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# 2025 CSI ANNUAL REPORT

**W**elcome to the 2025 edition of the CSI-Annual & Market Report. This year the survey responses and sponsorships increased by approximately 40% and we went from 108 pages to 116. Thank you to all of the people helping us grow this report.

One of the things about data is it has a shelf life and the fresher the better.

We delayed the survey in the fall until after the election results. We did an abbreviated survey in February to see how first quarter was living up to expectations. The results are interesting.

Gross sales are strong. 40% report the results were as predicted

and 37% had better than anticipated results. The units sold and profitability show similar results.

The other bright spot is the number of companies revising their forecasts upward for the remainder of the year. This table breaks that down by the type of construction and region.

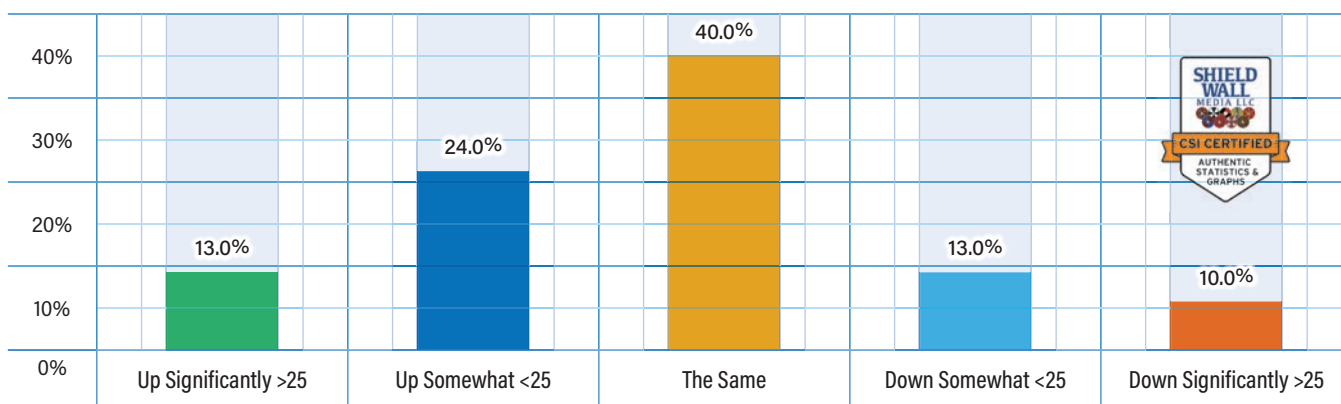
2025 starts with a lot of potential

Now we as business people have make good decisions and execute.

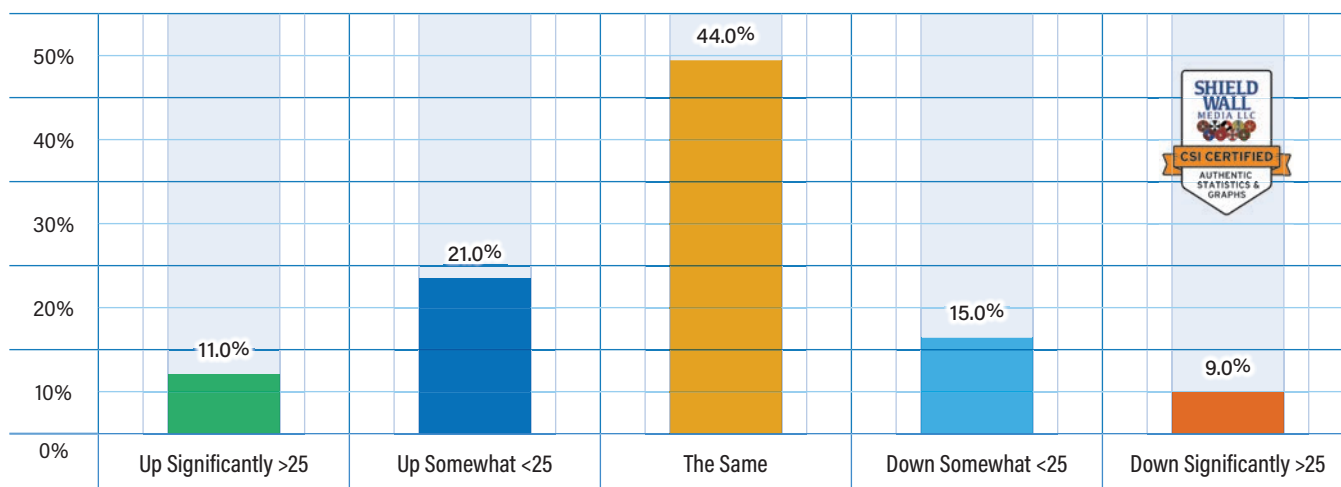
Hopefully the data in the 2025 CSI – Annual & Market Report helps.

*Gary Reichert, Publisher*

## How is Your Firm's Gross Sales for Q1 2025 Comparing to Expectations?

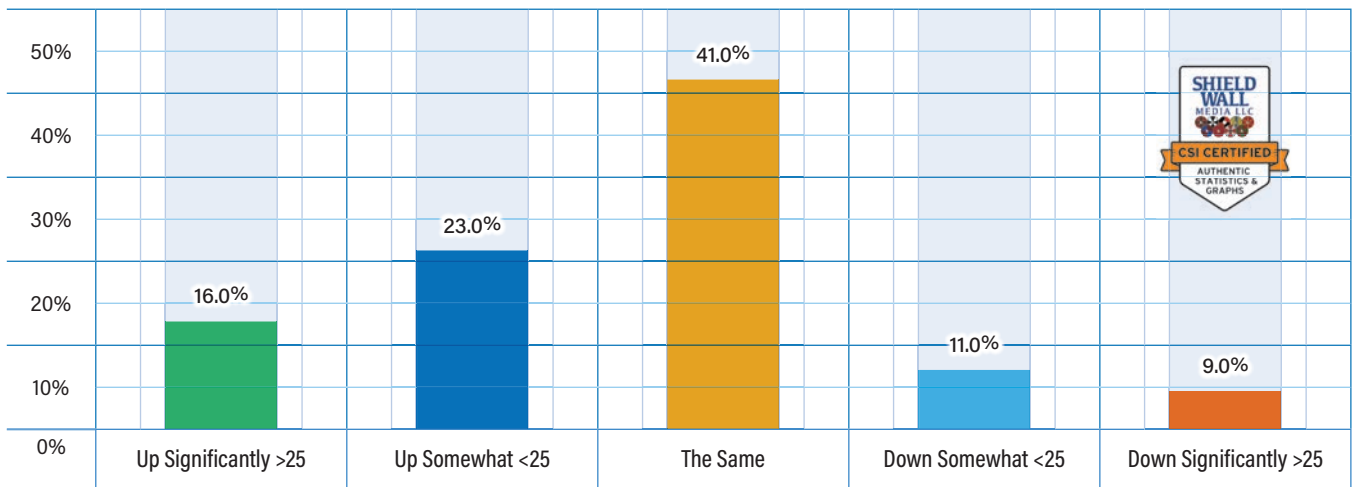


## How is Your Firm's Units Sold for Q1 2025 Comparing to Expectations?





## How is Your Firm's Profitability for Q1 2025 Comparing to Expectations?



## Are You Revising Your General Expectations for the Remainder of 2025?

		We are revising upward	Our expectations remain unchanged	We are revising downward
Q1 Which of these building types do you participate in? (check all that apply)	General Roofing	44.74%	46.05%	9.21%
	Metal Roofing	51.16%	46.51%	2.33%
	Other Roofing (gutters)	47.06%	47.06%	5.88%
	Post Frame	45.83%	50%	4.17%
	Metal Building (cold-formed)	46.67%	46.67%	6.67%
	Metal Building (pre-engineered)	36.84%	57.89%	5.26%
	Roll forming or metal forming	40%	60%	0%
	Wood framed (stick built)	42.86%	47.62%	9.52%
	Other Building (Temporary, modular)	35.29%	58.82%	5.88%
	Other Building (sheds and carports)	40.74%	59.26%	0%
	Other Building (masonry, SIPs, tip up concrete)	31.82%	54.55%	13.64%
	Sub-Contractor (site prep, electrical, HVAC, plumbing)	31.43%	62.86%	5.71%
	Manufacturing	22%	60%	18%
Q4 Where are you located?	East (NY, NJ, DE, CT, MA, RI, VT, NH, PA, WV, ME, MD, DC)	50%	45.24%	4.76%
	South (VA, KY, TN, AR, LA, MS, AL, GA, NC, SC, FL, OK, TX)	29.69%	54.69%	15.63%
	Midwest (MN, IA, MO, IL, WI, MI, IN, OH, NE, SD, ND, KS)	19.51%	65.85%	14.63%
	West (ID, MT, UT, NM, AZ, CO, WY, CA, NV, OR, WA, HI, AK)	26.53%	59.18%	14.29%
	Nationwide or multiple regions	55.56%	44.44%	0%



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# SECTION 1

## GENERAL ECONOMY TRENDS AND DATA



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SECTION 1

GENERAL ECONOMY  
TRENDS AND DATA

Since 2021, the U.S. economy has experienced significant shifts driven by inflation, interest rate hikes, labor shortages, and supply chain disruptions. The post-pandemic recovery saw strong consumer demand, but inflation surged to a 40-year high in 2022, prompting aggressive Federal Reserve rate increases.

These actions slowed economic growth, cooled the housing market, and led to higher borrowing costs. While inflation has eased, construction costs remain elevated due to labor constraints and material price volatility. Job growth has been steady, yet skilled worker shortages persist. Understanding these economic trends is crucial for assessing their ongoing impact on the construction industry.

Two Years of Battling Inflation

Inflation has been a dominant economic challenge for nearly four years, peaking at 9.1% in mid-2022—the highest in four decades. The Federal Reserve responded with aggressive interest rate hikes, which helped cool inflation but also increased bor-

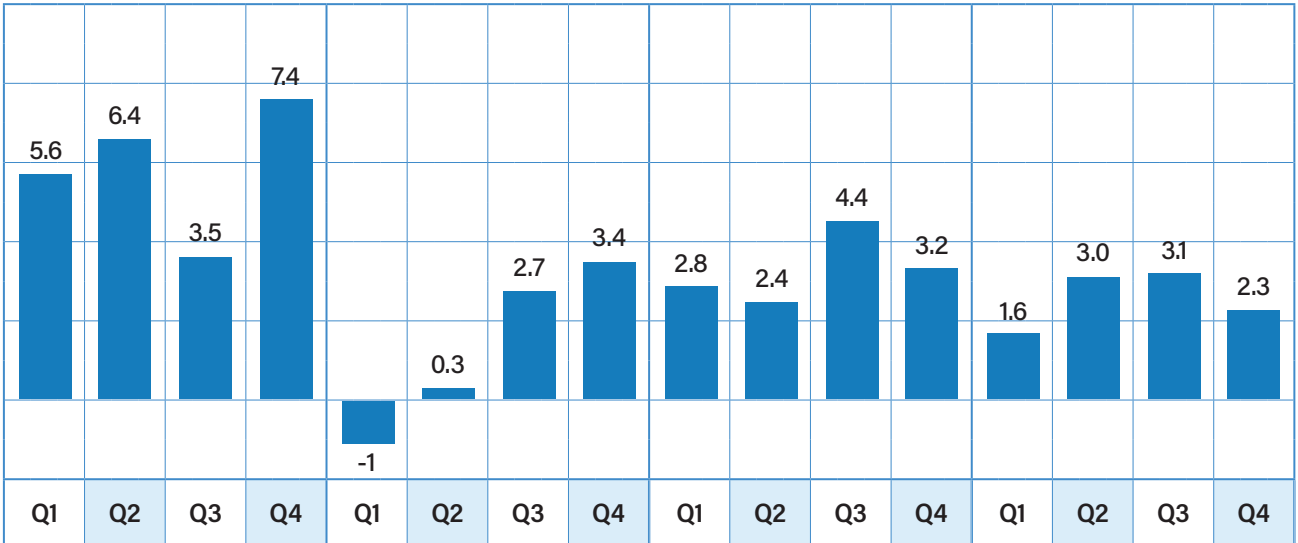
rowing costs for businesses and consumers. While inflation has since moderated, construction costs remain stubbornly high due to persistent labor shortages and supply chain disruptions. Contractors continue to navigate fluctuating material prices and tighter financing conditions, making cost management a critical priority in the industry.

GDP

After the pandemic, U.S. GDP growth has fluctuated due to the economic recovery, inflationary pressures, and Federal Reserve policy. In 2021, the economy rebounded strongly, growing by 5.9% as consumer spending surged and businesses reopened. However, in 2022, growth slowed to 2.1% as inflation soared and interest rates rose. The first half of the year saw negative GDP growth, raising recession fears, but the economy avoided a prolonged downturn. C1

In 2023, GDP remained resilient, growing by approximately 2.5% despite high interest rates. Consumer spending, a strong labor market, and govern-

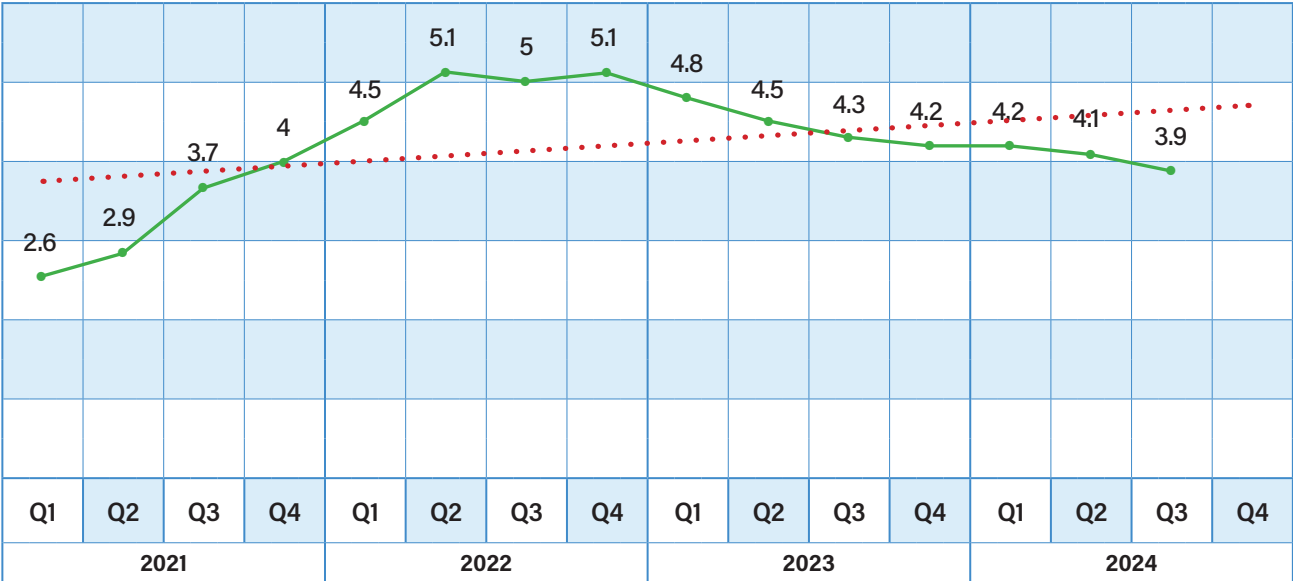
Chart C1 – Real GDP  
(Percent change from preceding quarter)



Source: U.S. Bureau of Economic Analysis



**Chart C2 – Total Compensation for Civilian Workers**  
(Percentage changed from preceding 12-months)



Source: U.S. Bureau of Labor Statistics

ment investments in infrastructure helped sustain momentum. However, sectors like housing and construction faced headwinds due to rising borrowing costs. Entering 2024, growth remains positive but at a moderated pace as businesses and consumers adjust to higher costs. While inflation has eased, economic uncertainty persists, with GDP expansion depending on labor market stability, Fed policy, and global economic conditions.

### Wages

Driven by inflation, labor shortages, and a competitive job market, employee compensation for civilian workers has risen significantly. According to the U.S. Bureau of Labor Statistics (BLS), total compensation—including wages, salaries, and benefits—has increased steadily each year. In 2021 and 2022, wages grew at their fastest pace in decades as employers struggled to attract and retain workers amid the Great Resignation. Private sector wages saw annual increases of over 4%, with some industries experiencing even higher growth. **C2**

However, these gains were often offset by inflation, which peaked at 9.1% in mid-2022. As a result, real (inflation-adjusted) wages declined during much of 2022, eroding purchasing power for many workers. In 2023 and early 2024, compensation growth remained strong, but inflation slowed, allowing for modest real wage gains.

Benefits costs have also risen, particularly for health insurance and retirement contributions, adding to employer expenses. Sectors like construction have had to offer higher wages and improved benefits to address persistent labor shortages. Looking ahead, compensation growth may moderate as the job market stabilizes, but demand for skilled labor, particularly in construction and manufacturing, will likely keep upward pressure on wages in those fields.

### Unemployment

The U.S. unemployment rate has undergone significant shifts, reflecting the economy's post-pandemic recovery, labor shortages, and monetary policy effects. In early 2021, unemployment remained

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elevated at around 6% as businesses reopened and rehired workers. However, strong economic growth and government stimulus fueled rapid job creation, bringing unemployment down to 3.9% by the end of the year. **C3**

In 2022, despite rising inflation and interest rate hikes, the job market remained resilient. Unemployment hovered between 3.5% and 3.7% for most of the year, indicating a tight labor market. However, employers struggled to fill positions, particularly in industries like construction and manufacturing, where skilled labor shortages persisted.

In 2023, the labor market remained strong, with unemployment staying near historic lows at around 3.5%–3.8%, even as the Federal Reserve raised interest rates to slow economic growth. Job openings declined slightly, but demand for workers remained high, especially in sectors like healthcare, hospitality, and construction.

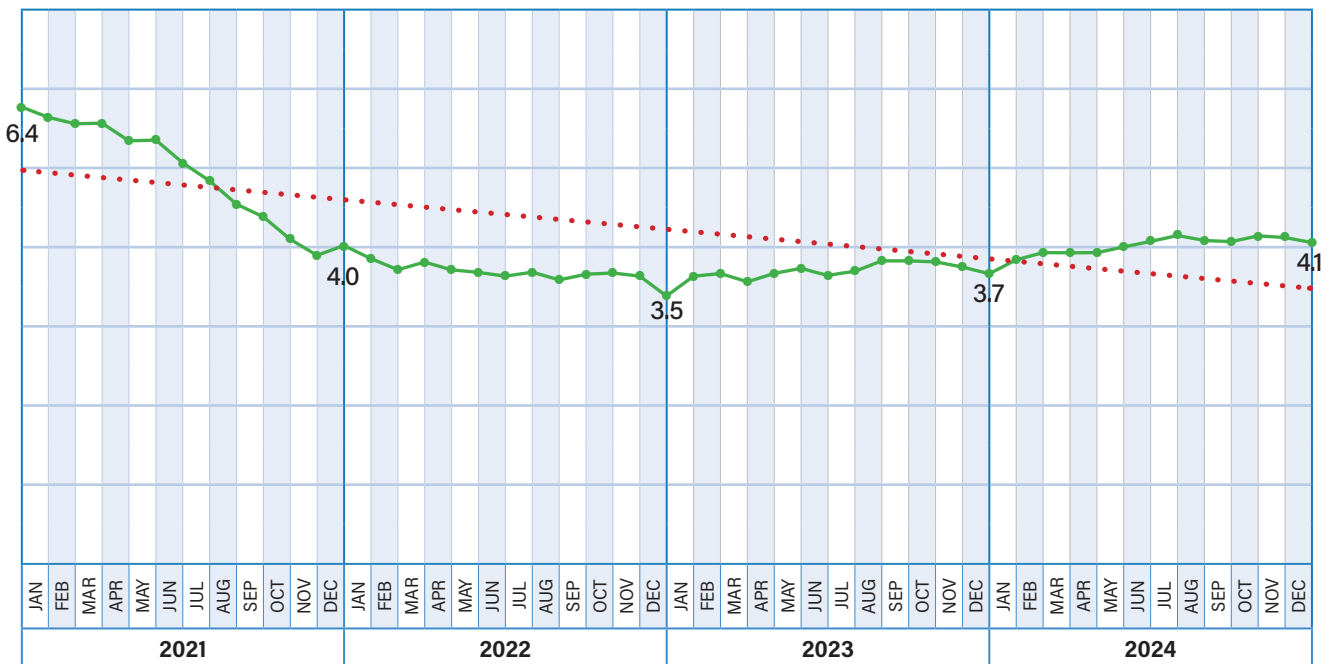
As 2024 unfolds, unemployment remains low, though signs of softening have emerged. While job growth continues, some industries face hiring slow-downs due to higher borrowing costs and economic uncertainty. However, overall labor market conditions remain favorable, supporting continued wage growth and consumer spending.

### Manufacturing

Since 2021, manufacturing employment has seen steady growth, driven by strong demand, supply chain adjustments, and government investments. After initial pandemic-related job losses, the sector rebounded, adding hundreds of thousands of jobs in 2021 and 2022. **C4**

However, labor shortages and rising wages created challenges. In 2023, manufacturing employment remained stable, supported by infrastructure

**Chart T3 – Civilian Unemployment Rate**  
(Percentage changed monthly)



Source: U.S. Bureau of Labor Statistics

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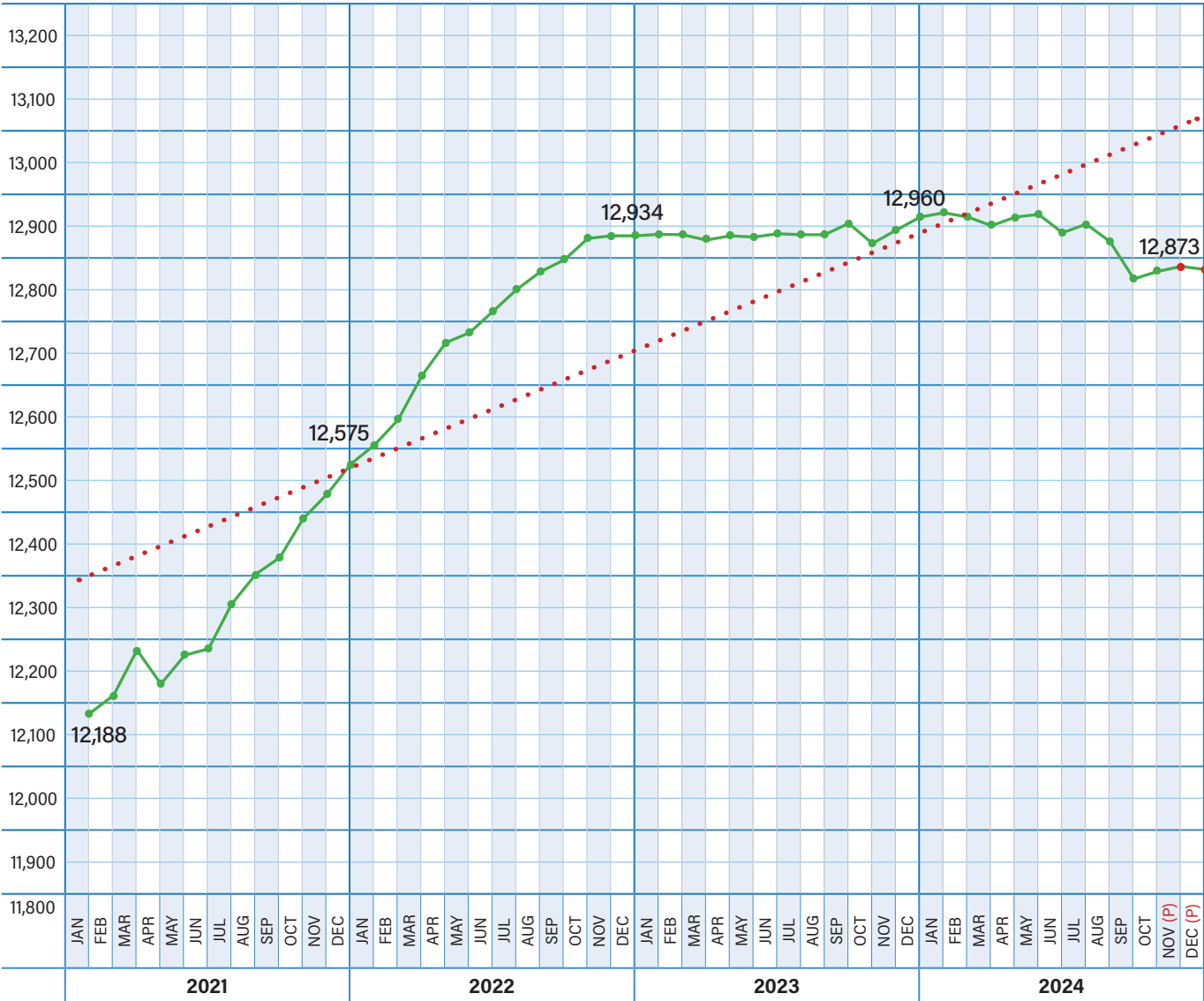
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**Chart C4 – U.S. Manufacturing Jobs**  
(in thousands)



Source: U.S. Bureau of Labor Statistics  
*P = Projected*

spending and reshoring efforts, though higher interest rates slowed expansion in some areas. Entering 2024, job growth has moderated, with some sectors facing softer demand. Despite this, manufacturing remains a key employment driver, particularly in advanced manufacturing, clean energy, and semiconductor production.

**Consumer Sentiment**

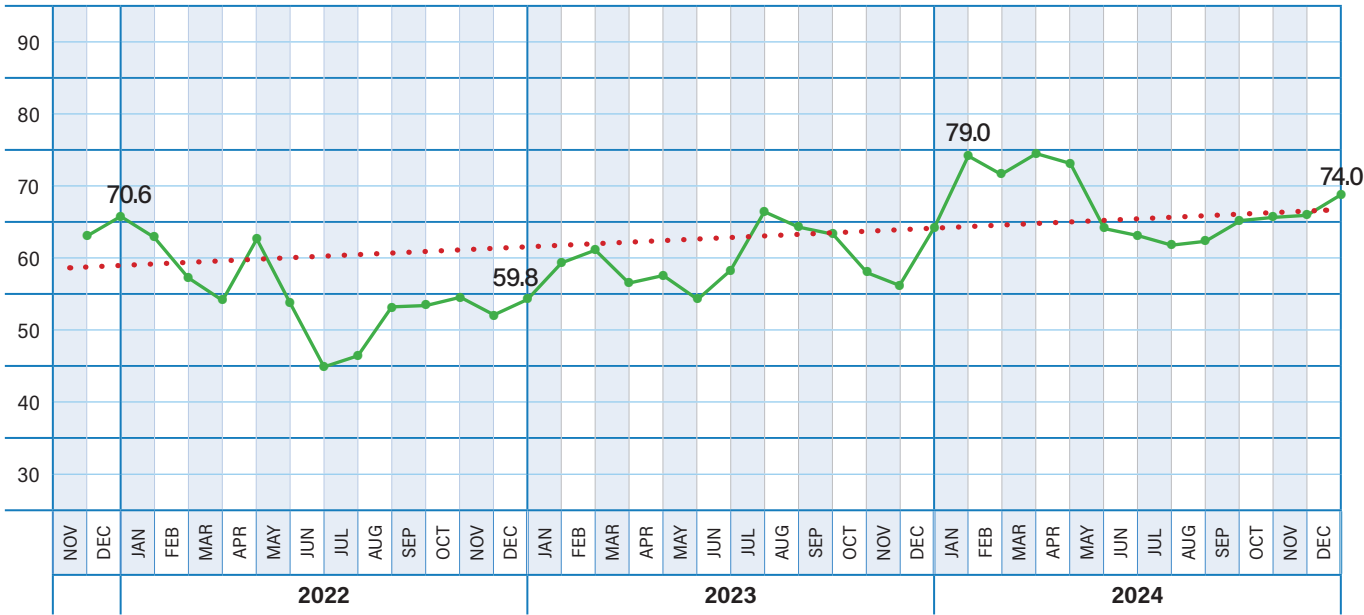
The University of Michigan’s Consumer Sentiment Index has fluctuated significantly over the past four years, reflecting economic uncertainty, inflation, and interest rate changes. In 2021, sentiment was

relatively strong as the economy rebounded from the pandemic, though concerns about rising prices emerged. By mid-2022, sentiment plunged to a record low of 50.0 due to soaring inflation, supply chain disruptions, and Federal Reserve rate hikes, indicating widespread consumer pessimism. **C5**

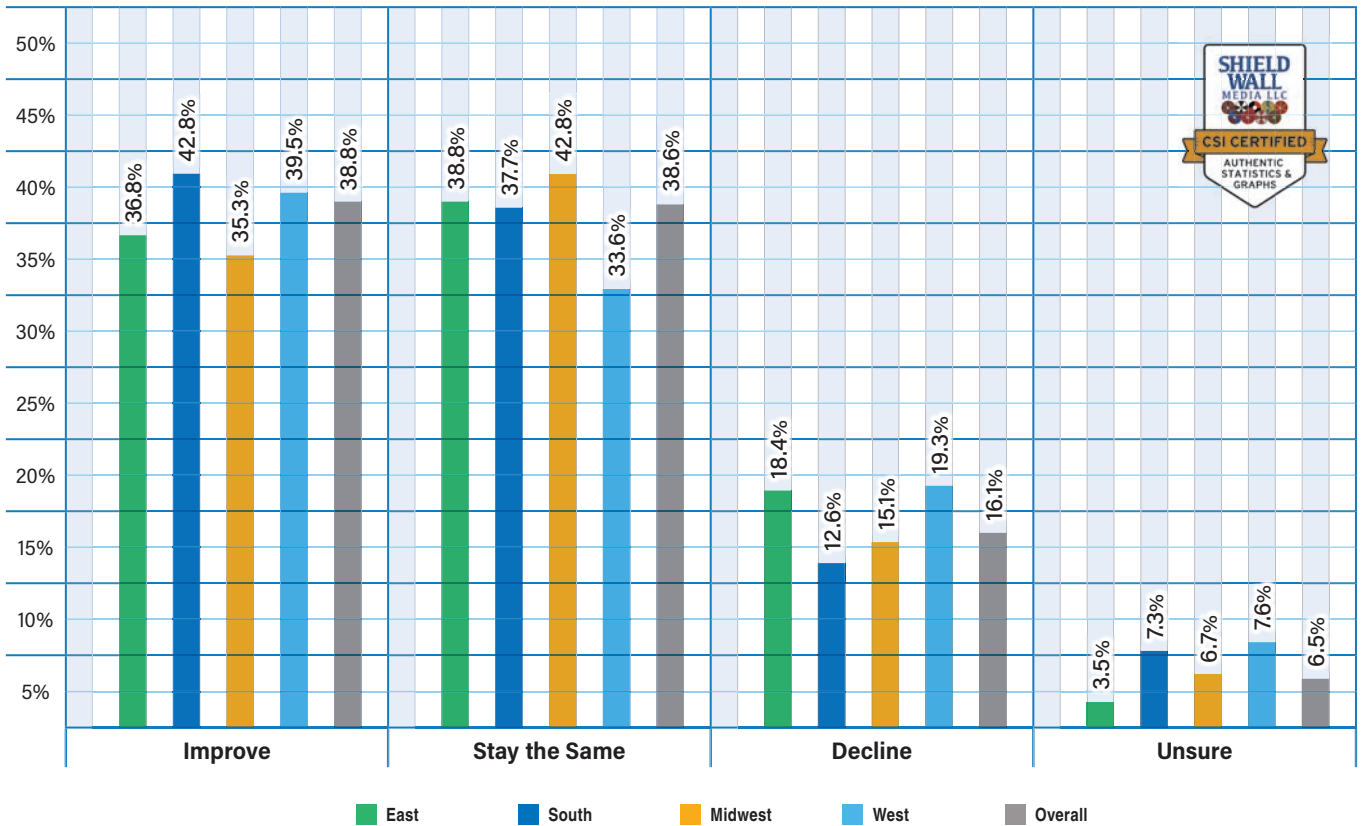
In 2023, as inflation eased and the job market remained strong, consumer sentiment gradually improved, though it remained below pre-pandemic levels. Rising borrowing costs and economic uncertainty kept confidence restrained. By early 2024, sentiment showed continued recovery, reaching its highest level in over two years as inflation moderated and wage growth outpaced price increases.



**Chart C5 – Consumer Sentiment Index**  
(University of Michigan)



**Chart C6 – General Business Sentiment**  
(by Location)





However, consumer outlooks remain sensitive to economic conditions, with factors such as interest rates, job stability, and geopolitical events influencing future sentiment trends.

### CSI Survey Attitudes Toward the Future

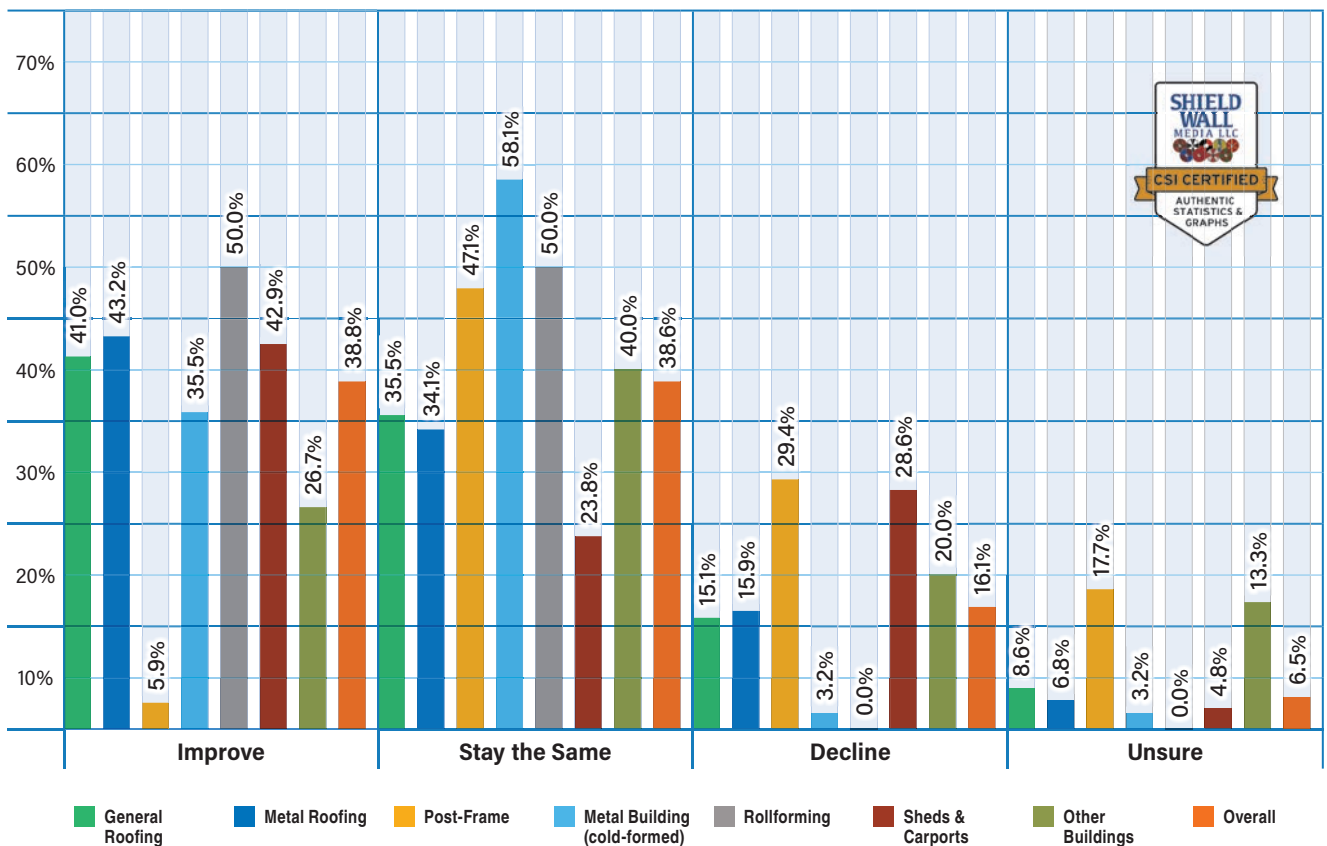
When asked what the business climate will be across the industry, 546 respondents were almost perfectly divided between saying it will improve (38.8%) or stay the same (38.6%).

The CSI survey went out after the November 5 national election, so there was no ambiguity about

how economic policies might be implemented. Our survey takers had every reason to understand that the changes in the administrative and legislative branches would be certain and the policies discussed during the election would be put in place.

This represents a bit of sea change over the last several years where there was considerable partisan sentiment about handling inflation and other issues affecting the economy. Now, there is one sustained vision, although the University of Michigan's Joanne Hsu, director of its Surveys of Consumers, said in December 2024, "Uncertainty over both short- and long-run inflation expectations... are considerably higher now than a year ago. One reason for the elevated

**Chart C7 – General Business Sentiment**  
(by Primary Area of Construction)



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uncertainty is the dispersion in beliefs about the consequences of anticipated economic policy changes.”

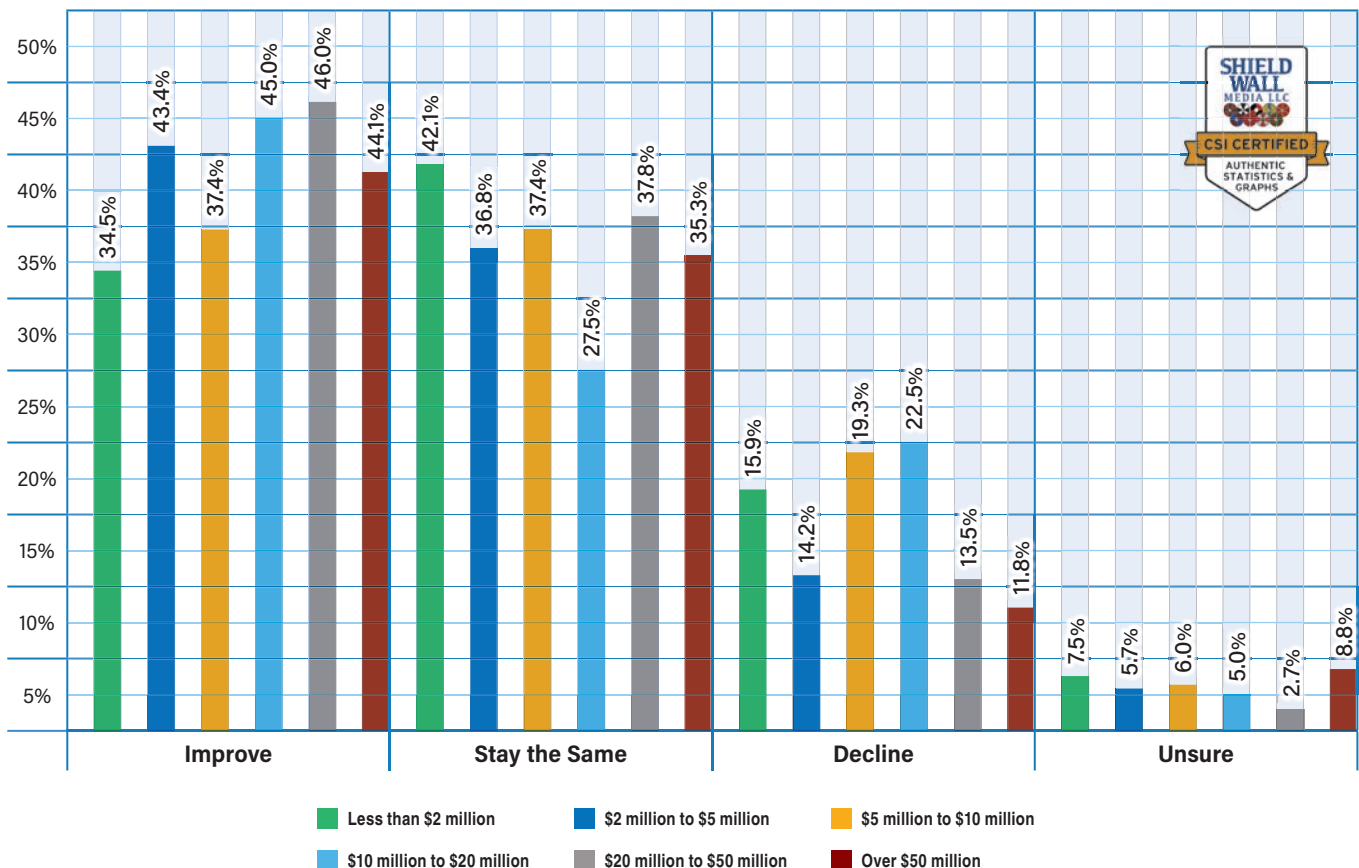
So, maybe it's not much of a surprise that the sentiments expressed about the future in this year's survey were not significantly different than last year. In the previous survey, 32.4% of respondents expected the general business environment to improve in 2024, and this year it rose slightly to 38.8%. Those who thought the economy would worsen in the next year declined slightly this year to 16.1% of survey takers versus 18.9% last year.

It is notable that there was less uncertainty. Overall, only 6.5% of respondents expressed they were unsure about the business environment in 2025, whereas 7.9% felt uncertain about 2024.

Across the different regions, there was very little variation about business sentiment, although people in the South did tend to be a little more positive with more than 80% of them saying the economy would improve or stay the same. Western respondents, however, were more inclined to say the economy would decline with 19.3% reporting such. **C6**

When we broke down how respondents viewed the general business climate based on their primary area of construction, a couple of significant outliers quickly drew notice. First, was companies in the post frame segment were far less likely to see the business climate in 2025 as improving with only 5.9% reporting that, which was well below overall sentiment of 38.8% of respondents. Companies in the post frame seg-

**Chart C8 – General Business Sentiment**  
(by 2024 Gross Sales)



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ment not only didn't expect improvement in 2025, 29.4% thought the business climate would decline. **C7**

Mark Stover, president, Perma-Column LLC, Osasian, Ind., doesn't share that sentiment. He says he's optimistic about 2025. "We have a lot of quotes going out," he says. "Big ones."

About half of respondents who said rollforming was their primary business looked for an improved business climate, and none of them expected any decline. When you add "improved" responses to "stay the same," the survey takers in the cold-formed metal building segment (93.5%) and temporary or modular building segment (90.9%) were the most optimistic.

We also looked at the general business sentiment based on how large the company was. For the most part, larger companies (greater than \$10 million gross sales in 2024) were more likely to say the economy would improve in 2025. Over 45% of them felt that. And smaller companies (less than \$2 million in annual sales) were less inclined to see improvement with 34.5% of them feeling positive. **C8**

While the big companies were more likely to be optimistic, they were also more likely to be pessimistic. Respondents from companies with gross sales between \$10 and \$20 million felt the economy would decline in greater percentages (22.5%) than other cohorts.

## SURVEY PARTICIPANT PROFILE

This year, the annual Construction Survey Insights market report had 565 respondents, nearly twice as many as participated in the inaugural report in 2024. The respondents shared their knowledge on the industry, their specific markets, and their businesses.

### — LOCATION —

Survey takers represented all regions of the United States, but the largest group (34.8%) were located in the South. Among the other three regions, participation was nearly dead even. There were a small number of participants in Canada or with a national presence.

### — PRIMARY AREA CONSTRUCTION —

The largest cohort of respondents to this year's survey identified general roofing (25.7%) as their primary area of construction. When combined with metal roofing specialists (7.8%) and other roofing contractors, such as gutter installers (3.9%), the total percentage of respondents in the roofing category represented more than a third of all respondents. Last year, 14.5% of respondents said manufacturing was their primary area and that was almost exactly equaled this year with 14.7% focusing on that area. We had a number of respondents who selected other (11.2%) and they identified as remodeling contractors, handymen, and building consultants among other selections.

### — OTHER AREAS OF CONSTRUCTION —

Not surprisingly, respondents did a lot more than specialize in just one building type. Again, companies engaged in general roofing (36.5%) were the most common respondents, but metal roofing (24.5%) and wood-framed buildings (22.2%) were done by a significant portion of the survey takers as well.

### — ROLES IN CONSTRUCTION —

Just over 40% of the respondents in the survey said they were builders or contractors. About a quarter (24%) identified themselves as designers, and 17% said they were material suppliers while 17.2% were manufacturers.

### — PRIMARY MARKET SEGMENT —

More than 70% of survey takers worked primarily in residential construction with 51.6% doing single-family buildings and 19.7% doing multifamily buildings. Just over 10% identified their primary market segment as agricultural, 12.4% commercial, and only 5.9% industrial.

### — OTHER MARKET SEGMENTS —

When asked what other market segments they worked in, our respondents again leaned toward residential with 54.8% participating the single-family market and 33.5% in multifamily. A much larger percentage were participating in commercial (25.1%) than had identified it as their primary market segment.

### — 2024 GROSS SALES —

Those companies that participate in the construction industry as either designers or contractors tend to be small. There has been very little consolidation in these areas, although there are large firms in both. So, it's not surprising that 45.2% of the survey takers had gross sales less than \$2 million in 2024. The next largest cohort, between \$2 million and \$5 million, only had 19.2% involvement in the survey. At the upper end, 61% of respondents reported gross sales greater than \$50 million in 2024.

### — PERCENTAGE OF NEW CONSTRUCTION VS. REMODEL —

Just about a third of our survey takers last year said more than 60% of their work is new construction. This year, almost half (45.3%) did more than 60% of their work in new construction with 20.4% saying almost all their work, i.e., more than 90%, was new. Companies that did roughly half and half new vs. remodel accounted for 28.1% of respondents.





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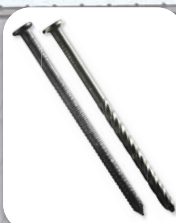
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## SECTION 2

# GENERAL CONSTRUCTION INDUSTRY DATA



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# SECTION 2

## GENERAL CONSTRUCTION INDUSTRY DATA

**D**riven in no small part by the investments as a result of the Infrastructure Investment and Jobs Act (IIJA), the construction industry has been on a steady rise over the last two years with increased spending and greater employee demand. In spite of rising interest rates and their effect on the housing market, the industry overall has been a very positive point in the U.S. economy.

### Census Data and Association Forecasts

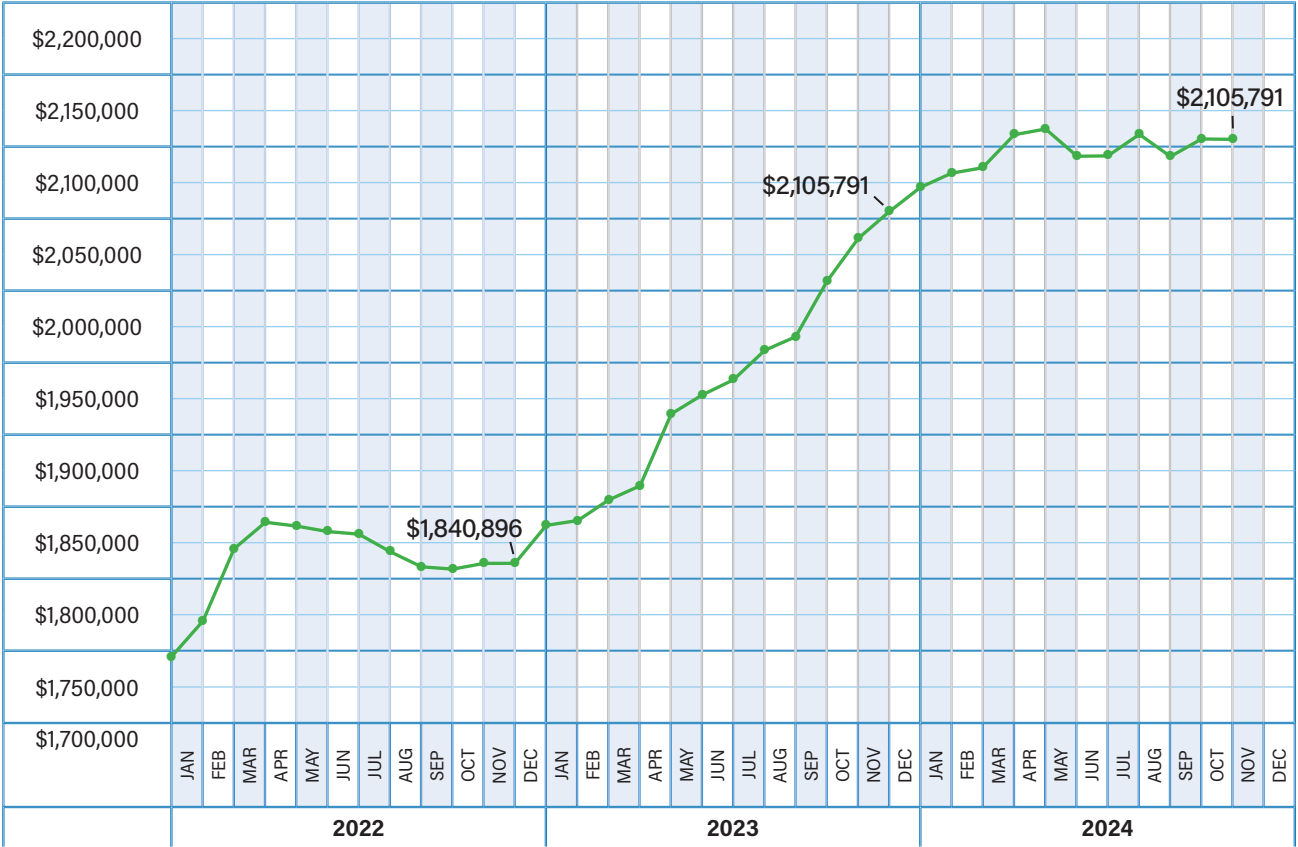
Between 2022 and 2024, U.S. construction spending exhibited notable growth. In 2022, total construction expenditures were approximately \$2.02

trillion. By December 2024, this figure had risen to \$2.19 trillion, marking an increase of about 8.5% over the three-year period. **C1**

Residential construction played a significant role, accounting for 43% of all construction spending in 2024, with expenditures reaching \$930 billion annually. Within this sector, single-family homes comprised 45%, multi-family units 15%, and renovations 40%.

The implementation of IIJA contributed to this upward trend, with approximately \$400 billion allocated to over 40,000 projects by November 2023. By November 2024, funding had increased to \$568 billion for 68,000 projects, indicating accelerated investment in infrastructure.

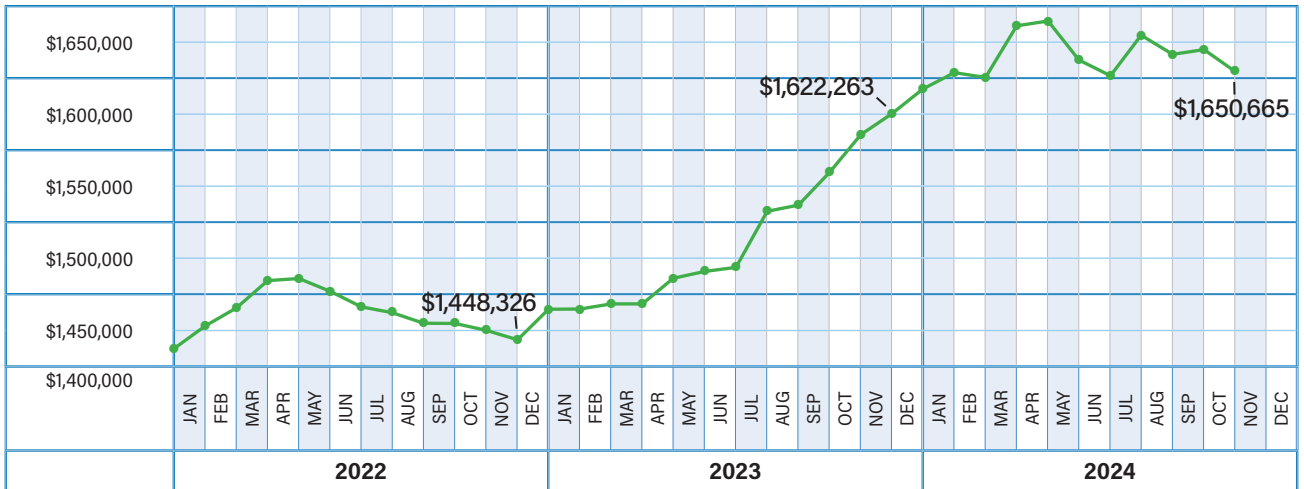
**Chart C1 – Annual Rate of Total Construction Spending**  
(in millions of dollars)



Source: U.S. Census Bureau



**Chart C2 – Annual Rate of Private Construction Spending**  
(in millions of dollars)



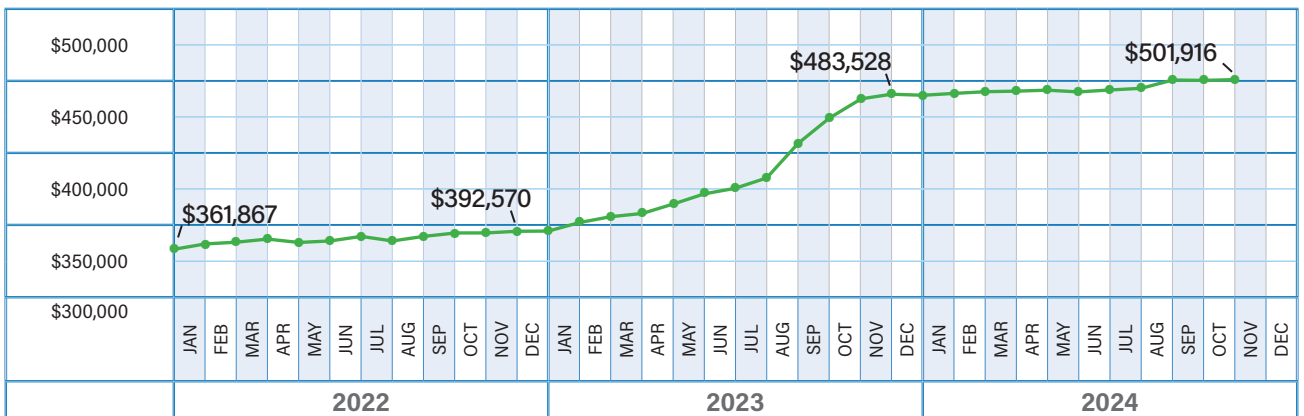
Source: U.S. Census Bureau

Overall, the period from 2022 to 2024 saw steady growth in U.S. construction spending, driven by significant investments in both residential and infrastructure projects.

Total private construction spending from 2022 to 2024 showed fluctuations driven by economic conditions, interest rates, and supply chain factors. In

2022, private construction spending was robust, fueled by post-pandemic demand, low interest rates early in the year, and ongoing residential growth. However, as the Federal Reserve raised interest rates to combat inflation, residential spending slowed, impacting overall private construction investment. **C2**

**Chart C3 – Annual Rate of Public Construction Spending**  
(in millions of dollars)



Source: U.S. Census Bureau

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In 2023, spending growth remained mixed. The residential sector faced affordability challenges due to high mortgage rates, leading to a slowdown in new home construction. However, multifamily and nonresidential sectors, including manufacturing and infrastructure-related projects, saw gains, buoyed by reshoring efforts and federal incentives.

By 2024, private construction spending showed signs of stabilization. Easing inflation and expectations of potential interest rate cuts improved housing demand, supporting residential construction. Nonresidential investment, particularly in industrial and commercial projects, remained strong, driven by technology sector growth and federal investments in manufacturing. Despite lingering economic uncertainties, private construction spending in 2024 reflected a more balanced trajectory, with resilience in nonresidential sectors offsetting continued affordability concerns in housing.

Since 2022, public construction spending in the United States experienced notable growth. In 2022, the federal, state, and local governments collectively invested nearly \$451 billion in public construction projects. According to the U.S. Census Bureau, public construction spending in December 2024

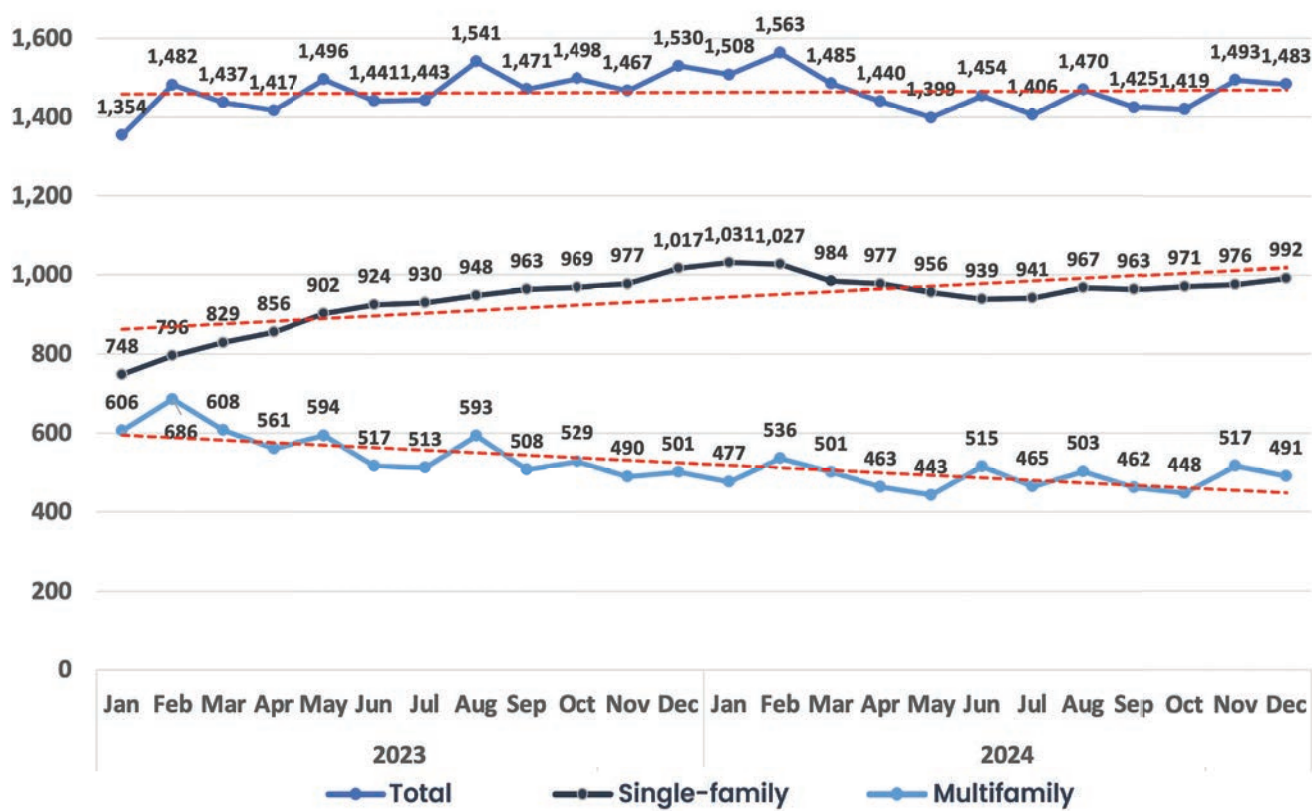
was approximately \$503.6 billion, measured at a seasonally adjusted annual rate. **C3**

This upward trend was significantly influenced by the IJJA. Spending on highway and street construction saw consistent increases, reflecting federal and state priorities in transportation upgrades. Educational facility construction also trended upward, supported by local bond measures and funding for school modernization. Additionally, public spending on water supply and sewage systems expanded as cities focused on climate resilience and sustainability.

Housing starts in 2023 faced challenges from high mortgage rates, persistent inflation, and supply chain disruptions. The year began with a slowdown as affordability concerns dampened demand. However, as inflation cooled and interest rates stabilized in late 2023, homebuilder confidence improved, leading to a gradual recovery. **C4**

Single-family housing starts saw a modest rebound, driven by pent-up demand and a shortage of existing homes. Multifamily starts, however, declined due to oversupply in some markets and tightening financing conditions. Builders responded by focusing on smaller, more affordable homes and offering incentives to buyers.

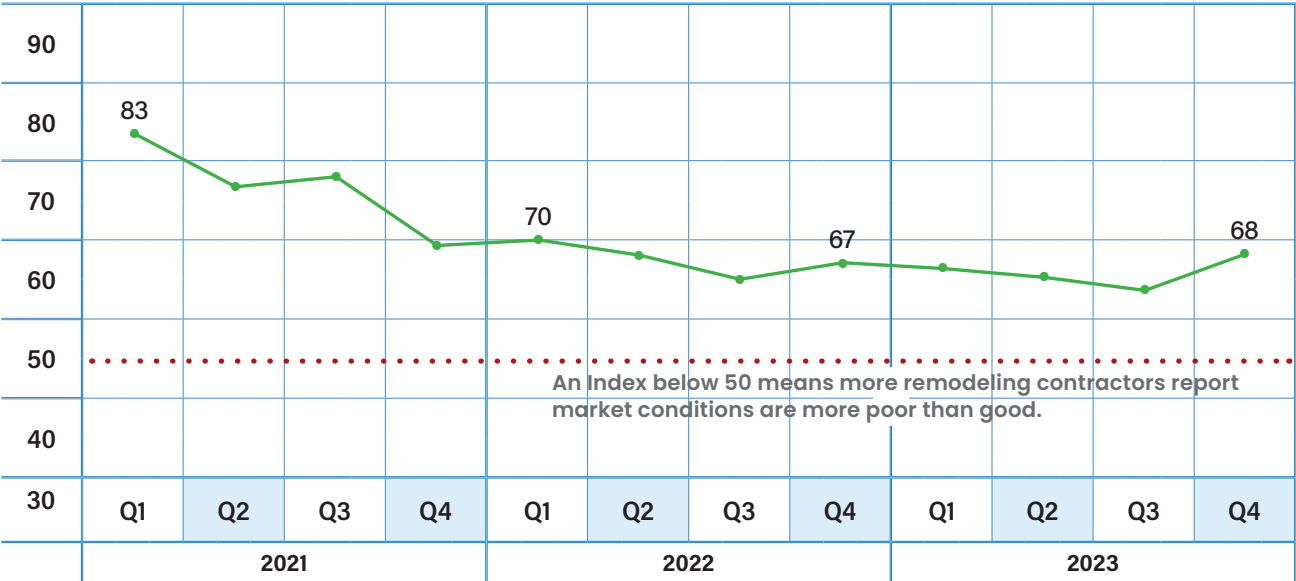
**Chart C4 – Seasonally Adjusted Rate of Housing Starts**  
(in thousands)



Source: U.S. Census Bureau



Chart C5 – NAHB Westlake Royal Remodeling Market Index  
(current conditions)



In 2024, housing starts showed signs of strengthening as the Federal Reserve signaled potential rate cuts, improving affordability. Supply chain conditions also improved, helping construction costs stabilize. However, regulatory constraints, labor shortages, and high land costs remained barriers to rapid expansion.

The National Association of Home Builders noted that builders added more supply in response to the housing affordability crisis, despite elevated mortgage interest rates and higher construction costs.

The NAHB Remodeling Index (RMI) from 2022 to 2024 has shown fluctuating trends in the remodeling industry, however it has remained above the 50 point mark, indicating remodeling contractors felt market conditions were good. In 2022, the index remained strong due to high demand for home improvements, driven by pandemic-related shifts in work and lifestyle. However, by 2023, rising material costs and interest rates began to impact consumer spending and project affordability. In 2024, the RMI stabilized, showing modest growth as the market adapted to economic pressures. **C5**

Between 2023 and 2024, the U.S. construction industry experienced notable employment growth. In the first eight months of 2024, approximately 1.475 million jobs were added, averaging 184,000 new positions per month. This rate is slightly below the 251,000 monthly average gain observed in 2023. **C6**

State-level data reveals that between June 2023 and June 2024, 35 states added construction jobs, while 14 states and the District of Columbia saw declines. Texas led with an increase of 36,100 jobs (4.4%), followed by Florida with 29,900 jobs (4.8%), Michigan with 14,400 jobs (7.6%), and Nevada with 12,800 jobs (11.5%).

In spite of a skilled labor shortage, the construction sector employed over 8 million people in November 2024, marking the highest employment level since 2008.

CSI Survey Attitudes

Shield Wall Media surveyed more than 550 contractors, designers, manufacturers, and suppliers who answered questions about the construction in-

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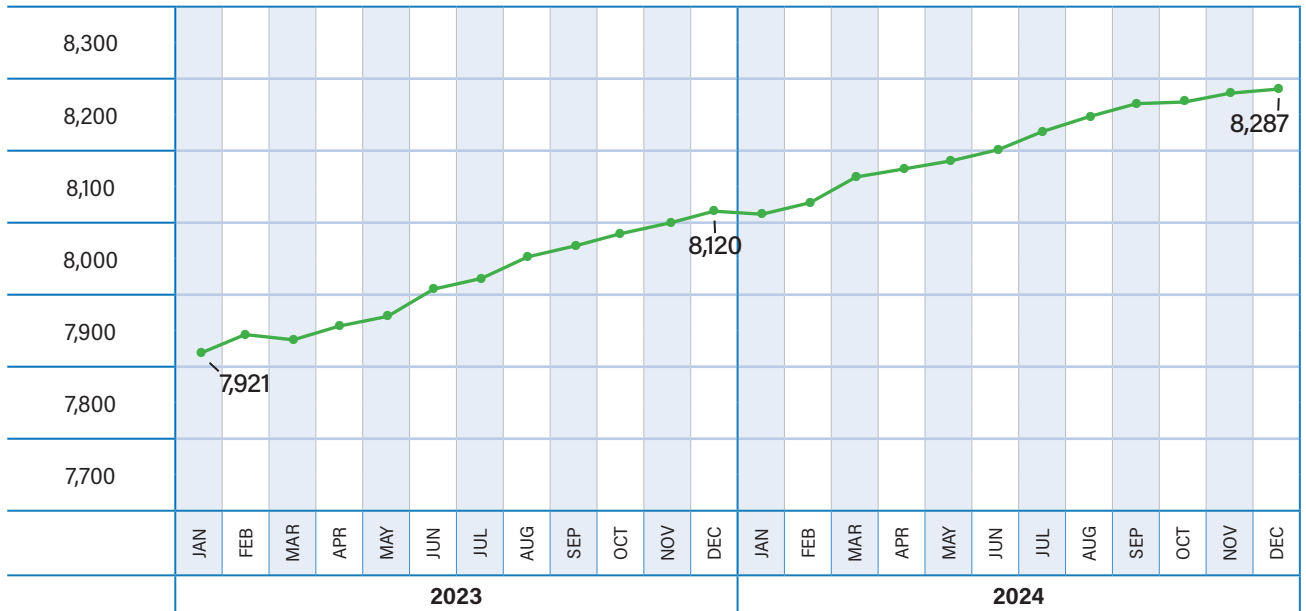


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**Chart C6 – Total Construction Employment 2023-2024**  
(in thousands)



Source: U.S. Bureau of Labor Statistics

**Chart C7 – Gross Sales Growth 2023-24 vs. Expected Growth in 2025**

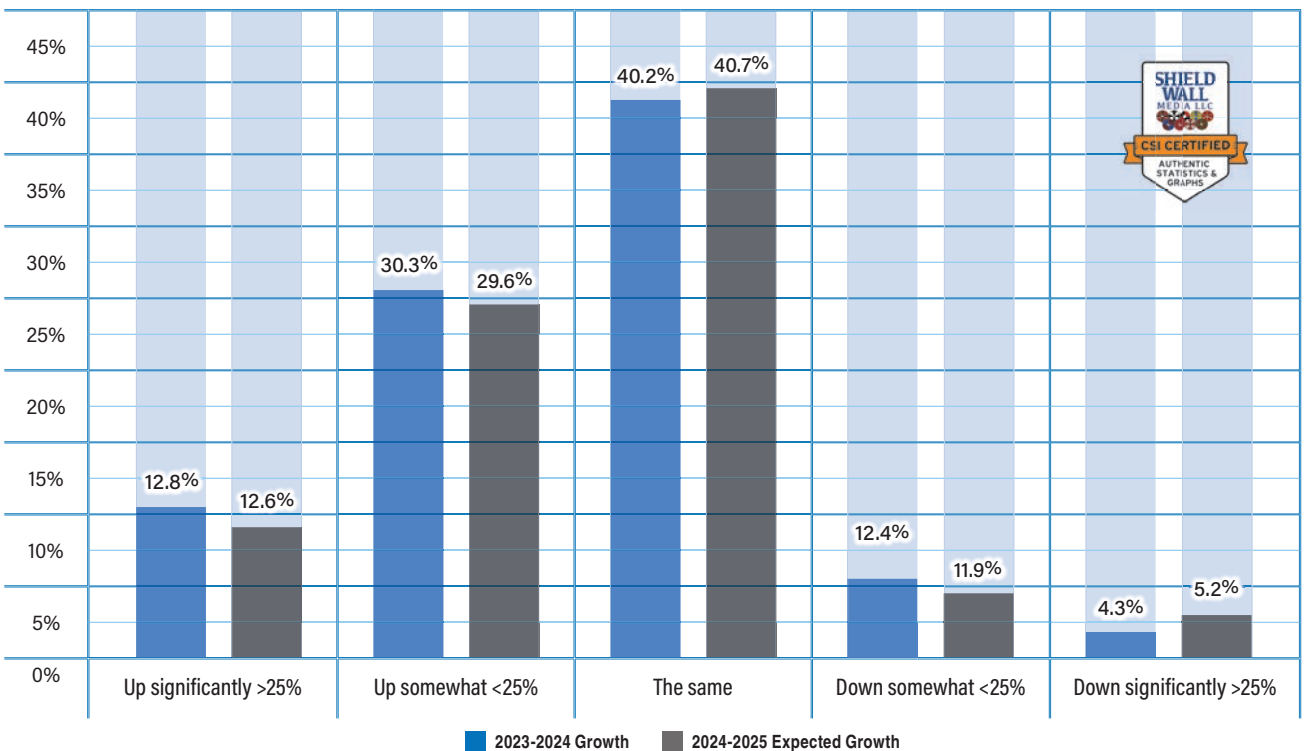
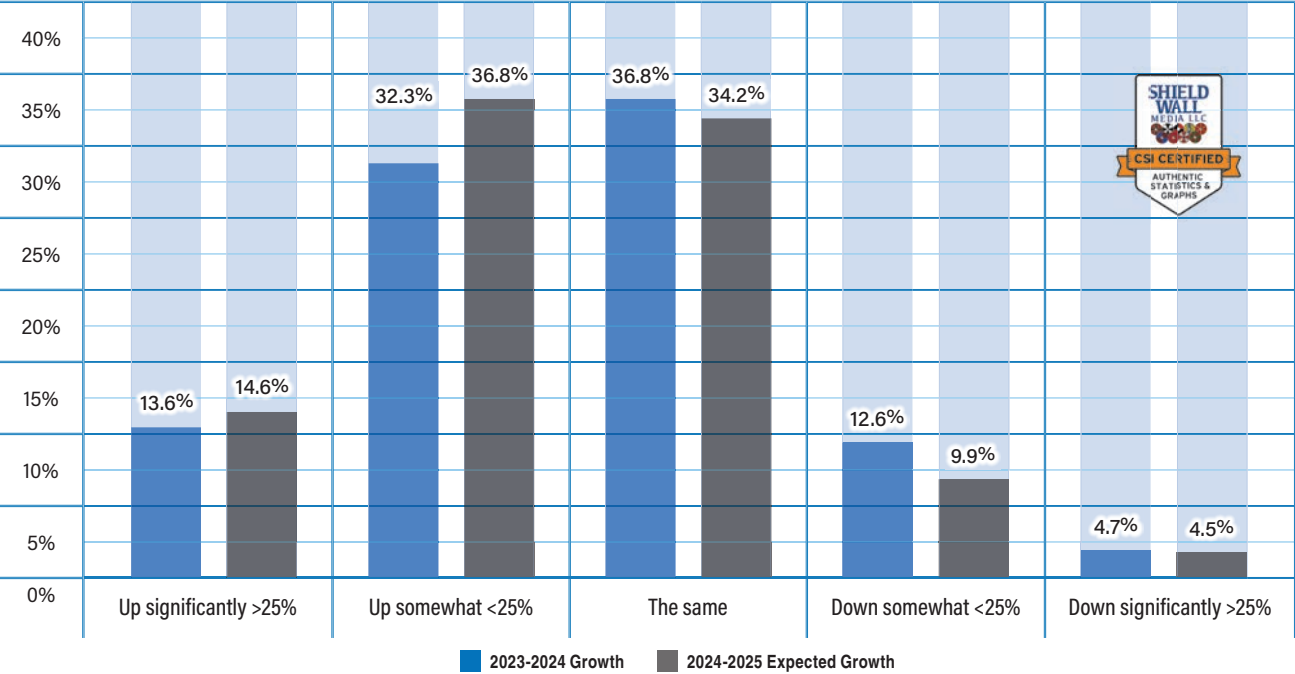




Chart C8 – Compare Profitability Growth 2023-24 vs Expected Growth in 2025



dustry performance in 2024 and what they expected to see in 2025.

When it comes to industry and economic trends, all perceptions are local. No matter how the industry or market segment is doing, what matters is whether their business is growing and profitable. The following charts show how the respondents felt about the industry through the lens of their businesses.

We asked survey takers about their gross sales growth in 2024 compared to 2023, and how they expected the growth to change in 2025. One very quick conclusion could be drawn. Our respondents didn't expect much change from 2024 to 2025. **C7**

Just under 13% said business was up significantly in 2024, and almost the exact same percentage said they expected the same kind of growth in 2025.

It didn't matter if we asked if they were up somewhat (less than 25%), business held steady, declined somewhat (less than 25%) or down more than 25%,

the percentage of survey takers who said their business would continue on the same growth trajectory was almost exactly the same.

Mark Stover, president, Perma-Column LLC, Ossian, Ind., put some the activity in a different perspective. "The pace of activity has slowed down," he says, "and is more normalized and seasonal." After COVID, the pace and normality seemed to be upended.

Unless a company experienced steady, controlled growth, it's incredibly difficult to match growth with profitability. Too often gross sales jump so rapidly, that costs accelerate beyond the normal mark-up and profits plummet. **C8**

Interestingly, respondents were more likely to report significant profitability increases than gross sales jumps. As mentioned earlier, 12.8% of respondents reported gross sales increases of greater than 25% in 2024, but 13.6% said profits increased more than 25%. The difference in expectations for 2025 among those who expected significant gross

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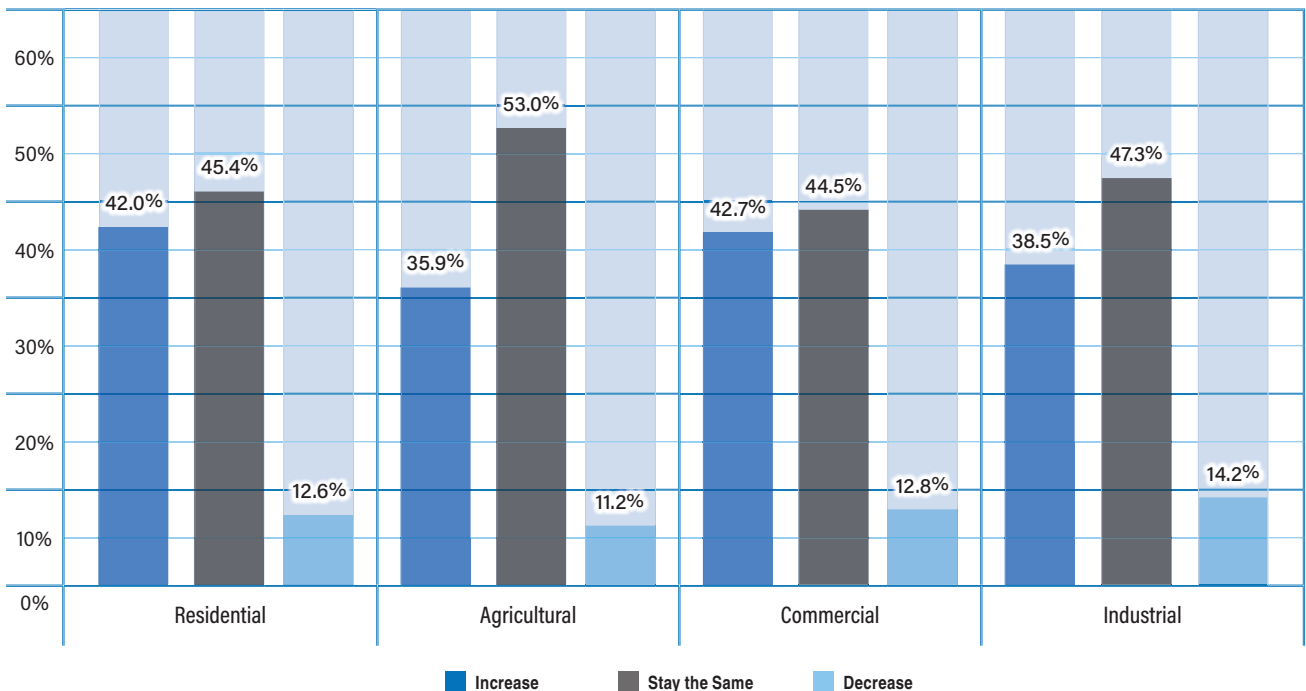
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**Chart C9 – Expected Growth by Market Segment**

sales increases (12.6%) also was less than those who expected significant profitability increases (14.6%)

The real differences showed among respondents who had more modest gross sales increases. In 2024, 30.3% of our survey takers say gross sales increased less than 25% and 29.6% expected a similar increase in 2025.

But far more companies reported modest profit increases than modest gross sales increases. Last year, 32.3% saw profits increase less than 25%, which isn't a lot more than reported gross sales increased, but 36.8% expect profitability to improve moderately in 2025. That is a noticeable difference to those expecting gross sales to climb moderately next year.

The following charts look at the overall expected growth in different market segments, then dig into what the growth in specific regions by each market segment is expected to be. **C9**

More of our respondents expected to see growth in the commercial (42.7%) and residential (42%) markets than either agricultural (35.9%) or industrial (38.5%). But a much higher percentage of survey takers (53%) believed the agricultural market would hold steady than thought any of the other markets would remain constant.

Consequently, expectations for declines in residential, agricultural, and commercial building segments were almost identical. And just slightly more (14.2%) of respondents expected a decline in the industrial market.

Chance Shalosky, Roofing Product Manager, ProVia, says, "Anticipated economic recovery and continued growth in construction activities, especially in sectors like residential housing and commercial developments, are likely to increase demand for reliable and innovative roofing solutions."

When we asked if respondents had plans to expand their business in the next year or the immediate future, we received slightly different responses between last year's survey and this year's. In the 2024 survey, nearly 30 percent of respondents expected to expand in 2024. But only 22.8% of respondents in this year's survey had immediate expansion plans. **T10**

However, this year's survey takers were more optimistic about future expansion plans. Ben Nystrom, CEO of MWI Components, Spencer, Iowa, says, "Everyone I talk to – builders, wholesalers, lumber yards, and rollformers – say they are busy booking and quoting jobs."

There are a lot of positive signs, but companies still seem to be holding capital in check against a rainy day.

Of the top ten things our respondents plan to add to their businesses in 2025, the first two are employees – both construction and support. The chronic skilled labor shortage makes it obvious that a third of respondents would say they need construction employees. But the 30.6% who say they need support staff suggests that growth is outstripping their ability to keep up with all the back office work

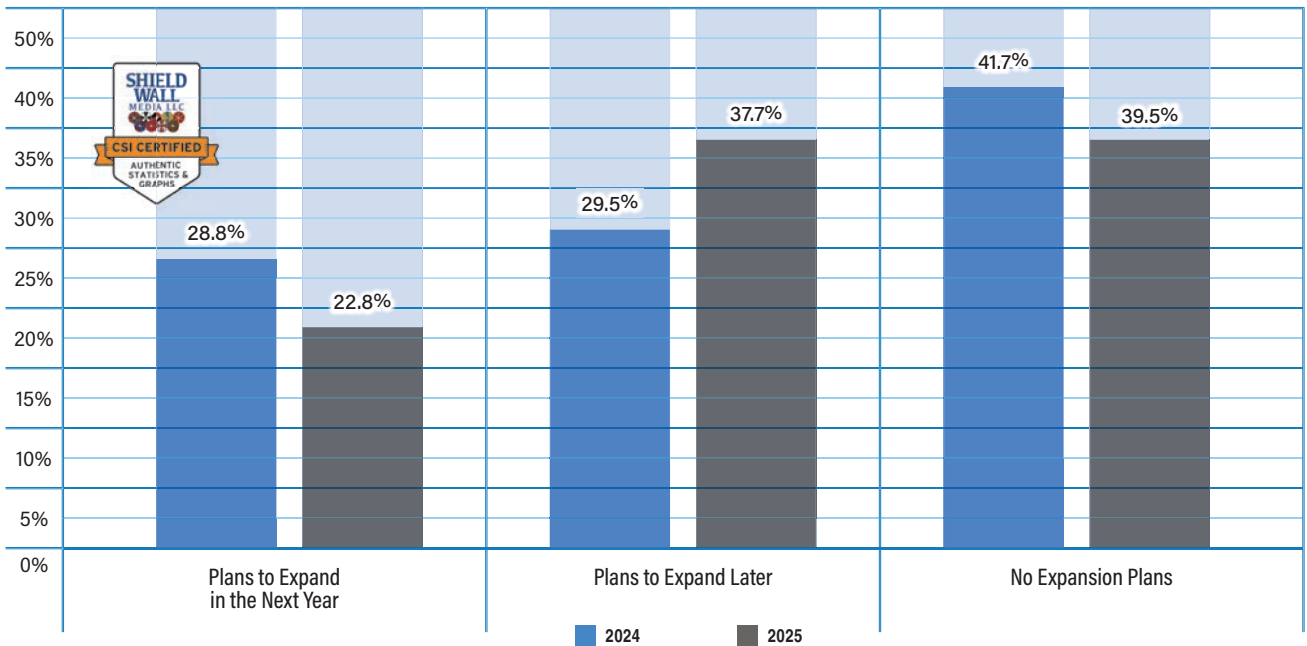


needed to control growth and serve customers. That can be good for profitability (see the previous charts) in the short run but can slow growth in the long run. **C11**

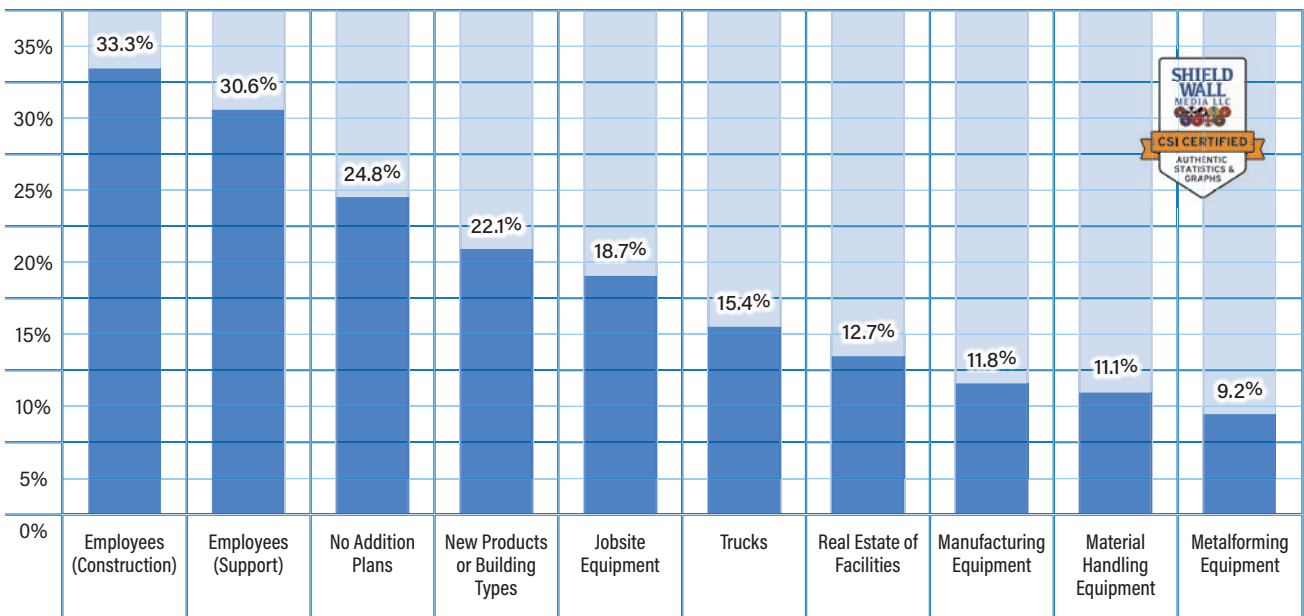
The bottom six items (jobsite equipment, trucks, real estate or facilities, manufacturing equipment, material handling equipment, and metal forming equipment) all support the ongoing work and represent an investment – either through a capital influx or leasing contracts – in the company.

Our respondents pointed to two items at the top of their list that are related to controlling cost of materials (51.3%) and inflation (31.7%). That more than half of survey takers identified concerns about the cost of materials as one of their biggest challenges in 2025, speaks to the ongoing difficulty of managing those costs since the beginning of the pandemic. First it was supply chain issues (no longer a challenge for most respondents) and now it is increasing inflation and worries about tariffs. **C12**

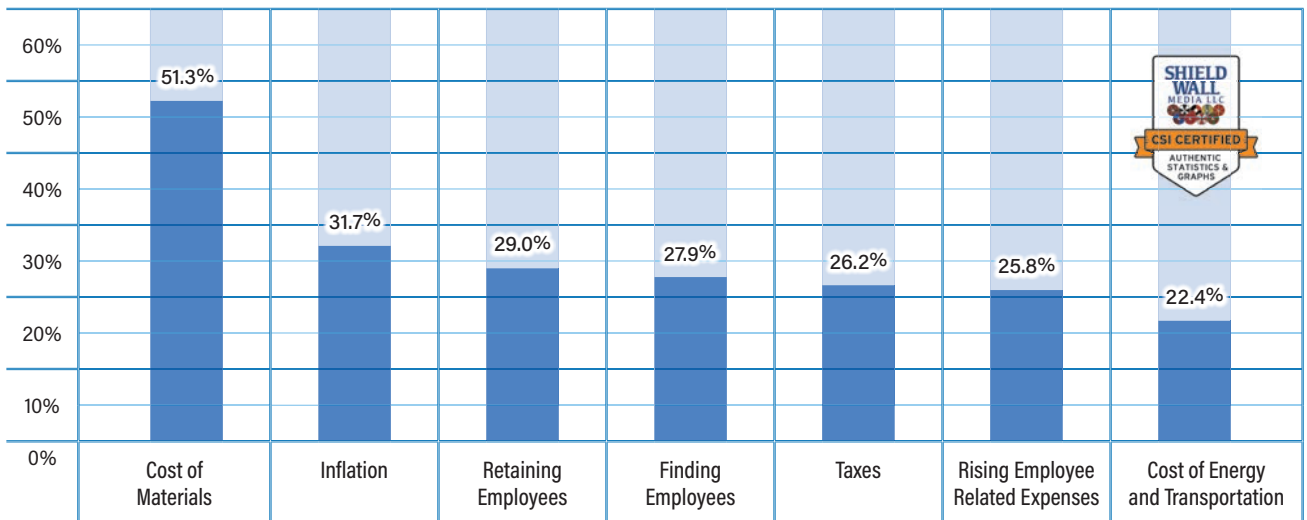
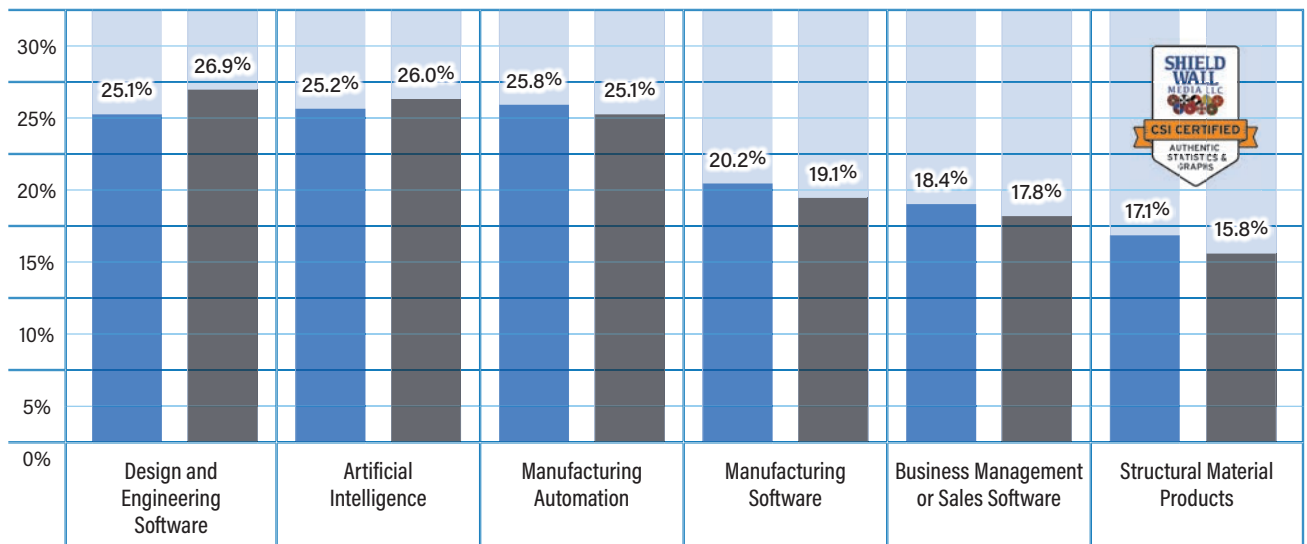
**Chart C10 – Expansion Plans**



**Chart C11 – Plan to Increase in 2025**





**Chart C12 – Top Challenges in 2025****Chart C13 – New Product or Technology Impact**

Retaining employees in a rapidly increasing costs environment is always a challenge. Combine that with the now decades-old difficulty of finding qualified skilled labor and it's surprising that employee recruitment and retention aren't identified by even more respondents.

Among a long list of potential product or technologies that could impact their businesses, our respondents identified a few they thought would be most impactful. Compared to last year, though, not a lot changed about those attitudes. Design and engineering software, artificial intelligence, and manufacturing automation were all identified by about a quarter of respondents as most likely to have the greatest impact on their businesses. **C13**

Last year, all three of these impacts were selected by about the same percentage of respondents. Two years ago, before this annual survey kicked off, artificial intelligence probably would not have warranted a second thought, but the introduction of ChatGPT and other generative AI programs changed that. They have become more integrated into business operations, especially in marketing.

Not on this chart, but in the list provided, were 3D printing and augmented reality, two technologies that a few years ago were thought to be poised for a significant impact on businesses in the construction industry. None of that has panned out, and fewer than 10% of our respondents expected either of those to impact them.





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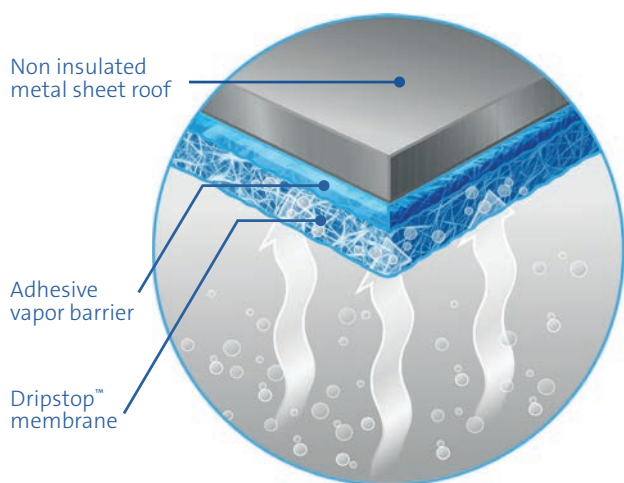
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## SECTION 3

# THE RURAL BUILDER: AGRICULTURAL, RESIDENTIAL AND LIGHT COMMERCIAL CONSTRUCTION DATA



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## SECTION 3

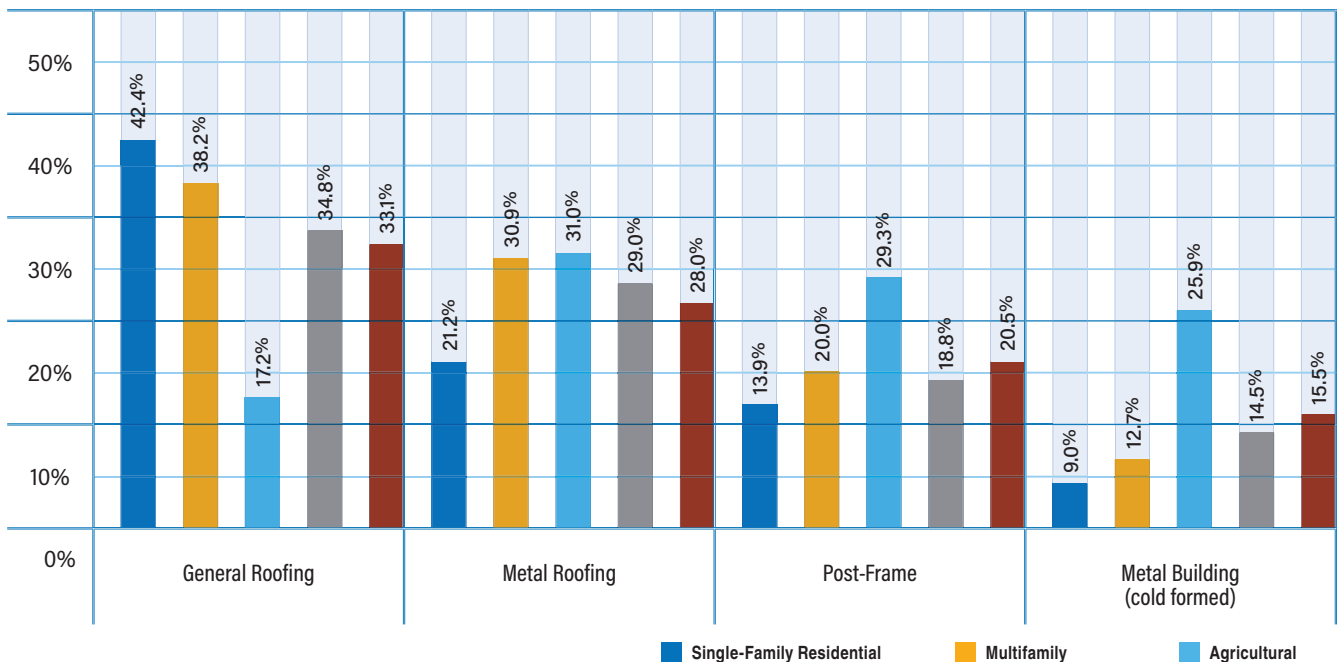
# THE RURAL BUILDER: AGRICULTURAL, RESIDENTIAL AND LIGHT COMMERCIAL CONSTRUCTION DATA

**C**ompanies serving the rural construction market fill a unique niche in the construction industry. Agricultural buildings – often the mainstay of the rural builder – are different from commercial or other buildings. Contractors need to be more flexible and can't specialize in one type of building or one type of customer. Architects often feel they are working with more utilitarian design

concepts instead of high design.

The Shield Wall Media CSI annual survey looked at companies serving the rural builder market by focusing on companies engaged in single-family, multifamily, commercial, and agricultural construction. As is shown later, there is considerable crossover among these market segments within one company.

**Chart C1 – Kind of Building Type by Market Segment**



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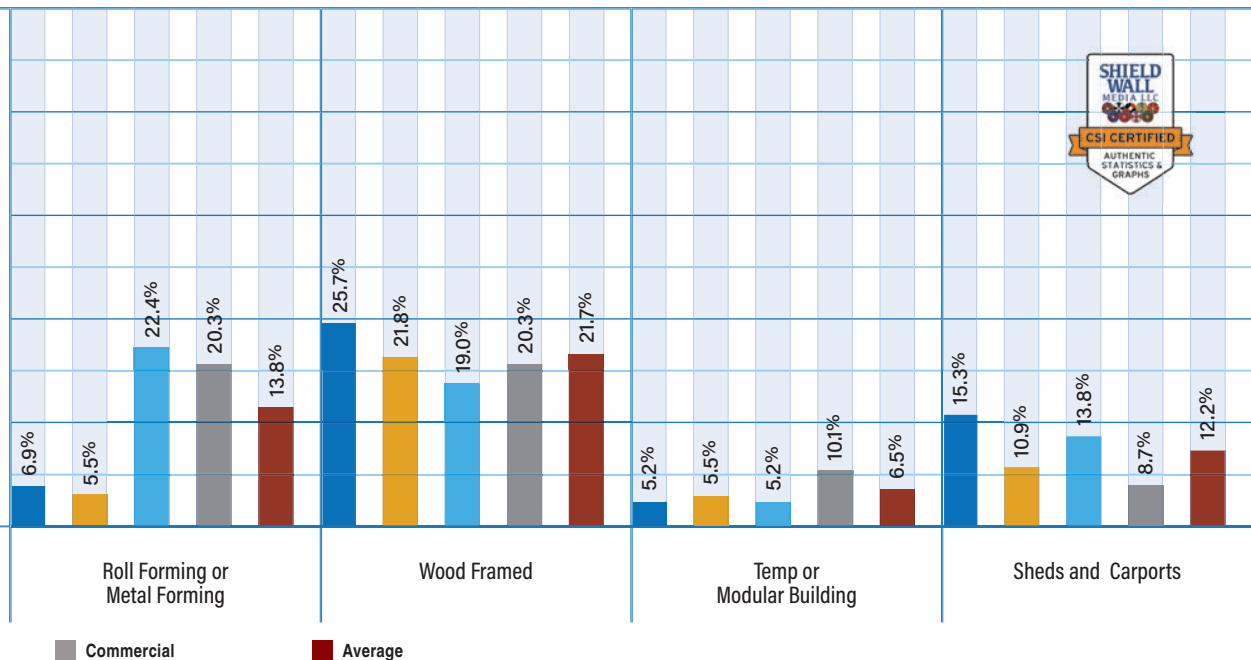
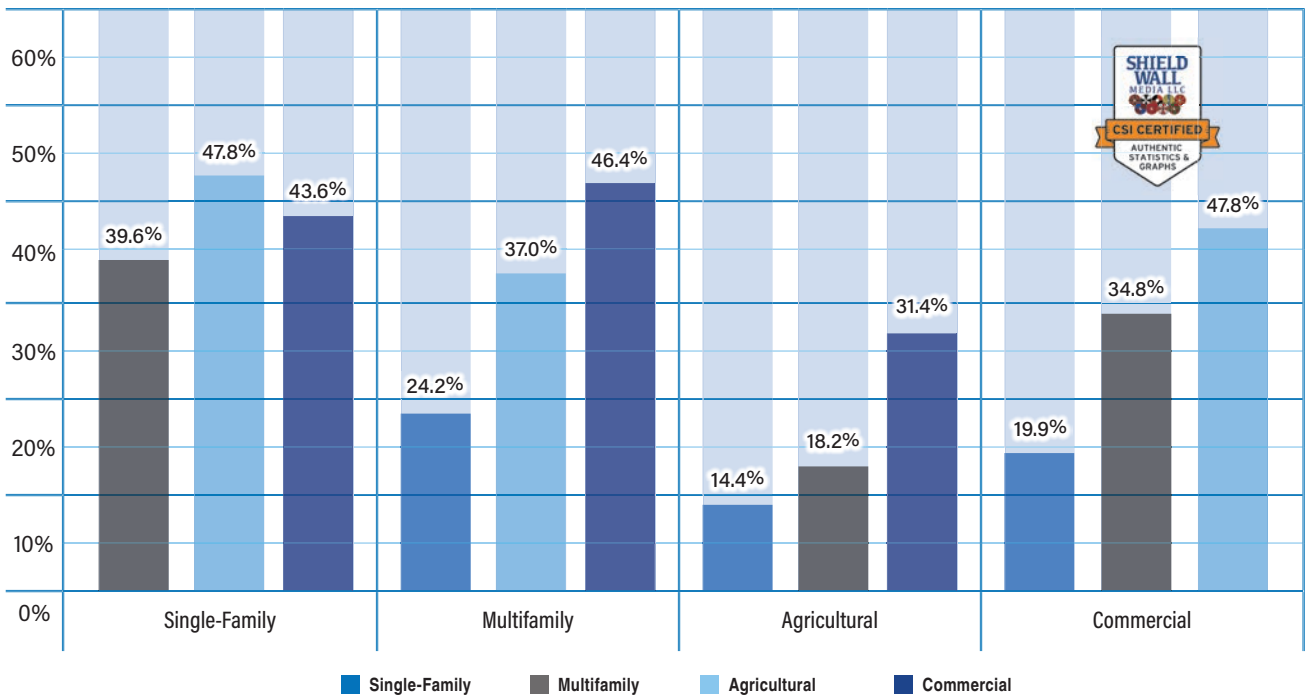


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**Chart C2 – Industrial Role by Market Segment**

### Characteristics of Rural Builders

We surveyed more than 550 designers, contractors, suppliers and manufacturers, and according to them, companies doing agricultural construction do post-frame buildings and cold-formed metal

buildings at a much higher rate than other market segments. **C1**

Nearly 30% of agricultural construction companies do post-frame buildings (29.3%), which compares to the average across single-family residential, multifamily, and commercial companies of 20.5%.



Companies engaged in single-family residential work were the least likely of the market segments to do post-frame buildings, clocking in at only 13.9%.

Looking at cold-formed metal buildings, again the companies engaged in agricultural construction were far more likely to execute this kind of construction (25.9%). The average across all market segments was only 15.5% with companies engaged in single-family construction the least likely to do cold-formed metal buildings (9.0%).

Interestingly, our respondents reported that those doing agricultural construction were less likely to do general roofing work (17.2%) than the other market segments, although they were the most likely to do metal roofing work (31.0%).

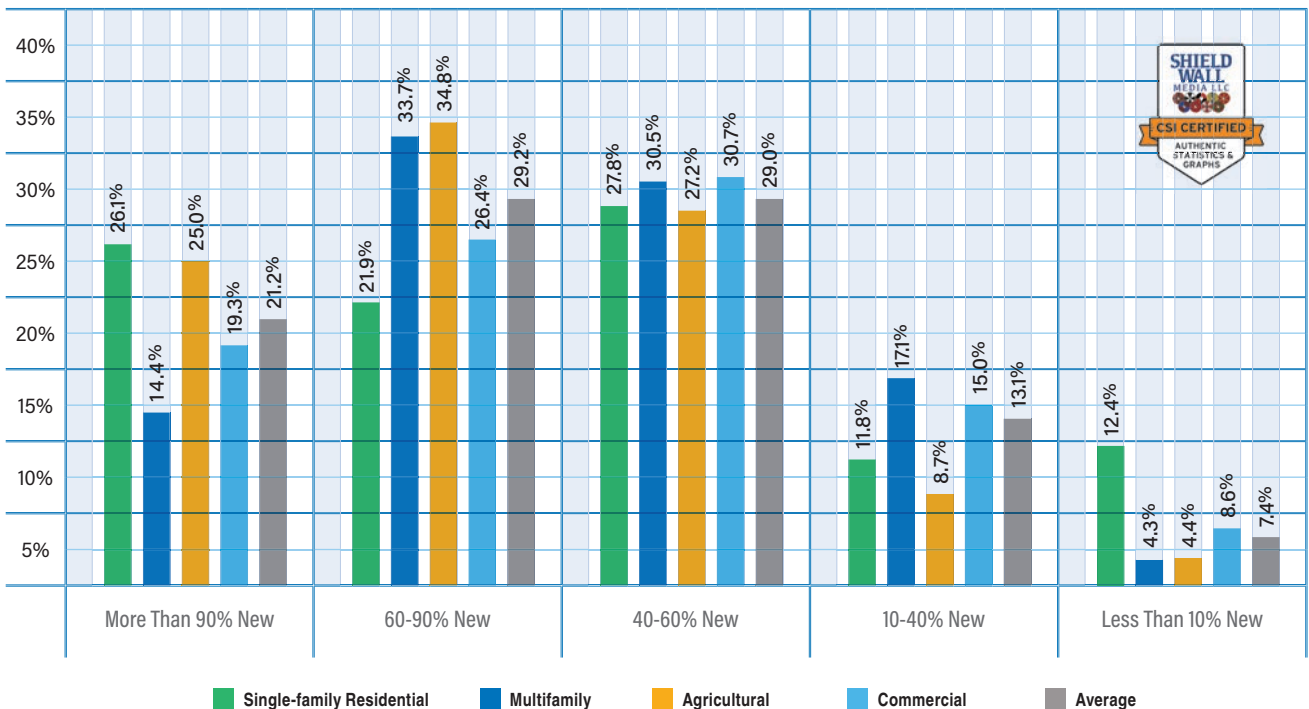
Obviously, a hundred percent of companies engaged in single-family construction do single-family work. But how much work do those companies do in the other market segments: multifamily, agricultural, and commercial. **C2**

This is the measurement of how flexible rural builders are. Single-family home builders are the least likely to do construction in other market segments. Only 24.2% of companies engaged in single-family construction do multifamily, and they are least likely to do agricultural construction (14.4%).

In contrast, companies engaged in agricultural construction were very likely to also do single family (47.8%), multifamily (37.0%), and commercial (47.8%). The same is generally true of the companies engaged in commercial construction. They participate at a 43.6% rate in single-family residential work, 46.4% in multifamily, and 31.4% in agricultural.

Of the four segments, the market segment other cohorts are least likely to participate in is agricultural. Single-family, multifamily, and commercial companies don't make the leap to agricultural as much as agricultural companies make the leap to those other segments.

**Chart C3 – Percent of New Construction vs. Remodel**



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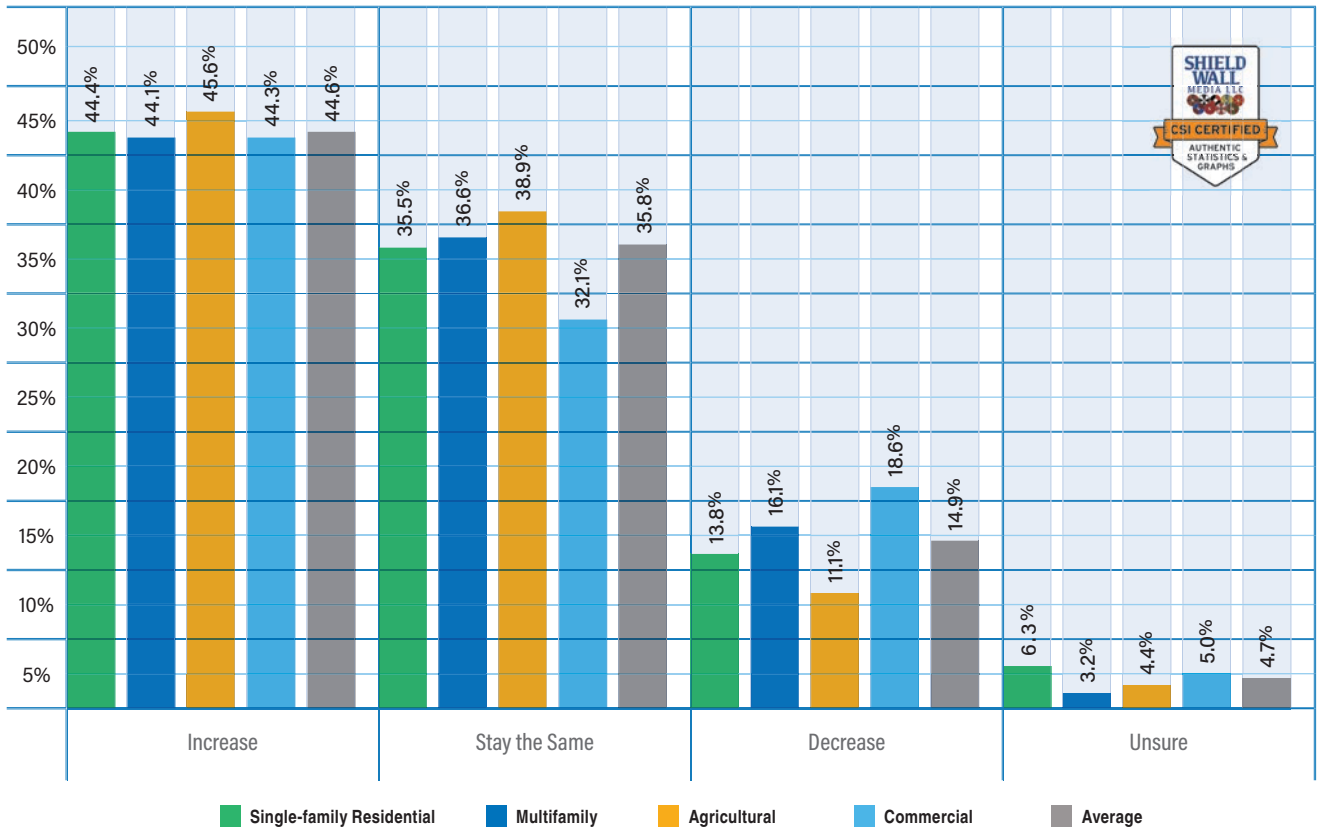
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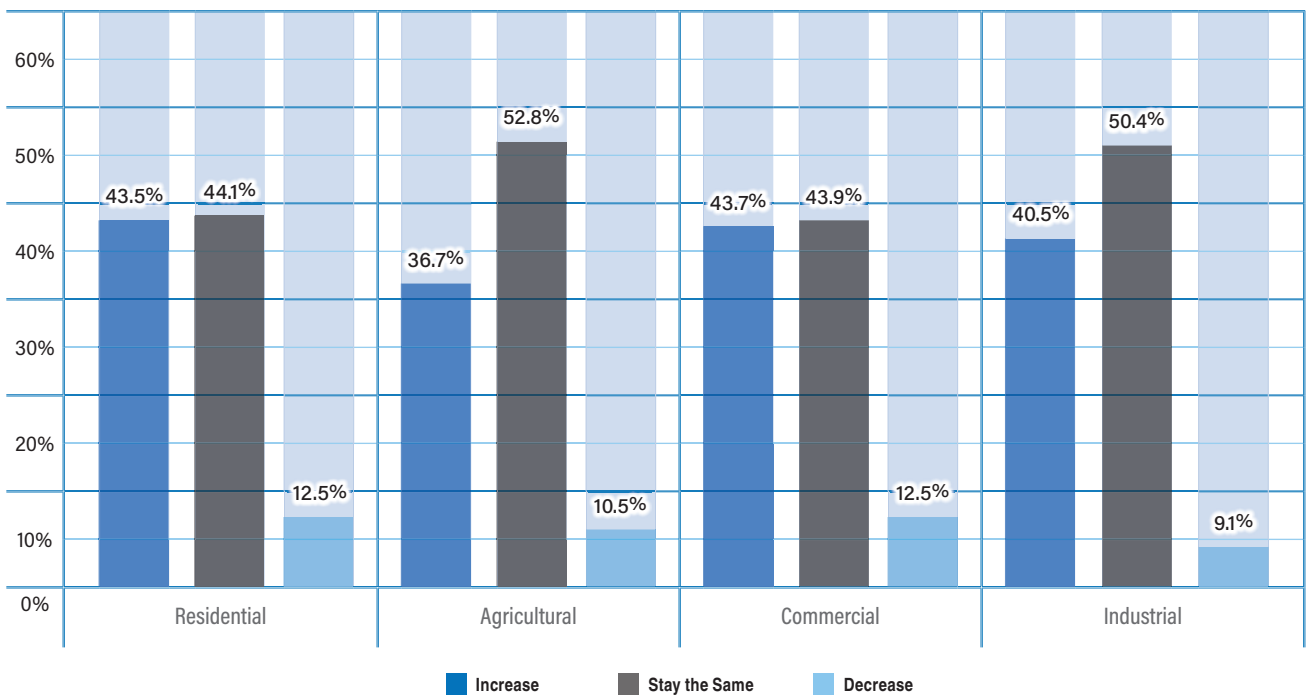
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**Chart C4 – Projected 2025 Construction Industry Growth for Companies Engaged in Residential, Agricultural, or Commercial Work**



**Chart C5 – 2025 Growth Expectation by Market Segment**





There are about 150 million existing housing units in the United States, which includes occupied and vacant properties. In 2024, we added about 1.5 million homes to that inventory, or about 1 percent of the total. The percentage of existing to new on the commercial side is even lower. So, it's no wonder that the construction industry is gradually moving to more work being done on existing structures than new. **C3**

Shield Wall Media surveyed more than 550 people in the construction industry across all market segments. On average, only 7.4% of respondents said more than 10% of their work was on existing structures, but more than a fifth (21.2%) said more than 10% was new construction. An almost identical response came through for those doing between 60% and 90% of new construction (29.2%) and between 40% and 60% (29.0%) new work.

But when we looked at how that broke out by market segment, there were some more notable differences. Very few companies engaged in multifamily (4.3%) or agricultural (4.4%) did less than 10% new construction. In fact, a total of 13.1% of companies engaged in agricultural construction reported doing less than 40% of their work in new construction. Nearly 60% of agricultural companies did more than 60% of their work in new construction.

## Projected Industry Growth

The general sentiment about the construction industry in 2025 was remarkably consistent among companies engaged in single-family residential, multifamily, agricultural, and commercial. All of those segments expected the general business climate across the construction industry to improve at the same rate—just around 45%. **C4**

Slight differences in attitude begin to show among those who think the general business climate might decrease. On average, 14.9% said it will decline, but 18.6% of companies engaged in commercial construction anticipated a decline where only 11.1% in the agricultural segment saw a decline across the construction industry.

We also asked survey takers how they thought individual market segments would perform in 2025. Of the more than 500 respondents who said they were

engaged in single-family residential, multifamily, or commercial construction, most were least optimistic about the growth of the agricultural market (36.7%). More than half of the respondents thought that market segment would stay the same in 2025. **C5**

Survey takers were evenly split about the residential market, with just around 44% saying it would increase or stay the same. Also evenly viewed were the growth sentiments for residential (43.5%), commercial (43.7%), and industrial (40.5%) markets.

## Company Size and Growth Projections

On average, about a third (34.7%) of the respondents in single-family, multifamily, agricultural, and commercial markets had revenues less than \$2 million, and only about a fifth (21.8%) reporting gross sales greater than \$10 million. **C6**

The biggest outlier was the in the single-family residential market segment, where nearly half of the survey takers said they had gross sales in 2024 below \$2 million. There were a number of companies in the home improvement and handyman markets, who responded to the survey, which likely drove down the size of the companies reporting.

The companies reporting gross sales greater than \$20 million were more likely to be companies working in the commercial or agricultural markets. It's important to remember that included in these numbers are manufacturers, and in the agricultural market in particular, they may be driving the larger gross sales numbers.

Companies engaged in agricultural construction report that their gross sales increased significantly in 2024 compared to 2023 at a higher percentage (17.4%) than companies in single single-family residential, multifamily, or commercial market segments. But they also report at a lower rate that sales growth in 2024 was only up somewhat (less than 25%) in 2024. **C7**

When we added significant growth reporting to some growth reporting and compared them across all the market segments, the percentage of respondents identifying sales growth in 2024 was nearly the same. At the high end, 48.2% of companies engaged in single-family residential work said their

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Chart C6 – 2024 Gross Sales

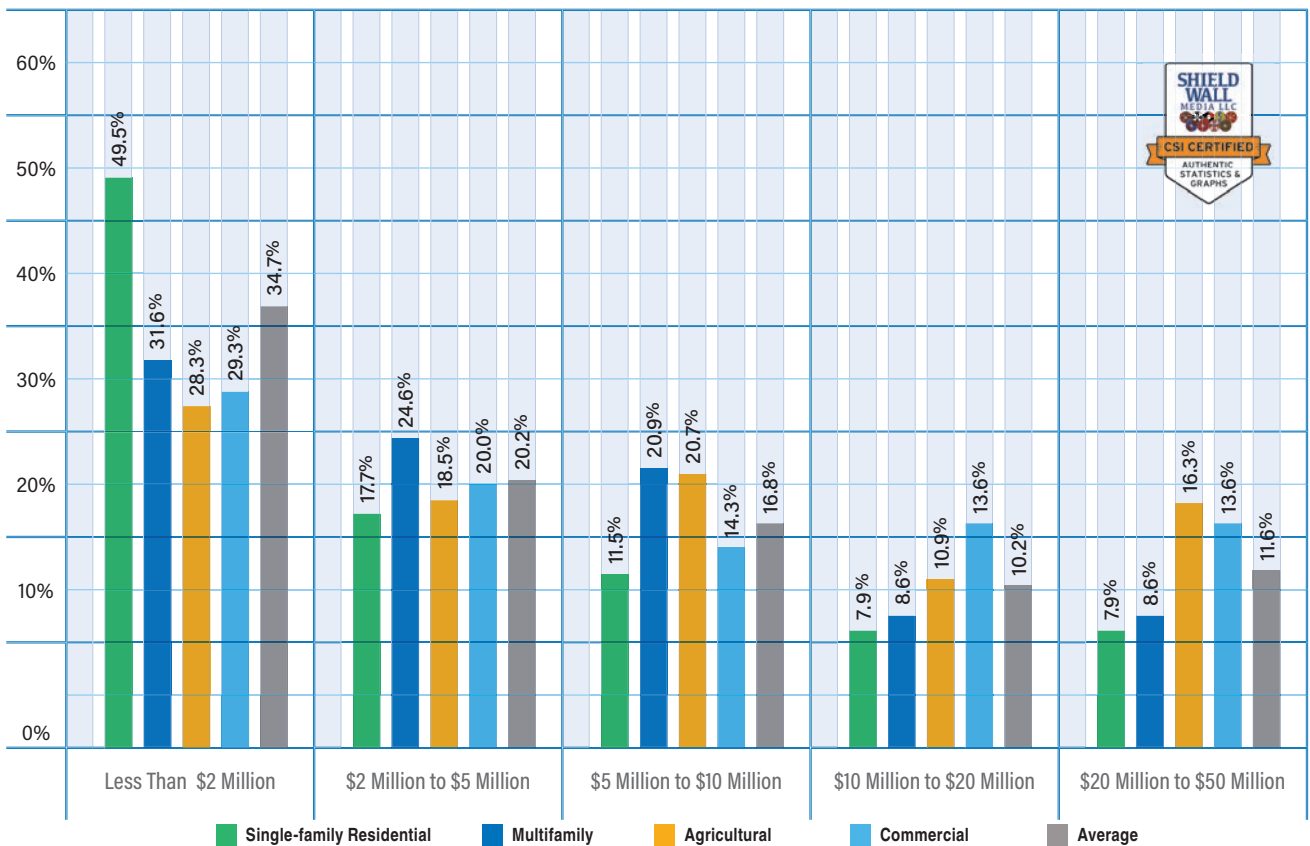
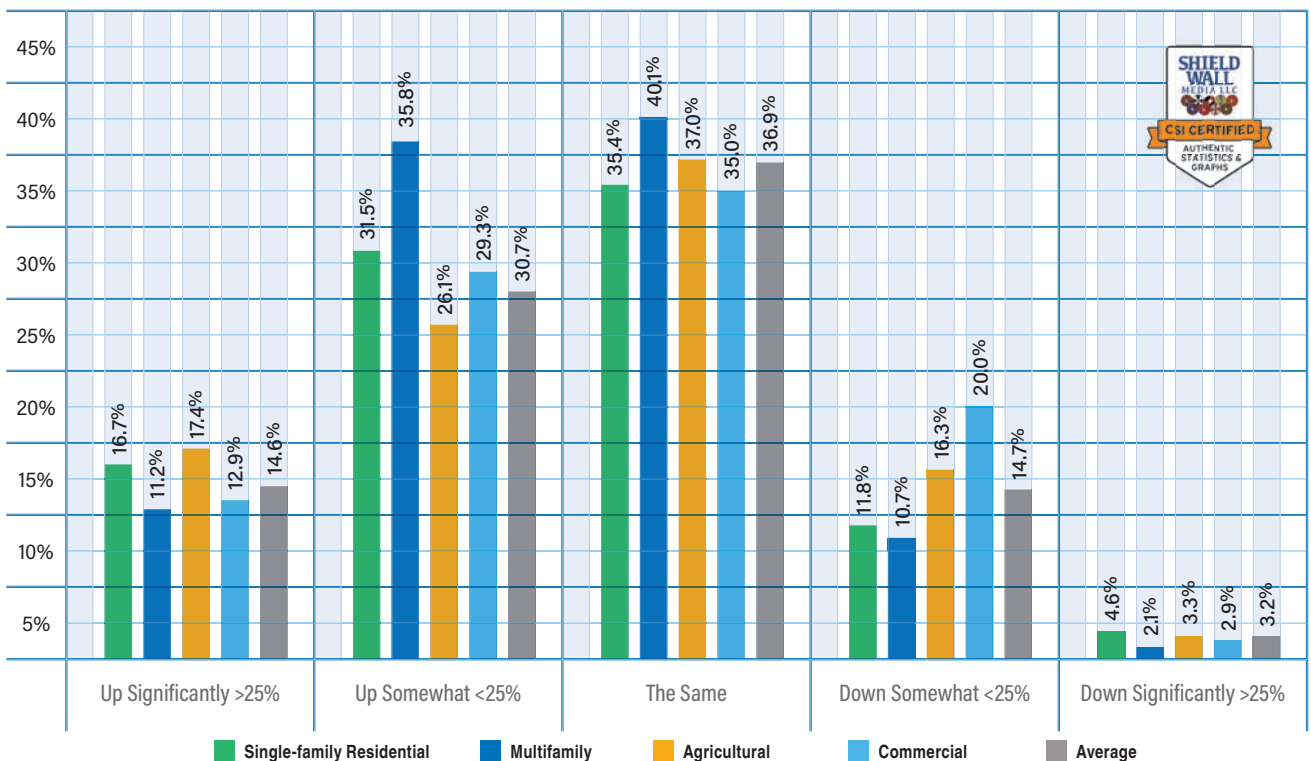
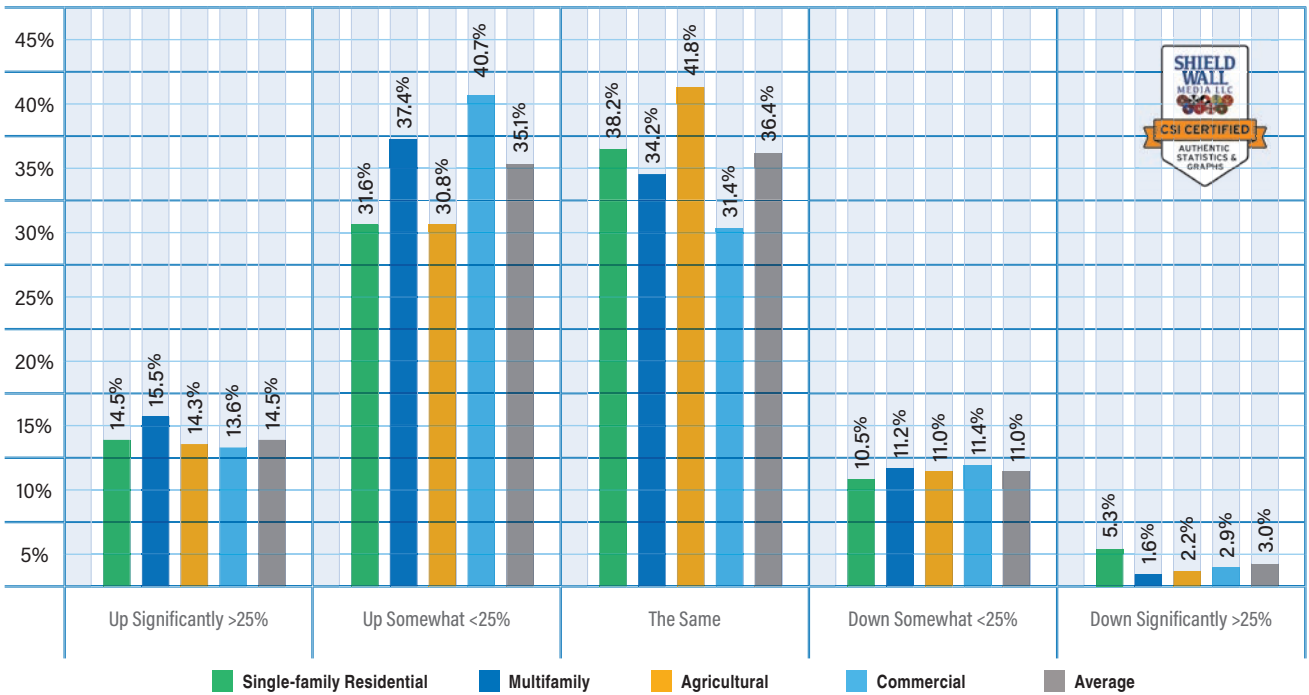
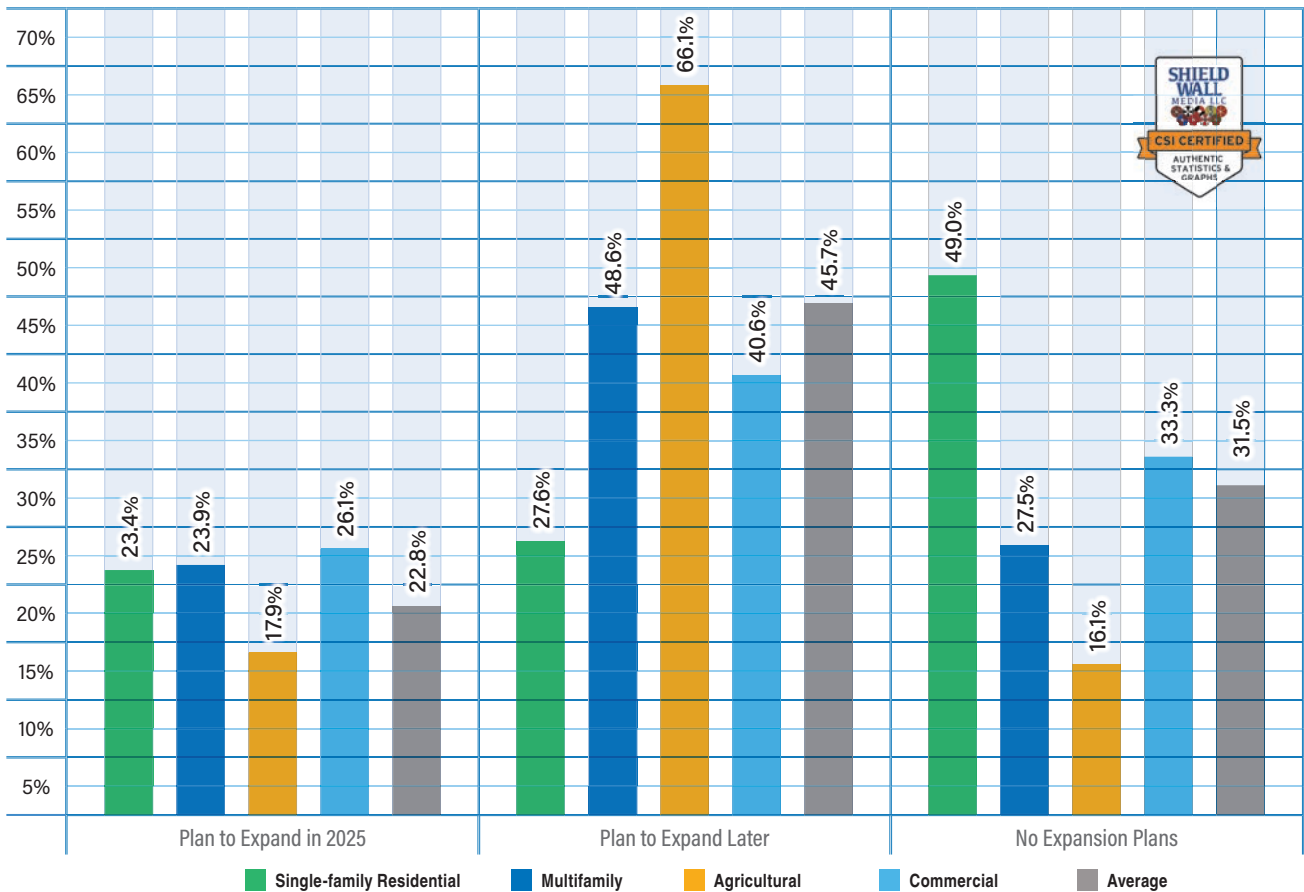


Chart C7 – 2024 Gross Sales Compared to 2023





**Chart C8 – Projected Sales Growth 2025 Compared to 2024****Chart C9 – Expansion Plans**



gross sales increased year over year, and at the low end, 42.2% of commercial segment companies reported growth.

We averaged across all those market segments, and 45.2% of these respondents reported increased sales last year, 17.9% reported decreased sales, and 36.9% said sales held steady.

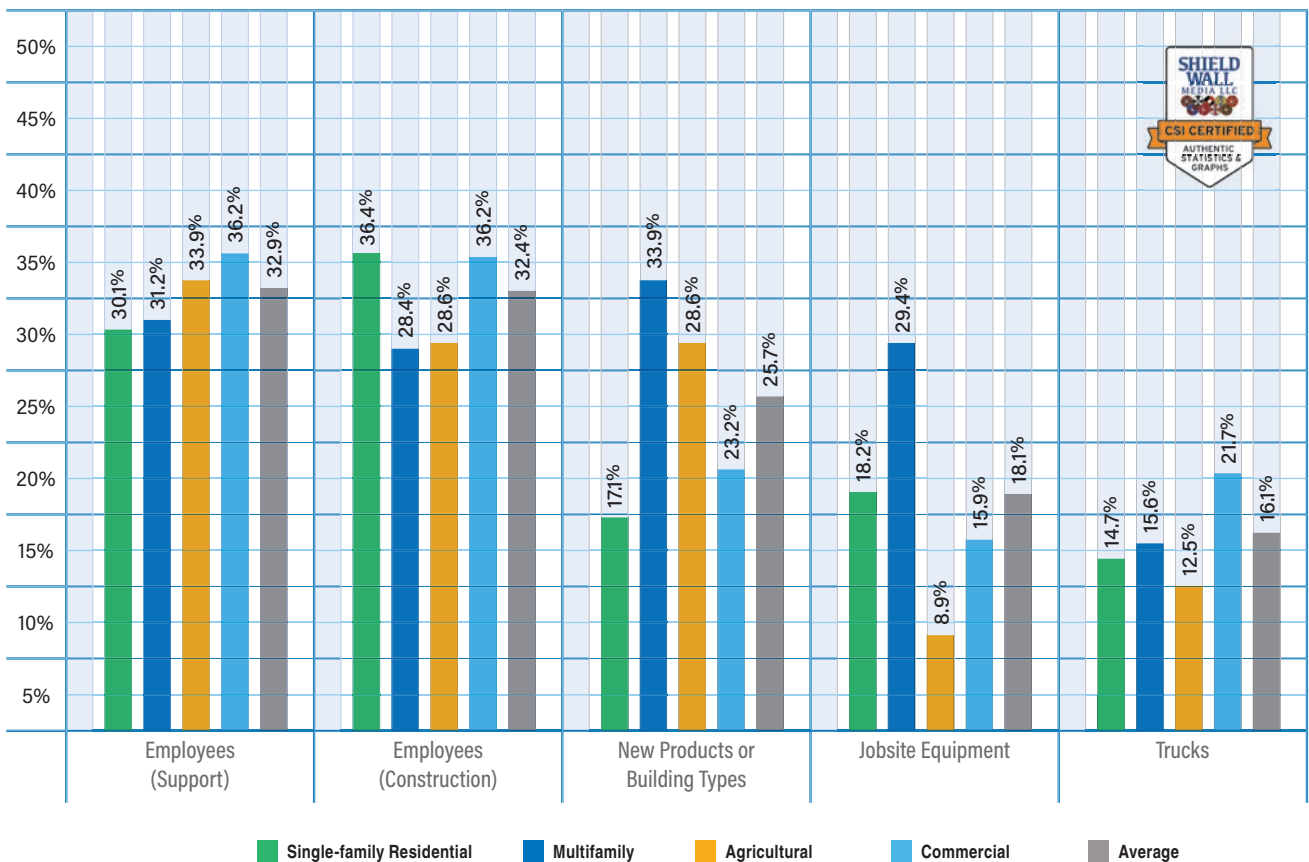
Befitting the general optimism within the construction industry, companies engaged in single-family residential, multifamily, agricultural, or commercial market segments anticipated gross sales increases in 2025. Commercial market companies were most robust with 54.3% expecting gross sales jumps and 13.6% of them said the increase would be greater than 25%. **C8**

Companies engaged in single-family residential work were most likely to expect significant declines but even that, at 5.3% of survey takers, was a relatively small percentage.

In last year's survey, the companies engaged in agricultural work were much more volatile in their reporting. This year, with more than 550 survey participants – compared to 300 last year – that volatility seems to have decreased, and we are seeing more consistency across the board in this market segment.

Later, we'll talk about challenges in this market, but one of the concerns being reported by many respondents is the issue of material costs. Paul Short, president of Combilift North America, points to the

**Chart C10 – Top Five New Resources Planned to Add in 2025**



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difficulty in predicting this as the potential for tariff increases. "Material prices could have an effect both positive and negative," he says.

## Future Opportunities and Challenges

On average, 68.5% of companies expect to expand their operations at some point in the future, with 22.8% of them stating they intend to do so in 2025. The market segment most likely to have plans for expansion were companies engaged in the agricultural segment as 84% say they'll expand, most (66.1%) pushing those plans to some point in the future. **C9**

The least likely to have expansion plans were companies engaged in the agricultural market segment. Only 16.1% said they had plans to expand. Considering that this market segment was the most likely to report a decline in sales in 2024, and least optimistic about growth in 2025, having expansion plans on the board seems a stretch.

Another measure of how optimistic companies

were about the future of their market segment was the kind of resources they planned to add or increase in 2025. We offered a list of 12 options to survey takers. The top two were no surprise since adding employees is a perennial problem for companies in the construction industry as a whole, especially on the skilled labor side. In a bit of surprise, support employees tipped the chart just above construction employees, but only by a fraction. On average, 32.9% of respondents said they would add support employees in 2025, while 32.4% pointed to construction employees as a need. **C10**

Companies engaged on commercial construction (36.2%) were the most likely to need support employees, identical to the percentage who reported the need for construction employees. Single-family residential companies (36.4%) also pointed to the need for construction employees as their most important resource to add.

In the agricultural market segment, only 8.9% of respondents said they would add jobsite equipment

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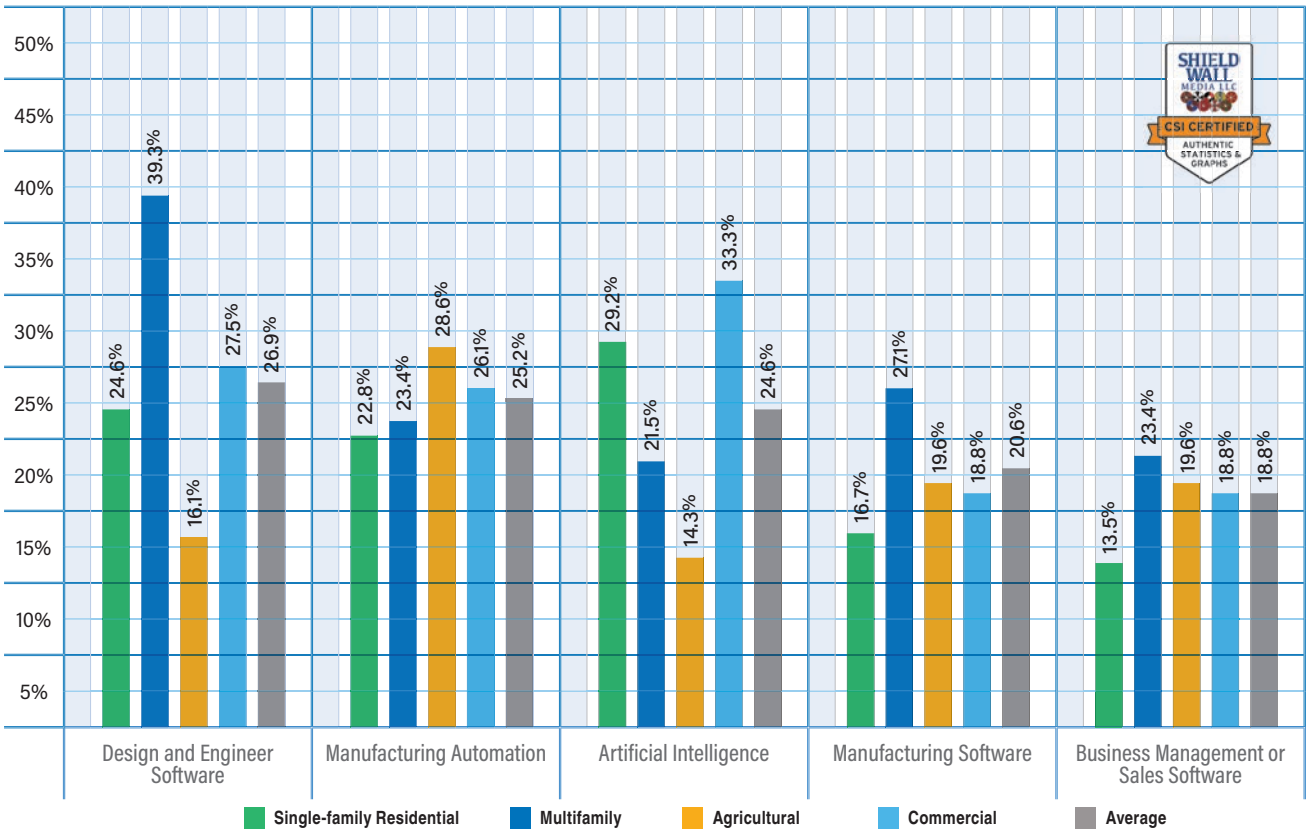
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**Chart C11 – Top Five New Products or Technology Impact**





in 2025, which is well below other market segments and the average of 18.1%. In a big contrast multifamily companies plan to add jobsite equipment at a 29.4% rate.

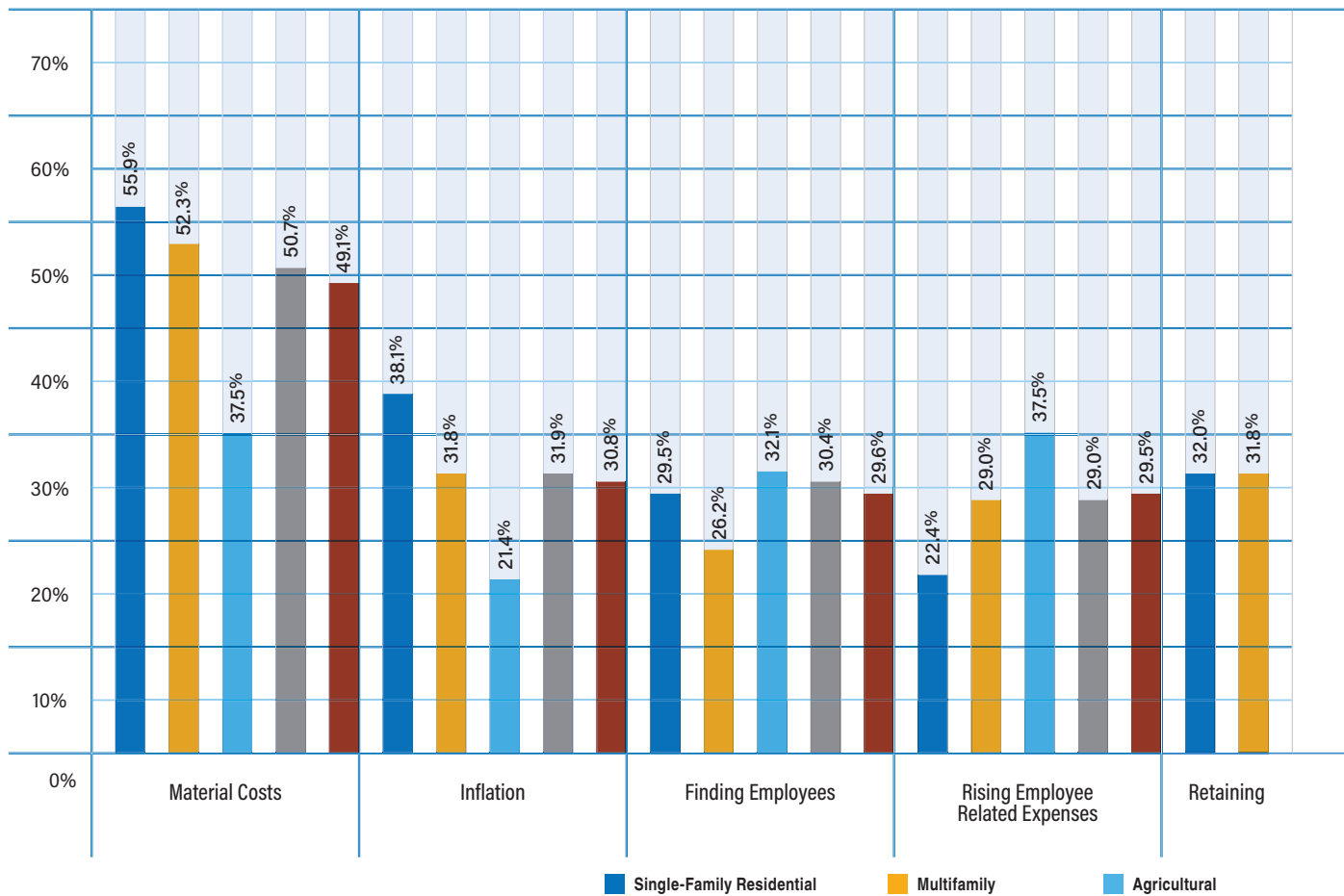
The five new technologies or products that companies engaged in single-family residential, multifamily, agricultural, or commercial thought would have the greatest impact on their businesses were design and engineering software, manufacturing automation, artificial intelligence, manufacturing software, and business management or sales software. **C11**

Technologies that didn't scrape the top five included drones, 3D printing, and structural material products among others.

The biggest outlier was that 39.3% of multifamily companies identified design and engineering software as the technology most likely to impact them. But commercial companies identified artificial intelligence as having the greatest impact.

Paul Short of Combilift identified material costs and their variability as one of the main challenges his company expected to face in 2025. He was not alone.

**Chart C12 – Top Challenges in 2025**



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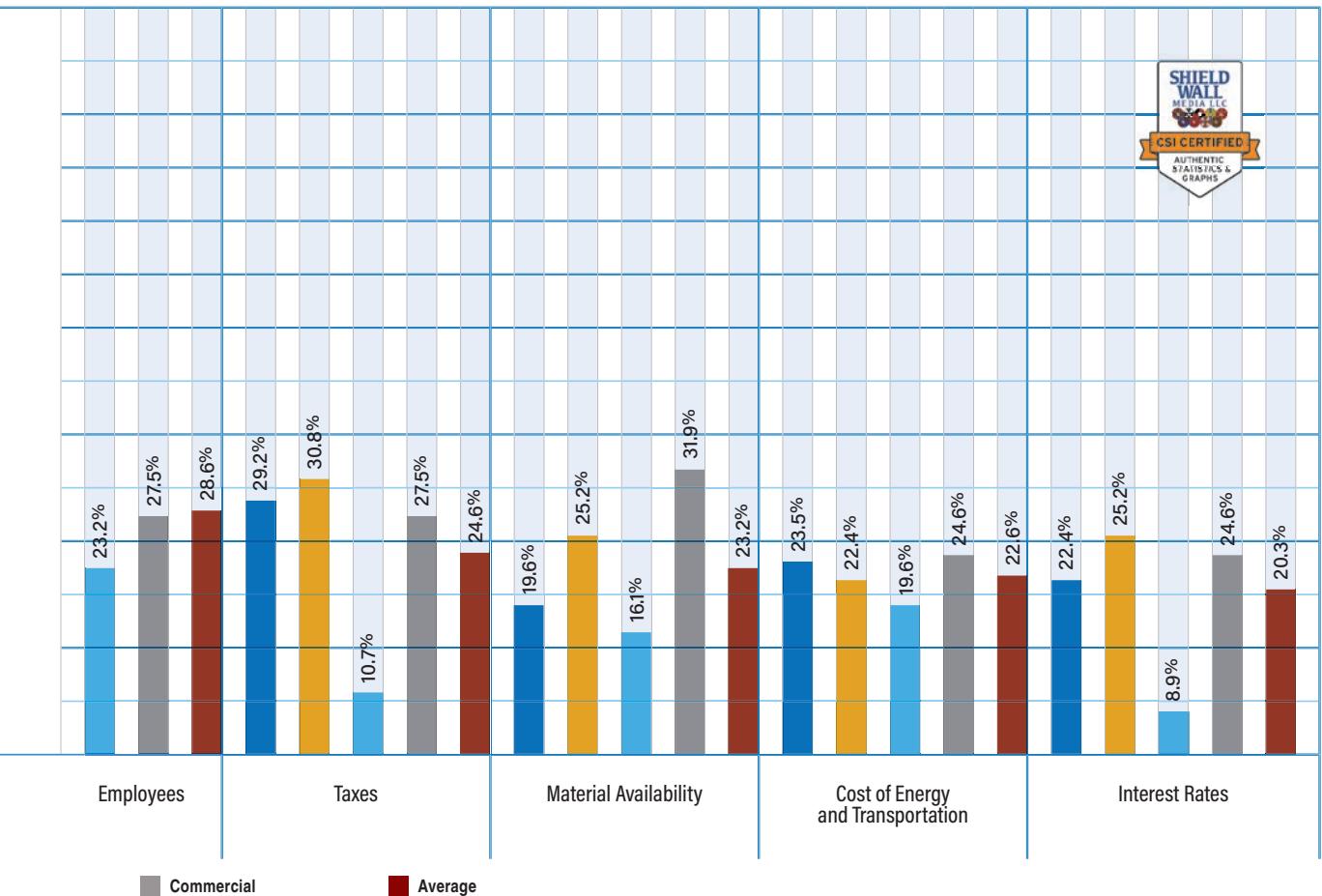
Of the more than 500 respondents to this question from the residential, agricultural, and commercial market segments, nearly half (49.1%) identified material costs as the biggest challenge for 2025. **C12**

Only companies engaged in agricultural construction (37.5%) responded at a rate lower than half. Those companies thought rising employee costs with 37.5% selecting that as the greatest challenge in 2005.

While nearly half of the companies, on average, identified material costs as the biggest challenge,

the next highest percentage of companies (30.8%) engaged in residential, agricultural, or commercial construction believed inflation would be a challenge. That's a 20 point gap between the most prevalent challenge and the next most prevalent.

Of course, many of the challenges identified impact material costs, such as inflation, rising employee costs, and interest rates, but that respondents overwhelmingly see material costs as the biggest challenge speaks to the focus on the problem the industry faces.



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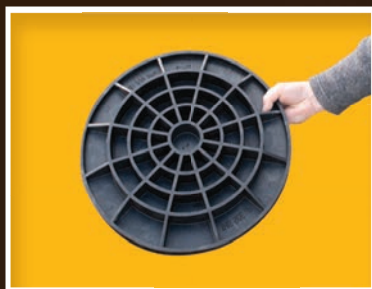
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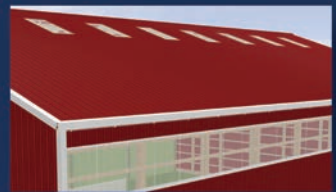
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# SECTION 4

## POST-FRAME CONSTRUCTION DATA



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## SECTION 4

# POST-FRAME CONSTRUCTION DATA

The post-frame construction market is primarily centered in rural America, which also means that companies engaged in post-frame construction are also likely taking on other building types. Rural builders need to be flexible. That kind of flexibility is matched by the design flexibility of the buildings.

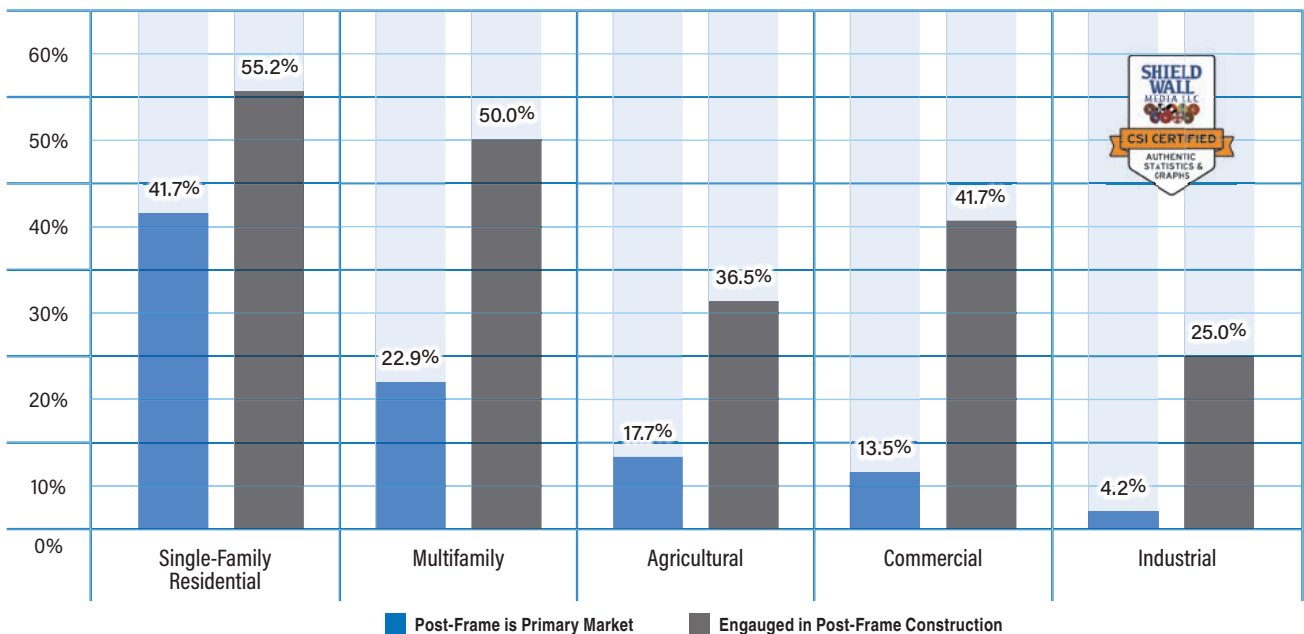
## Characteristics of the Post Frame Industry

While post-frame buildings are used extensively in the agricultural market, the companies in our sur-

vey who report their primary building type was post-frame are more likely to be involved in single-family residential work (41.7%). The rise of the popularity of barndominiums is likely driving that move, but 17.7% of the respondents also said they were involved in agricultural construction. **C1**

When we broaden the scope and look at companies who report they are engaged in post-frame construction, which would include those who have it as their primary building type, the survey-takers still report they are most likely to be involved in single-family residential (55.2%). Surprising, 50%

**Chart C1 – Market Segments Served by Companies Who Do Post-Frame Construction**



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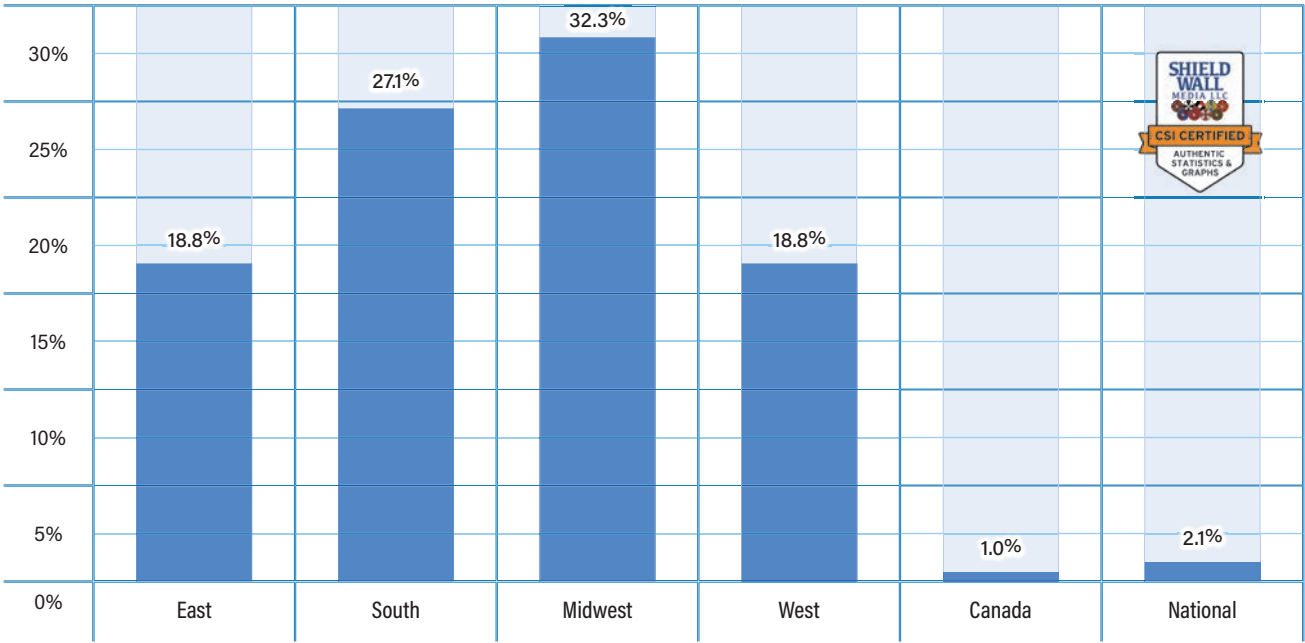
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**Chart C2 – Location**



of those respondents also report that they are involved in multifamily work, which probably speaks again to the flexibility companies doing rural construction need to exhibit. **C2**

Respondents to the CSI annual survey who were engaged in building post-frame buildings were more likely to be based in the Midwest (32.3%) or South (27.1%) than the other U.S. regions. We did have a few companies that worked nationally, though, they were probably manufacturers, not contractors

or designers. And we did have one respondent of the 96 who said they were engaged in post-frame buildings in Canada.

Most of the companies who responded to the survey and were engaged in post-frame construction were contractors (54.2%), which is a 20% increase of the percentage of contractors who participated in this survey last year (45.1%). **C3**

Just over a fifth of survey takers were designers (21.9%) and that was still less than half the total of

**Chart C3 – Role in Construction**

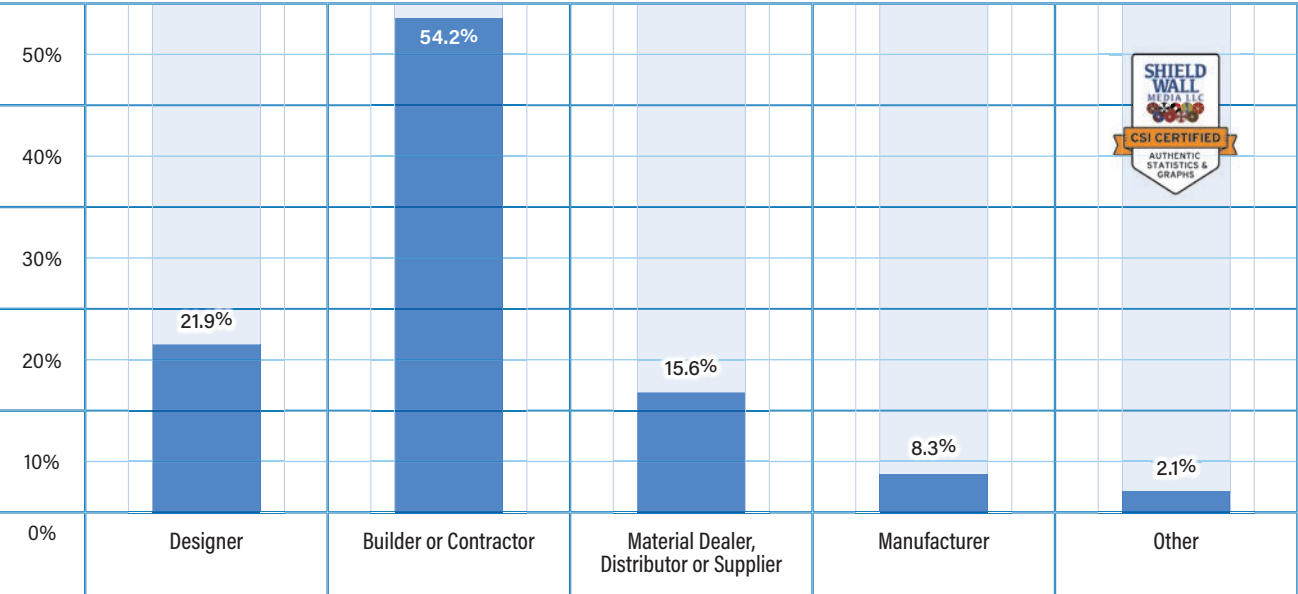




Chart C4 – New vs. Remodel

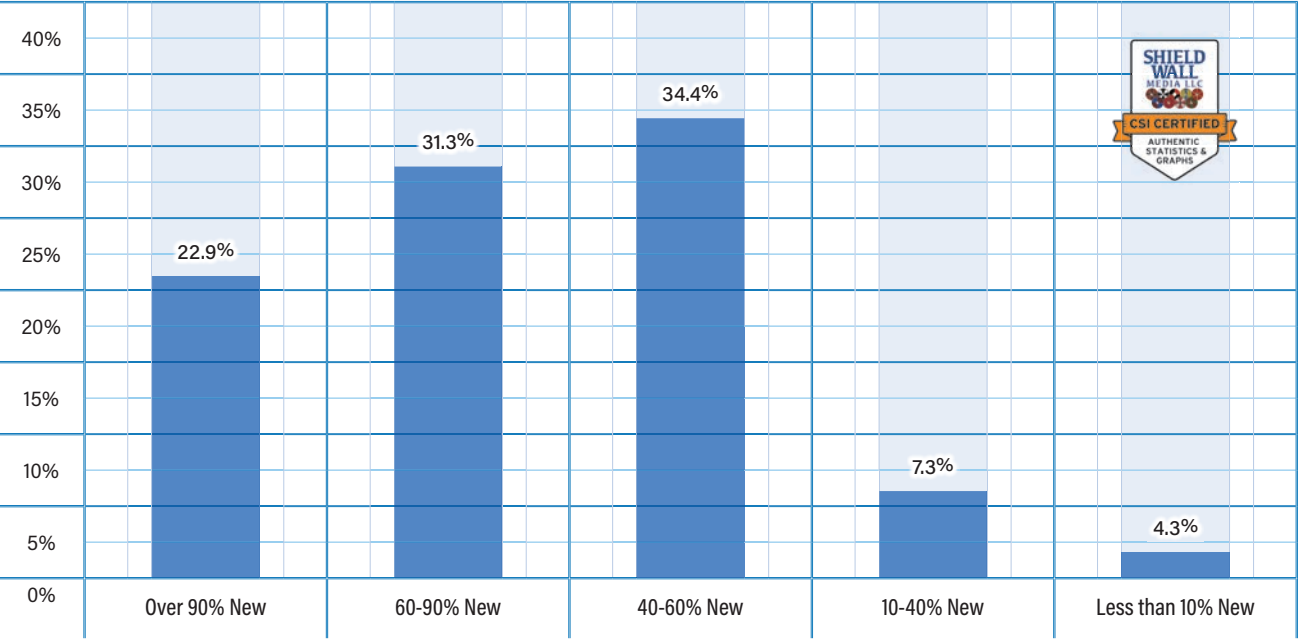
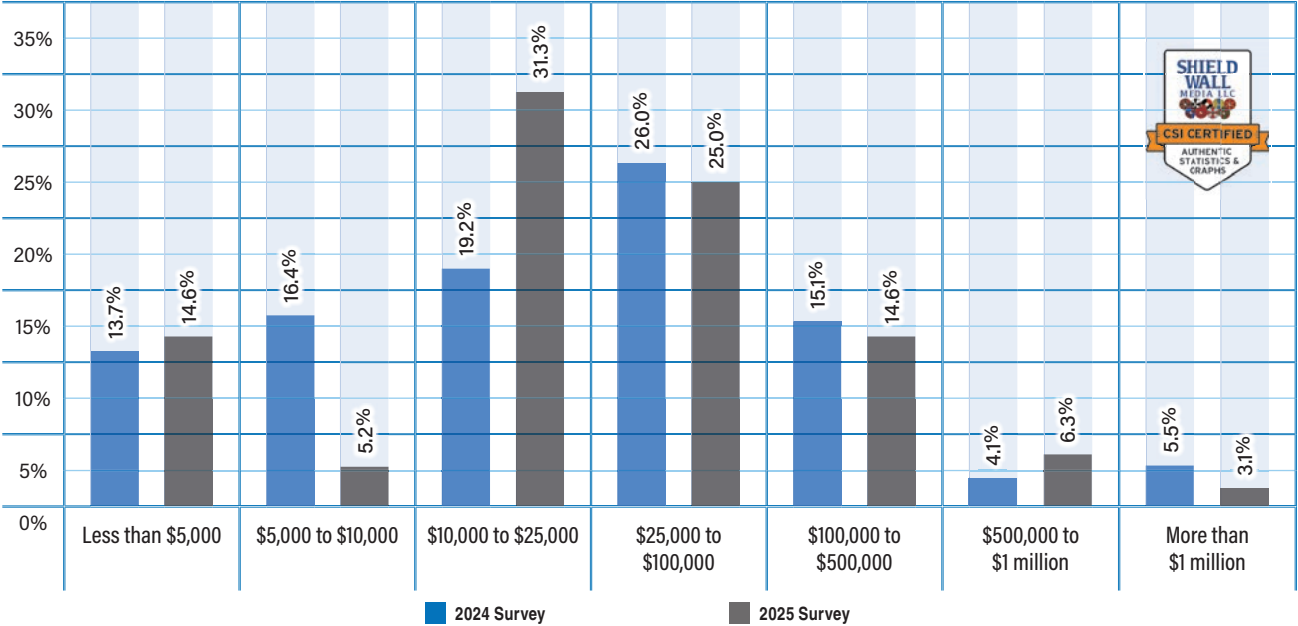


Chart C5 – Average Job Size



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survey takers. Distributors represented 26.8% of respondents while designers clocked in at 19.7% of all respondents. The smallest faction represented were manufacturers with only 8.5% of respondents.

More than half (54.2%) of the companies engaged in post-frame construction say at least 60% of their work is in new construction, with only 11.5% reporting less than 40% of the work is new. Of the survey takers, 22.9% said almost all their work was new construction. Approximately, a third (34.4%) reported they did between 40% and 60% new work. **C4**

We compared the average job size of companies engaged in post-frame buildings reported in last year's survey to this year's. An almost identical percentage said their average job size was less than \$25,000. In 2024, 49.3% reported that, and this year 51.0% reported it. But there was within that average size a very large shift to larger jobs. Companies that reported their average job size was between \$10,000 and \$25,000 in 2023 were 19.2% of responders, but the companies in this year's survey reporting their job size for 2024 in the same grouping totaled 31.3% of the respondents. **C5**

A job less than \$5,000 is a small handyman or remodeling project, but a project less than \$25,000 is a mid-sized remodeling project, such as a reroofing. About a quarter of the survey takers in both years report average job sizes greater than \$100,000.

Because of the lower participation in the survey last year, we saw considerable volatility when we analyzed participation by region or market segment. Of particular note, the East region was particularly unstable. This year, we had 93 companies reporting they were engaged in post-frame construction, which is nearly double the participation from last year. **C6**

Respondents in the East (27.8%) were as likely to report revenues below \$2 million as companies in the other regions. But only (55.6%) of companies in the East doing post-frame construction reporting gross sales in 2024 below \$10 million, which was much lower than the other regions, where about 70% reported revenues less than \$10 million.

Ben Nystrom, CEO of MWI Components, Spencer, Iowa, says "Last year was a strange year. The typically busy months were slower than expected. I'm usually fairly optimistic about our industry. We are still experiencing a COVID correction from the first half of the 2020s. I hope we find balance in 2025."

Mark Stover, president, Perma-Column, Ossian, Ind., supports Nystrom's analysis of 2024. "The pace of business activity started to slow," he says, "and has become more normalized seasonality since post-COVID."

The Eastern region's propensity to have lower gross sales in 2024 can likely be attributed to the

**Chart C6 – 2024 Annual Gross Sales by Region**

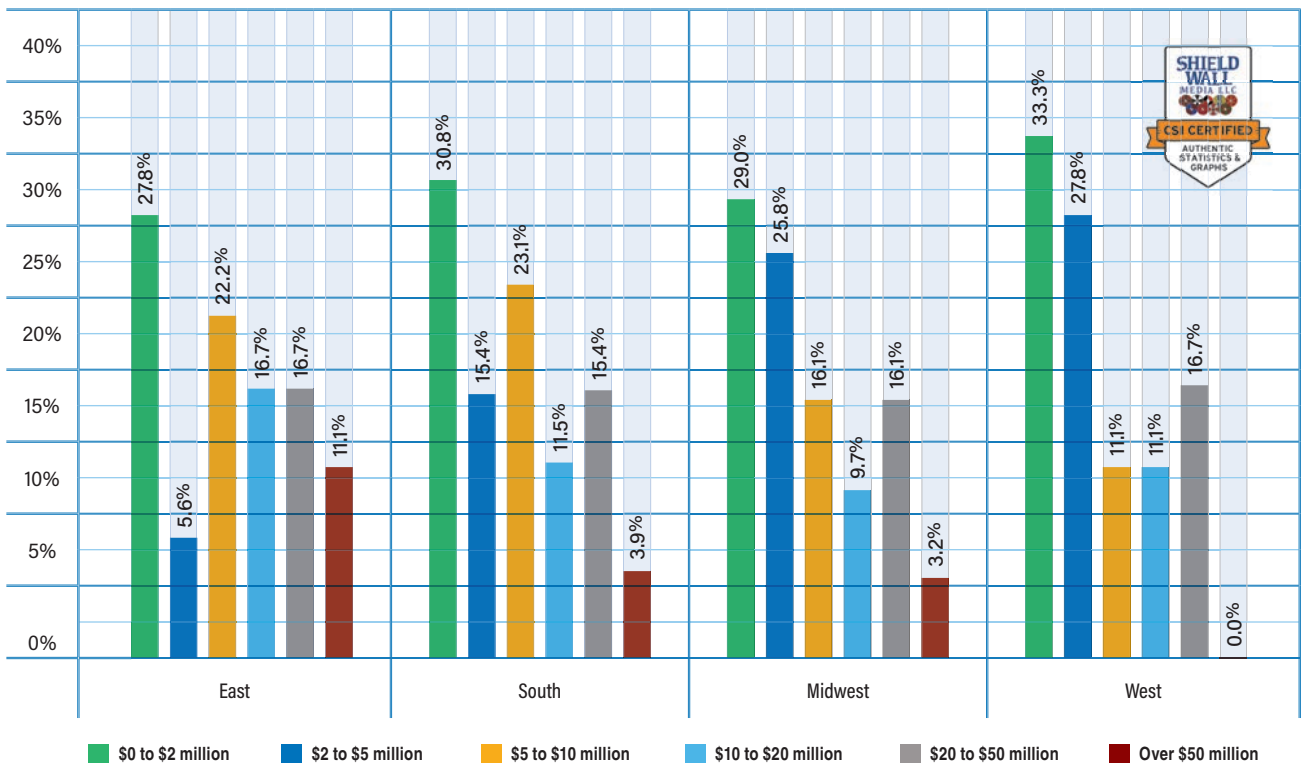
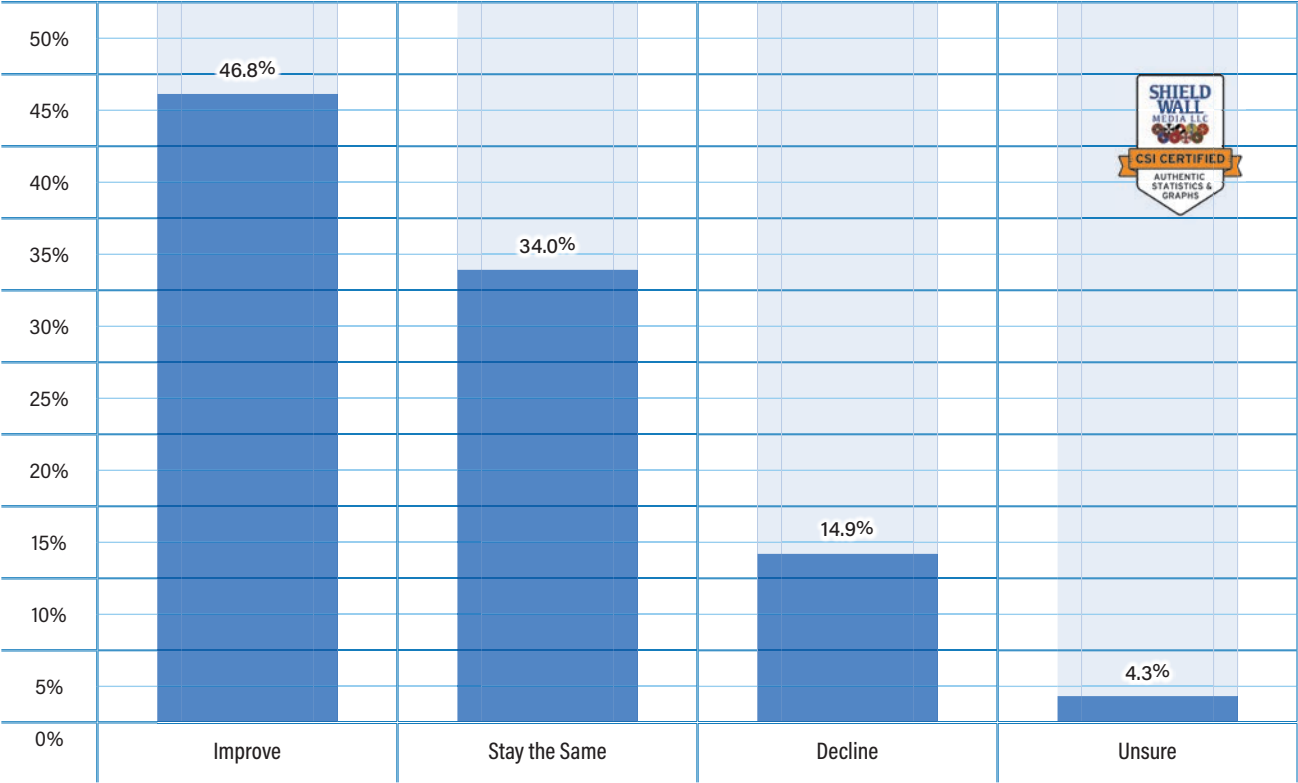




Chart C7 – 2025 Sentiment



participation of very large companies. 11.1% of companies in that region said 2024 gross sales were greater than \$50 million. No other region came close to that percent, and companies in the West had no respondents reporting revenues that large.

Projected Industry Growth

In our survey last year, 31.5% of companies engaged in post-frame construction expected the construction industry as a whole to improve in 2024, and 37% thought it would stay the same. Almost 30% (28.8%) anticipated a decline in 2024. **C7**

This year, the attitudes are more optimistic even though there seems to be cause of concern. Compared to last year’s 31.5% expectation of improvement, 46.8% of respondents in this year’s survey

anticipated 2025 to be a better year. Only 14.9% thought the general business climate in the construction industry would decline.

The positivism is leavened by the comments of people on the front lines. Mark Rhine, a regional sales manager for Leland Industries and based in Oklahoma says, “I’m neutral about the 2025 construction economy. I’m not sure how potential tariffs may affect the business climate.”

We also asked survey takers to express their sentiment about 2025 for the different market segments, and there were some interesting differences. Among companies engaged in post-frame construction, there was a consistency in whether they thought any given market segment would decline. Only 9.5% though the residential market would drop in 2025, 7.4% felt the same about agricultural mar-

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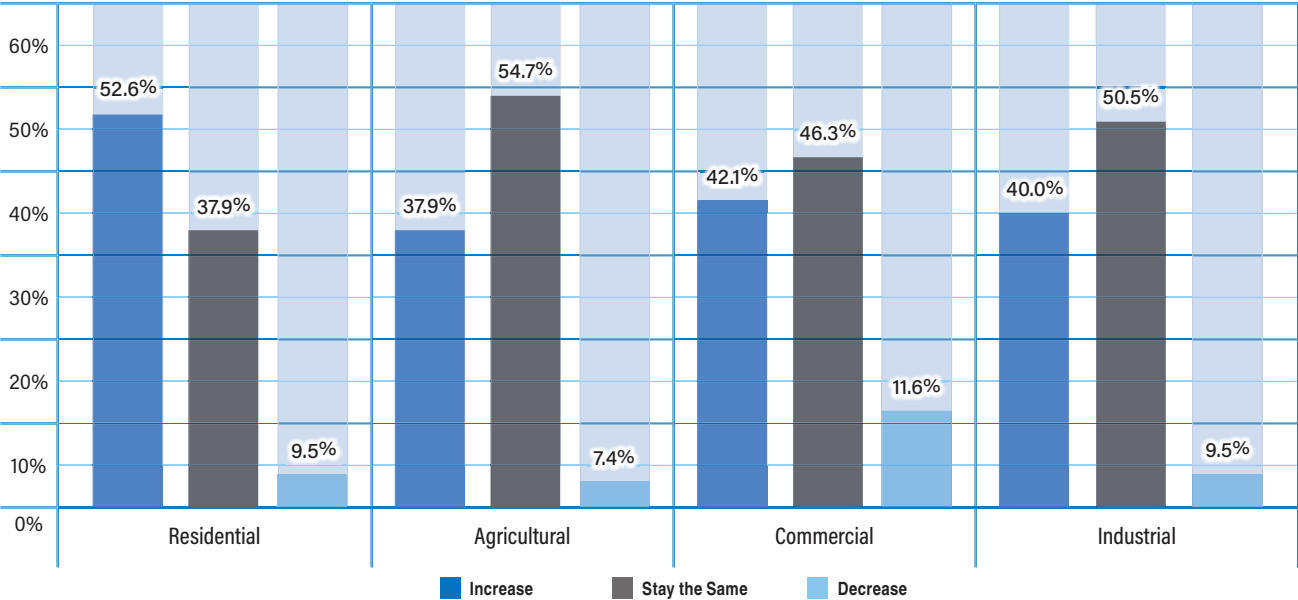
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Chart C8 – 2025 Growth Expectation by Market Segment



ket, 11.6% about commercial and 9.5% about industrial. **C8**

However there were significant differences on whether they expected those market segments to improve or stay the same. Far and away, the largest percentage of survey takers (52.6%) thought the residential market would improve. They were less optimistic about the other three segments with agri-

cultural sentiment about improving being the lowest (37.9%).

In 2024, there were noticeable differences in gross sales growth compared to 2023 by region. More than 60% (61.1%) of companies in the East that were engaged in post-frame construction reported their gross sales increased in 2024 year over year, while only a third of the countries in the West saw growth. **C9**

Chart C9 – Gross Sales 2024 Compared to 2023 by Region

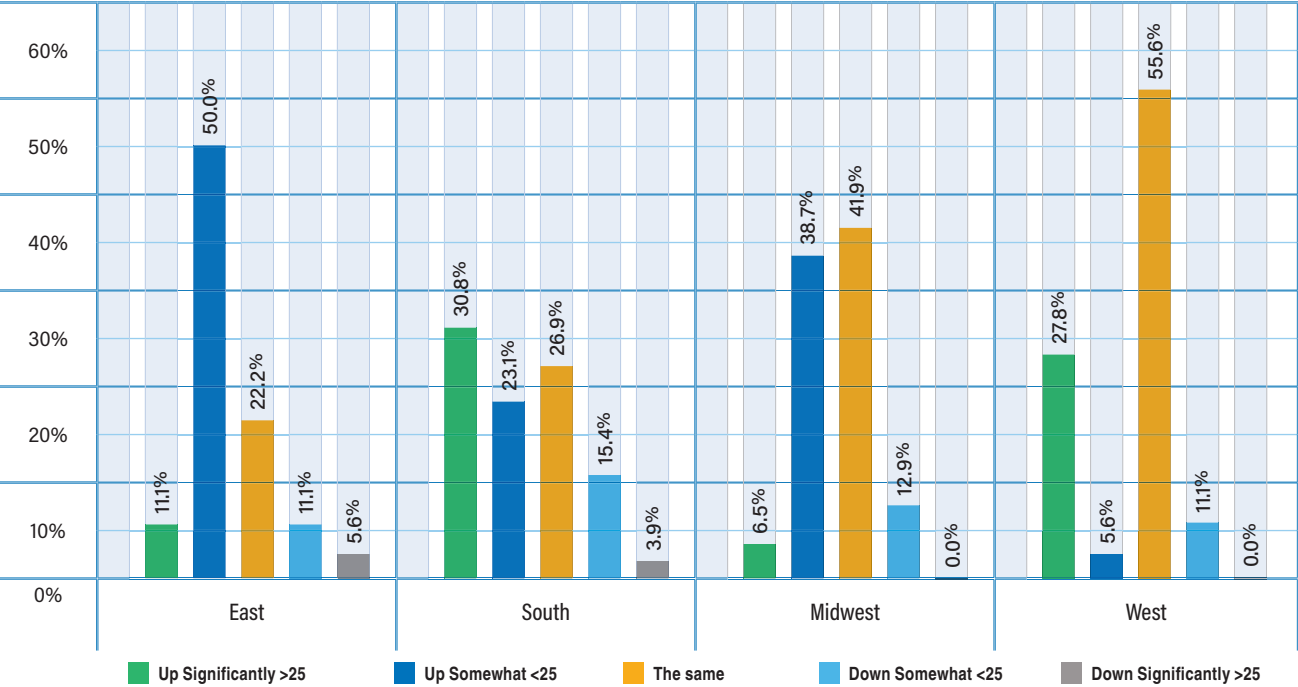
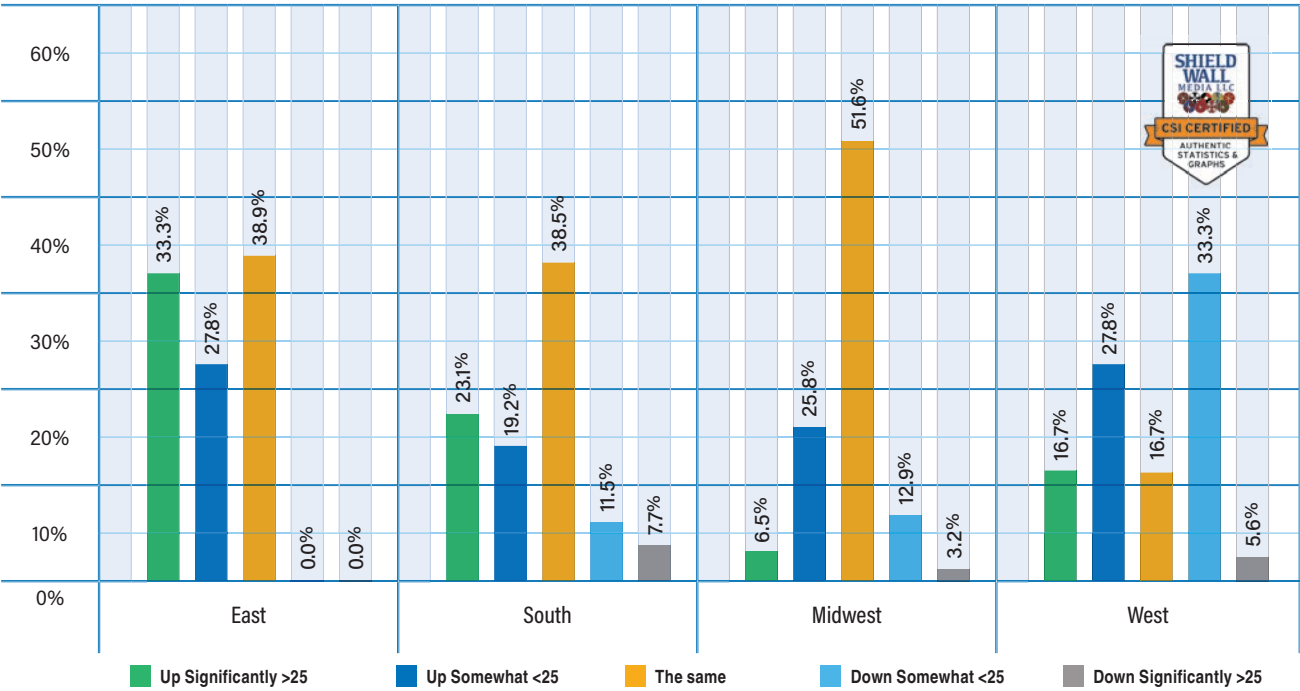




Chart C10 – 2025 Projected Gross Sales by Region



The nature of the growth changed significantly from region to region as well. Companies in the South were far more likely (30.8%) to report growth greater than close up while only 6.5% of companies in the Midwest experienced similar growth.

Less than a fifth of any region reported a decline in gross sales in 2024. Extrapolating from that you can see that respondents were more likely to report growth or flat gross sales than a decline in gross sales.

A third of companies engaged in post-frame construction in the East anticipated significant growth (greater than 25%) in 2025. Combined with the 27.8% who thought gross sales would increase somewhat, it's clear that companies in the East are far more robust about sales than the other regions. **C10**

Survey takers in the Midwest were not as likely to expect to see growth in 2025, with only 32.3% of them feeling optimistic. However, they were not necessarily pessimistic, since more than half (51.6%) felt gross sales year over year would be flat.

Companies based in the West were the most pessimistic, with 38.9% expecting a decline in gross sales, which is about double the next closest region (the South at 19.2%) to that sentiment.

Company Size and Growth Projections

In 2024, the likelihood of companies engaged in post-frame construction saying gross sales increased in 2024 was about the same regardless of market segment. Those doing single-family residential work were slightly more likely to report an increase (66.0%) compared to the other segments, which all hovered around 50%. But the reporting on the single-family residential market was primarily driven by survey takers who said gross sales increased only somewhat. **C11**

Respondents working in the agricultural (31.4%) and commercial (30.0%) markets were more likely to report significant, or greater than 25%, growth in 2024 compared to 2023. About a fifth of the com-

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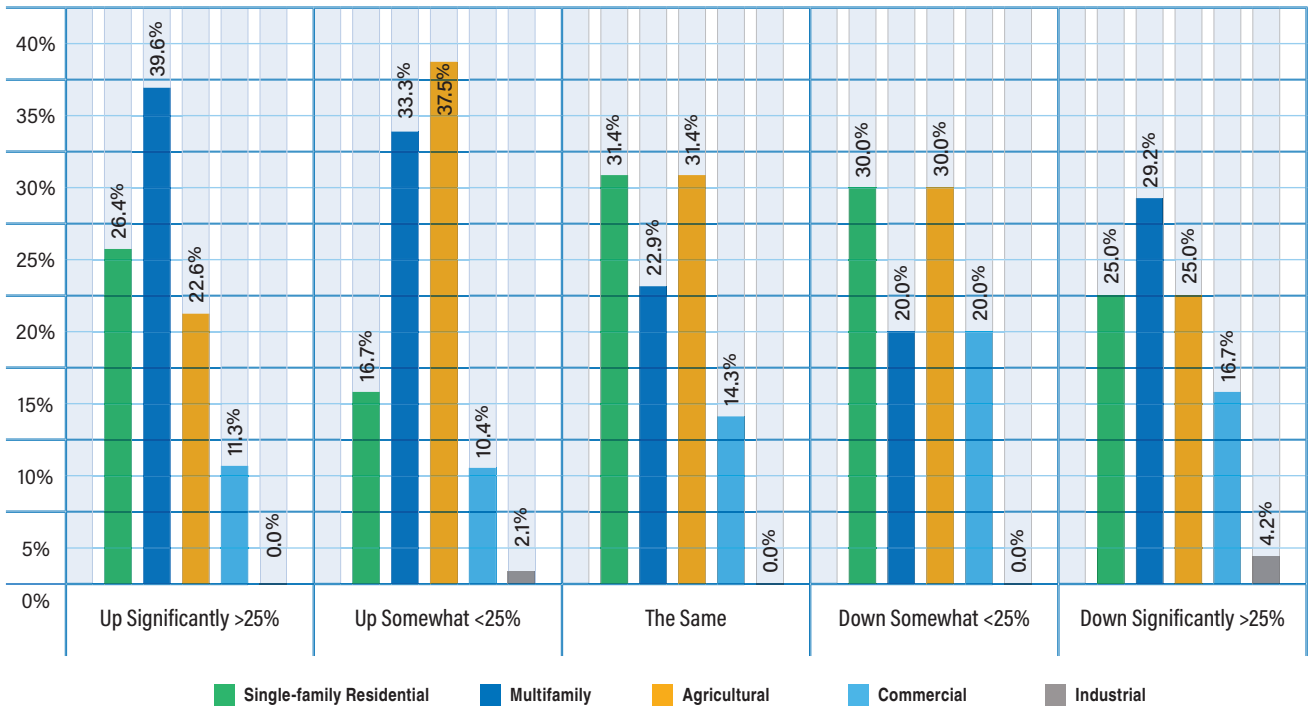
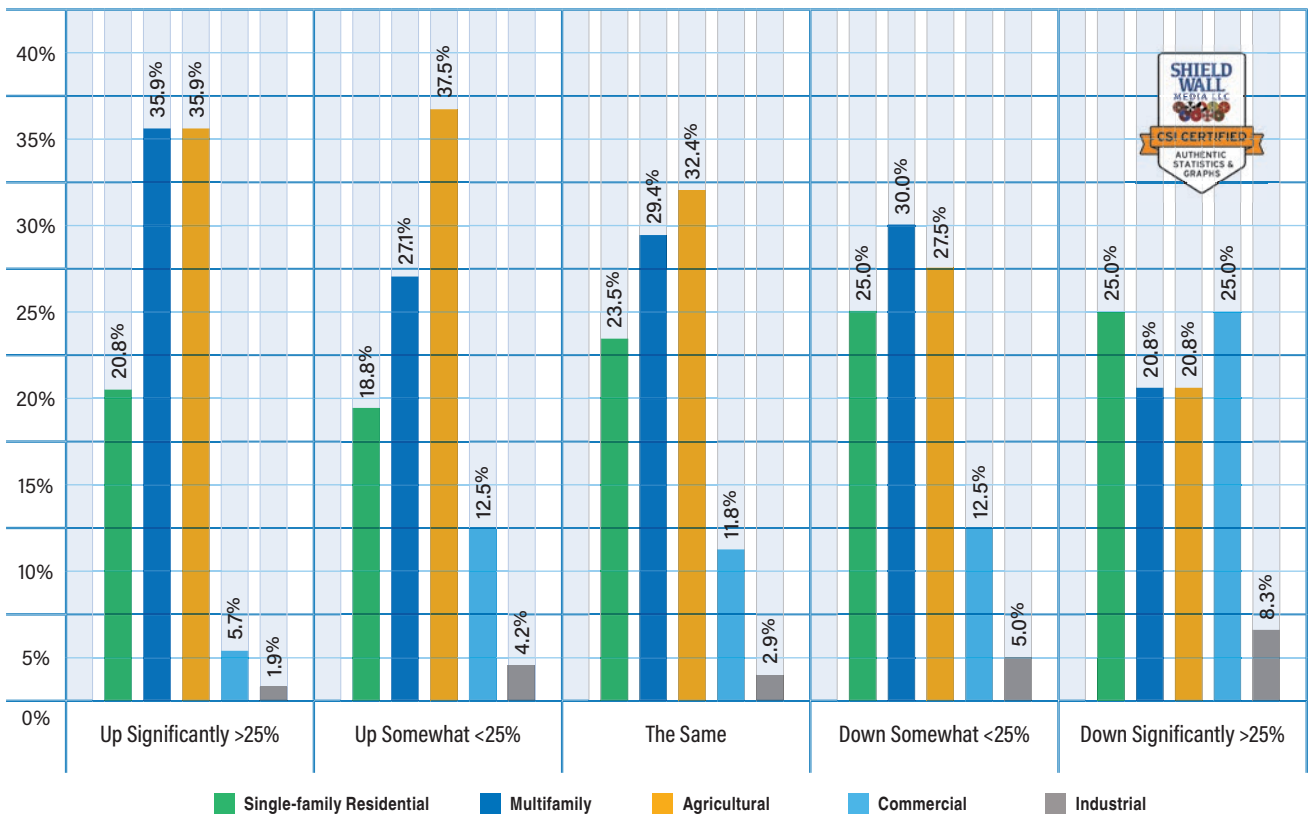
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**Chart C11 – 2024 Gross Sales Compared to 2023 by Market Segment****Chart C12 – 2025 Projected Gross Sales by Market Segment**



mercial and industrial companies also reported a decline in gross sales.

Among companies working in the post-frame building industry, the prospects for 2025 were remarkably similar no matter what market segment they worked in. About half of all the respondents, regardless of the market segment, anticipated some kind of growth in gross sales in 2025 with the likelihood ranging from 45 to 55%. **C12**

The only differences between segments depended on whether the survey taker thought the increase would be significant (greater than 25%) or just somewhat. Among companies in the single-family residential market, only a fifth (20.8%) thought growth would be significant. Only multifamily (18.8%) respondents reported less likelihood of significant growth.

When looking at the potential for decline in gross sales across market segments, the story is slightly

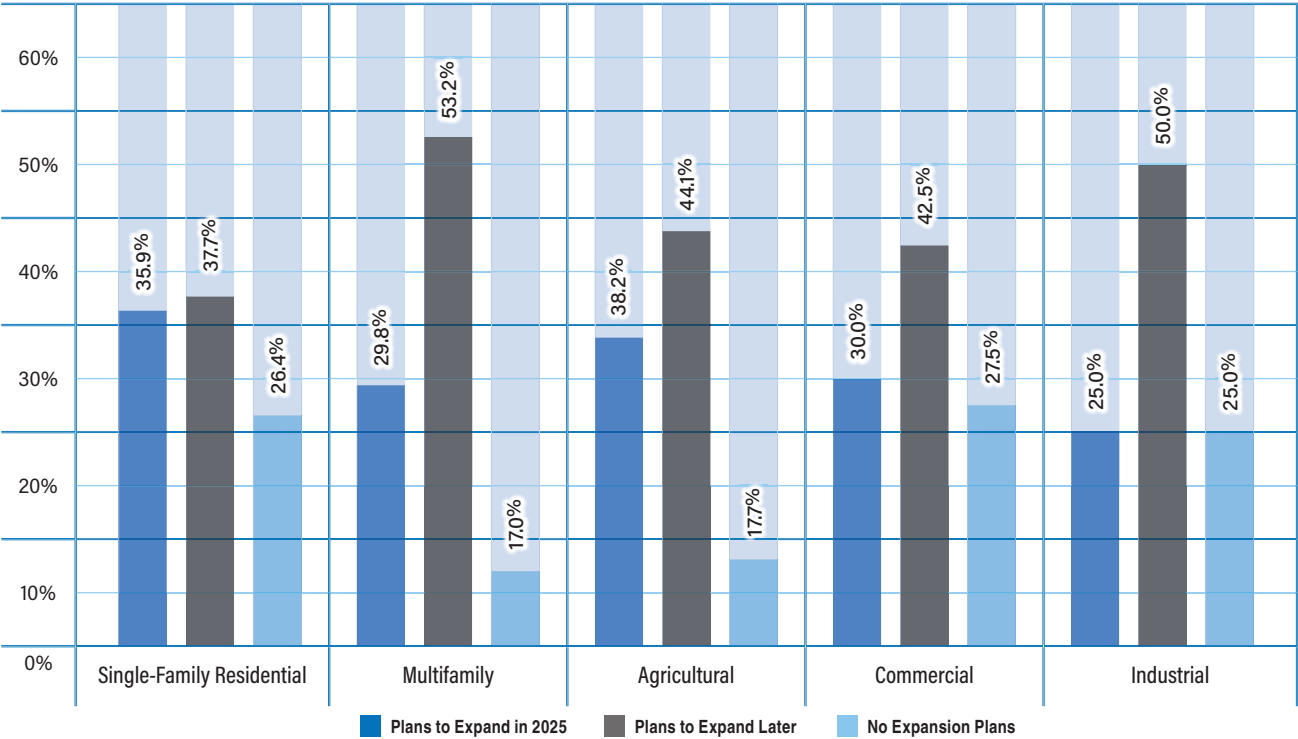
different. Only 7.6% of single-family residential respondents expected a decline in 2025, but a third of industrial survey takers anticipated a drop.

Future Opportunities and Challenges

On average, 31.8% of companies have expansion plans in 2025 and 22.7% have no future expansion plans, leaving 45.5% planning to expand some time beyond 2025. Across market segments, about a quarter of the respondents engaged in post-frame construction report they have no expansion plans, but the multifamily (17.0%) and agricultural (17.7%) are less likely than the other market segments. **C13**

Companies in the agricultural market (38.2%) were most likely to report they planned to expand in 2025. Only 25% of industrial market companies looked to expand next year.

Chart C13 – Expansion Plans



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Chart C14 – Plans to Add Resources in 2025

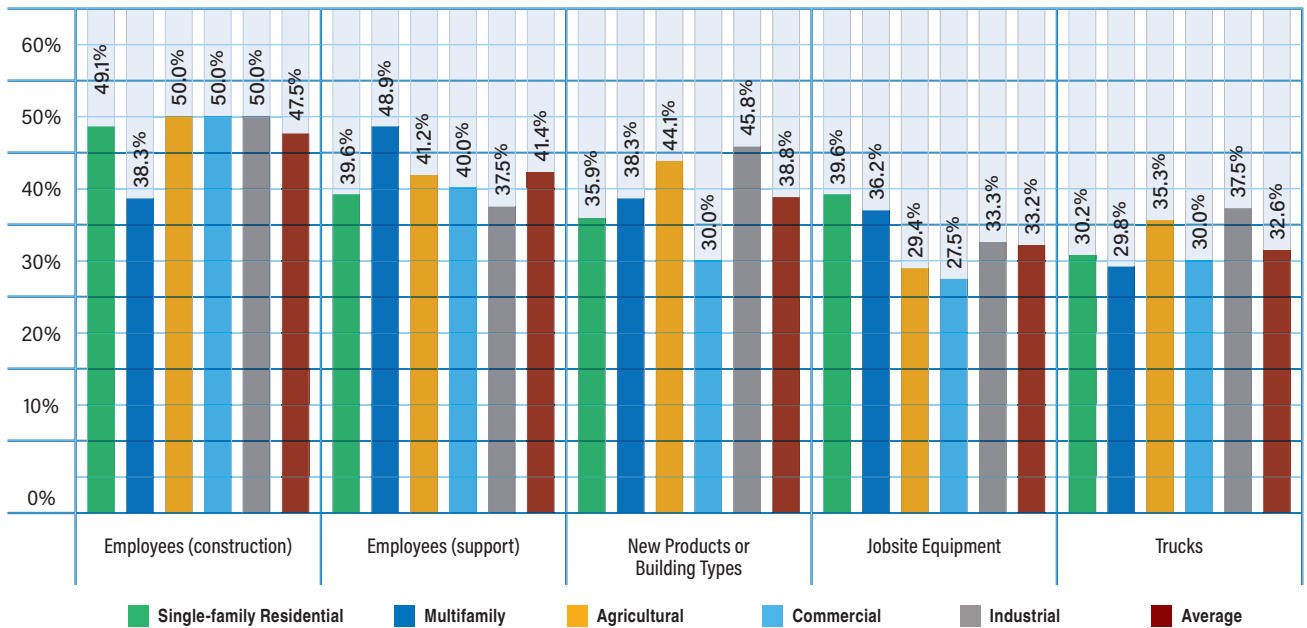
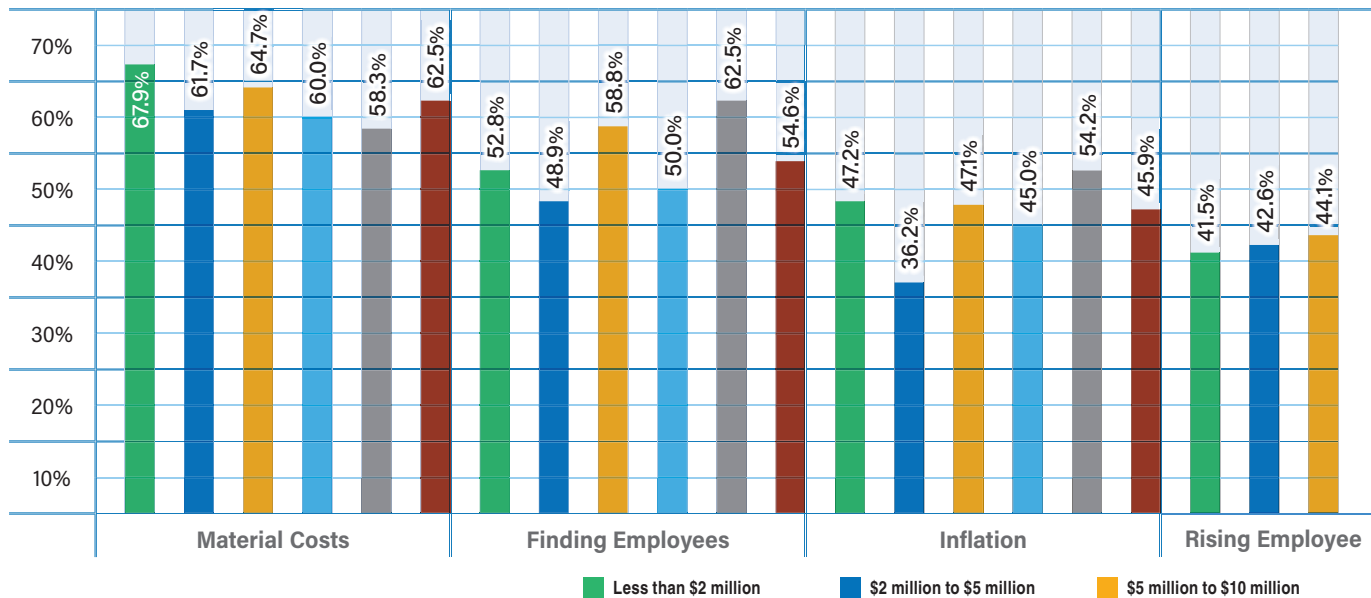


Chart C15 – Challenges in 2025



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Expansion plans require the addition of resources. For many companies, maintaining business size means adding resources as well, especially as employees depart or equipment goes out of service. **C14**

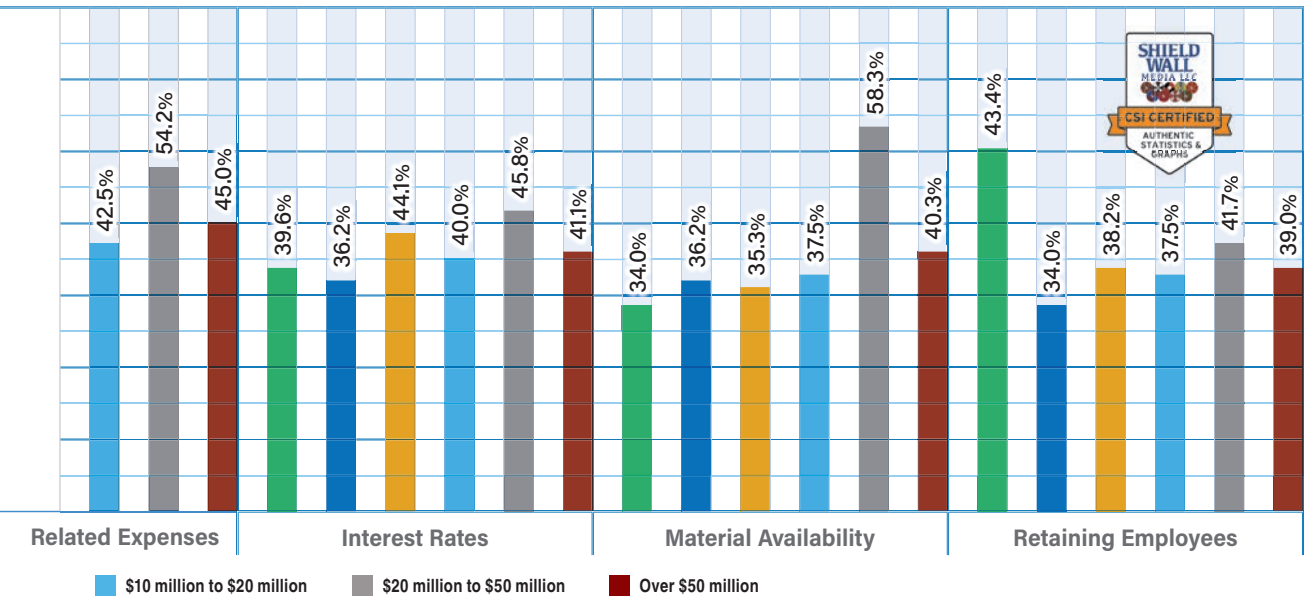
Among a list of twelve potential resources, respondents from companies engaged in post-frame construction identified the most pressing needs as adding employees, both construction and support. Of all the market segments, those doing multifamily (38.3%) work were least likely to say they were going to add construction employees. About half of each of respondents in the other market segments said they would add construction employees. But multifamily companies (48.9%) were more likely to look at add support employees than any other market segment.

Companies in the construction industry face all kinds of challenges, some day-to-day and others potentially upsetting the entire industry. For years, the industry has battled a shortage of skilled labor, and companies engaged in post-frame construction have felt that bind as well. **C15**

But in our survey this year, one particular challenge kept rising to the top of the concerns: material costs. On average, 62.5% of survey takers said rising material costs were going to be the big challenge in 2025. Respondents in all market segments agreed with that sentiment. The likelihood of them choosing that was 58.3% at the low end among industrial companies and 67.9% at the high end among single-family residential companies.

Inflation, rising employee costs, interest rates, and material availability (shortages) all combined to make the material cost issue the most challenging respondents face in the coming year. And the specter of tariffs certainly had business owners in the post-frame construction market concerned.

Ben Nystrom, CEO of MWI Components, Spencer, Iowa, sums it up. "Weather, finding quality candidates, and uncertainty regarding a new administration discussing tariff," he says, "are all going to be challenges."



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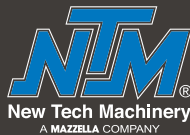
  
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The beautiful eagle feather metal roof detail was designed and specified to last. The roof is comprised of 22-ga. 70% PVDF-coated Galvalume panels that transition from Silver Metallic on the left end to Slate Gray as the middle tone to Dark Bronze on the right end. The Sharkskin Ultra SA® was selected as the roof underlayment beneath the multi-colored feather-shaped metal roof and metal wall panels, as it will provide long term moisture resistance.

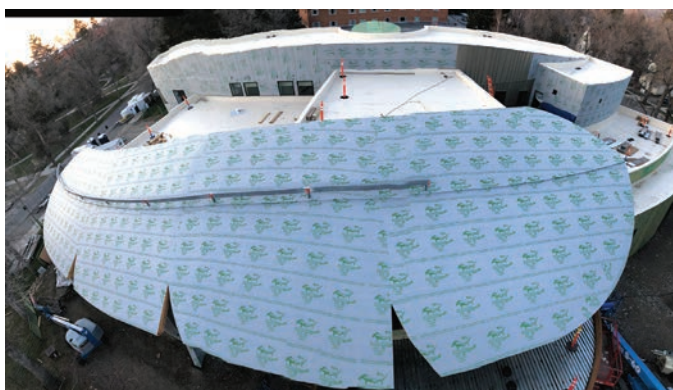
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Photos, top & middle: Montana State University & Chris Kamman (SkyLab Media House). Bottom: Zach Kilwein, Beartooth Metal Roofing.

**Metal Roofing Manufacturer:**  
Sheffield Metals International, Sheffield, Ohio

**Roofing Contractor:** Zach Kilwein, Beartooth Metal Roofing, Billings, Montana



## SECTION 5

# METAL ROOFING AND RESIDENTIAL ROOFING DATA



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## SECTION 5

# METAL ROOFING AND RESIDENTIAL ROOFING DATA

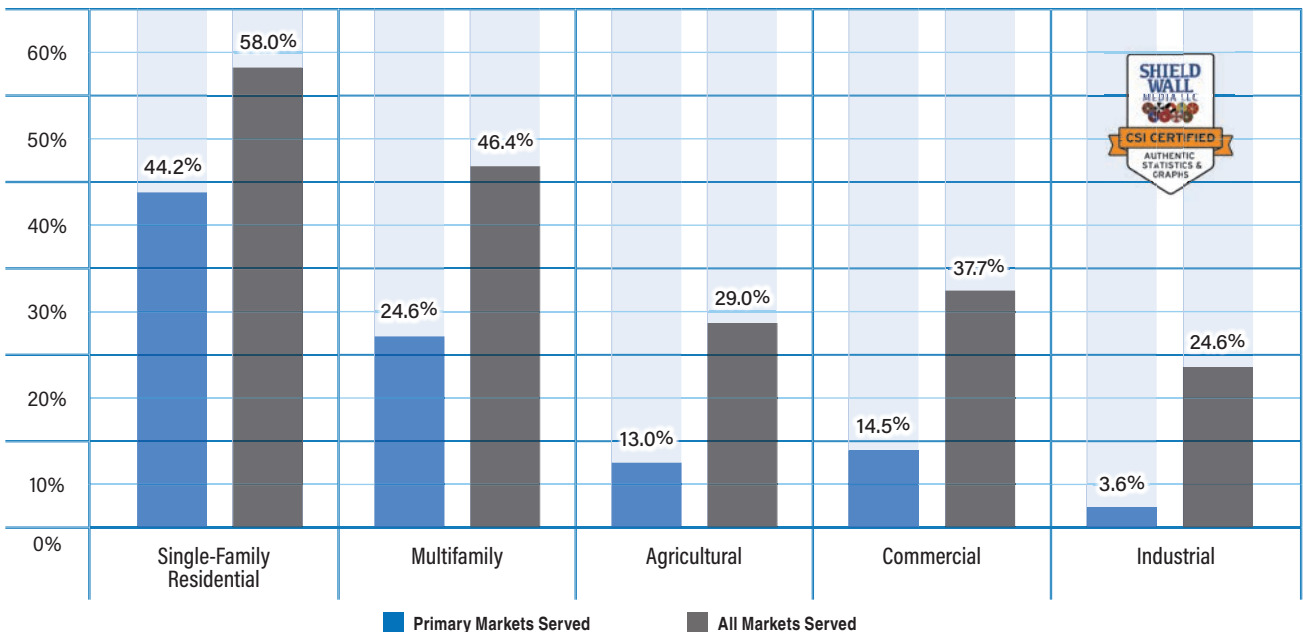
In research released last Fall, the Metal Roofing Alliance reported that the housing market slowdown in 2023 caused a decline in the metal roofing market. That slight decline coincided, though, with an increase in the share of the market. Metal roofing now has roughly 18% of the residential market. Going forward, the goal will be to hold market share and ride a rising construction market.

Renee Ramey, executive director, Metal Roofing Alliance, says, "We are optimistic the economy will be strong and that homeowners' desire to renovate uti-

lizing eco-friendly, durable, sustainable products will continue to grow. Unfortunately, the number of extreme weather events (hurricanes, hail, and wildfires) was not something I think any of us anticipated. The amount of loss and the widespread need to rebuild was a surprise. It is our hope we continue to drive awareness for more sustainable building materials that can help harden homes against such events."

The wildfires in Los Angeles in early 2025, in particular, have drawn attention to the kind of resilient construction that metal roofing helps bolster.

**Chart C1 – Market Segments Served by Companies Who Do Metal Roofing**



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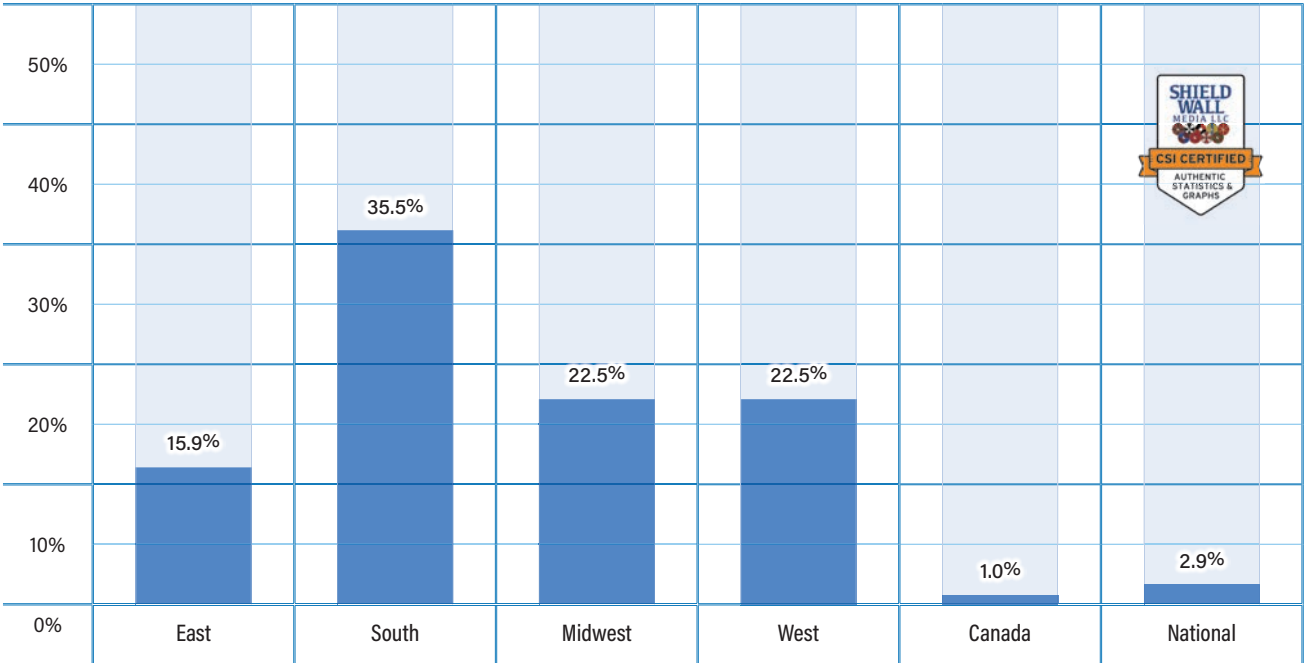
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Chart C2 – Metal Roofer Locations



Characteristics of the Metal Roofing Industry

The largest cohort of respondents (25.7%) to the 2025 CSI annual survey were companies that primarily did general roofing. (See Section 1: Survey Participant Profile.) Companies whose primary building type was metal roofing came in at 7.8%. When asked what other building types respondents participated in, general roofing came in at

36.5% and metal roofing 24.4%. Clearly a significant portion of the respondents in our survey were general roofers who also offered metal roofing as a service.

Breaking that participation out by the markets they served, we compared companies doing primarily metal roofing to those engaged in metal roofing. For both types of companies, single-family residential work was the predominant area of concentration, with 44.2% of companies primarily

Chart C3 – Role in Construction Process

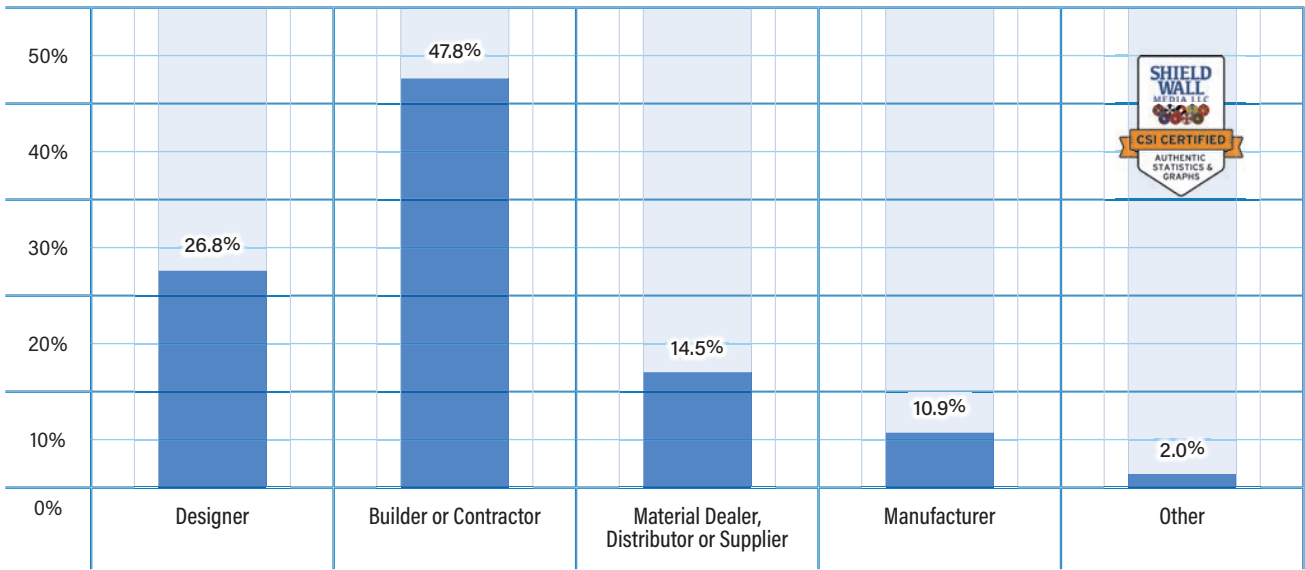
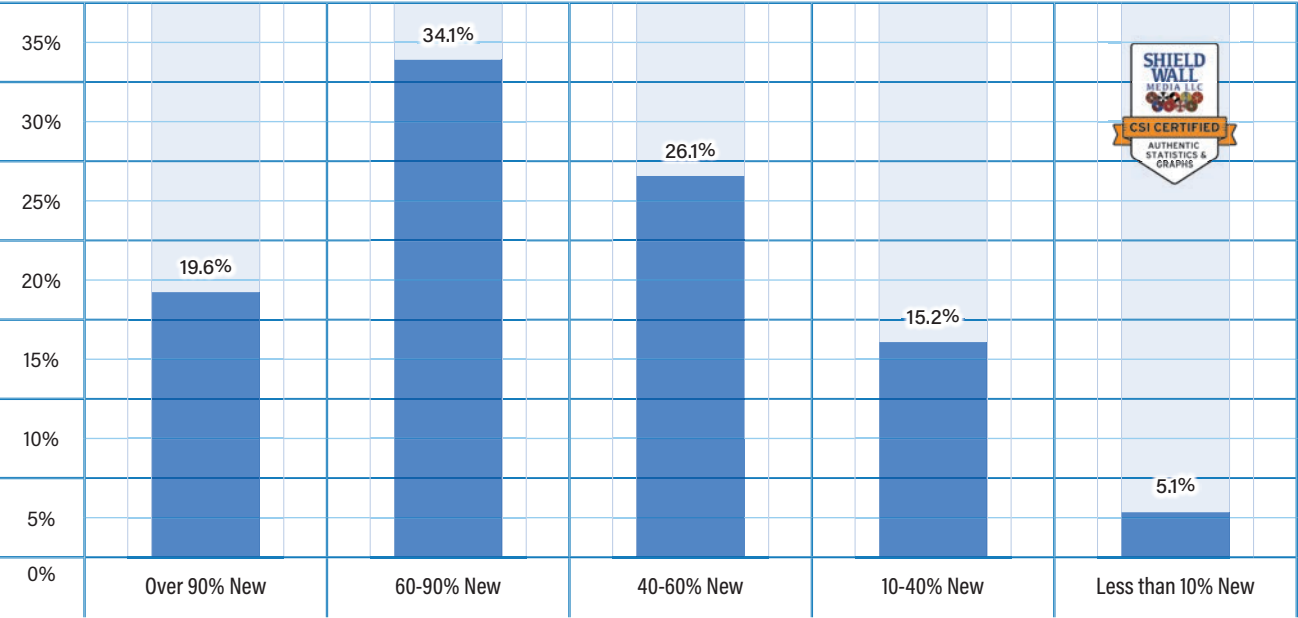




Chart C4 – New vs. Remodel



doing metal roofing in the single-family residential market and 58.0% of those only engaged in metal roofing. **C1**

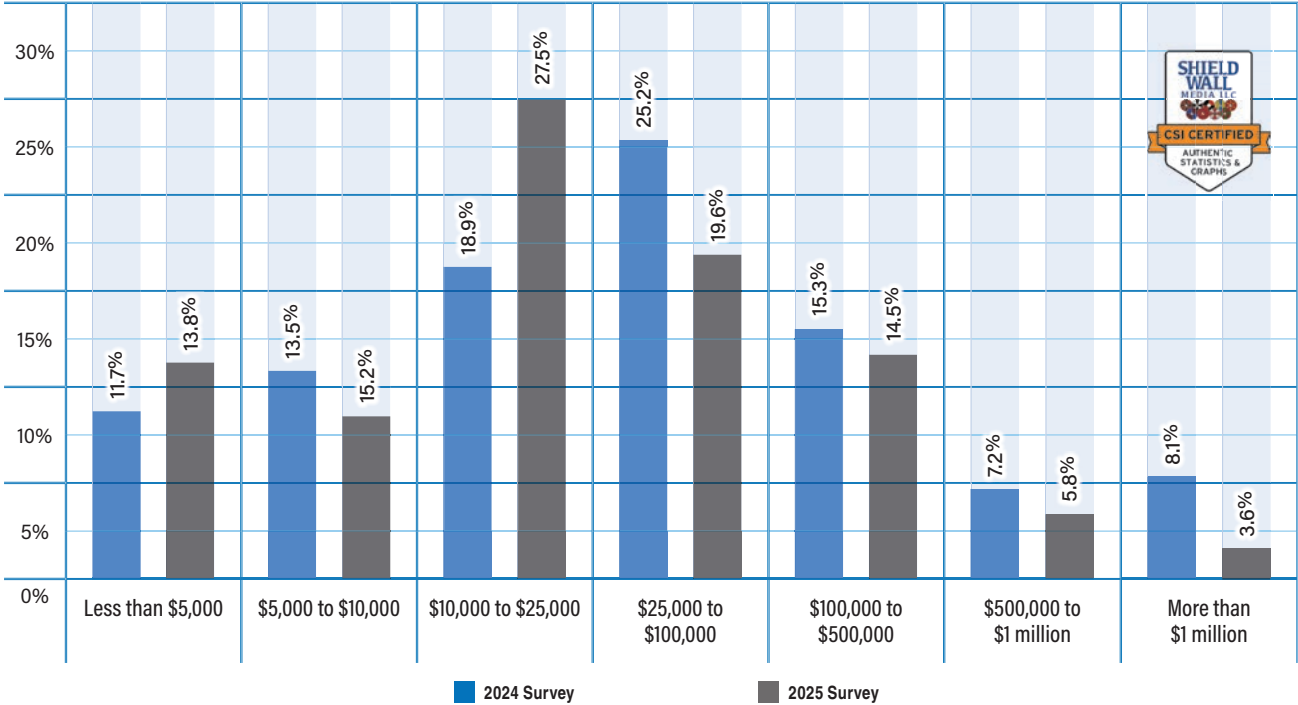
Very few of our respondents did metal roofing on industrial projects and almost none of them (3.6%) were companies doing primarily metal roofing.

The large percentage of companies whose primary service was metal roofing that work in residential

construction speaks to the type of companies doing that work. In our survey, they tended to be remodeling contractors specializing in that area. Companies in the commercial roofing business often offered a variety of roofing types other than metal.

Narrowing the survey down to only those companies that primarily did metal roofing left out a large number of companies doing metal roofing and at

Chart C5 – Average Job Size





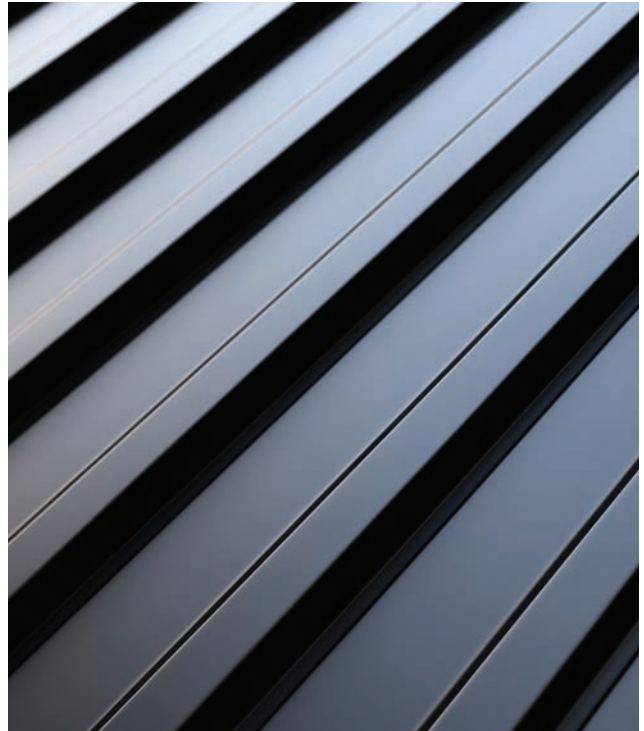
what could be a significant level. A general roofing company that did \$20 million in gross sales might be getting \$7 million of that from installing metal roofs, which would make them a much larger metal roofer than a \$1 million company installing only metal roofs. **C2**

When we broke out the companies engaged in metal roofing, we found most of them were based in the South, with 35.5% percent of respondents in that region. There were a few national companies (2.9%), who were probably manufacturers, and both the Midwest and West regions accounted for about a fifth (22.5% for both regions) of respondents.

Of the 238 companies reporting they were engaged in metal roofing, 47.8% were builders or contractors. Given the high percentage of respondents engaged in the residential market, that would be understandable. Designers made up 26.8% of the survey takers engaged in metal roofing, while material dealers, distributors, or suppliers comprised 14.5% and manufacturers 10.9%. Those breakouts are nearly identical to the breakouts for the 2024 CSI annual survey. **C3**

As the Metal Roofing Alliance has shown in its reporting, a significant portion of the metal roofing market is residential, and a large part of that is retrofit. It's a little surprising to see the percentage of companies who do primarily new construction among the companies engaged in metal roofing. Of the companies engaged in metal roofing, more than half (53.7%) did at least 60% of their work on new buildings. Only 5.1% of the companies did more than 90% remodeling work. **C4**

We contrasted the average job size as reported by companies engaged in metal roofing in the 2024 survey to the survey takers in 2025. In general, there was a higher predominance of smaller average job sizes among this year's respondents. This year, 56.5% of respondents reported they had an average job size of less than \$25,000 compared to last year when 44.1% said that. As reported elsewhere, there were a number of respondents who reported they offered handyman services, which may have skewed these numbers to smaller job sizes. **C5**



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## Projected Industry Growth

Our respondents to the 2025 CSI annual survey were generally more optimistic about the upcoming year (2025) than last year's survey takers were about 2024. The percentage saying the general business climate in the construction industry would improve in 2025 rose to 47.8% from 41.1% last year, which is a 16.3% increase year over year. Just as importantly, the percentage expecting a poorer business climate in 2025 dropped slightly to 15.2% from 16.1% from last year's survey. **C6**

Jim Bush, vice president of sales and marketing, ATAS International, Allentown, Pa., puts this into more specific terms. "While the industry appeared to enter into a softening period during the second half of 2024," he says, "I believe the first half of 2025 will continue in this manner with an improving market during the second half of 2025."

Complementing that sentiment is Rob Heselbarth, director of communications, PAC-CLAD, Elk Grove Vil-

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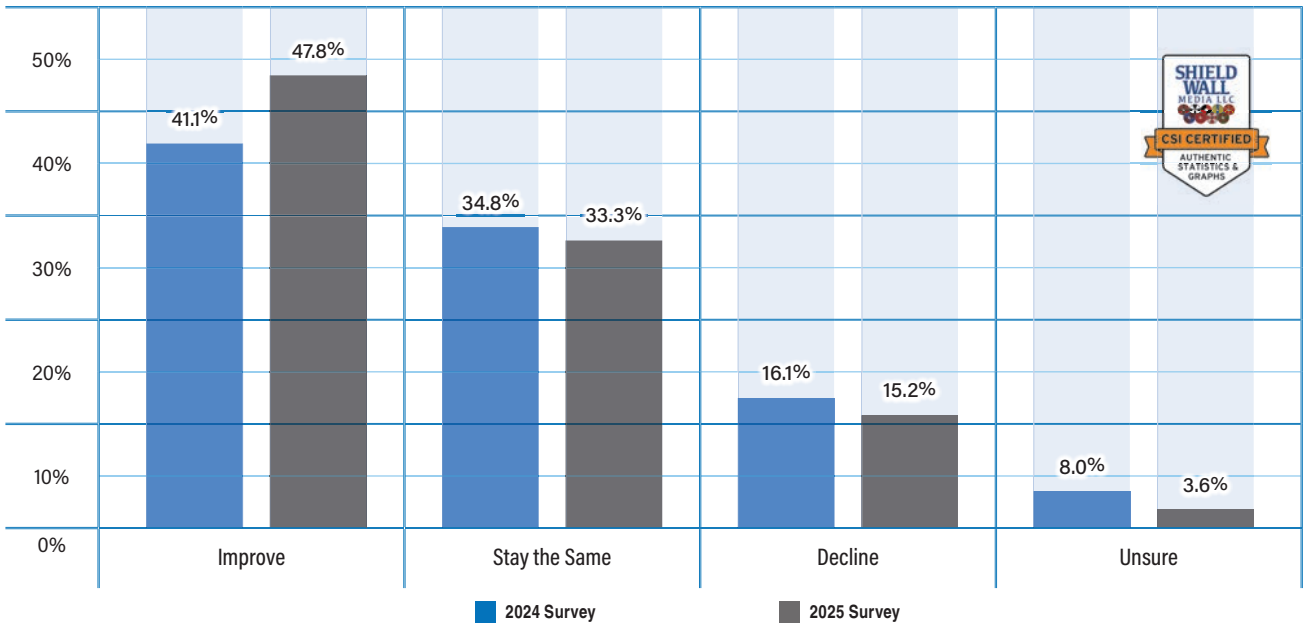
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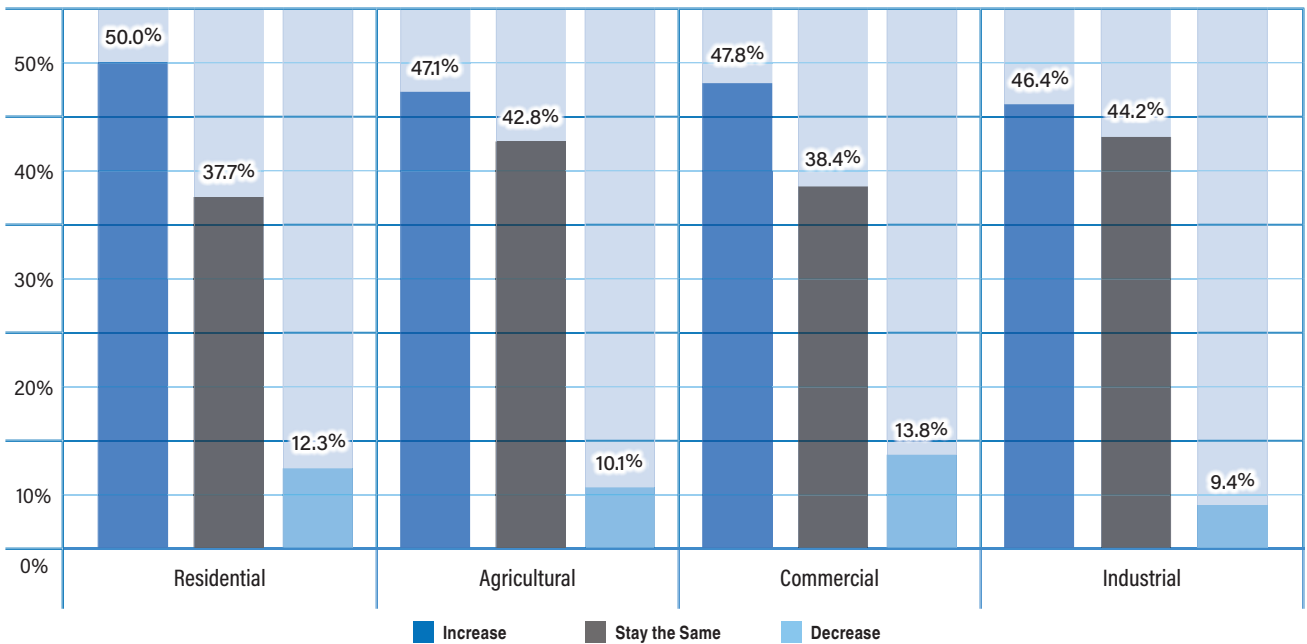
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**Chart C6 – Sentiment About Construction Industry in 2025**



**Chart C7 – 2025 Growth Sentiment by Market Segment**



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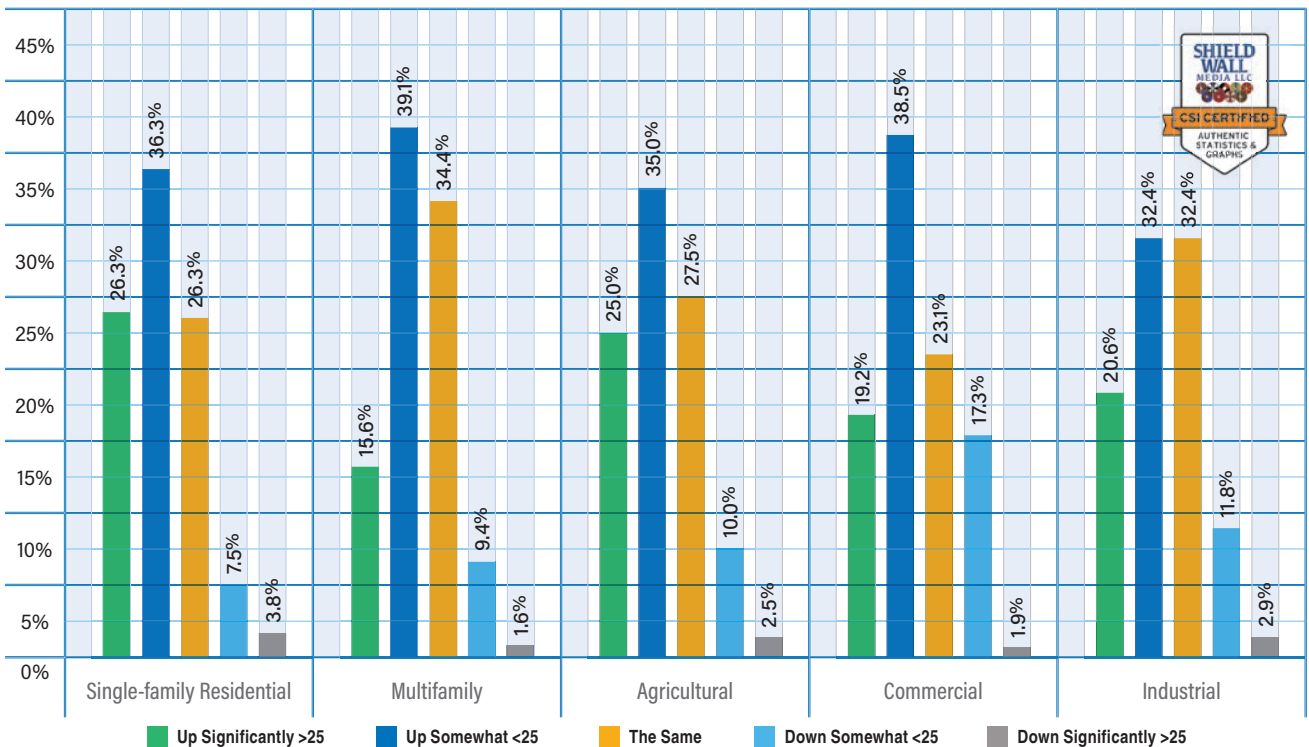


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**Chart C8 – 2024 Gross Sales Compared to 2023 by Market Segment**

lage, Ill., who spends a lot of time talking to professionals at trades shows and industry meetings. “They indicate confidence in 2025,” he says, “as do the industry reports and as do PAC-CLAD executives.”

Our survey asked respondents to prognosticate whether the construction activity in individual markets would increase, stay the same, or decrease. Among companies engaged in metal roofing, there was a relatively even sentiment across market segments about construction activity improving with 50% of respondents saying the residential market would improve, 47.1% seeing improvement in the agricultural market, 47.8% expecting commercial construction activity to rise, and 46.4% looking for an increase in industrial construction. **C7**

That’s not to say 2025 will come roaring out of the gates. Bush says, “The drawback of construction starts out of ground in 2023 and 2024 affected the industry in late 2024. As we move into the latter half of 2025, we will see the upcoming construction starts begin to improve and the economy settle into the new market dynamics.”

### Company Size and Growth Projections

Among companies engaged in metal roofing, the year-over-year growth they experienced in 2024 was remarkably consistent across all the market

segments. At the high end, 62.5% of companies serving the single-family residential market showed increased gross sales in 2024. At the low end, 52.9% of companies serving the industrial market reported 2024 gross sales increases. **C8**

Within those increases was some differentiation. The single-family companies (26.3%) and agricultural companies (25.0%) were far more likely to have significant (greater than 25%) growth than the other market segments.

When looking at declining revenues, companies serving the commercial construction market (19.2%) were most likely say gross sales declined in 2024, but only 1.9% said the drop was significant.

While companies engaged in metal roofing work in the commercial market segment were most likely to report a decline in 2024, they were the most likely to anticipate an increase in gross sales in 2025 with 69.2% expecting sales to go up this year. Nearly a fifth of them (19.2%) expected the increase to be greater than 25%. **C9**

Individual businesses are the engines that drive industry and market economies. For the most part, respondents engaged in metal roofing were bullish on 2025, and the businesses serving this market more often than not expected their gross sales to increase this year. Survey takers responded almost evenly that gross sales would jump significantly. Twenty percent of agricultural companies saw a big



Chart C9 – 2025 Projected Gross Sales Compared to 2024 by Market

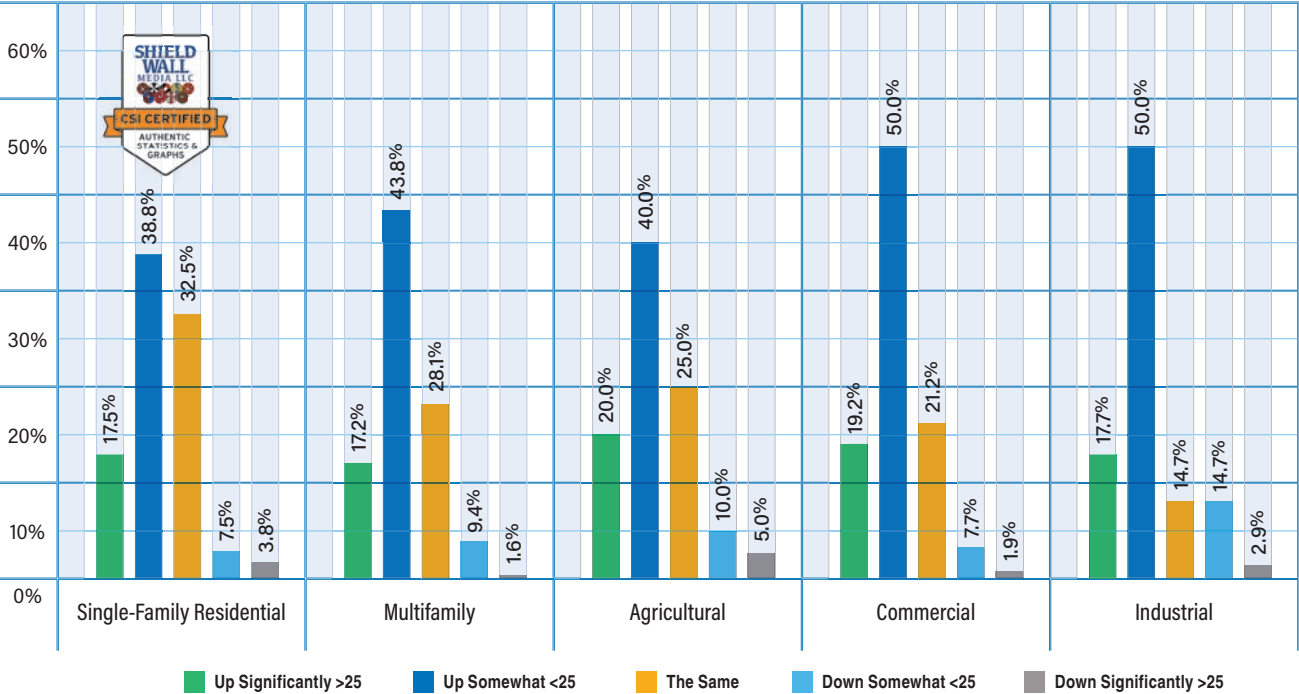
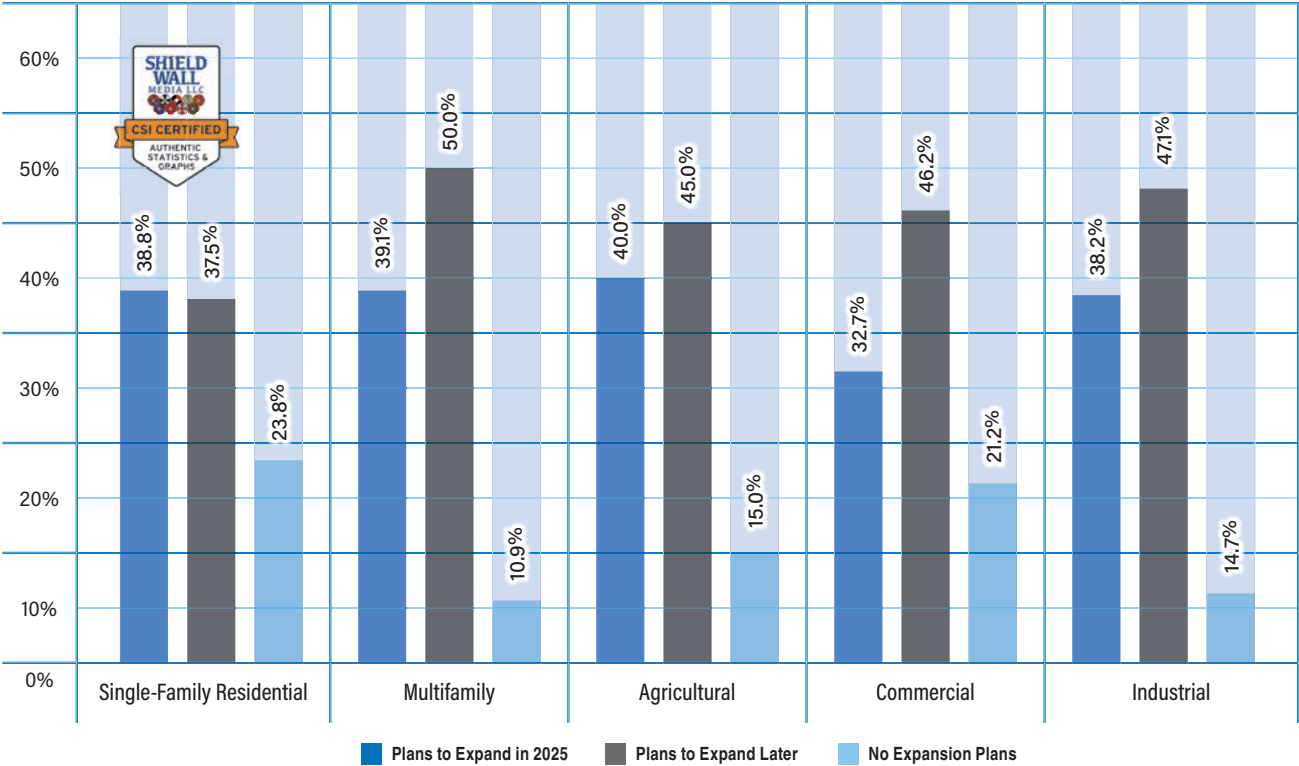


Chart C10 – Expansion Plans





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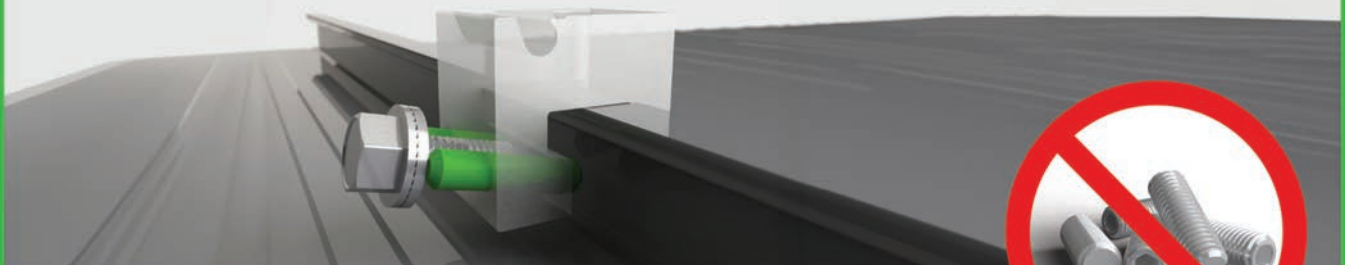


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Chart C11 – Plans to Add Resources in 2025

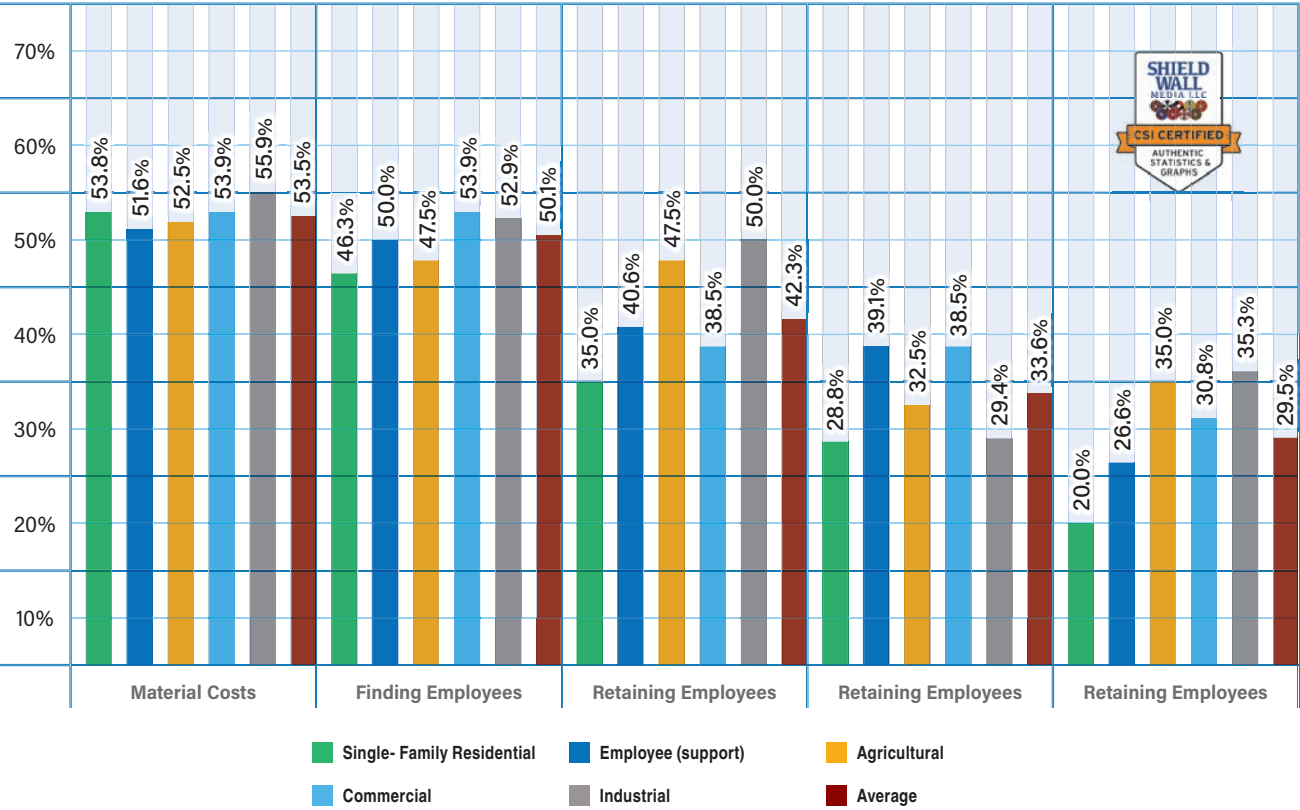
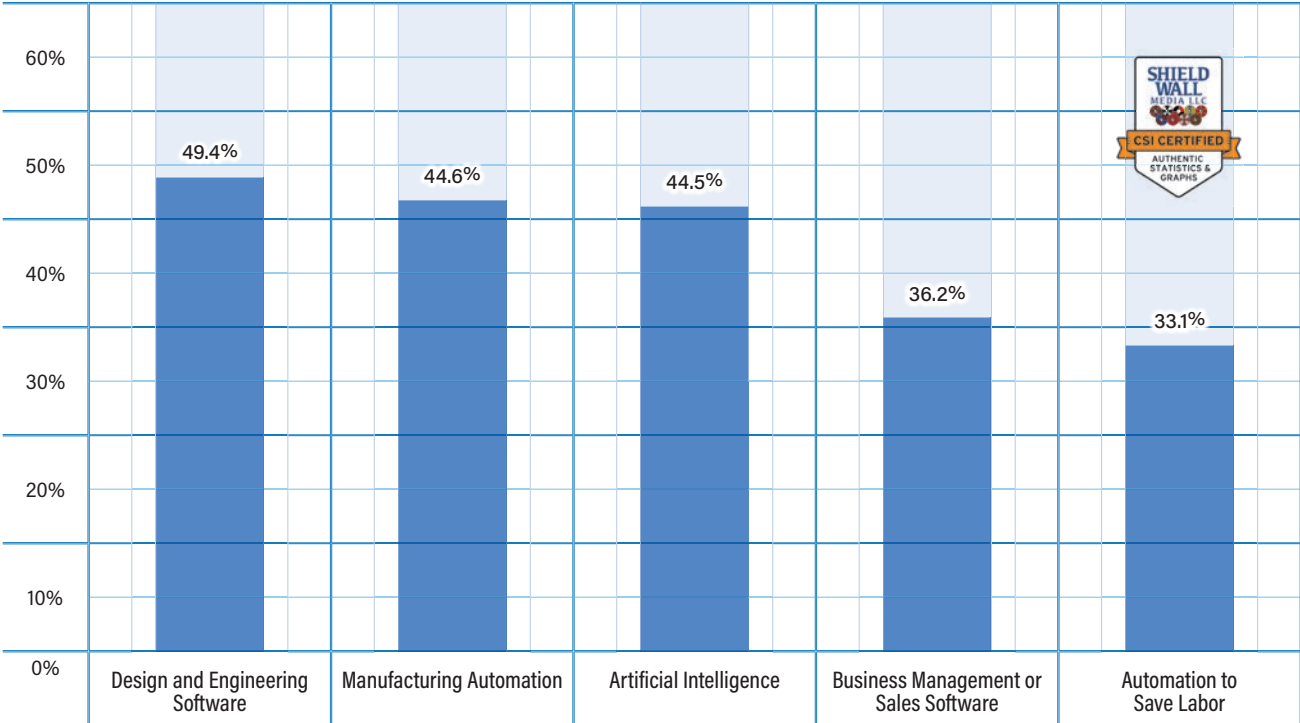


Chart C12 – Top Five New Products or Technology Impact





increase in gross sales coming, and at the bottom end, 17.2% of multifamily companies anticipated significant growth.

### Future Opportunities and Challenges

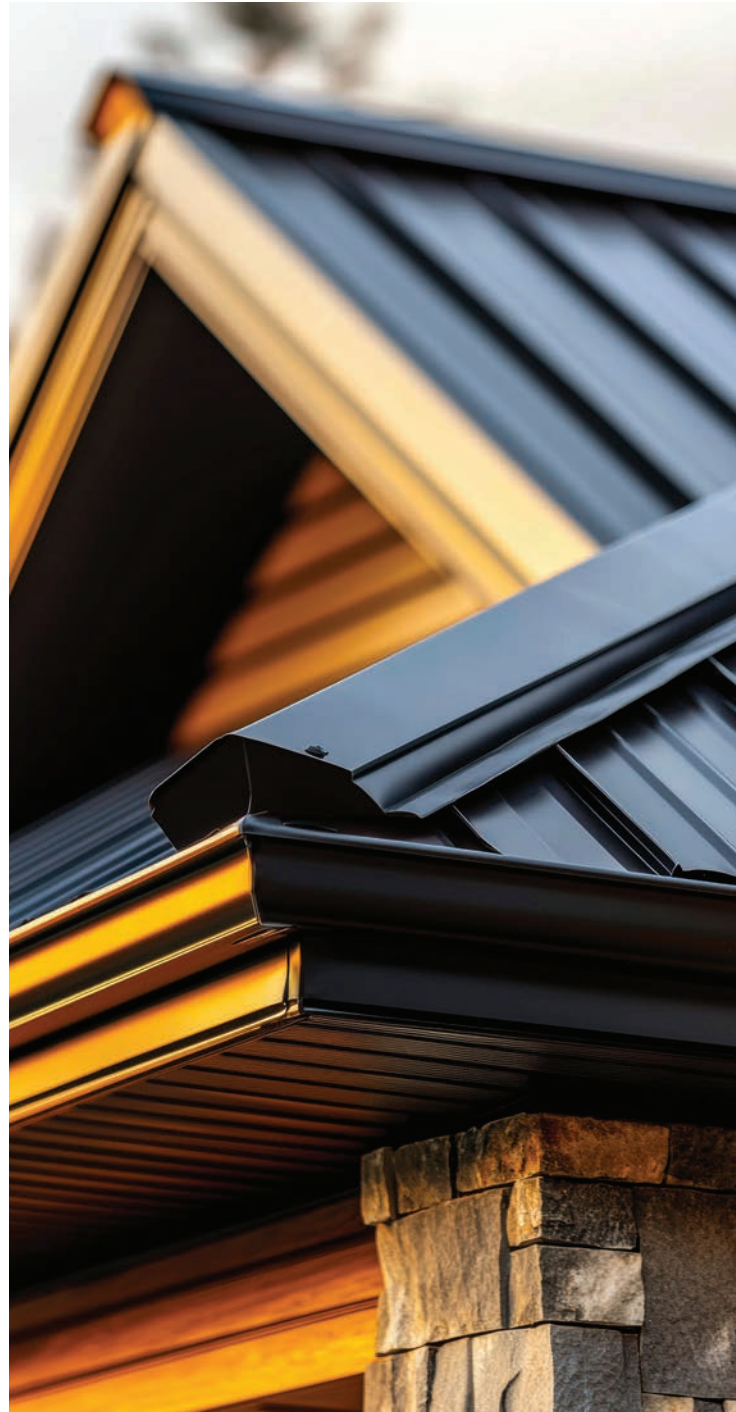
Anticipating growth is one thing, but planning to expand a business shows a robust belief in both the strength of your company and the prospects for the industry. By that measure, just under 40% of the respondents who were engaged in metal roofing had plans to expand their operations in 2025. Agricultural companies (40%) were most likely to report expansion plans for this year and 32.7% of companies in the commercial market segment anticipated expanding in 2025, which was the least likely of all the market segments. **C10**

As far as plans to expand beyond 2025, 23.8% of companies in the single-family residential market said they had no expansion plans, and 21.2% of commercial companies held similar attitudes. Only 10.9% of respondents in multifamily said they had no expansion plans, making that market segment the most optimistic.

In every section in the 2025 CSI annual survey, companies identified adding employees in 2025 as one of those resources, but among companies engaged in metal roofing, finding employees (construction and support) were the top needs. More than half of the companies said they wanted to add employees: 53.5% looking for construction employees and 50.1% hiring support employees. **C11**

Among companies engaged in metal roofing, the likelihood of saying they wanted to add construction employees was almost identical across the market segments. And the spread of response rates across market segments for companies looking to add support employees was not very significant either, with 46.3% of single-family residential companies as the low end, and 53.9% of commercial companies as a high end.

Rounding out the top five resources companies engaged in metal roofing planned to add were new products or building types, jobsite equipment, and manufacturing equipment. The only consistency



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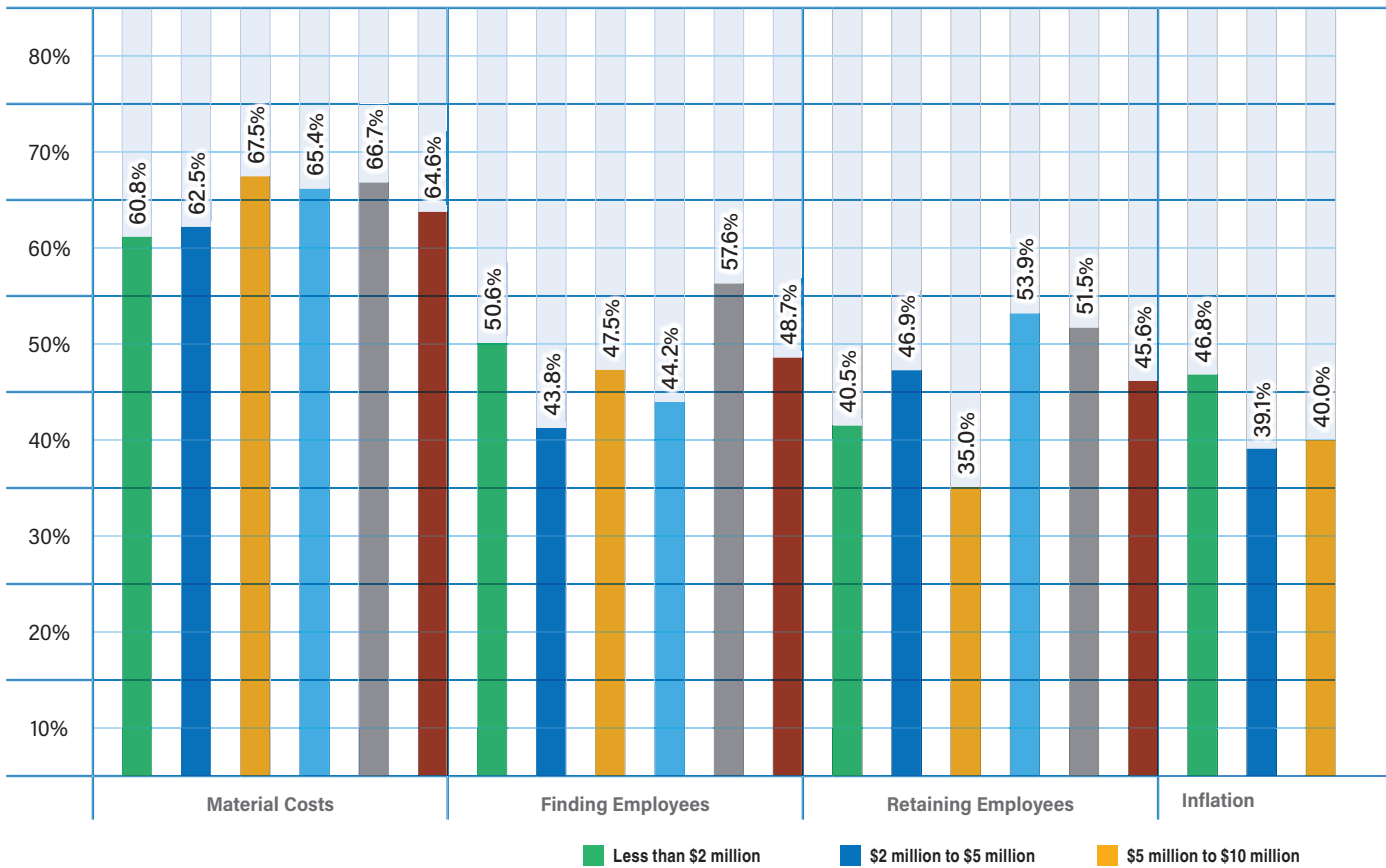
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Chart C13 – Challenges in 2025



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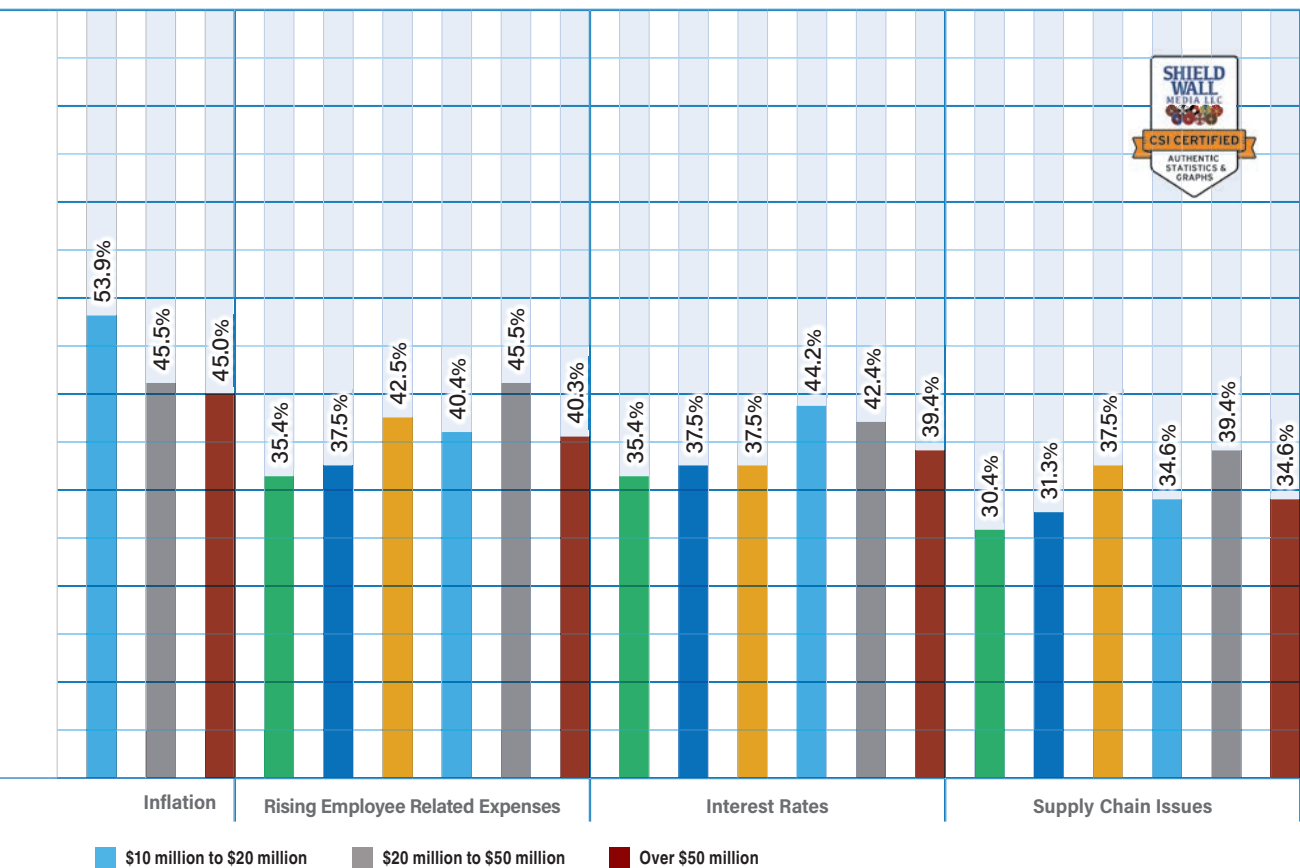


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about adding resources across building types was everyone identified the need for employees as a top three requirement.

Technology is impacting every element of the construction industry. For the companies engaged in metal roofing, the biggest impact they said will be from design and engineering software with 49.4% reporting that is most likely to have the greatest effect on their business. Manufacturing automation (44.6%) and artificial intelligence (44.5%) were close behind. According to our respondents, the impact of artificial intelligence on companies engaged in any of the building types in this report is remarkably consistent. **C12**

Among the new technology and products mentioned by respondents, the top five were all related to increased efficiency. Other advances, such as drone imagery and 3D printing, rated much lower.

As with the respondents to the survey overall and for those engaged in each building type, rising material costs was seen as one of the biggest challenge for our industry. Among companies engaged in metal roofing, nearly two-thirds (64.6%) said material costs would be a challenge in 2025. The next

closest was finding employees – the perennial difficulty in the construction industry – where 48.7% expected to be facing that difficulty in 2025.

Other employee-related issues, such as increasing employee related expenses and retention all came out near the top of the challenges the respondents expected to see in 2025. **C13**

All of the cost issues, of course, are interrelated, so it's no surprise that inflation and high interest rates are also going to be challenges next year for companies engaged in metal roofing.

Unlike other areas of the construction industry, the metal roofing sector still seems to be facing some lingering supply chain management. About a third of respondents (34.6%) said supply chain issues would be a challenge.

Jim Bush brings a broader perspective to the challenges the industry is facing. "Regulatory issues such as building codes and the over selling of competitive products as having green or sustainable attributes are a challenge," he says. "As an industry, the metal community must develop a consistent message of the value we bring to this changing landscape of sustainable initiatives."



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## SECTION 6

# ROLLFORMING AND METAL FORMING CONSTRUCTION DATA



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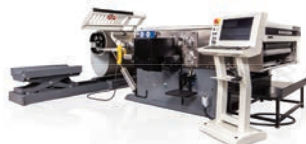
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# SECTION 6

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### Characteristics of the Rollforming and Metal Forming Industry

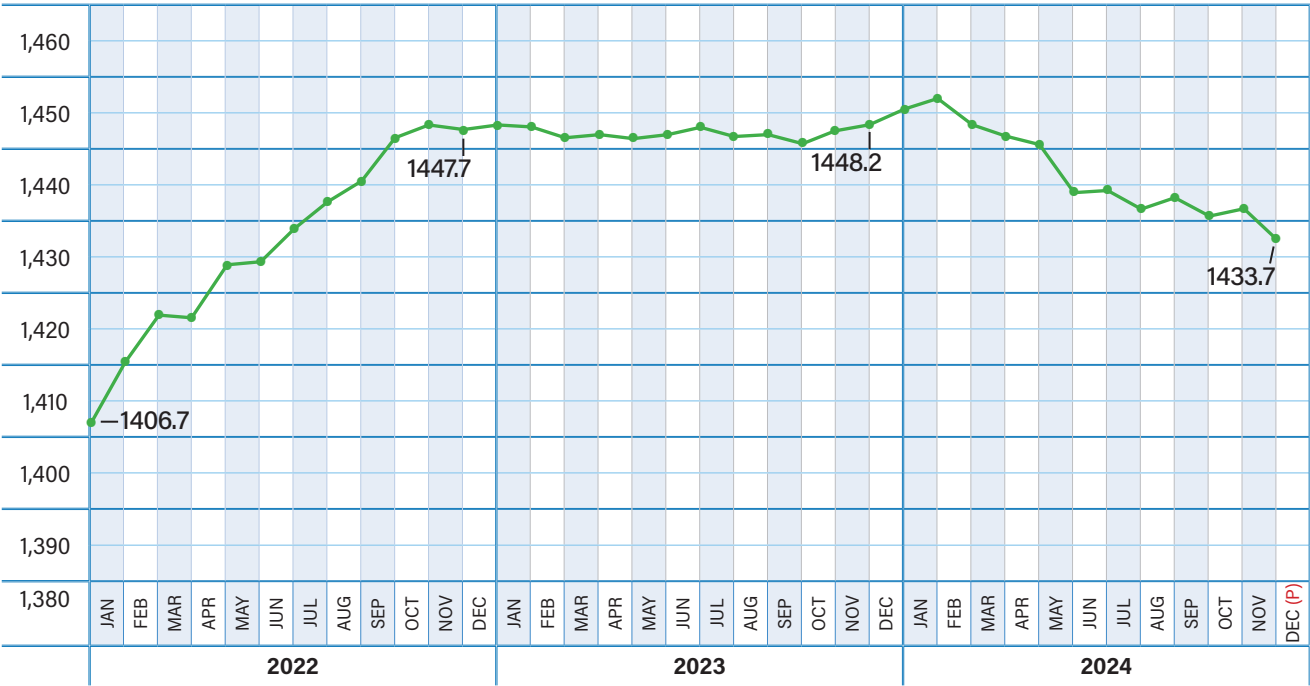
When we compared the markets served by companies engaged in rollforming from the 2024 CSI an-

nual survey to the 2025 survey, we don’t find much of a difference. This year, we had 56 respondents in this category compared to 39 last year, and this year there were a far greater number of companies working the industrial market segment (39.7% compared to 5.4%). Otherwise, there wasn’t a lot of difference. **C2**

The largest percentage of respondents doing rollforming came from the Midwest and the West (both at 26.8%) but we did have a few from Canada (5.4%) and some of the survey takers (probably manufacturers) worked nationally (7.1%). Respondents from the South represented 21.4% of the survey takers engaged in rollforming. **C3**

Most of the respondents who were engaged in rollforming in 2024, fell in the builder or contractor (33.9%) category. Material dealers (25.0%) and

**Chart C1 – U.S. Fabricated Metal Employment**  
(in thousands)



Source: U.S. Bureau of Labor Statistics  
**P= Projected**





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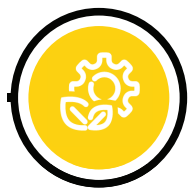
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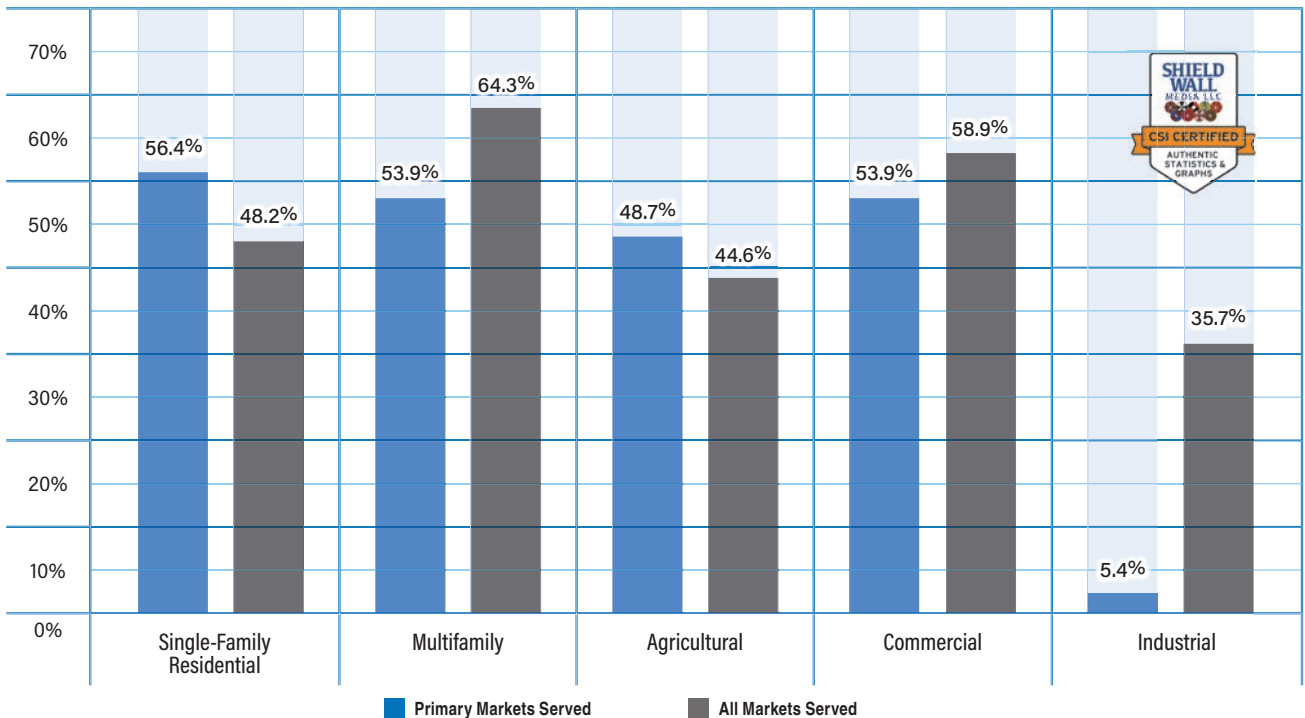
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**Chart C2 – Market Segments Served by Companies Who Do Rollforming**

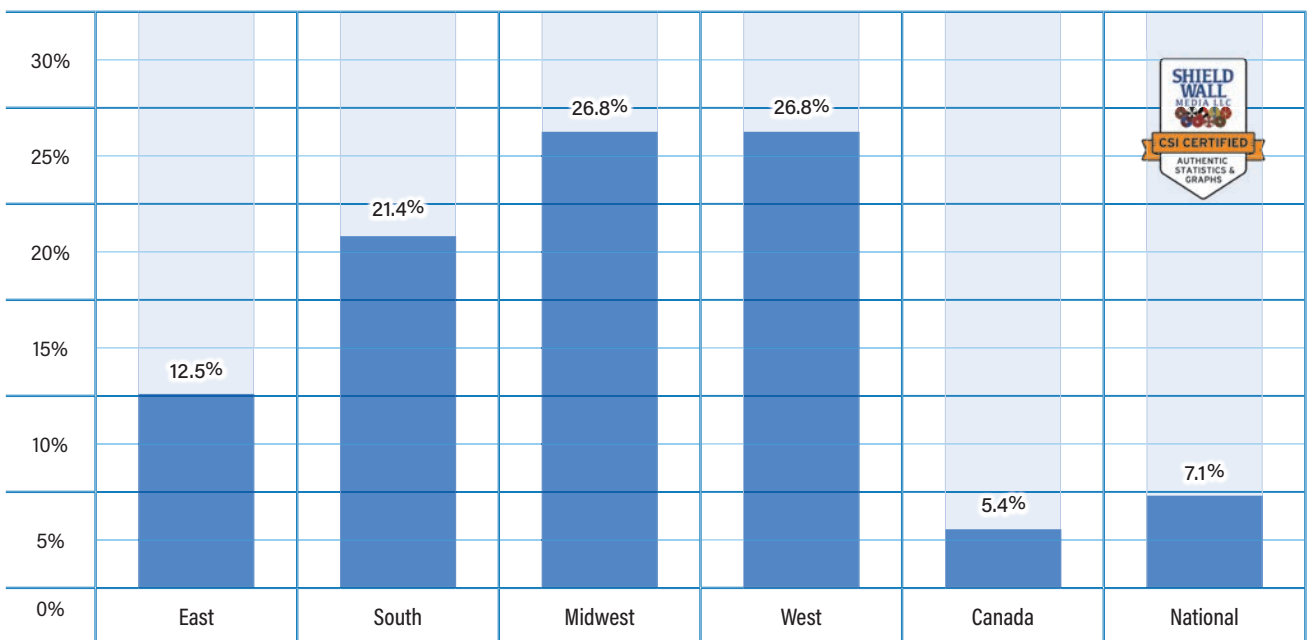


manufacturers (21.4%) made up a larger percentage of companies in this section than in building types covered in the survey. That makes sense since the work covered in this section is specifically related to types of tools or machines more so than types

of construction or building types. **C4**

Just over 30% of the respondents did about half of their work in new and half in remodel, but predominantly companies who were engaged in rollforming did new construction with 17.9% saying they did

**Chart C3 – Rollformer Locations**







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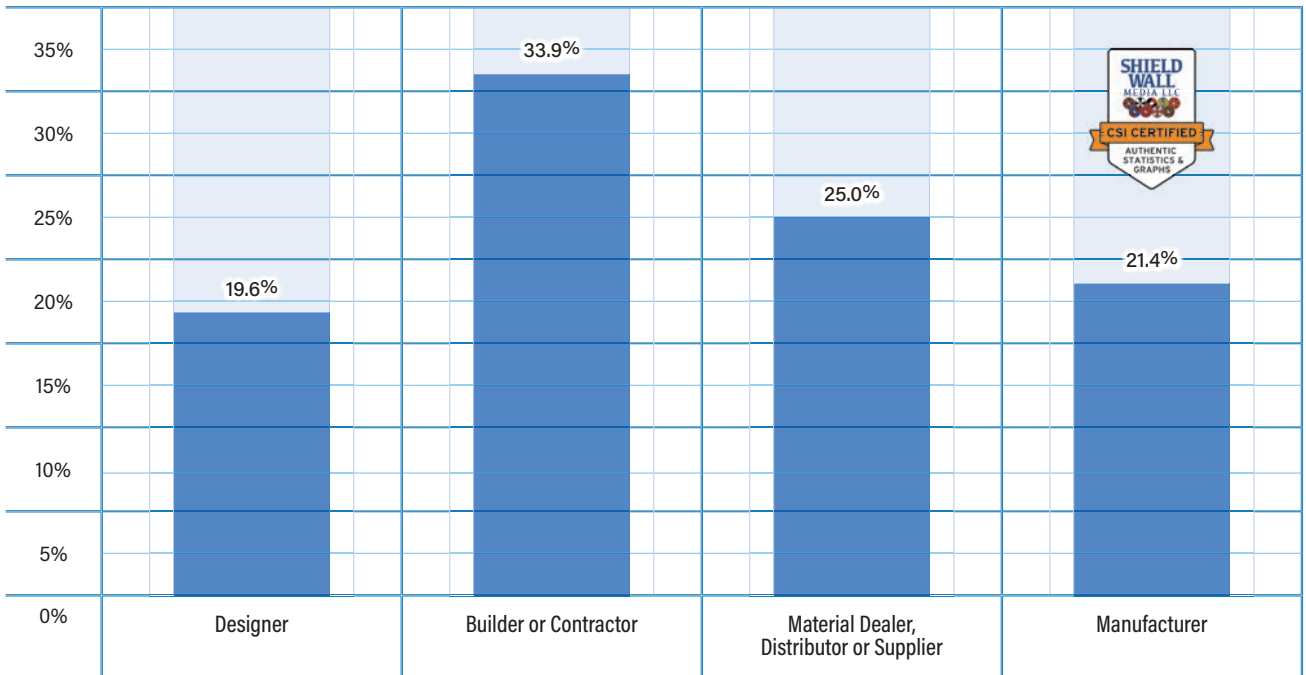
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**Chart C4 – Role in Construction**

at least 90% of their work in new construction. Only 3.6% of survey takers said 90% or more of their work was remodeling, while 46.4% did at least 60% of their work in new construction. **C5**

As with other sections of this report, there was a greater preponderance of companies doing smaller jobs this year compared to last year. In the 2024 report, 41.5% of survey takers had an average job

size below \$25,000. This year 58.9% reported average job size below \$25,000, although there did seem to be a shift within the smaller jobs from the extremely small (less than \$5,000) to those in the \$5,000 to \$10,000 range. It's hard to get any construction project done for less than \$5,000 so even a slight inflationary push would get those projects into the next cohort. **C6**

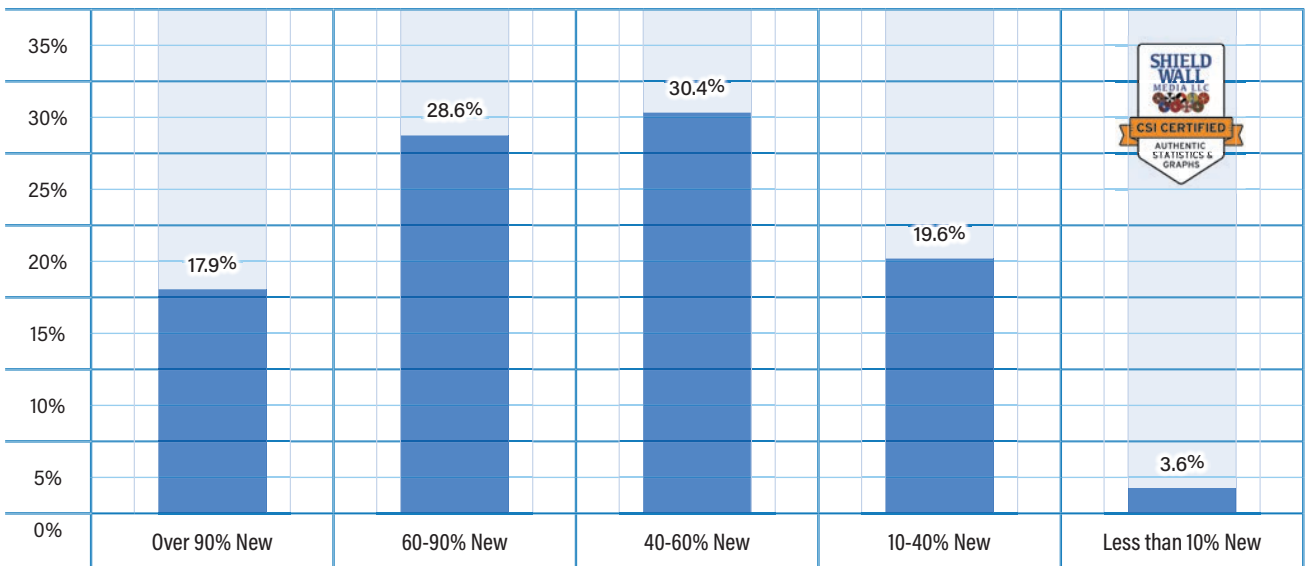
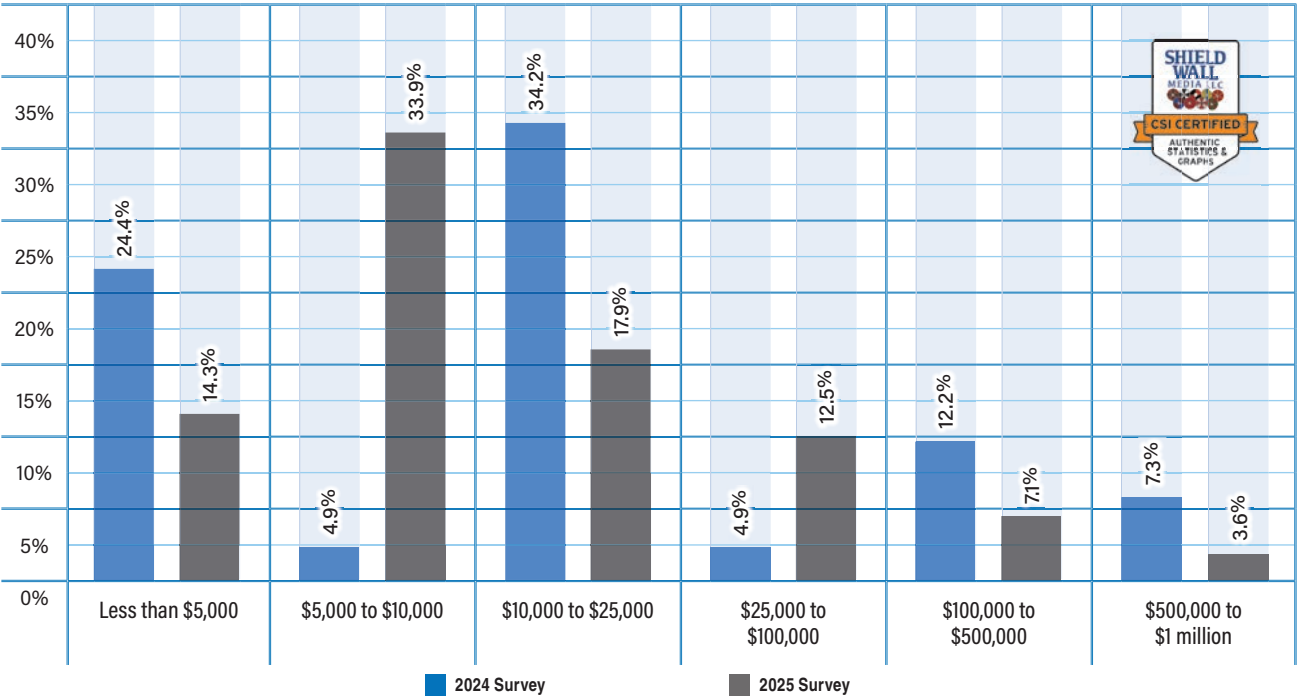
**Chart C5 – New vs. Remodel**



Chart C6 – Average Job Size



Companies doing rollforming who reported an average job size greater than \$100,000 were almost identical in the 2024 survey (24.4%) to the 2025 survey (23.2%).

Projected Industry Growth

We asked companies engaged in rollforming activity how they felt the general business climate would be in the construction industry in 2025. More than half (57.1%) expected it to improve. Last year's respondents were not quite as optimistic about 2024, when only 51.2% expected the construction economy to improve. The percentage who anticipated the following year's construction economy would be poorer did decline from 2024 survey takers (12.2%) to 2025 (10.7%). **C7**

Of note, there seems to be a much greater certainty about the upcoming year. Only 1.8% of our respondents were unsure compared to 12.2% last year. That may have something to do with the presidential election, which always brings uncertainty, being decided. **C8**

When asked how specific market segments would perform in 2025, companies engaged in rollforming had very different ideas. The commercial market got the most positive attention with 57.2% of respondents expecting that market segment to grow in 2025.

The other three segments – residential, agricultural, and industrial – all had similar responses from

companies engaged in rollforming. About 40% to 45% of survey takers thought those individual markets would increase in 2025 and between 41% and 48% expected them to hold their own.

Generally, about 10% of the respondents thought any given market would decline in 2025.

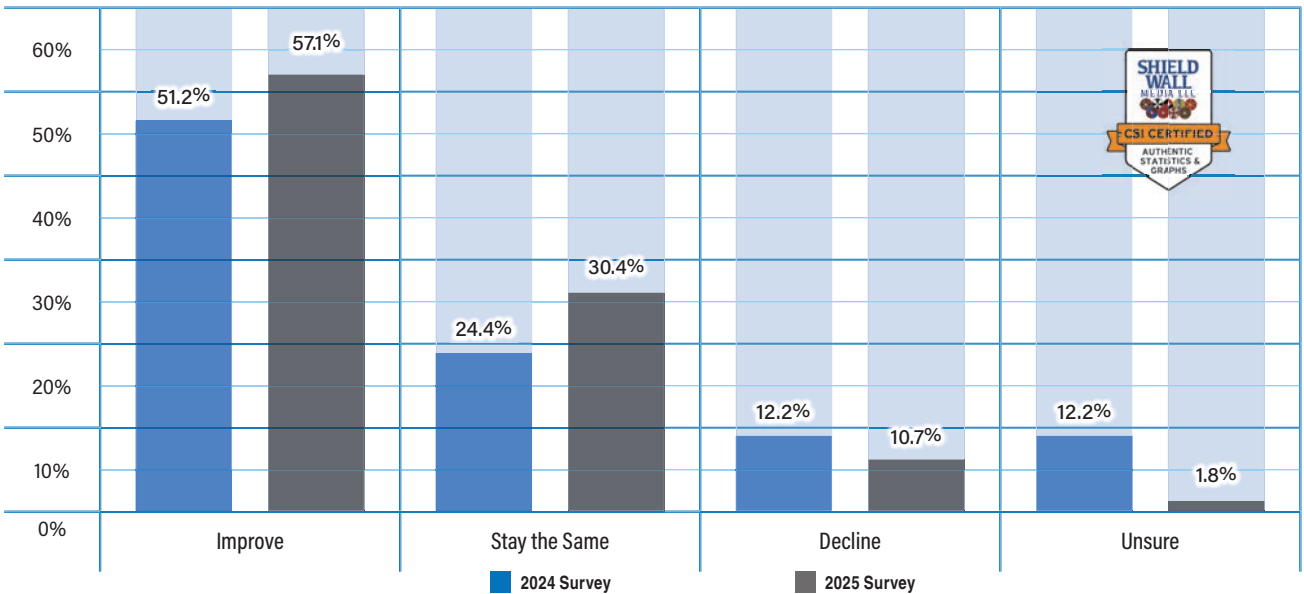
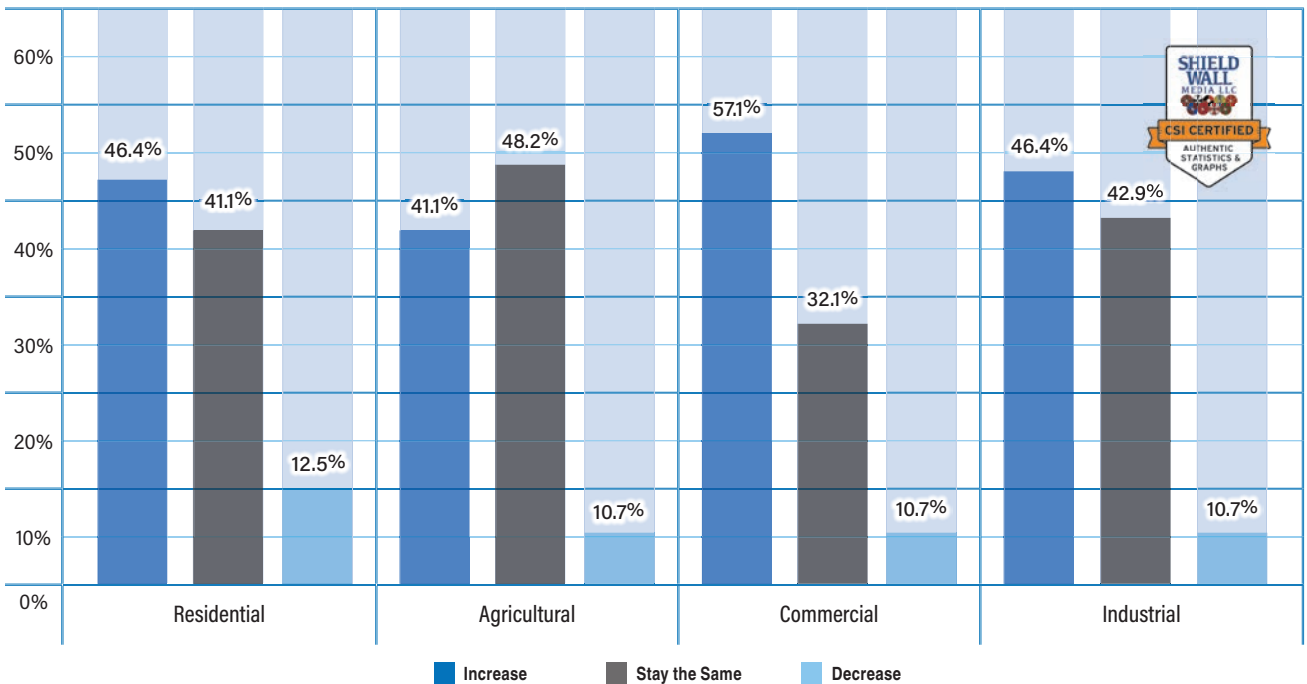
Company Size and Growth Projections

Englert is a company that distributes nationally, both machinery and finished metal products, giving them a comprehensive perspective on the industry. James Hazen, national roofing sales manager for the Perth Amboy, N.J.-based company says about 2024, "Despite some slowdown prior to the election in the economy, we continued to add new business, customers, products, and marketing efforts that resulted in year-over-year growth."

The total number of respondents who were engaged in rollforming was 56 for this survey, so analyzing information about specific regions, where participation can be slight, may lead to conclusions with a greater variability. That shows when we looked at the growth of gross sales, where survey takers in the East offered significantly different responses, so it's important to keep an eye on the average growth. **C9**

On average, 62.7% of companies engaged in rollforming reported growth in 2024 and 16.5% of



**Chart C7 – Sentiment about the Construction in 2025****Chart C8 – 2025 Growth Sentiment by Market Segment**

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Chart C9 – 2024 Gross Sales Compared to 2023 by Region

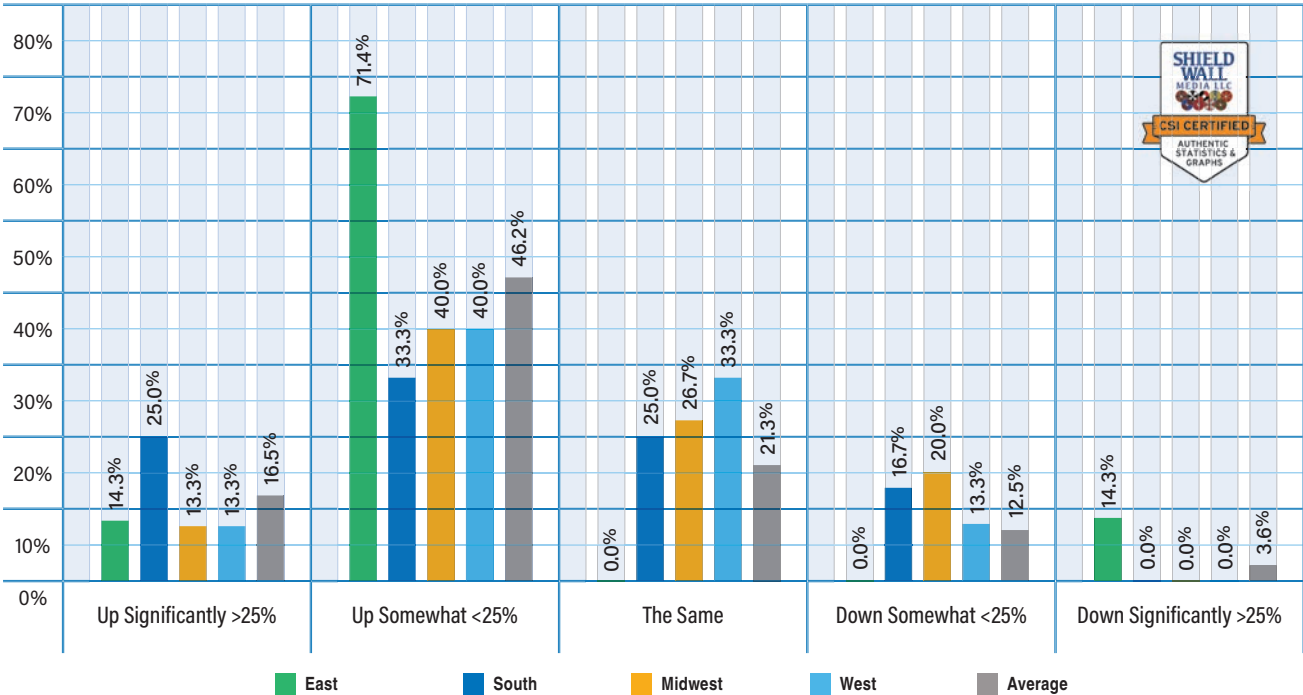
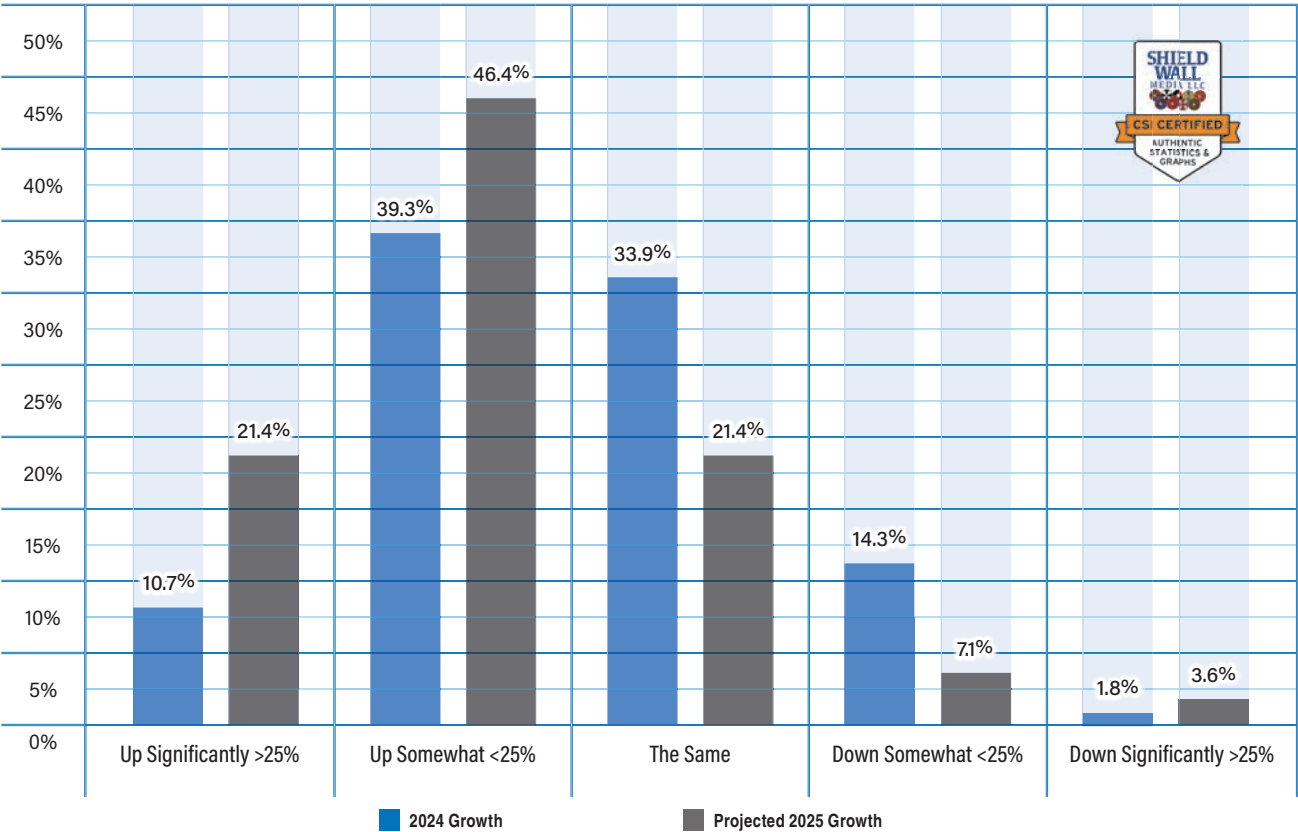


Chart C10 – 2024 Sales Growth Compared to 2025 Projections





them said their growth was significant or greater than 25%. Respondents in the East were most likely to report gross sales increases. Only 16.1% of the companies reported a gross sales decline in 2024, and only companies in the East said they experienced a decline.

In 2024, 50% of the survey takers saw their gross sales increase year-over-year, and 10.7% experienced sales growth greater than 25%. On the other side of the ledger, 16.1% had declining gross sales last year, but only 1.8% said that decline was significant or greater than 25%.

In keeping with the general optimism of the construction industry, and the sense of confidence that comes after an election year, our respondents were optimistic about their company's growth. More than two-thirds said the their gross sales would increase in 2025 and 21.4% expected the growth to be greater than 25%. A third of respondents (33.9%) said 2024 sales were the same year over year, and 21.4% projected them to stay the same in 2025. **C10**

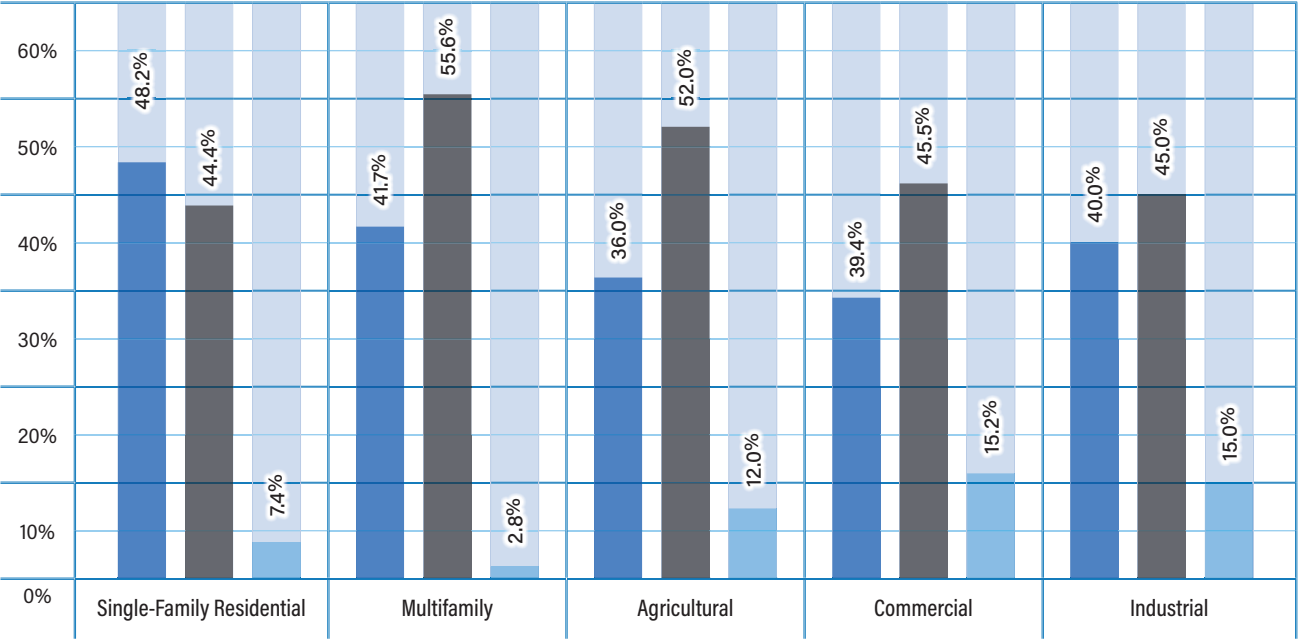
Future Opportunities and Challenges

Companies engaged in rollforming have different expectations of expanding their business depending on what market segment they serve. Companies in the multifamily market were most likely to have plans to expand with only 2.8% of them saying they had no plans. But companies in the commercial (15.2%) and industrial (15.0%) sectors were less likely to have plans.

**C11** Single-family residential companies engaged in rollforming (48.2%) were more likely to plan to expand in 2025 than the other segments, but not by a significant amount. Companies doing agricultural work (36.0%) were least like to lay out plans for expansion in 2025.

When asked about resources they would add in 2025, companies engaged in rollforming addressed the labor shortage with 68.6% saying they would add support staff and 49.7% looking to add construction employees. Neither of those were surprising. The skilled labor shortage is well documented.

Chart C11 – Expansion Plans



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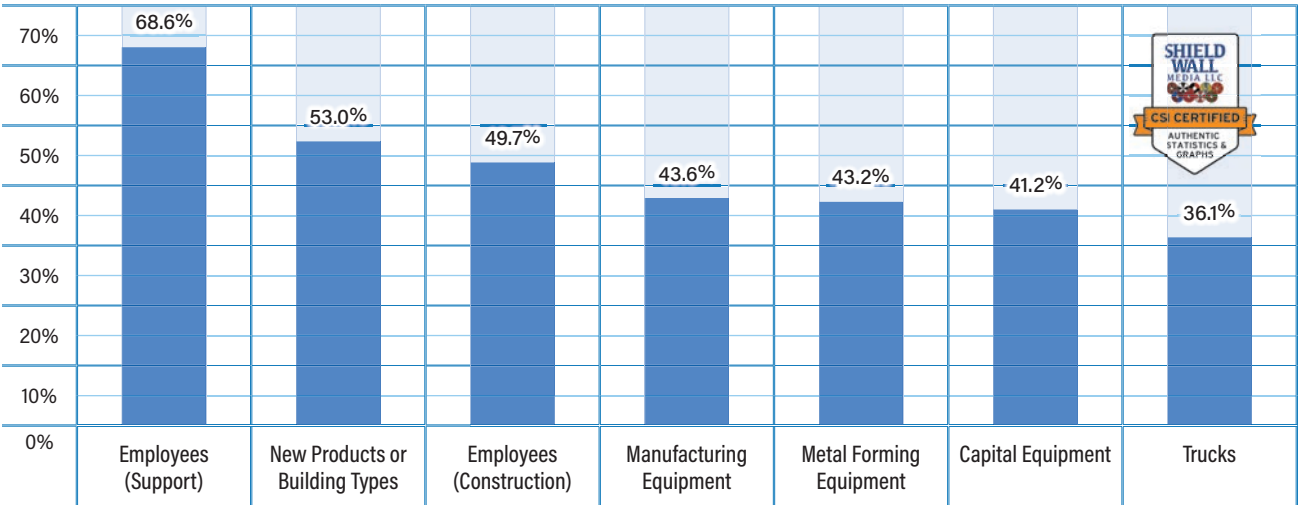
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Chart C12 – Plans to Add Resources



Since these types of companies were less likely to have employees on the jobsite compared to companies such as metal roofing, the need for support staff would certainly outweigh the need for construction employees. **C12**

Companies engaged in rollforming also had their eyes on adding resources that might require capital investments, and that included manufacturing equipment (43.6%), metal forming equipment (43.2%), and trucks (36.1%). The more general category of capital equipment also got a nod from these companies with 41.2% saying they would add those resources in 2025.

Adding employees – support and construction – as well as investing in equipment could all help

companies prepare to expand their businesses by offering additional products or taking on new building types. Among companies doing rollforming, 53.0% said they planned to add new products or building types in 2025. **C13**

Companies that were engaged in rollforming were more likely to see manufacturing equipment (50.3%) as the innovation having the greatest impact on their businesses. Given that 21.3% of respondents in this section were manufacturers and 25% were material distributors that was not surprising. It was also not surprising that the innovation that took second spot in the impact on their businesses was design and engineering software with 46.6% of respondents reporting that.

Chart C13 – Top Five New Products or Technology Impact

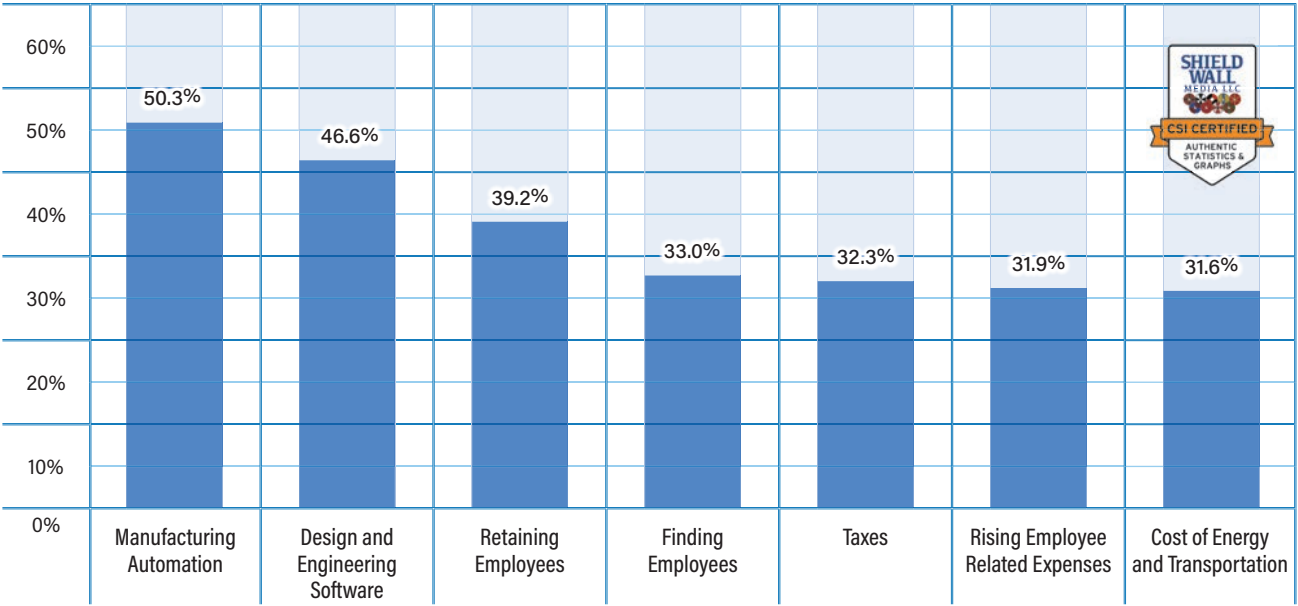
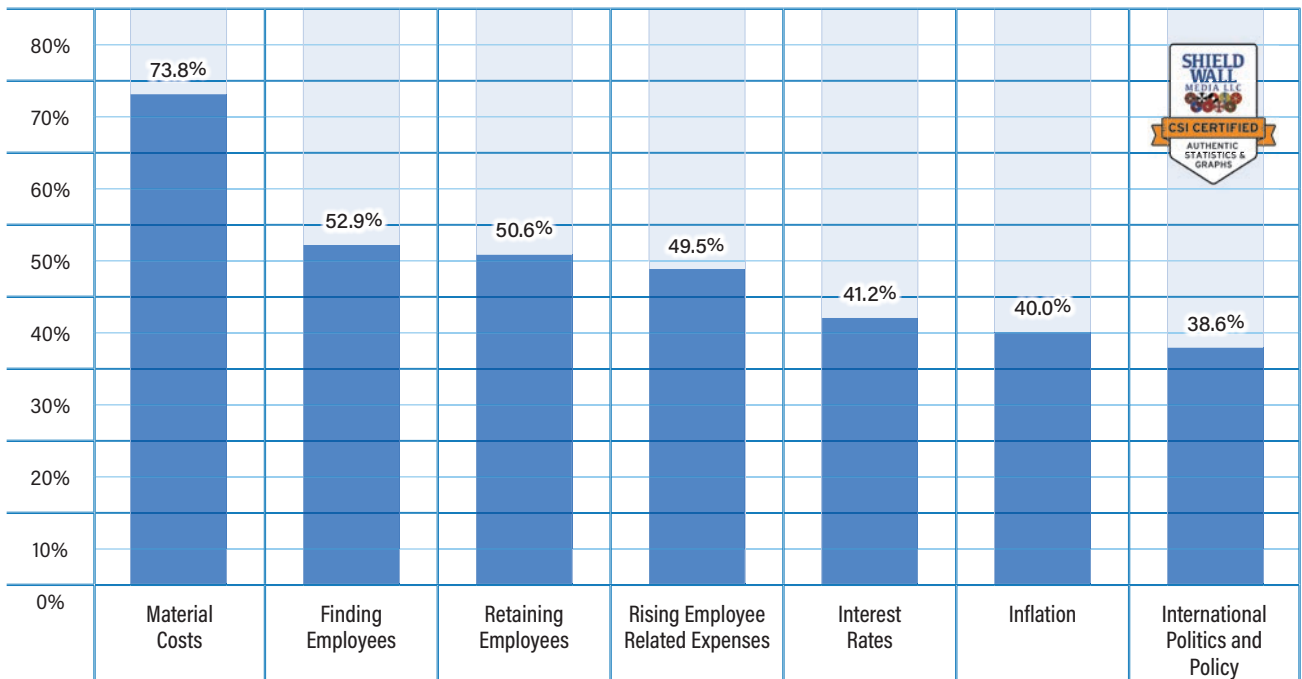




Chart C14 – Challenges in 2025



Business management software (32.3%) and automation to save labor (31.6%) both relate to manufacturing automation and business efficiency. For companies engaged in rollforming, those innovations were among the most likely to impact their businesses.

Artificial intelligence (AI) continued to grab the attention of survey takers, and 39.2% of companies doing rollforming said it will impact their businesses. AI could be part of the manufacturing automation or manufacturing software. About a third of survey takers said those two innovations would have an impact.

In a bit of a one-off, the companies engaged in rollforming also identified structural material product (31.9%) innovations as likely to impact their business.

Companies engaged in rollforming were no different in their attitudes about the challenges of rising material costs than companies doing any other building type we surveyed. Almost three quarters (73.8%) said material costs would be a challenge for 2025. **C14**

Englert's James Hazen says, "Uncertainty in the market, a new administration, new policies, and supply chain policies" are all challenges his company expects

to face. All of those elements could have a negative impact on material costs.

In spite of that potential, Wayne Troyer, sales manager, Acu-Form, Millersburg, Ohio, was robust in his attitude about the prospects for 2025. His biggest challenge? "Not being able to produce machines fast enough," he says. Increased demand and constraints on manufacturing space could combine to limit growth, and his comments speak also to the impact manufacturing automation will have on businesses. **C14**

It wouldn't be a survey in the construction industry if one of the major challenges companies faced was finding (52.9%) and retaining (50.6%) employees. Even though far fewer respondents were likely to identify those challenges than rising material costs, still more than half of them said employee related issues would challenge their businesses.

Interest rates (41.2%) and inflation (40.0%) also made the top of our list of challenges for companies engaged in rollforming. Standing as a bridge between them and employee recruitment and retention challenges were concerns about rising employee expenses (49.5%).

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# SECTION 7

## GARAGE, SHED AND CARPORT CONSTRUCTION DATA



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## SECTION 7

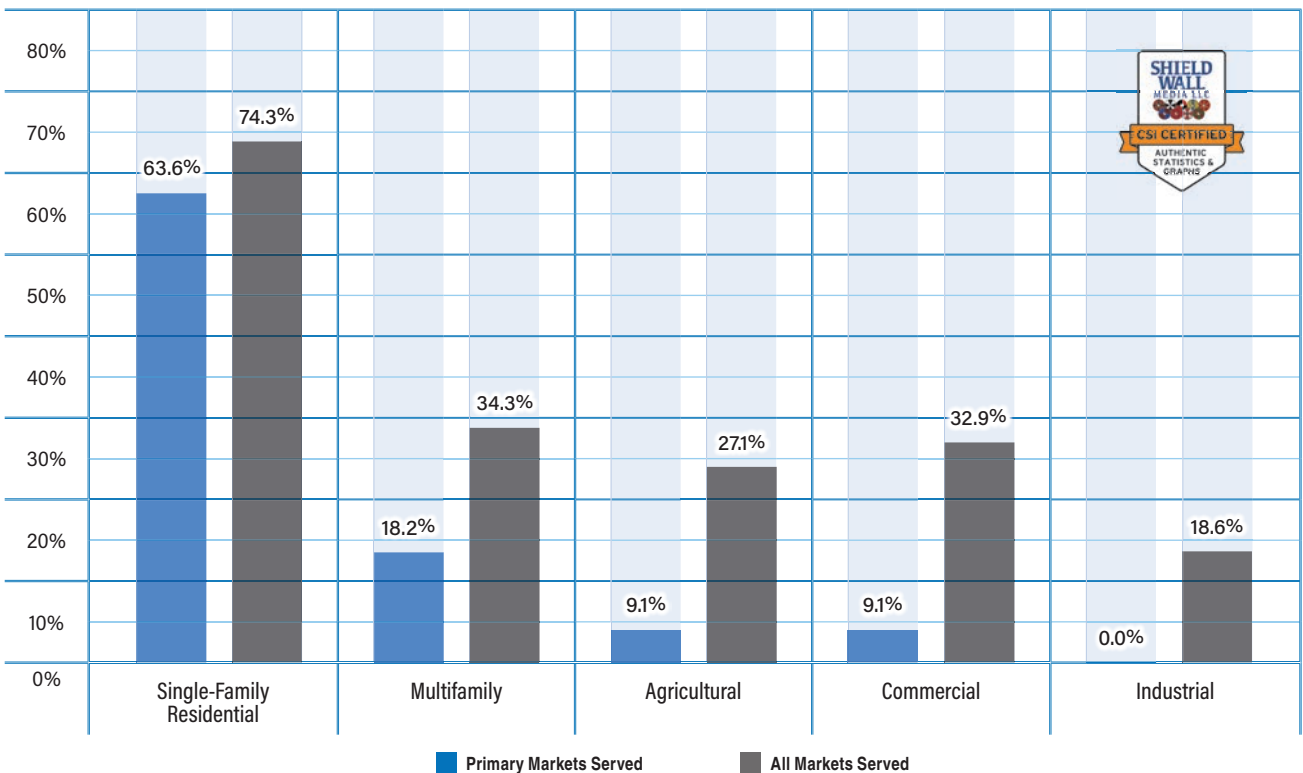
# GARAGE, SHED AND CARPORT CONSTRUCTION DATA

**H**ome improvement contractors who sell specialty services, such as siding and roofing replacements, need to generate lots of leads to make a sale. The same is true with contractors who sell and install garages, sheds, and carports. They primarily market to homeowners, and without the leads, the sales dry up. In addition, they may also be

a distributor or even a manufacturer of the product, making this supply chain nearly unique in construction.

In addition, these companies may also provide financing for the project in order to make the sale smoother. The result is a niche that operates like its own industry.

**Chart C1 – Market Segments Served**



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## Characteristics of the Garage, Shed, and Carport Industry

In the 2025 CSI annual survey, 22 respondents identified their primary building type in the garage, shed, and carport category, and 70 said they were engaged in that area of construction. **C1**

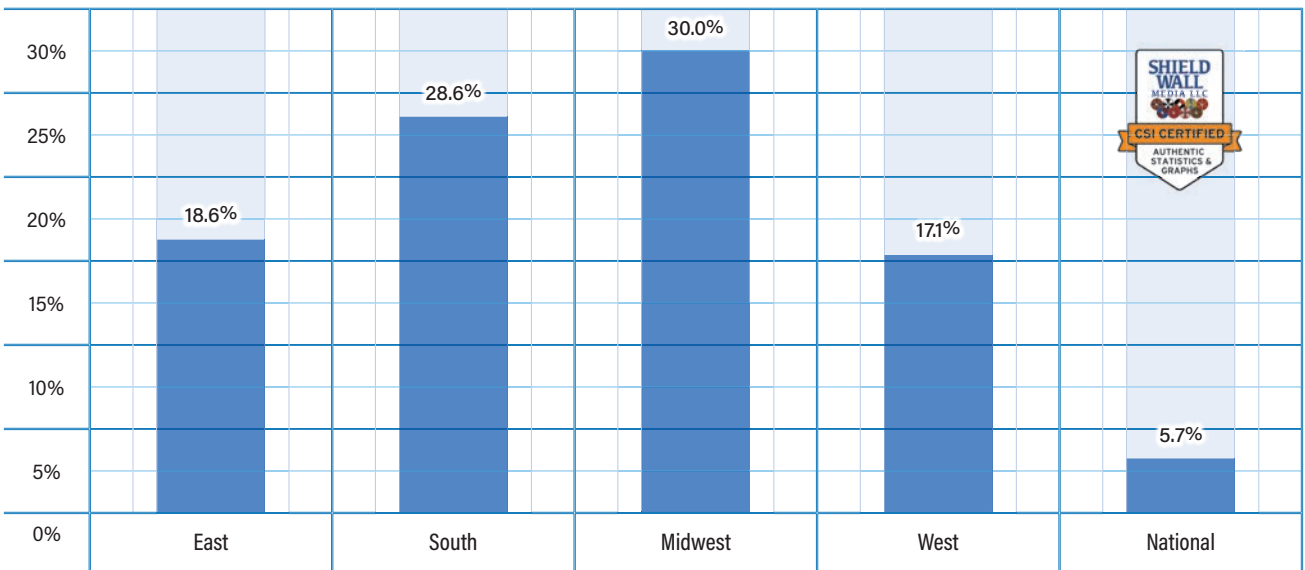
The large majority of them worked in the single-family residential market, although not exclusively. Of those who identified this building type as their primary business, 63.6% of them worked in single-family residential, and 74.3% of those engaged in the industry worked in single-family residential. These companies also worked in all the other market

segments, although none of the companies whose primary business was garages, sheds, or carports did industrial work.

As with many of the areas of construction this report has delved into, the companies engaged in garage, shed, and carport construction tend to be heavily based in the Midwest (28.6%) and South (30.0%). Very few companies worked nationally, and we had no respondents from Canada. **C2**

We inferred at the top of this section that contractors tended to be the point people in garage, shed, and carport construction, and 51.4% of our survey takers engaged in this category identified as a builder or contractor. We also had 11.4% each

**Chart C2 – Location**



**Chart C3 – Role in Construction**

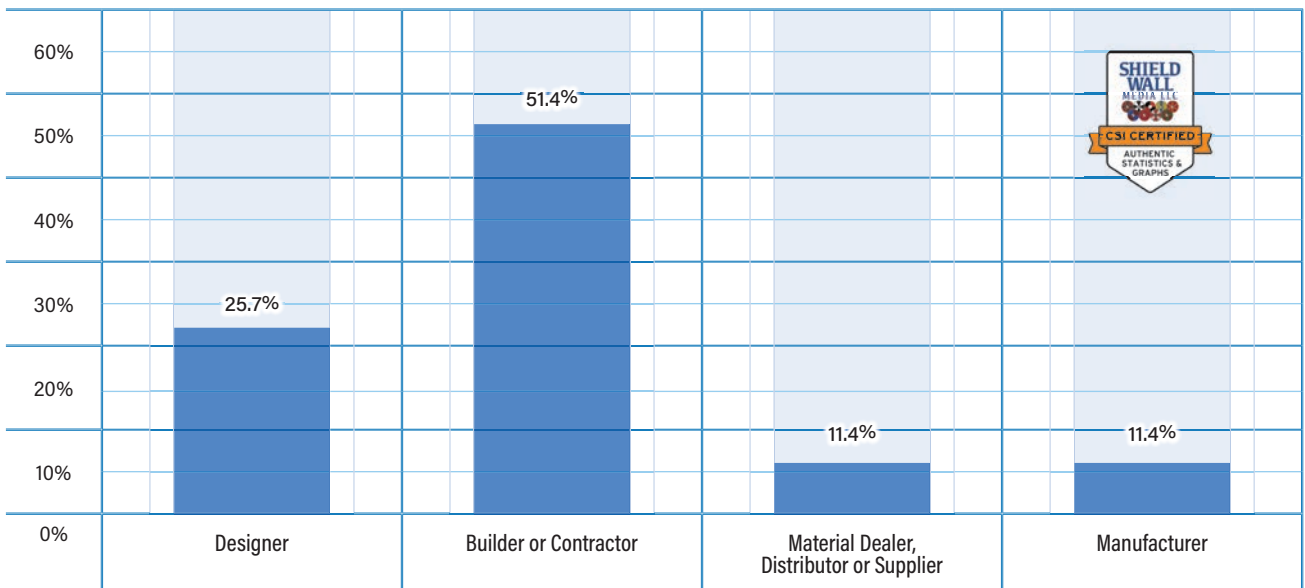
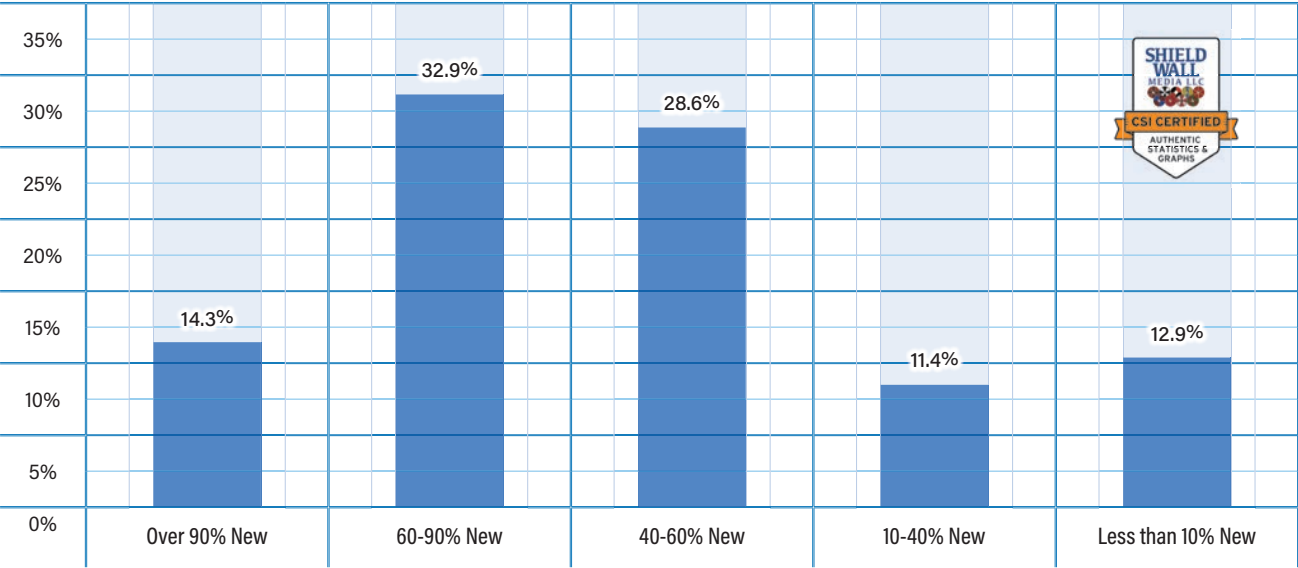




Chart C4 – New vs. Remodel



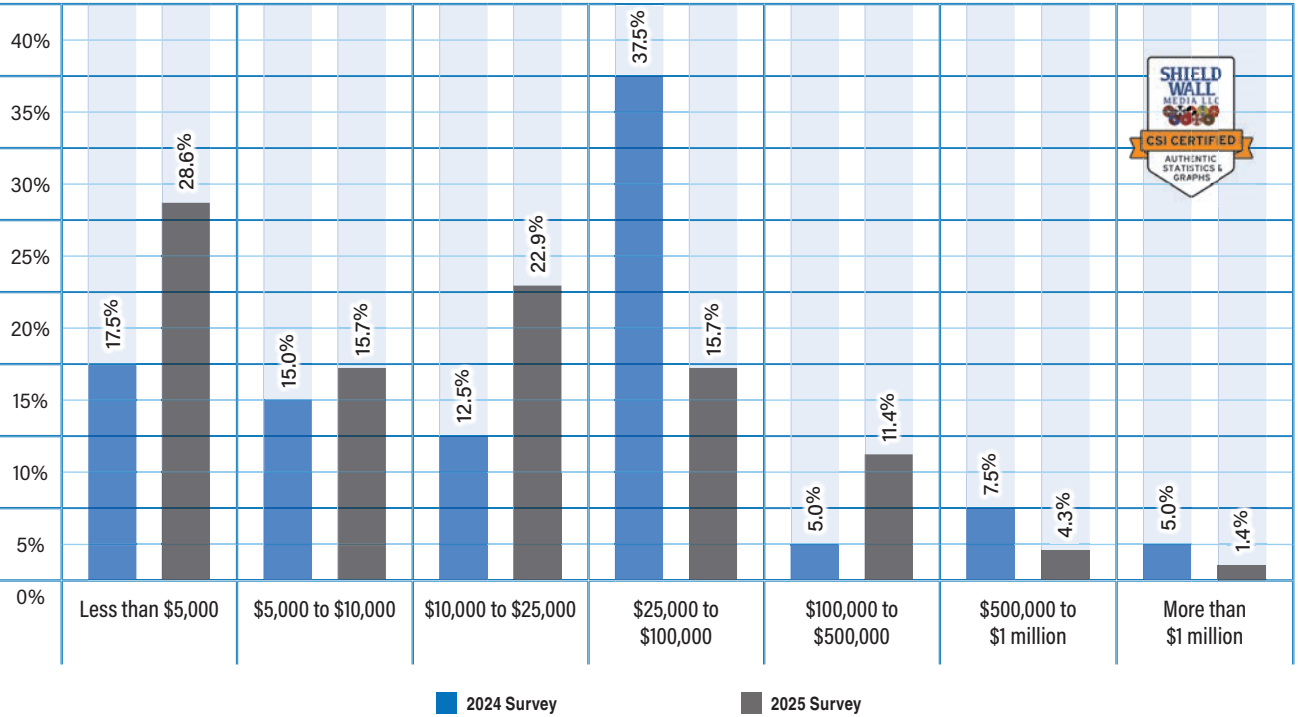
of manufacturers and distributors. About a quarter were designers. **C3**

Judging what is new and what is a remodeling project in the garage, shed, and carport construction market can be a little tricky. Certainly, a replacement is a remodeling project, but a garage addition, while new, is according to the U.S. Census Bureau a remodeling project. **C4**

Of our survey takers engaged in garage, shed, and carport construction, 47.2% do more than 60% of their work in new construction, and 24.3% do less than 40% in new construction. There is a clear bent toward new construction, including the 14.3% who do more than 90% of their work as new.

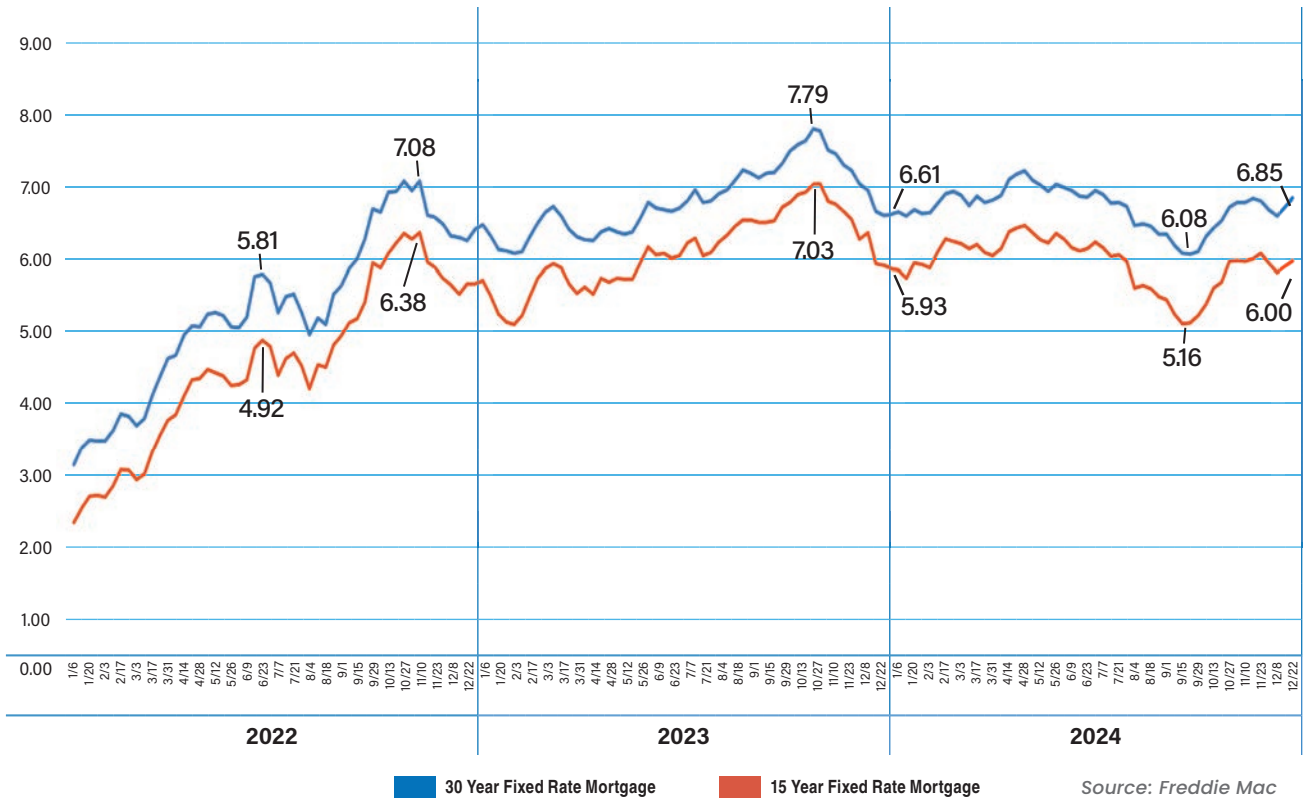
Again among this sector of the industry, our survey takers this year tended to skew toward smaller

Chart C5 – Average Job Size





**Chart C6 – Mortgage Rates**  
(Jan. 2021 through Dec. 2023)



projects. Over a third (67.1%) of companies engaged in garage, shed, and carport construction had average job sizes below \$25,000, and 28.6% had jobs smaller than \$5,000. As has been mentioned elsewhere, we had a number of survey takers identify as handymen, which would bend the numbers lower on average job size. **C5**

Companies that did have large average job sizes (over \$100,000) were about the same as last year. Although engaged in garage, shed, and carport construction, those averages were likely driven up by a company doing other work, such as new home construction.

### Projected Industry Growth

A lot of companies engaged in garage, shed, and carport construction offer financing because many of their customers demand it. Having the product and financing in one package, such as purchasing a new car at a dealership, makes the sales easier and gives companies a predictable revenue source. Consequently, low interest rates become a great harbinger of increased sales in this niche, and higher rates, such as has been experienced

since the pandemic and the rapid inflation that occurred afterward, can constrain the growth of companies. **C6**

Since the 30-year fixed rate peaked in October 2023 at 7.79%, it dropped quickly to 6.61% at the beginning of 2024 and held relatively stable since then. There was a brief decline in late summer to almost 6%, but after the election, the rates rose back up to the levels they were at during the beginning of the year. The 15-year fixed rate followed the exact same path, but was generally about a percentage point lower.

While these rates are hurting affordability, their stability has allowed homeowners and building owners to make reliable decisions and budget appropriately.

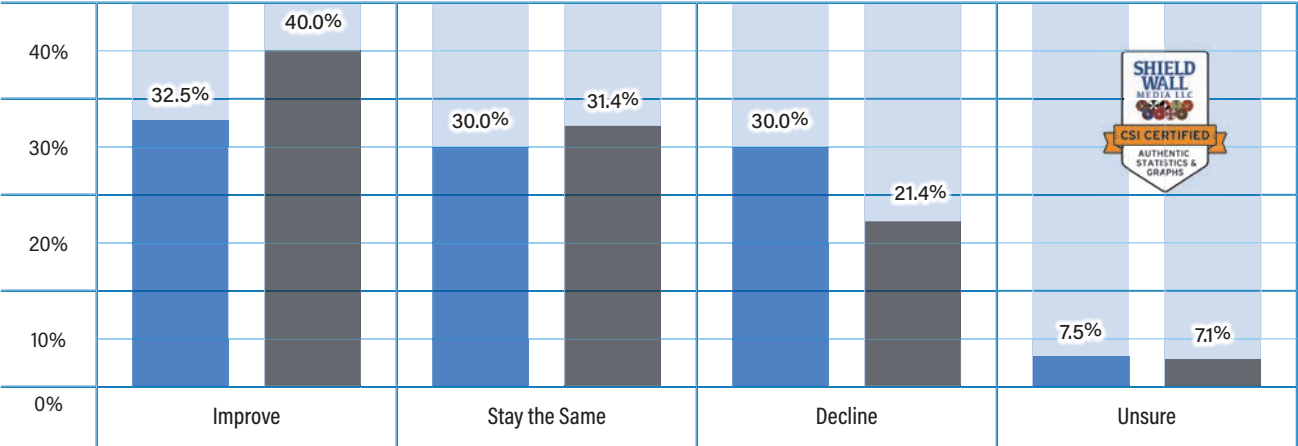
Respondents to the 2025 CSI annual survey who are engaged in garage, shed, and carport construction are more positive about 2025 than the survey takers in last year's survey were about 2024. This year, 40% of respondents thought the general business environment in the construction industry would improve in 2025, compared to 32.5% last year. That's a 23% increase year over year. Survey takers could respond with "improve," "stay the same," "decline,"





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Chart C7 – Sentiment about the Construction in 2025



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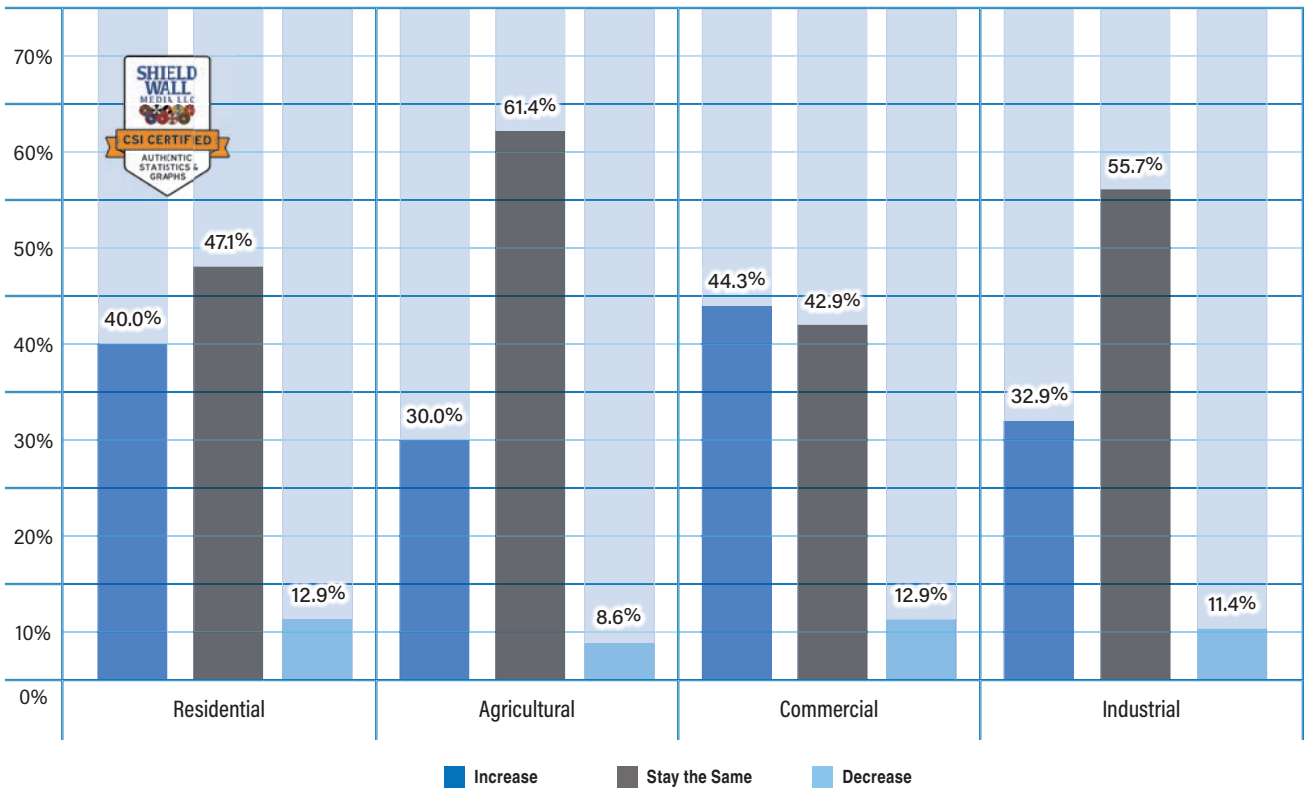


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**Chart C8 – 2025 Growth Sentiment by Market Segment**

or “unsure.” Only the percentage saying either improve and decline changed significantly from year to year, indicating a clear shift to a more positive sentiment about the business climate. **C7**

In addition to asking companies that are engaged in garage, shed, and carport construction what they felt the general business climate would be in the construction industry in 2025, we wanted to know how they felt about different market segments. The vast majority of our respondents (74.3%) work in the single-family residential market, so their familiarity and understanding in that area is likely stronger than in the other markets. **C8**

In the residential market, 40% of our survey takers felt 2025 would be a better year than 2024, 47.1% expected it to be about the same, and 12.9% thought it might decline. The only market segment to outstrip single-family residential in terms of expectation is the commercial one. There, 44.3% of respondents engaged in garage, shed, and carport construction felt 2025 would be better than 2024.

High percentages of respondents felt the agricultural (61.4%) and the industrial (55.7%) market segments would stay the same year over year. And the final measure of sentiment, a decline in activity, was thought to happen by about an equal number of participants regardless of the market segment.

## Company Size and Growth Projections

On average, 58.5% of our respondents engaged in garage, shed, and carport construction said their gross sales increased in 2024 compared to 2023. Commercial and industrial companies were most likely to report increases. 65.2% of commercial and 69.2% of industrial companies said they had year-over-year increases. **C9**

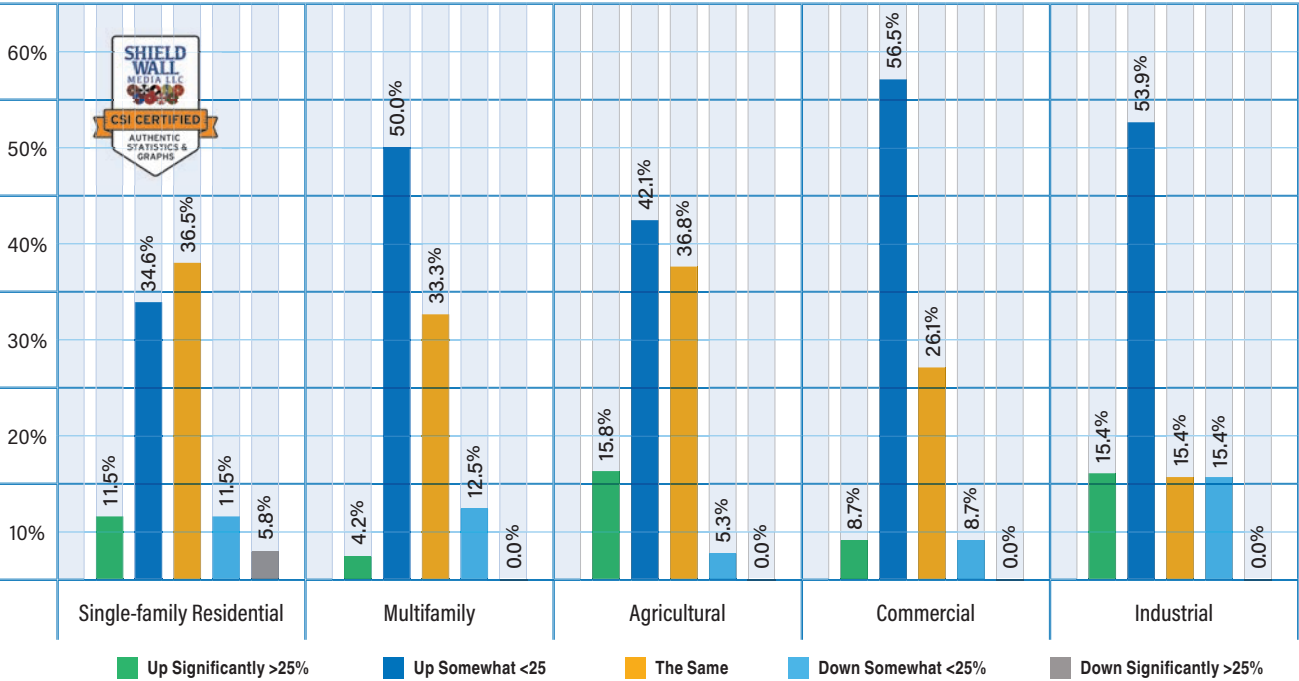
Interestingly, 15.4% of companies serving this niche from the industrial market segment said they had declines in gross sales in 2024. That’s above the average across all market segments of 11.8%, so for industrial companies it was feast or famine, with only 15.4% reporting their gross sales stayed the same.

There wasn’t a high percentage of survey takers who said their gross sales jumped significantly, or more than 25%. Just over 15% of agricultural companies and industrial companies said they had a large jump.

There were 65 respondents engaged in garage, shed, and carport construction to the question about projected gross sales for 2025, and most of them worked in multiple market segments. The fewest worked in the industrial segment and they were the most likely to expect year-over-year growth



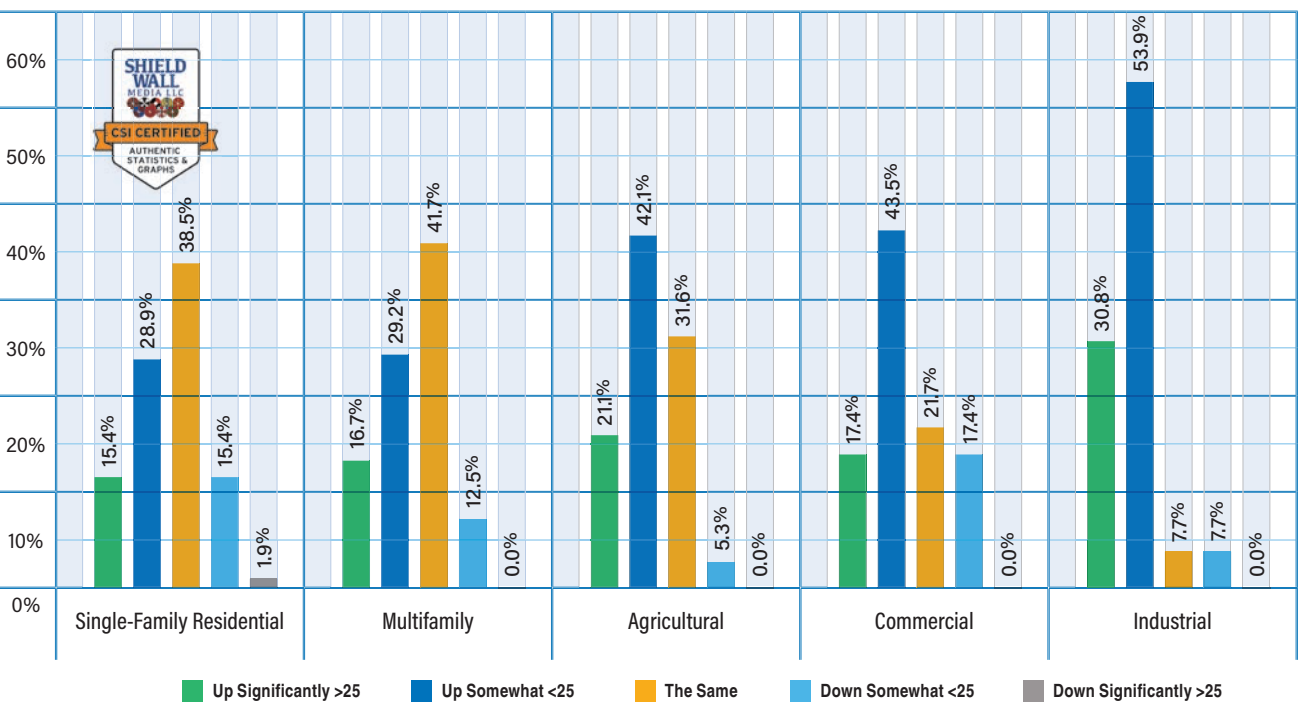
Chart C9 – 2024 Gross Sales Compared to 2023 by Market Segment



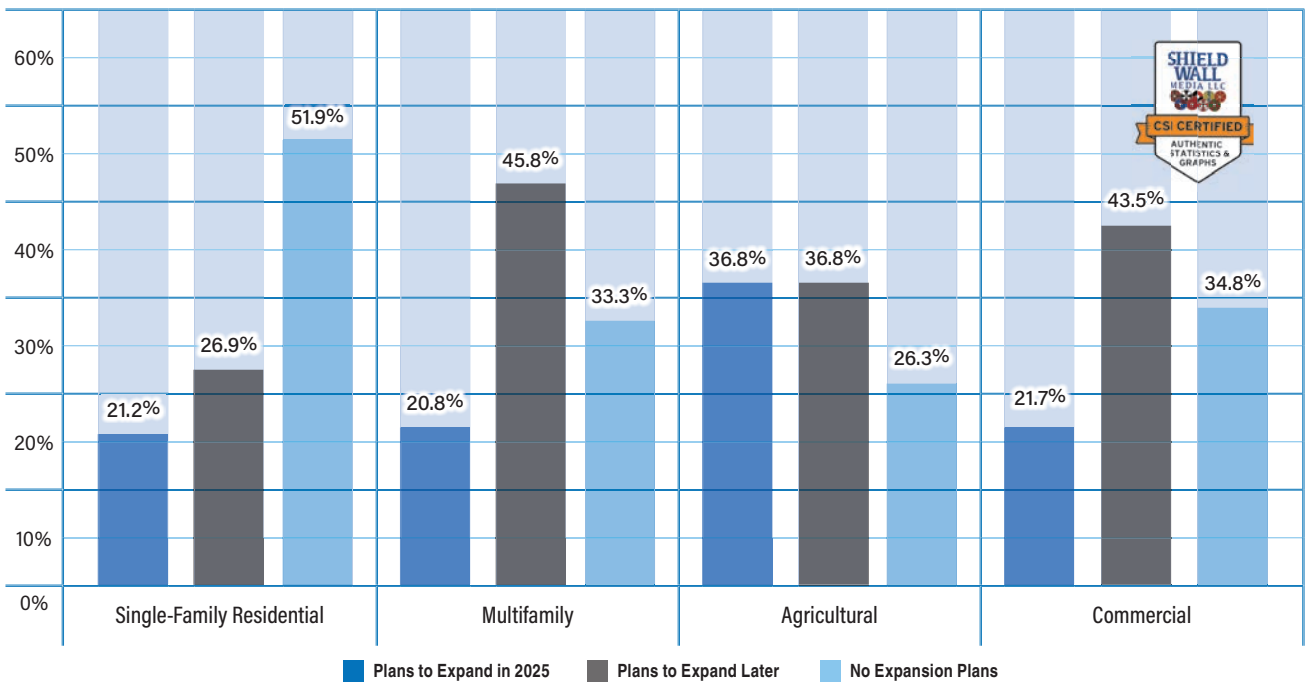
in 2025 with 84.6% saying so. The least likely, were those companies in the single-family residential market – who also happened to be the greatest number of respondents – where 44.2% thought they would see increased growth in 2025. **C10**

Companies engaged in garage, shed, and carport construction who were working in the agricultural market segment were least likely to report anticipated declines next year. Only 5.3% of them thought their gross sales would drop this year.

Chart C10 – 2025 Projected Gross Sales Compared to 2024 by Market Segment





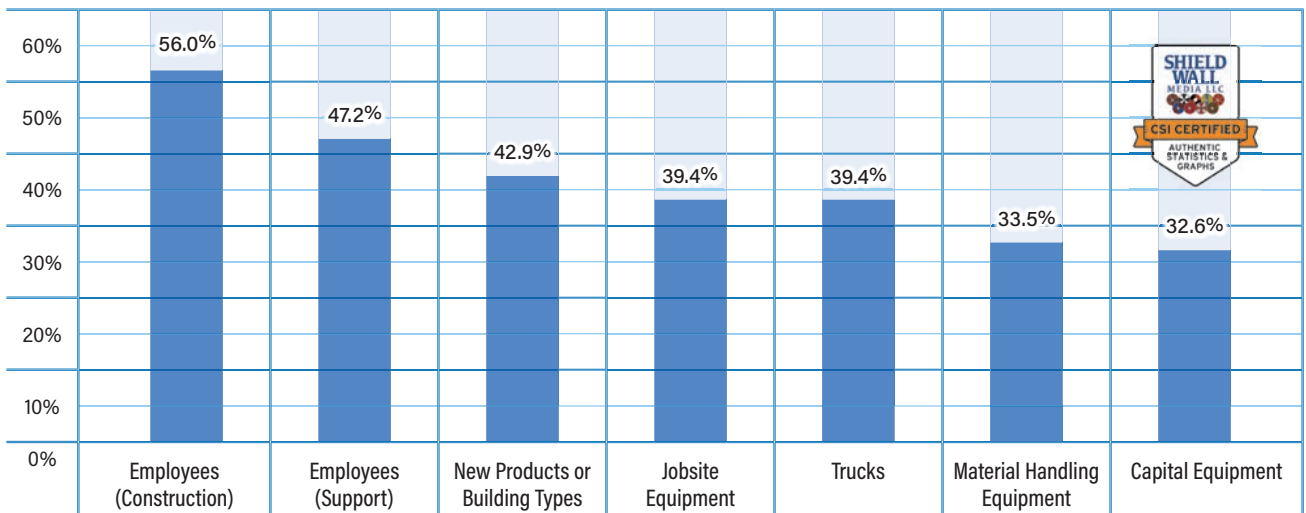
**Chart C11 – Expansion Plans**

### Future Opportunities and Challenges

Above, we reported that companies engaged in garage, shed, and carport construction working in single-family residential markets were least likely to anticipate growth in 2025, so it's not surprising that they – along with multifamily and commercial companies – were unlikely to have plans to expand their businesses this year. However, 51.9% in single-family residential had no plans to expand their businesses in 2025 or even beyond **C11**

Companies in the agricultural market (36.8%) who did garage, shed, and carport construction were most likely anticipate expansion this year and next year.

The problem that has vexed the construction industry for almost three decades, a shortage of skilled labor, continues on without an end in sight. For companies engaged in garage, shed, and carport construction, the same holds true. More than half (56%) plan to add construction employees next year, and 47.2% look to bring on more support employees. **C12**

**Chart C12 – Plans to Add Resources**





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Companies that wanted to expand their offerings in products or move into working on new building types in 2025 totaled 42.9%. Of the options we offered survey takers, the top seven were rounded out by a need to add construction-related tools. Just under 40% identified jobsite equipment and trucks as a need to be addressed in 2025. Material handling equipment was selected by 33.5% of respondents engaged in garage, shed, and carport construction as needing to be added this year. Rounding out the top seven was capital equipment (32.6%), which is a catch all that includes metal forming equipment and other items.

Artificial intelligence is a wave that has swept across the construction industry since ChatGPT was

launched Nov. 30, 2022, but among respondents engaged in garage, shed, and carport construction AI did not rank in the top three of technological or product innovations that they thought would impact their businesses. Manufacturing automation ranked number one with 44.1% of survey takers saying it would have the biggest impact. **C13**

Of course, manufacturing automation also now, by default, includes AI, as do the other two innovations respondents thought would have the biggest impact: design and engineering software (39.2%) and automation to save labor (39.0%).

After AI (32.7%) there is a bit of a drop in the percentage of respondents in this category regard-

Chart C13 – Top Five New Products or Technology Impact

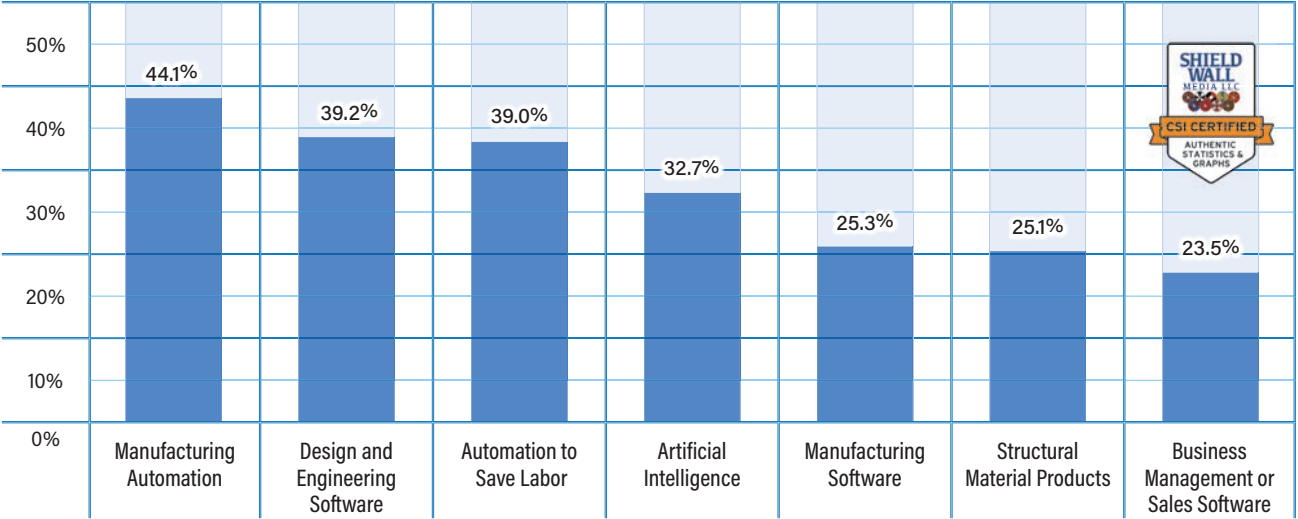
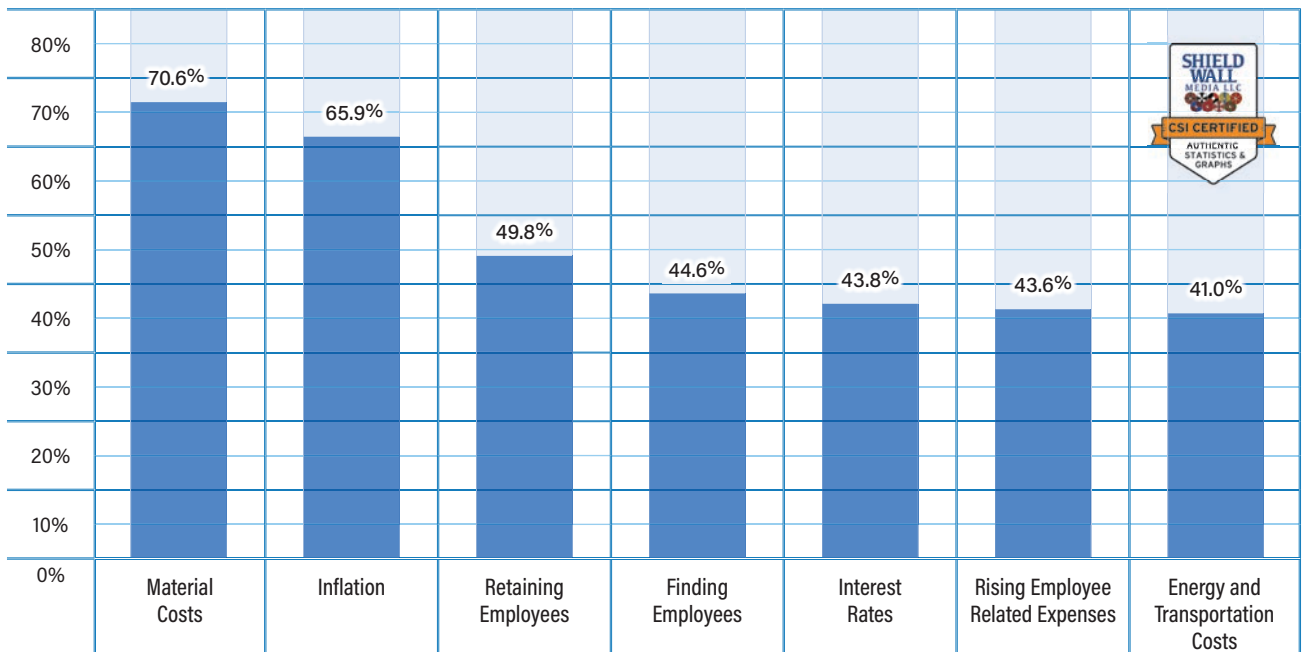




Chart C14 – Challenges in 2025



ing what innovations will impact their businesses. Manufacturing software (25.3%), structural material products (25.1%) and business management or sales software (23.5%) round out the top seven with drone imagery, 3D printing, and augmented reality not making the top of the list.

Across the board, regardless of the type of building our survey takers were engaged in, material costs ranked as the highest concern on their list of challenges for 2025. Among companies engaged in garage, shed, and carport construction, 70.6% thought rising material costs would be a challenge. In last year's survey, material costs were only identified by 54.3% of respondents as a challenge, and last year the issue ranked fifth after the three employee-related issues and inflation. **C14**

Inflation contributes to rising material costs, and 65.9% of respondents identified that as one of the biggest challenges, ranking it higher than companies engaged in other building types such as metal roofing.

Even though respondents in this area identified

construction employees and support employees as the two resources they are most likely to add in 2025, they did not rank retaining (48.8%) or finding (44.6%) employees at the top of the challenge list. For the companies engaged in these kind of buildings, it's interesting to note that retaining employees ranks higher than finding them, which is the opposite of respondents in the other sections.

The final three on the top seven list of challenges companies engaged in garage, shed, and carport construction anticipate facing in 2025 are interest rates (43.8%), rising employee related expenses (43.6%), and energy and transportation costs (41.0%).

Given how important low borrowing rates are to this segment of the industry, the concern about interest rates is understandable, but the needle doesn't seem to have moved on this as a challenging aspect of the business for companies in this niche. Last year, a nearly identical 45.3% of survey takers identified this as a challenge for the upcoming year.

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## SECTION 8

# COLD-FORMED METAL BUILDINGS CONSTRUCTION DATA



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SECTION 8

# COLD-FORMED METAL BUILDINGS CONSTRUCTION DATA

Lightweight and versatile, cold-formed metal buildings require less substantial foundations than conventional red iron buildings and serve as excellent outbuildings for equipment storage, small manufacturing, machine shops, and other purposes. Open clear spans make them ideally suited for hangars as well, allowing unfettered movement throughout the interior.

Not to be confused with metal building systems or pre-engineered metal buildings, cold-formed steel buildings use lightweight framing bent at room temperature instead of heavy red iron.

## Characteristics of the Cold-formed Metal Buildings Industry

The response rate to the 2025 CSI annual survey among companies who do primarily cold-formed metal buildings was much stronger than for the 2024 survey, with 69 respondents saying they were engaged in constructing cold-formed metal buildings. Among those survey takers who said these were their primary type of buildings, 37.7% did single-family construction and only 5.8% did industrial. **C1**

Among the companies engaged in cold-formed metal building construction, 53.6% did commercial

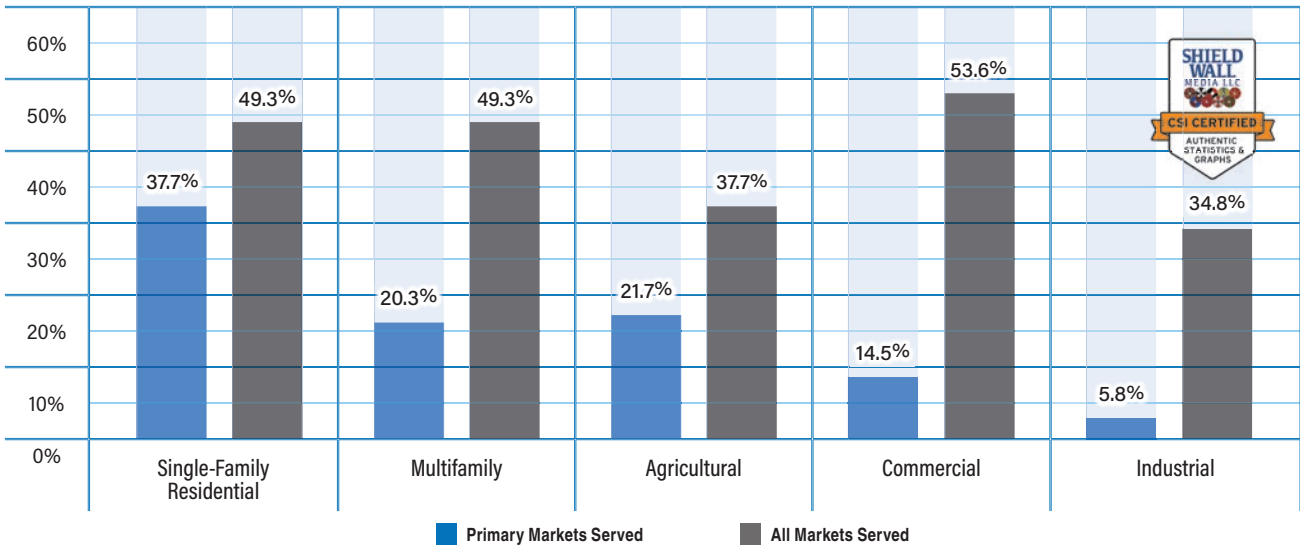
construction and 34.8% did industrial work. In single-family and multifamily, 49.3% of respondents said they worked in at least one of those market segments.

Throughout this survey, companies located in the Midwest have been the majority of participants, and the same is true with those engaged in cold-formed metal buildings. A third of the respondents were based in the Midwest. However, while in other sections, the next most likely region for respondents to be located is the South, among these companies only 18.8% were located there, but 29% were located in the West. **C2**

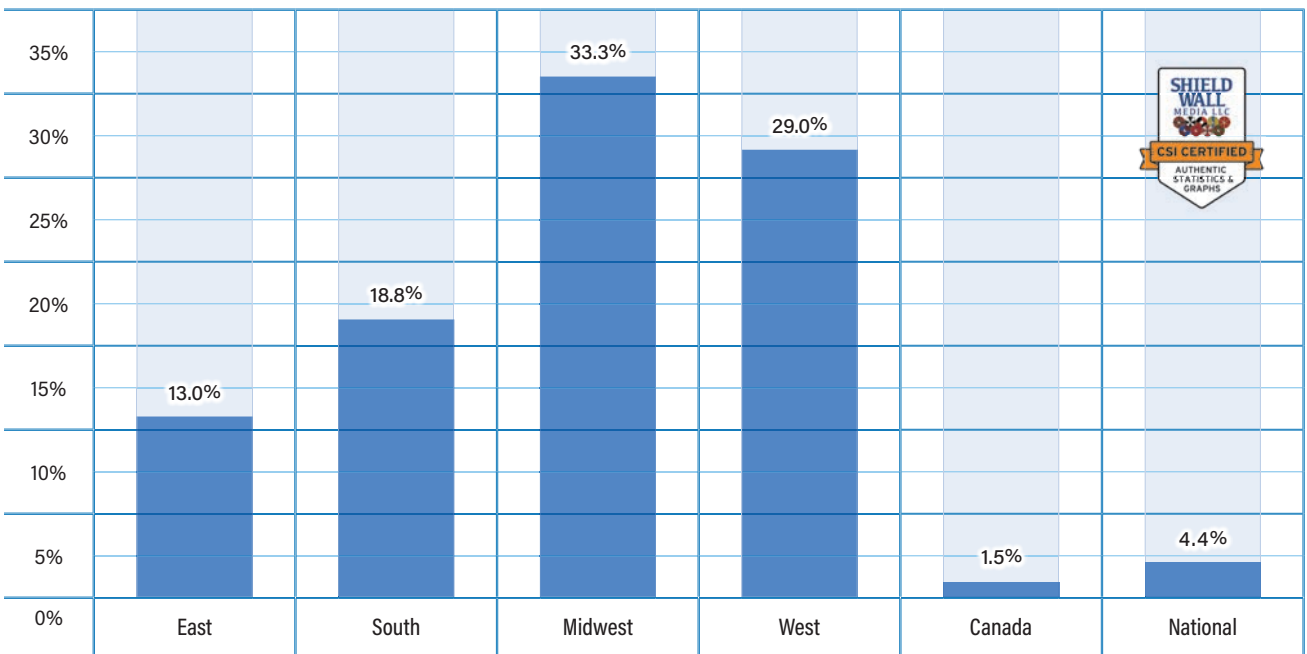
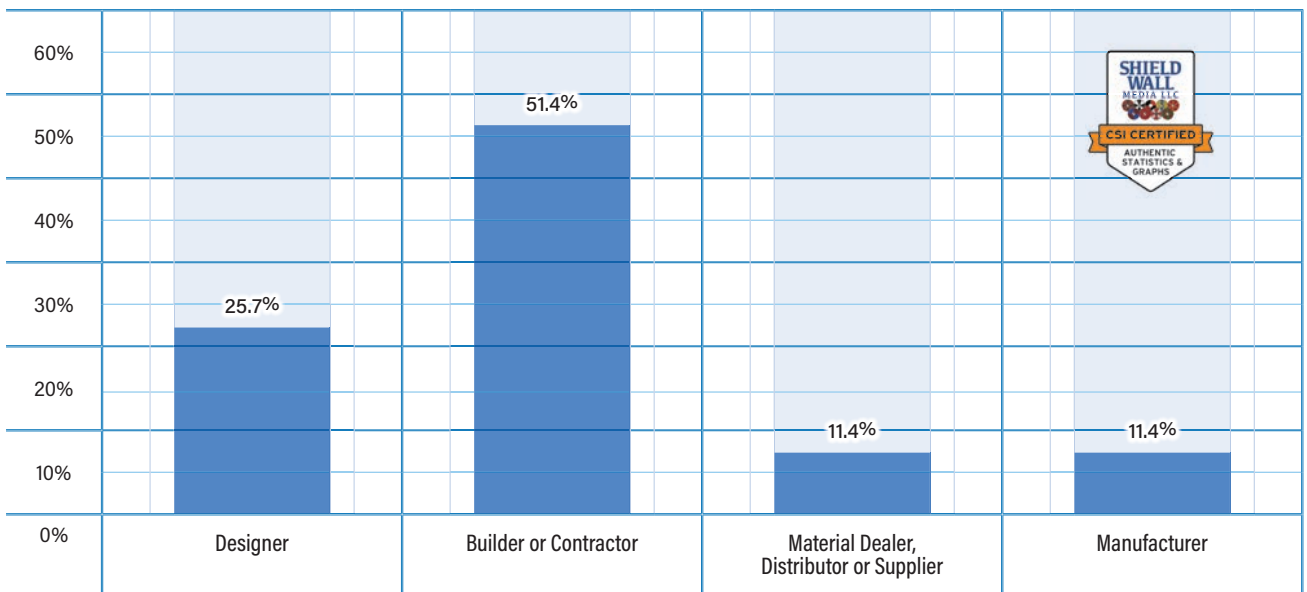
More than half (51.4%) of respondents said they were builders or contractors. Cold-formed metal buildings is a type of business that easily lends itself to design-build work, though 25.7% of companies engaged in this kind of construction were also designers. Distributors (11.4%) and manufacturers (11.4%) made up the rest of the participants. **C3**

Cold-formed metal buildings do not lend themselves easily to remodeling other than maintenance and repair for something like punctured or dented wall panel. Half of the respondents engaged in cold-formed metal building construction do at least 60% of their work in new construction and only 18.8% do at less than 40% new construction. Because this

Chart C1 – Market Segments Served





**Chart C2 – Rollformer Locations****Chart C3 – Role in Construction**

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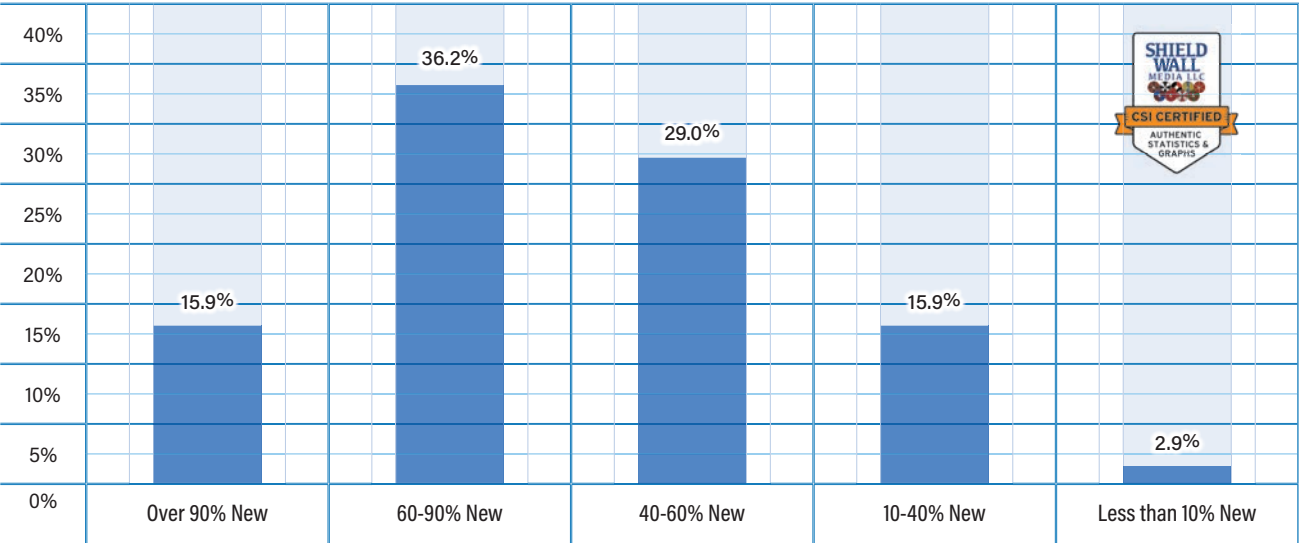
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type of building is often found in agricultural or rural settings, it's not surprising the companies doing the work offer quite a number of services across multiple market segments. **C4**

When we compared the average job size among companies engaged in cold-formed metal build-

ing construction from the 2024 survey to this year's survey takers, we found significantly more have average job sizes under \$25,000. Last year, 32.7% of respondents reported job sizes that small, but this year 56.5% said their average job size was under \$25,000. As has been mentioned elsewhere, we did

Chart C4 – New vs. Remodel



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Chart C5 – Average Job Size

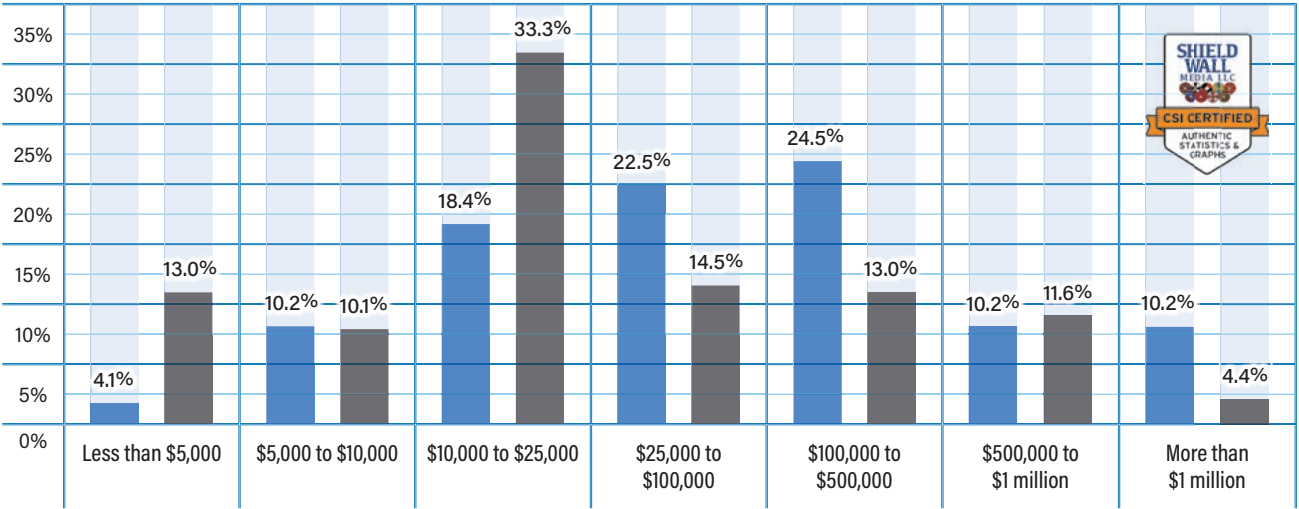
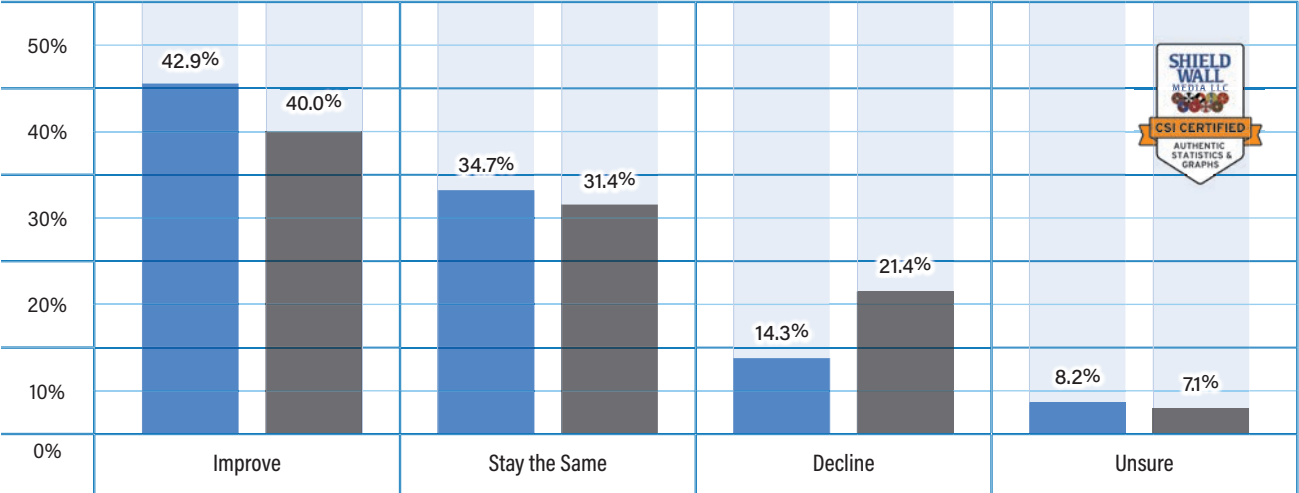


Chart C6 – Sentiment About Construction Industry in 2025



have a large number of handymen responding this year, which likely drove down the job size. **C5**

Projected Industry Growth

We asked respondents how they felt the general business climate would be across the construction industry in 2025, and companies engaged in cold-formed metal building construction had predominantly the same expectation as the survey takers from last year’s CSI annual survey with a notable exception. Around 40% felt it would improve, slightly fewer thought it would stay the same, but a significantly higher number thought the general business climate would decline in 2025. Last year 14.3% of respondents saw a decline coming, but this year, 21.4% anticipated a poor business climate. That’s nearly a 50% increase. **C6**

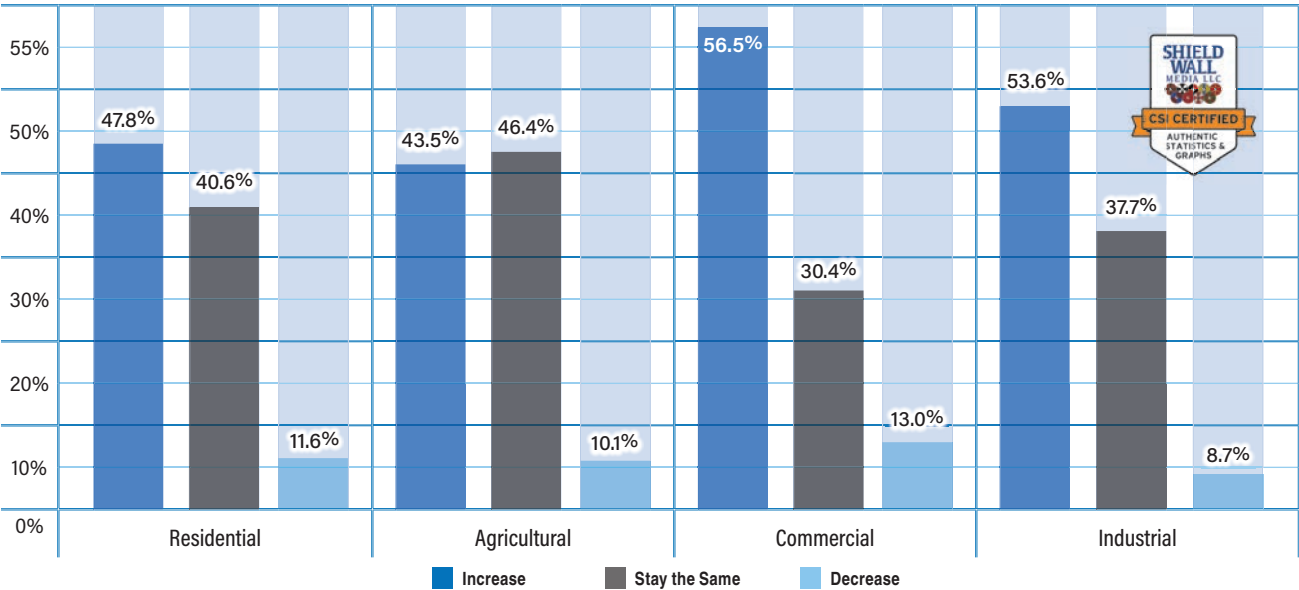
Beyond just the general business environment, we surveyed companies engaged in cold-formed metal building construction how they felt individual market segments would perform in 2025. Our respondents were more bullish on the commercial (56.5%) and industrial (53.6%) market segments, saying that construction activity would increase in those segments. Both residential (47.8%) and agricultural (43.5%) segments had below half of survey takers saying those markets would increase. **C7**

For the most part, though, few companies engaged in cold-formed metal building construction thought any given market would decline. No more than 13% expected slower activity in an segment.

After hitting a peak in late 2021, the producer price index (PPI) for cold rolled steel and strip had been steadily declining until the end of 2024. Based on a 1982 index that equals 100, the PPI for cold-rolled



Chart C7 – 2025 Growth Sentiment by Market Segment



steel jumped to 711.611 in Nov. 2021, but closed out 2024 at 322.156. That is a clear trend downward in a major commodity affecting the cold-formed metal building industry. **c8**

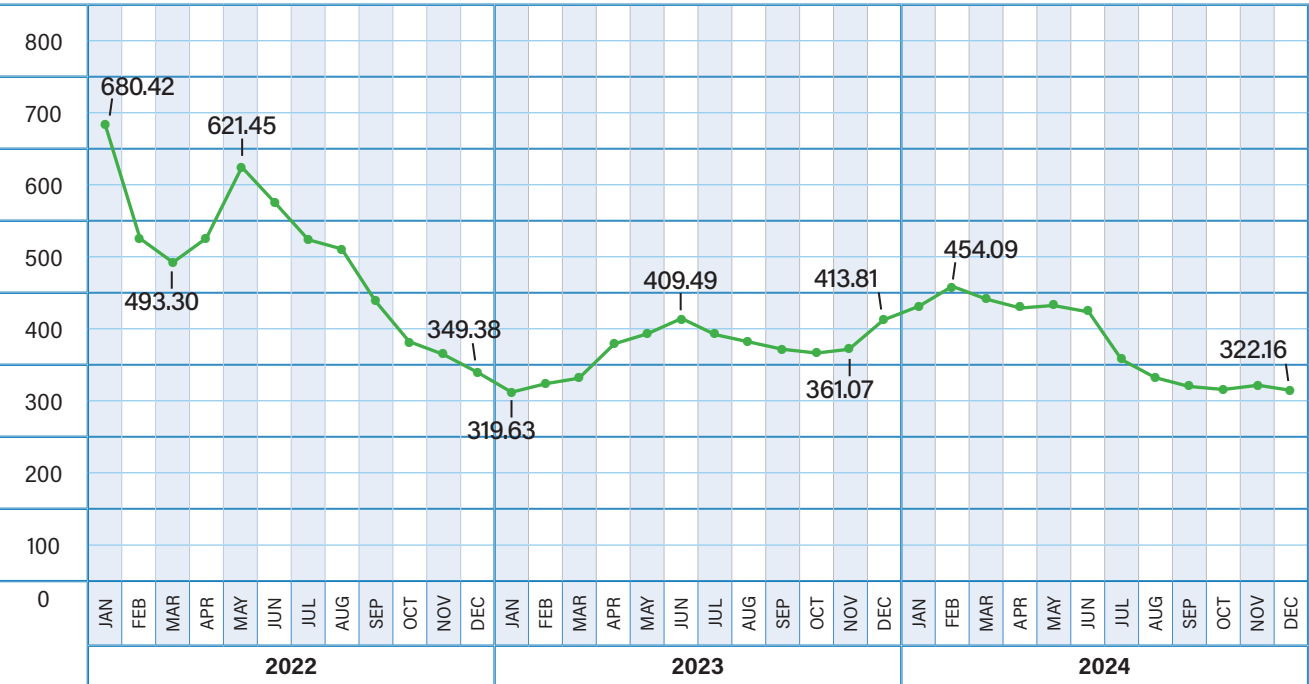
The U.S. Bureau of Labor Statistics has not yet released data for 2025 as of the writing of this report, so market reaction to tariffs against China, Canada, and Mexico by the Trump administration have not

yet been reflected and may affect sentiment about the 2025 business climate.

Company Size and Growth Projections

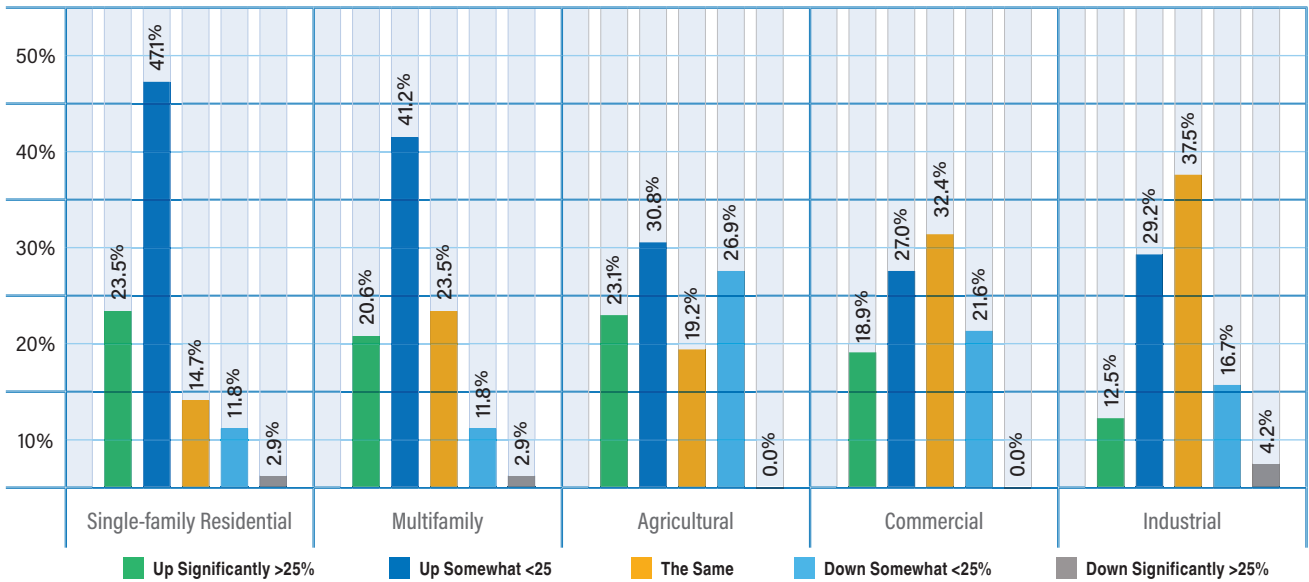
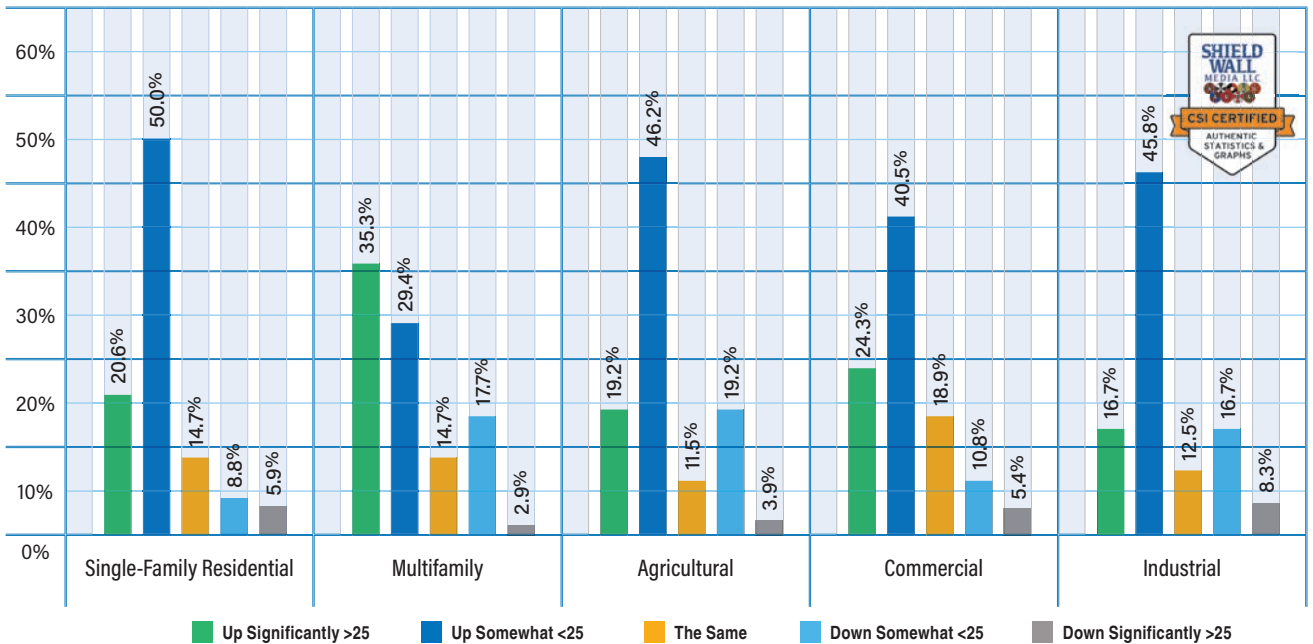
On average, 54.8% of our respondents engaged in the cold-formed metal building construction said gross sales increased in 2024 compared to 2023.

Chart C8 – Cold-rolled Steel Producer Index



Source: U.S. Bureau of Labor Statistics. Based on 1982 index that equals 100



**Chart C9 – 2024 Gross Sales Compared to 2023 by Market Segment****Chart C10 – 2025 Projected Gross Sales Compared to 2024 by Market Segment**

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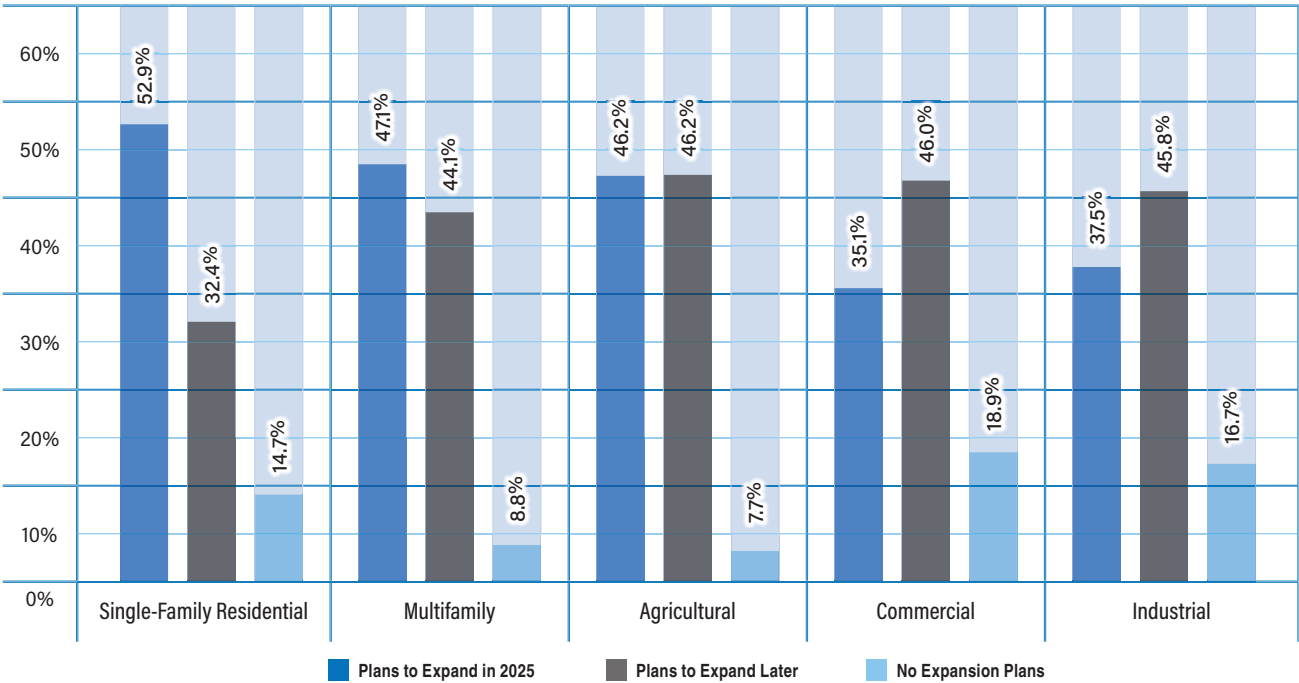
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Chart C11 – Expansion Plans



Nearly 20% said gross sales were up significantly. Those survey takers working in single-family residential markets were most likely to report increased gross sales, with 70.6% saying they were up and 23.5% saying they were up more than 25%. **C9**

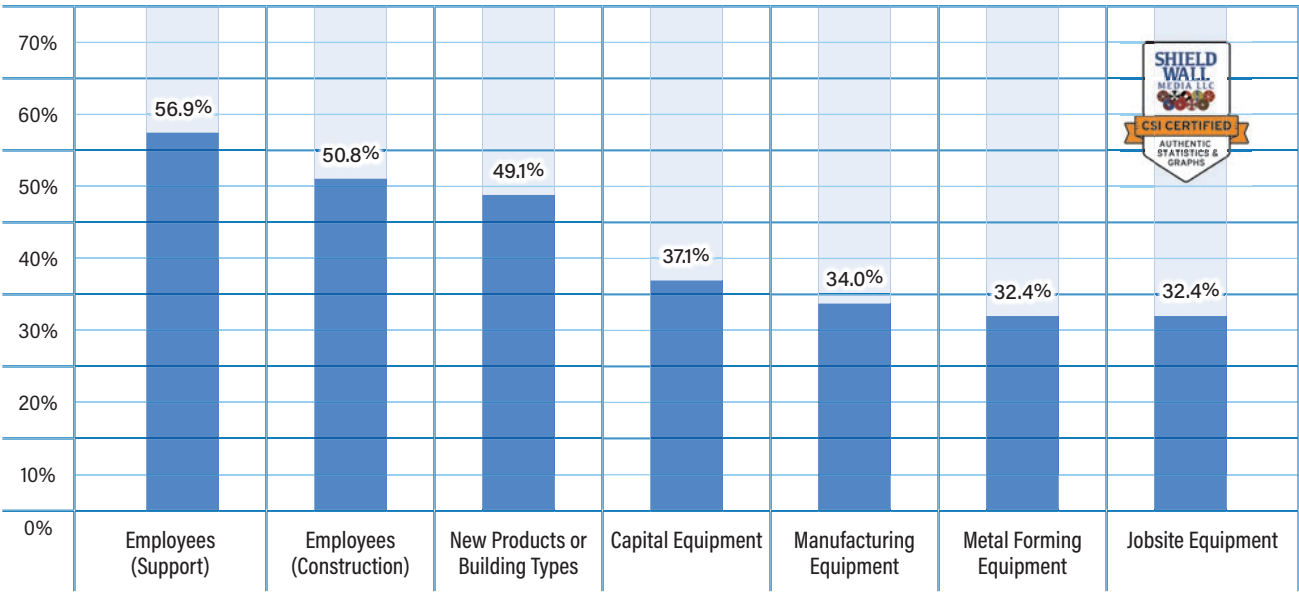
Companies working in the other market segments were about equally inclined to report gross sales were down, with between 20% and 26% saying sales declined. But 26.9% of companies working in the ag-

ricultural market who were engaged in cold-formed metal building construction told us gross sales were down significantly.

Chance Shalosky, roofing product manager, Pro-Via, points to “uncertainty and high construction costs” in 2024, which he says “negatively impacted the roofing segment of our business.”

When we asked respondents engaged in cold-formed metal building construction what they ex-

Chart C12 – Plans to Add Resources in 2025





pected gross sales to be in 2025, they were remarkably consistent from market segment to market segment. On average, 65.6% of them expected gross sales to increase year over year. At the low end, 62.5% of companies working in the industrial market expected them to increase, and at the top end, 70.6% of single-family residential market companies looked for an increase. Only companies in the multifamily market expected significant increases, with 35.3% saying gross sales would jump more than 25% in 2025. **C10**

## Future Opportunities and Challenges

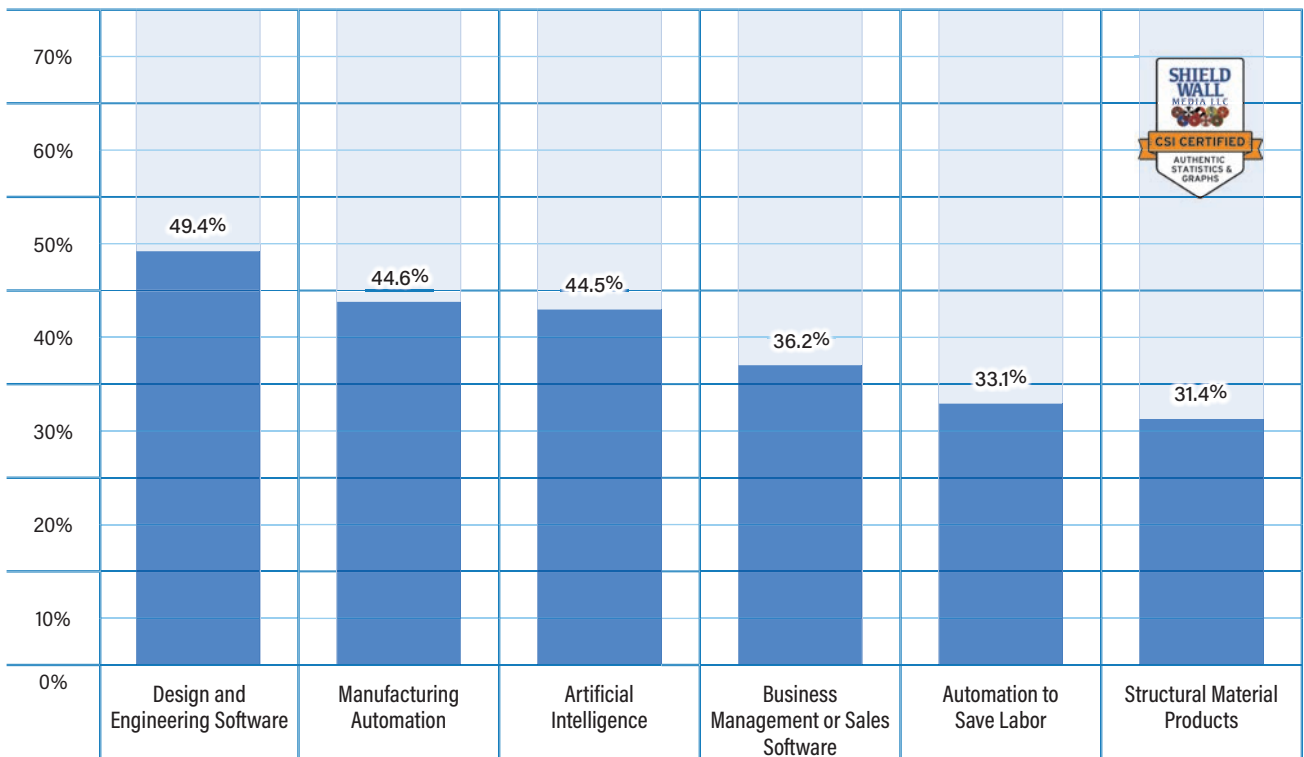
It's one thing to expect your business to increase, and it's a much stronger sentiment to take action and plan to expand your business. Nearly 90% of the companies engaged in cold-formed metal building construction planned to expand their businesses in the future with 86.7% reporting that

likelihood. Even more impressive was the percentage of respondents who said they plan to expand soon. In 2025, 43.8% of survey takers had plans to expand. Companies in the single-family residential market were most likely to plan to expand in 2025 with 52.9% reporting that, and commercial companies were least likely with 35.1% reporting expansion plans. **C11**

Respondents engaged in cold-formed metal building construction who work in the commercial and industrial markets were most likely to say they had no plans for expansion. 18.9% of commercial companies and 16.7% of industrial respondents reported they do not plan to expand their companies.

Expansion plans require resources. With 86.7% of companies having expansion plans in sight, the need for resources is imminent. In fact, some resources will need to be added in 2025, and not just to meet expansion plans but to meet current mar-

**Chart C13 – Top Five New Products or Technology Impact**



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ket demands. In the least surprising insight of all insights, 56.9% of respondents engaged in cold-formed metal building construction plan to add support employees and 50.8% will add construction employees in 2025. The great resource shortage of the modern construction era is labor. **C12**

Compared to companies engaged in other types of building construction, those engaged in cold-formed metal building construction were generally more likely to plan to add new products or building types in 2025, with 49.1% reporting as such.

After those three resources that included employees and new products, there was a drop-off in the likelihood of respondents saying they would add resources. The next four of the top seven were all related to financial capital. The general capital category of

resources garnered 37.1% of respondents engaged in cold-formed metal building construction saying they would add that resources. Manufacturing equipment (34%), metal forming equipment (32.4%), and jobsite equipment (32.4%) all had companies engaged in cold-formed metal building construction saying they would add that resource.

We asked a number of industry leaders what surprised them in the past year. Shalosky says, "Over the past year, the regulatory emphasis on durability and the capacity of building products to withstand extreme weather was an unexpected shift. This change reflects the growing impact of severe weather events and necessitates innovation in product development and strategy. It provides opportunities for growth in markets focused on enhanced durability and

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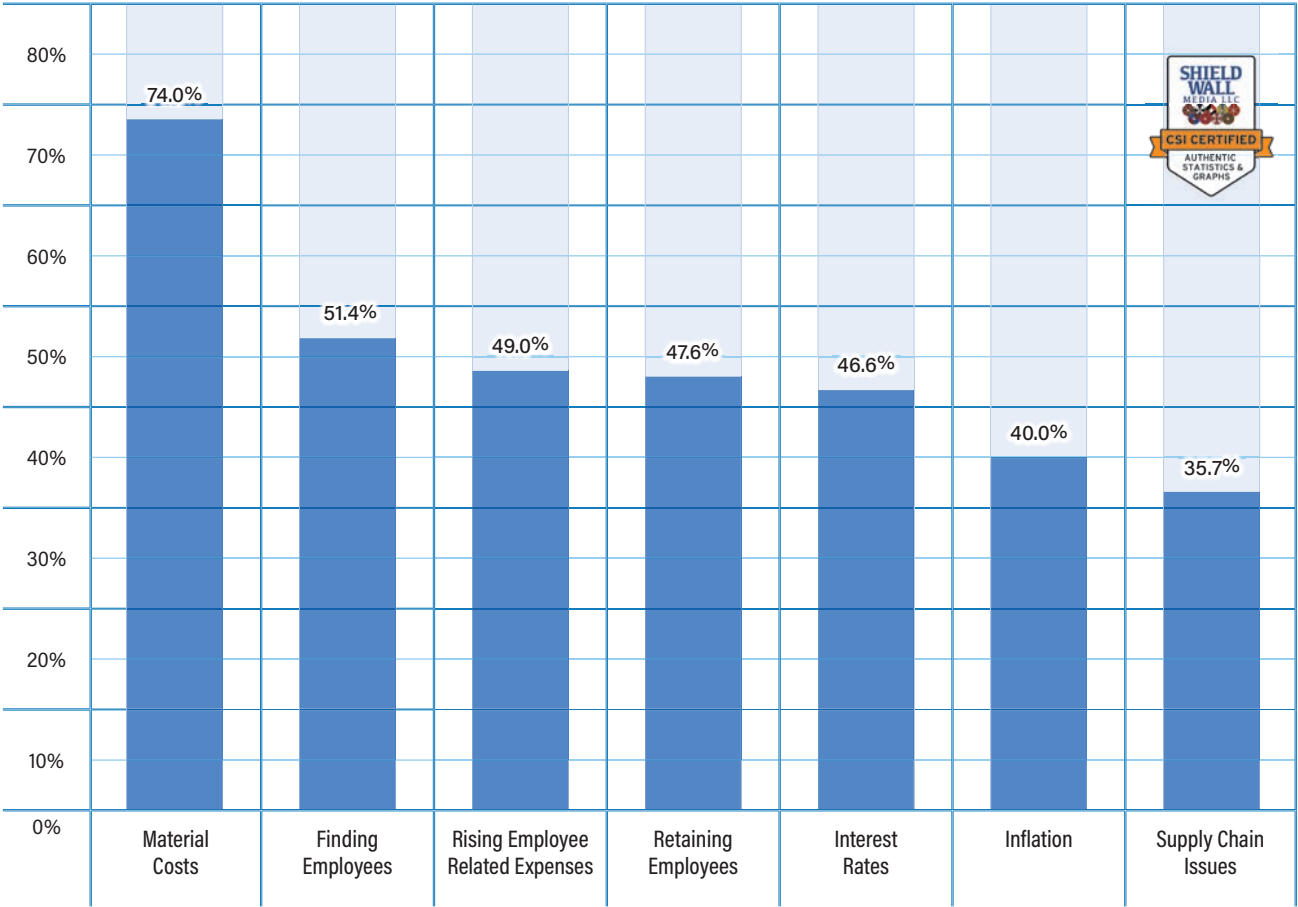
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Chart C14 – Challenges in 2025



safety standards, aligning with our commitment to high-quality, resilient products.”

Innovation comes from variety of technologies that can have an impact on a business, and respondents engaged in cold-formed metal building construction identified seven innovations they thought would impact their businesses. Design and engineering software was selected by 49.4% of respondents and was the most often chosen option. **C13**

Close behind were manufacturing software (44.6%) and artificial intelligence (44.5%). AI has been on the list in every section of this survey as a technology that will impact businesses and often about half of the respondents identified it.

To address Shalosky’s point directly, structural material product innovations were selected by 31.4% of respondents as likely to have an impact on their businesses. But make no mistake, AI will be part of all the other innovations, and all the other innovations will be used to address the need for resilient building products.

If you could put into one word the biggest challenge that comes through across the entire 2025 CSI annual report, it is concern about rising material costs. The concern shows in anecdotal evidence

during conversations with respondents, and it arises time and again in the numbers.

Among companies engaged in cold-formed metal building construction, 74% identified material costs as a challenge they will face in 2025. This was far and away the challenge with the greatest percentage of respondents. The second, third, and fourth challenges – finding employees (51.4%), rising employee related costs (49%), and retaining employees (47.6%) – fell far behind in the percentage of respondents identifying them as challenges in 2025. **C14**

For years, finding employees – especially skilled construction workers – has been the number one challenge in the industry, and it’s been a problem for companies engaged in any kind of building construction. But interest rates (46.6%), inflation (40%), and supply chain issues (35.7%), which round out the top seven challenges, will all contribute to the rising material costs. As will rising employee costs.

If, as Shalosky says, the industry needs to “focus on enhanced durability” then those rising material costs and labor shortages will make that goal even more challenging.



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