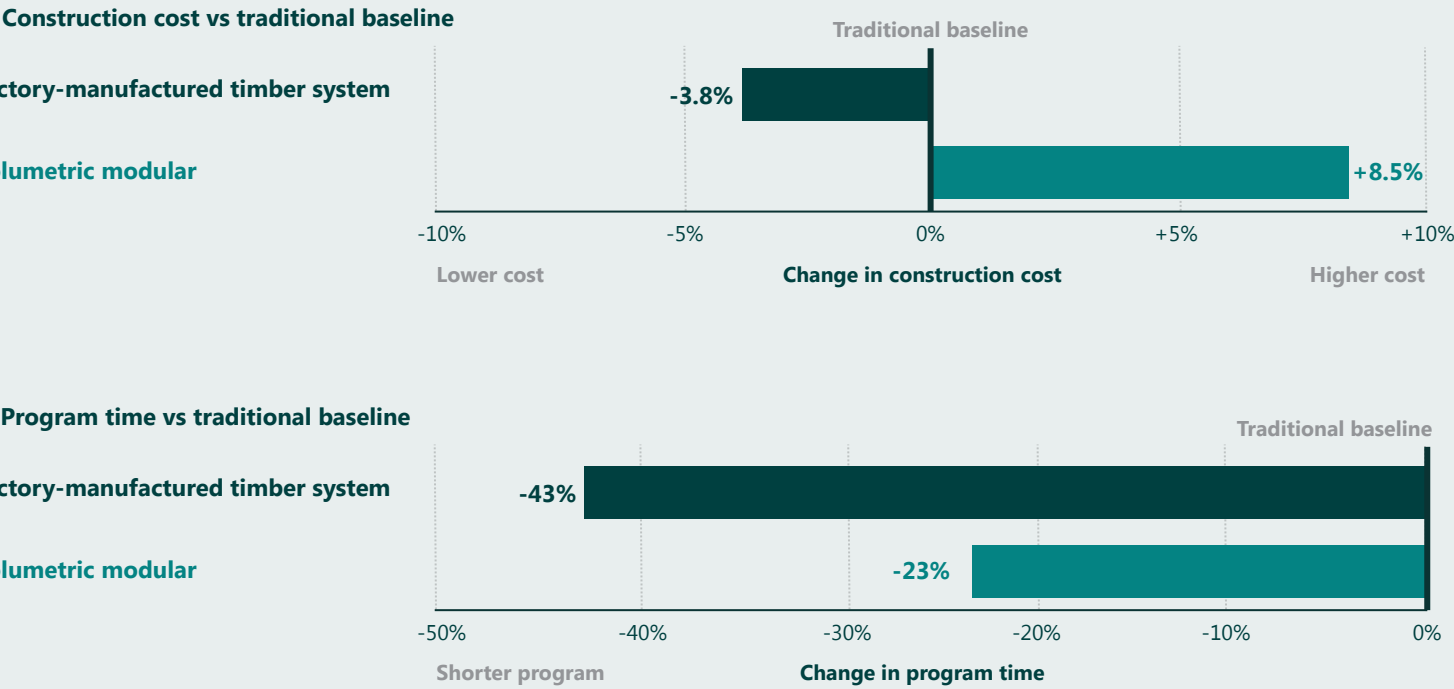


EXHIBIT 1: COST AND PROGRAM AGAINST TRADITIONAL CONSTRUCTION



Each bar shows the change against traditional construction, where the traditional baseline is 0%. Bars left of the baseline mean lower cost or a shorter program. The timber system reduces program time by 43% and cost by 3.8%. Volumetric modular reduces program time by 23% and adds 8.5% to cost.

Key Insight 1 Industrialised construction is not a single solution.

Neither approach is inherently better. In this study, the component-based system improved both cost and program, while the volumetric system traded higher cost for time. The right approach depends on the building, the system and the conditions in which it will be delivered.

“Industrialised construction isn’t one solution. The program benefit depends on the system you choose, how much work moves off site and how the manufactured components come together on site. The right balance of cost and time depends on the project.”

Bernhard Funke, Director, Slattery

Case Study 2: NSW Housing Pattern Book

The approach

The NSW Government's Housing Pattern Book, released in July 2025, replaces bespoke design with repeatable housing 'patterns' and standardised documentation that support faster, more consistent delivery.

The 2026-27 NSW Budget takes this approach further with funding for a new "world-class facility using cutting-edge prefabrication, modular construction and digital technologies" to produce high-quality housing at scale.⁸

Slattery supported the NSW Department of Planning, Housing and Infrastructure across both the low-rise and mid-rise Housing Pattern Book programs, developing detailed bills of quantities, benchmark cost information and providing embedded cost advice throughout design development.

The outcome

Between July 2025 and January 2026, 21,000 Pattern Book designs were downloaded.⁹

Eight standardised low-rise housing designs were supported by priced bills of quantities and benchmark cost data, enabling builders, developers and suppliers to assess scope and price alternative construction methods without extensive remeasurement or redesign.

Six mid-rise apartment typologies were developed with embedded cost planning to improve buildability and program certainty.

21,000

Pattern Book designs
downloaded in 6 months.

8

Standardised low-rise housing
designs supported.

6

Mid-rise apartment typologies
developed.



Image credit: NSW Government and Carter Williamson Architects

Key Insight 2

Standardisation creates the conditions for industrialisation.

Standardised designs, documentation and cost information reduce variation and make repeatable delivery easier. By linking Pattern Book designs with manufacturing capability, the NSW Government is creating a pathway to industrialised delivery at scale.

“

Ready-to-use bills of quantities enable builders, developers and suppliers to price projects and test alternative delivery solutions immediately, eliminating unnecessary remeasurement and redesign. The result is faster decision-making, streamlined procurement and a quicker path from concept to delivery. ”

Simon Moses, Head of Advisory, Slattery

⁸NSW Government, June 2026.

⁹NSW Government, January 2026.

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Case Study 3: Australian modular schools program model

The approach

Slattery tested how the economics of permanent modular construction could change across a program of repeat school projects for a state education agency.

We compared traditional delivery with an initial modular project and a mature modular program, assuming a standardised “kit-of-parts” design library that could be reused across successive projects. This captured the higher setup costs of early adoption, then tested how repetition could reduce design effort, consultant fees, preliminaries and construction costs as the program matured.

The outcome

We estimated that the first modular project would cost 7.4% more than traditional delivery, reflecting upfront design development, factory setup, learning-curve inefficiencies and limited market competition.

By the fifth repeat project, total project cost was estimated to be 11% below the traditional baseline.

Facility construction costs fell by approximately 27% between the first and fifth modular projects, as repetition improved design reuse, procurement and factory production.



EXHIBIT 2: REPETITION DRIVES VALUE ACROSS THE PROGRAM

Total project cost relative to traditional baseline

BUILD 1

First deployment

+7.4%
versus
traditional baseline



REPEAT BUILDS

Buils 2–4

- Design refinement and standardisation
- Supply chain learning and scale
- Operational efficiency improves with repetition



BUILD 5

Mature program

-11%
versus
traditional baseline



The first project typically costs more than traditional delivery



Later projects are less expensive than traditional delivery

17%

REDUCTION IN TOTAL PROJECT COST
Between Build 1 and Build 5, driven by
reduced facility construction costs

Key Insight 3

Repetition, not the first project, unlocks the value.

The benefits emerge through repetition, not one-off pilots, typically after four or five repeat builds. Early cost premiums reflect investment in capability, while repeatability drives long-term improvements in cost, productivity and delivery certainty.

“The initial cost premium should be treated as an investment in templates, approvals, tooling and capability uplift. The value comes when you use that investment again and again across a pipeline of projects.”

Disney Patterson, Director, Slattery

Case Study 4: Singapore's DfMA ecosystem

The approach

Over the past decade, Singapore has transformed construction through a coordinated national strategy centred on Design for Manufacturing and Assembly (DfMA).

Government policy, procurement and industry investment have supported the development of Integrated Construction and Prefabrication Hubs (ICPHs), enabling more construction activities to move into controlled factory environments.

The outcome

Singapore's largest ICPH spans 3.8 hectares, or around seven football fields, and produces 100,000 cubic metres of precast components each year, enough to construct around 17 apartment blocks. Industrialised production has delivered an 80% improvement in labour productivity.¹⁰

3.8ha

Site area, around seven football fields.

100,000 m³

Precast components produced each year, enough to construct around 17 apartment blocks.

80% ↑

Improvement in labour productivity delivered by industrialised production.



Key Insight 4

Industrialisation needs pipeline certainty.

Rather than treating industrialised construction as a building process, the Singapore Government has ensured manufacturing capability is matched by long-term policy, procurement and investment. The key is building an ecosystem that allows industrialised construction to operate at scale.

“Manufacturers don't invest in projects. They invest in pipelines. A visible 3–5 year pipeline, consistent procurement and long-term government commitment give industry the confidence to invest in capability, competition and scale.”

**Sarah Slattery, Director,
Partnerships and Innovation, Slattery**

¹⁰Singapore BCA, 2023 and 2026.

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Case Study 5: United States failed factory model

The approach

Founded in 2015, Kattera set out to industrialise construction by vertically integrating the entire delivery process. Backed by more than US\$2 billion, the company promised to reduce construction programs by 30–50%.

Kattera sought to implement modern technology at every stage of delivery, from architectural design and engineering to manufacturing, procurement, construction and project management. It even developed its own software platform and manufactured building products ranging from windows to heating, ventilation and air conditioning (HVAC) systems.

The outcome

At its peak, Kattera employed 7,500 people and operated an assembly factory in Phoenix, Arizona.

Kattera also opened a 25,000 m² (270,000 sq ft) cross-laminated timber (CLT) manufacturing facility in Spokane, Washington, increasing North American CLT production capacity by 50%.

However, rapid expansion across multiple products, services and markets increased complexity faster than Kattera could standardise and integrate its operations. Kattera filed for bankruptcy in 2021.¹¹



Key Insight 5

Industrialisation requires repeatability before scalability.

Kattera assumed construction could be transformed using the same manufacturing principles that had reshaped the electronics industry. But construction is not a single manufacturing process. Projects vary by site, design, regulation, client and market, limiting how readily a single vertically integrated system can be repeated.

Market commentary concluded that the company attempted to reinvent the entire construction value chain rather than focusing on a repeatable product platform.¹² The lesson is not that vertical integration cannot work, but that industrialisation depends on being clear about where standardisation and repetition create value.

“Kattera attempted to apply a Silicon Valley disruption model but underestimated just how variable the construction industry is. The real opportunity for industrialisation is in focusing on the elements that can be standardised and repeated at scale, not in trying to industrialise everything at once.”

Shannon Percy, Director, Slattery

¹¹Architect Magazine, 2021; Suardi, 2025.

¹² Suardi, 2025.

Case Study 6: Australian kindergarten facilities program

The approach

Slattery compared four near-identical two-room kindergarten facilities: one delivered conventionally and three using modular construction. All faced the same immovable deadline: completion in time for the kindergarten intake calendar.

The outcome

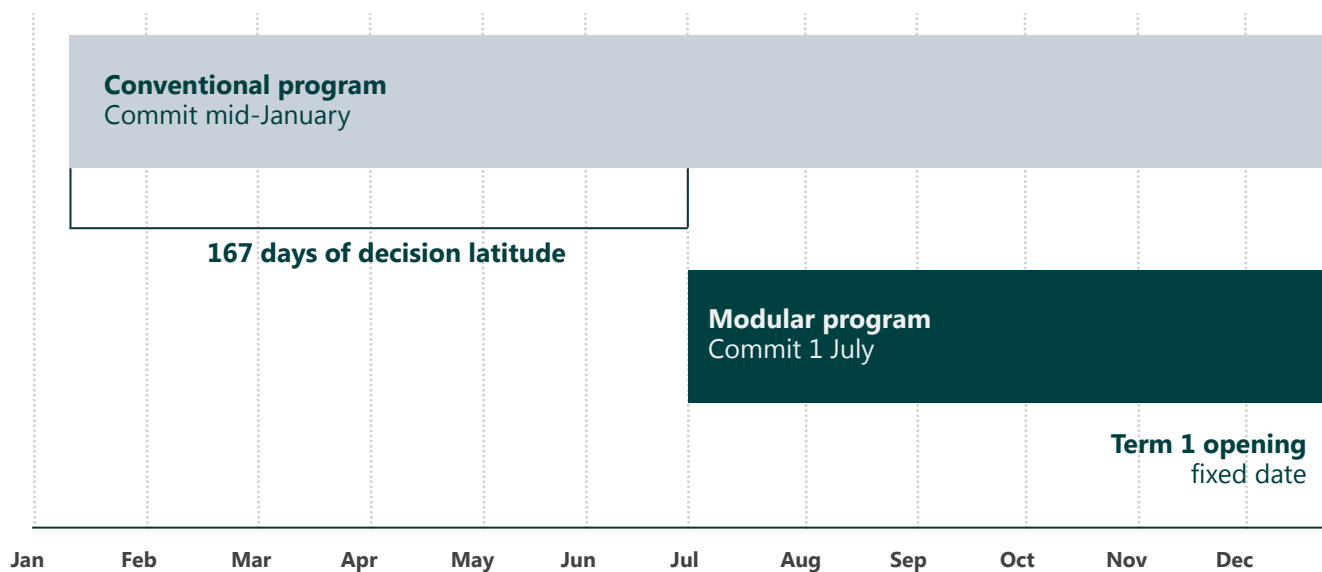
Modular construction came at a clear capital premium. The three modular facilities cost between 12% and 38% more per square metre than the escalated conventional benchmark. But they also required 167 fewer calendar days to deliver.

Because the opening date was fixed, those 167 days allowed the client to commit to the project almost six months later.

EXHIBIT 4: RATE COMPARISON OF CONVENTIONAL AND MODULAR KINDERGARTENS

Facility Method	Rate (\$/m ²)	vs benchmark
Conventional Stick build	\$7,960	—
Facility A Modular	\$8,904	+12%
Facility B Modular	\$10,255	+29%
Facility C Modular	\$10,975	+38%

EXHIBIT 3: WHERE THE 167 DAYS ARE SPENT



Both programs land on the same fixed opening date. The modular program consumes 167 fewer calendar days, so the point of commitment moves from mid-January to 1 July.

Key Insight 6

A shorter program creates more choices.

The shorter program did not bring the delivery date forward. Instead, it shifted the point of commitment by almost six months. Funding approvals, planning decisions, design development and procurement could all occur much later without jeopardising the opening date.

“ The real benefit here was flexibility. Modular gave the client almost six more months to make decisions without moving the opening date. That flexibility applies well beyond kindergartens. On projects without a fixed operational deadline, the same time saving could instead bring operations forward. ”

Disney Patterson, Director, Slattery

Case Study 7: Volumetric modular timber dwellings

The approach

Slattery assessed the upfront embodied carbon of four volumetric modular timber dwellings at two sites against eight traditionally constructed steel and timber framed homes.

The client had already established a factory to manufacture volumetric modular timber homes, so the task was to understand the embodied carbon performance of the approach already in production.

The assessment covered upfront embodied carbon to practical completion (A1–A5), including the modular components, substructure works of screw-pile micropiles and concrete strip footings.

The assessment included transport to site (A4). As all projects were located in metropolitan areas, longer transport distances associated with regional delivery were not tested in this comparison.

The outcome

Both modular dwelling types recorded lower upfront embodied carbon per square metre than every traditional building, regardless of whether steel or timber structures were used.

- **Modular Site A** is around 23% lower carbon than traditional timber Building 1 and 29% lower than traditional steel Building 2.
- **Modular Site B** is around 17-18% lower carbon than traditional timber Buildings 3 and 4, and 22–24% lower than traditional steel Buildings 5 and 6.

The comparison reveals a clear modular advantage. The data suggests modular construction can be a very effective way to reduce upfront embodied carbon.

The comparison also underscores the influence of structural material. Across the traditional buildings, timber-framed structures consistently recorded lower upfront embodied carbon than their steel-framed counterparts.

This study comes with a caveat: it only considered transportation to a local site. Where modules travel long distances by road, transport emissions can erode some of the carbon advantage achieved through the building system.

EXHIBIT 5: UPFRONT EMBODIED CARBON RATE BY SCHEME AND BUILD TYPE, BIOGENIC CARBON INCLUDED

Scheme	Build type	Storeys	kgCO ₂ -e/m ² GFA
Modular Site A	Volumetric modular timber	1	347
Modular Site B	Volumetric modular timber	2	399
Building 1	Traditional timber	1	451
Building 2	Traditional steel	1	490
Building 3	Traditional timber	2	480
Building 4	Traditional timber	2	485
Building 5	Traditional steel	2	509
Building 6	Traditional steel	2	524
Building 7	Traditional timber	3	495
Building 8	Traditional steel	3	555

Key Insight 7 Modular construction can mean low-carbon, but not always.

Volumetric modular timber construction can deliver a substantial upfront embodied carbon advantage over conventional construction. But modular is not a single carbon variable. Carbon performance also depends on early decisions about materials, structure, module geometry, manufacturing waste and transport distances. Assessing these factors early means carbon can influence the design, rather than simply be calculated afterwards.

“Carbon outcomes are committed through the choice of structural system, the module geometry and the substructure solution – decisions taken at concept and early design, long before a single component reaches site. Late carbon management can only verify a number that early design has already set.”

Tom Dean, Director, Carbon Planning, Slattery

What’s really inside the box?

Across the seven case studies, a common theme emerges: the greatest gains from industrialised construction do not come from taking construction offsite and making buildings in boxes. They come from creating the conditions that make repeatable production possible.

Think standardised designs, coordinated procurement, a reliable pipeline of work and confident decisions made early.

The factory may be the most visible box. But look inside and we find another kit of parts: the drawings, contracts, suppliers, schedules, cost information and relationships that allow a project to move from prototype to product.

This is the real lesson from looking inside the box. Industrialised construction asks us to think differently before anything gets built.



Seven lessons at a glance

1	Industrialised construction is not a single solution.	European modular construction system
2	Standardisation creates the conditions for industrialisation.	NSW Housing Pattern Book
3	Repetition, not the first project, unlocks the value.	Australian modular schools program model
4	Industrialisation needs pipeline certainty.	Singapore’s DfMA ecosystem
5	Industrialisation requires repeatability before scalability.	United States failed factory model
6	A shorter program creates more choices.	Australian kindergarten facilities program
7	Modular construction can mean low-carbon, but not always.	Volumetric modular timber dwellings

Reading the lessons together

Every lesson points upstream. Cost, program and carbon outcomes are set by decisions about standardisation, procurement and pipeline, not by the point at which a component leaves the factory.

GLOSSARY

Cross-laminated timber (CLT) is an engineered timber product made by bonding layers of timber at right angles to create strong structural panels for walls, floors and roofs.

Design for Manufacture and Assembly (DfMA) simplifies construction by considering manufacturing, transport, logistics and installation from the earliest stages of design.

Embodied carbon refers to the greenhouse gas emissions associated with producing, transporting, constructing, maintaining and disposing of building materials over a building’s lifecycle.

Heating, ventilation and air conditioning (HVAC) refers to the systems used to control a building’s temperature, ventilation and indoor air quality.

Industrialised construction is a construction approach that applies manufacturing principles across the entire project lifecycle. It combines standardisation, digital design, prefabrication and repeatable production to improve productivity, quality and certainty.

Kit of parts is a standardised family of interoperable building components that can be combined in different ways to create multiple building types without redesigning every element.

Modular construction applies standardised, repeatable design and assembly principles to construction. Building elements are manufactured off-site and assembled on site, allowing projects to be delivered more efficiently and consistently.

Modern methods of construction (MMC) is an umbrella term describing approaches that shift construction activities from site to factory, while applying manufacturing principles such as standardisation, repeatability, quality control and digital production.

Platform approach is based on standardised components, interfaces and design rules that allow different buildings to be delivered from a common system rather than being designed from scratch.

Prefabrication is the process of designing and manufacturing building parts or components away from the final construction site before transporting them for installation or assembly. Prefabrication can range from individual panels and structural elements through to complete building modules.

Repeatability is the ability to use the same designs, components or construction processes across multiple projects, reducing cost, program and risk through learning and standardisation.

Standardisation is the use of common dimensions, components, interfaces or processes to improve consistency, efficiency and interoperability across projects.

Traditional construction treats every building as a prototype. Most work is completed on site, project teams assemble for a single project, and variability is expected and priced into the delivery process.

Upfront embodied carbon (A1–A5) refers to greenhouse gas emissions associated with materials and construction up to practical completion, including material production, transport and construction.

Value engineering is the process of reviewing a design to reduce cost while maintaining the required function and performance. In traditional construction, value engineering often occurs late in the project when opportunities for meaningful change are limited.

Volumetric modular construction involves manufacturing complete three-dimensional building modules off-site. Entire rooms or sections are delivered largely complete and assembled on site to form the finished building.

For further information on definitions and terms, see Standards Australia’s Prefabricated building – Glossary of terms, published in May 2026.¹³

¹³Standards Australia, 2026.

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Shaping Australia's built environment with certainty.

Slattery is a national property and construction advisory firm, helping clients plan, adapt and invest with confidence. We partner with clients to uncover value, reduce risk and deliver smarter, more sustainable outcomes across Australia's cities and communities.

Slattery acknowledges the Traditional Custodians of the lands on which we live and work across Australia. We pay our respects to their Elders past and present, and recognise their continuing connection to land, water and community.

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