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+

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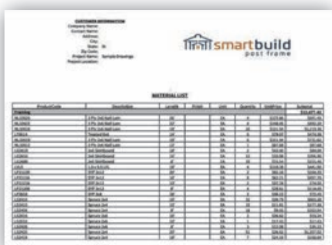
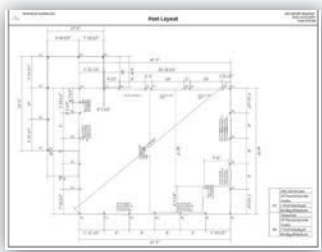
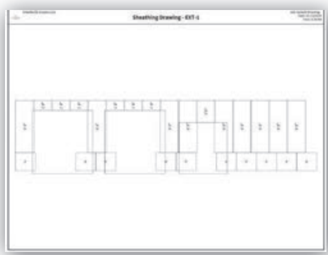
- Errors are eliminated & everyone wins!

Material Lists	Floor Plans	Sheathing Layouts	Framing Details







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SECTION 4

POST-FRAME CONSTRUCTION DATA

SECTION 4

POST-FRAME CONSTRUCTION DATA

Post-frame construction remains both a rural builder staple and generally concentrated in the Midwest. Emerging markets in the East and West show opportunity for expansion. Looking forward, companies doing post-frame construction are bullish about the future, but concerned about labor shortages, rising employment costs, and interest rates that are inhibiting investment..

Characteristics of the Post Frame Industry

Companies engaged in post-frame construction and companies with post-frame construction as their primary focus remain closely tied to their agricultural roots, but the market mix highlights a clear diver-

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

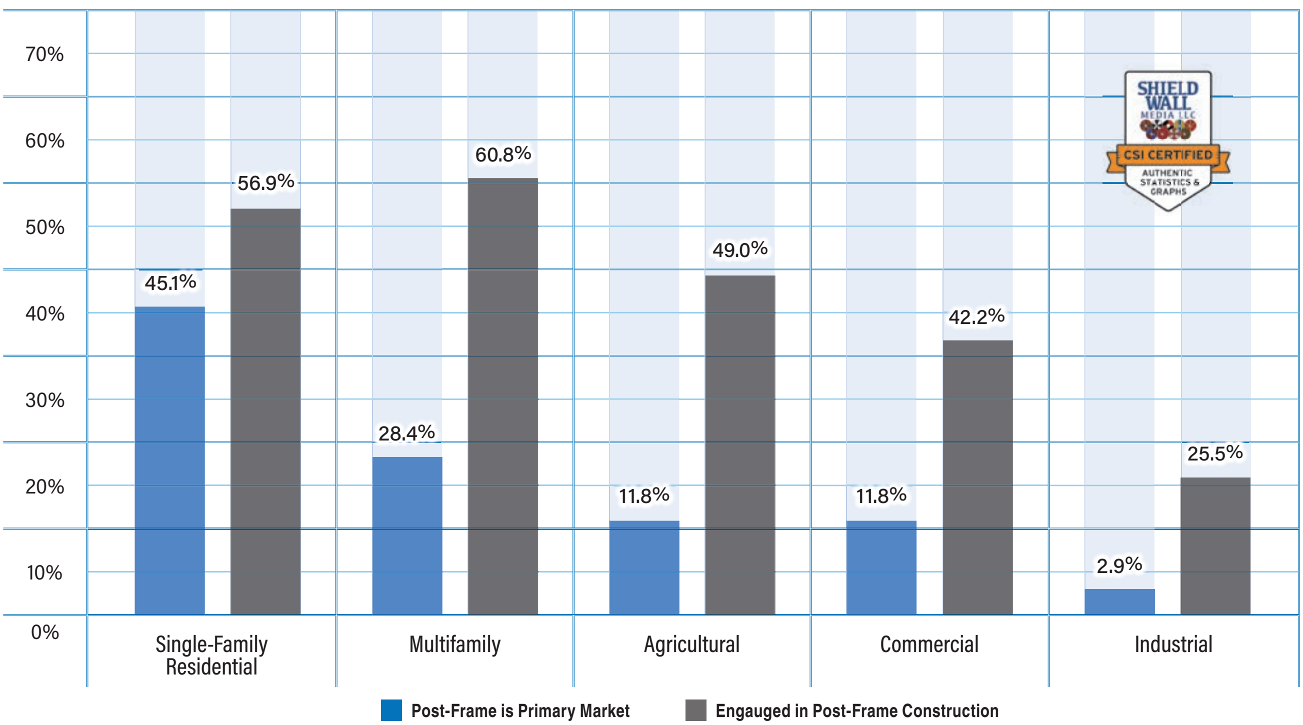
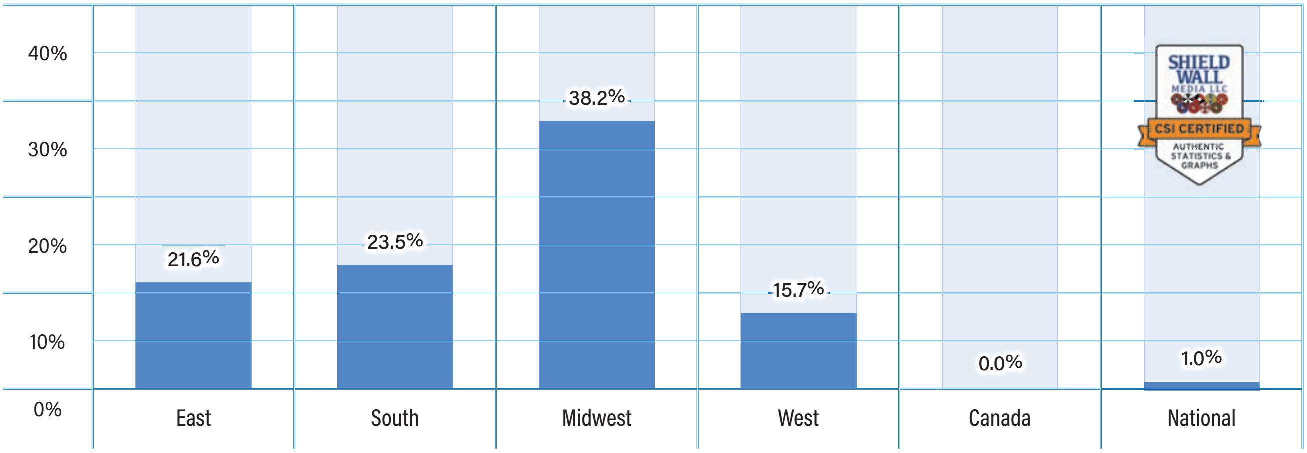


Chart C2 – Location



sification toward residential work. Among companies that identify post-frame as their primary building type, the largest share now serves the single-family residential market (45.1%), far outpacing agricultural construction (11.8%). When the lens widens to all firms engaged in post-frame construction, residential exposure grows even stronger, with 56.9% working in single-family and more than half also participating in multifamily projects. C1

This diversity underscores how post-frame's design flexibility enables builders to cross market boundaries, particularly in rural and small-town regions where contractors must pursue multiple segments to sustain volume. Rather than being niche agricultural specialists, today's post-frame companies operate as diversified generalists, leveraging the system's cost and speed advantages across residential and light commercial applications. C2

In the 2026 CSI survey, respondents were heavily concentrated in the Midwest (38.2%), which accounts for the largest share by a wide margin and reflects post-frame's deep roots in that region. Compared to last year's survey, the response rate from that region actually ticked up a bit from 32.3%. The South ranks second at 23.5%. With a growing population and mixed-use demand, that's not surprising. Representation tapers off in the West and East, suggesting these regions remain secondary markets but offer room for expansion as awareness and acceptance increase.

Nearly 70% of respondents who are engaged in post-frame construction are either designers or

Chart C3 – Role in Construction

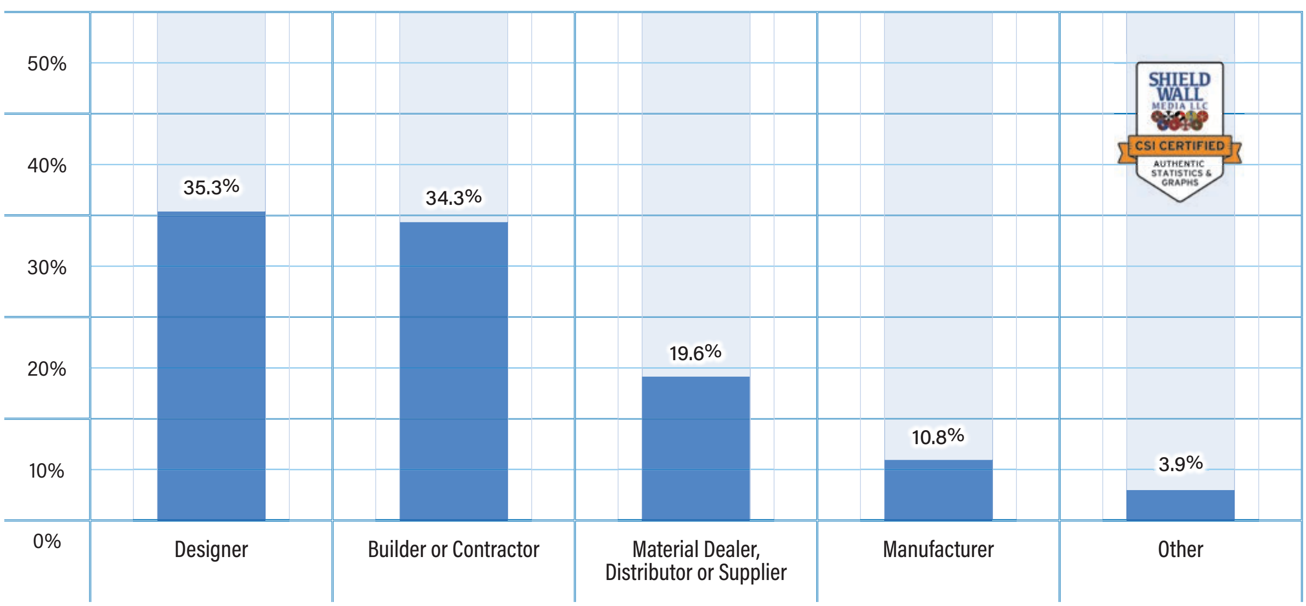
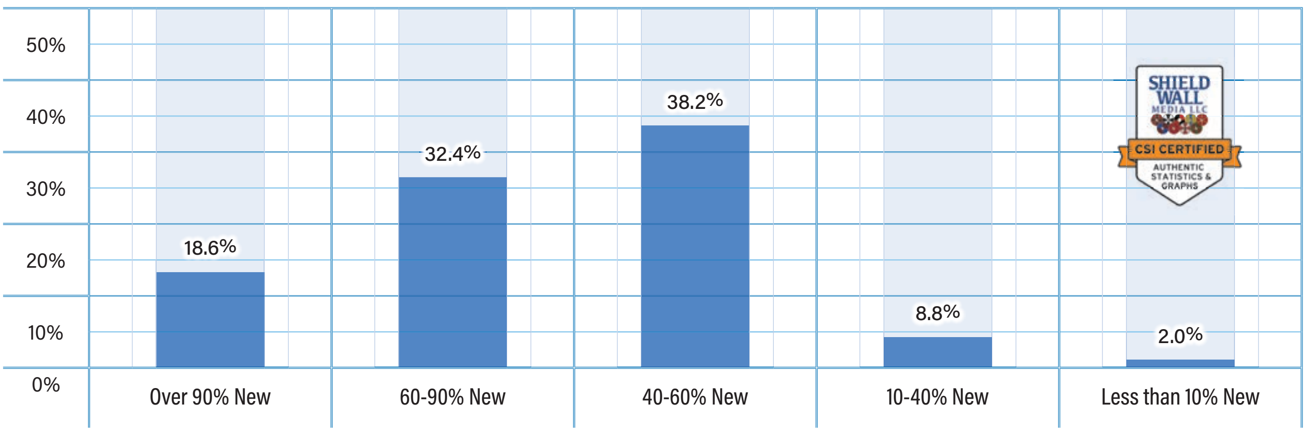


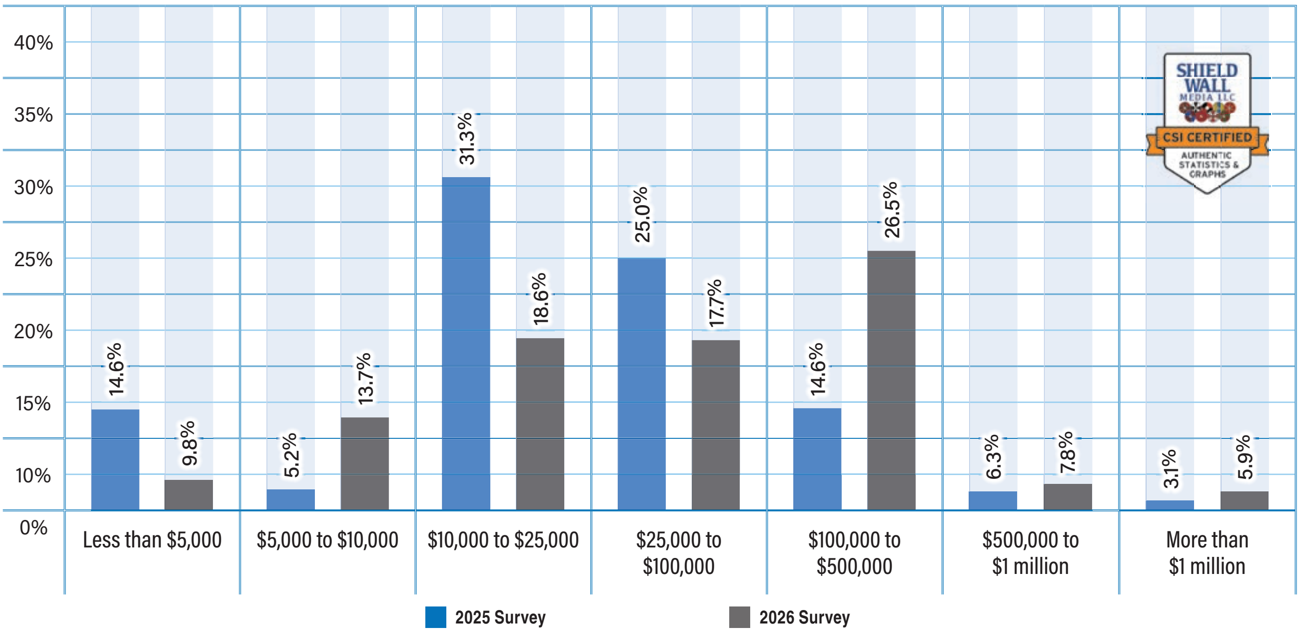
Chart C4 – New vs. Remodel



builders. Each of those two roles in construction represented about a third of survey takers. Dealers (19.6%) ranked third, followed by manufacturers (10%) and other (3.9%). Of those who selected "Other," when prompted to describe it, a significant number mentioned remodeling as their primary role. C3

How much of the work companies who are engaged in post-frame construction do is new construction vs. remodeling? Slightly more than half of survey takers said they do at least 60% of their work in new construction. Only 10.8% do less than 40% new work. It is interesting that 38.2% do about half new and half remodeling work. Those figures are com-

Chart C5 – Average Job Size



parable to the 2025 survey with a slight tilt toward more remodeling work. C4

There was a modest upward shift in average job size among survey takers since last year. In 2025, firms were more heavily concentrated in the lower-to-middle job-size ranges, reflecting cautious project selection amid tighter margins and economic uncertainty. This year, a larger share of respondents report moving into higher average job-size categories, while participation in the smallest project tiers declined. C5

This suggests growing confidence and a willingness to pursue more complex or higher-value work. The upper-end categories still represent a minority overall, but there was a huge increase in the percentage of respondents in the $100,000 to $500,000 range. Some of that could be due to increasing material costs and labor rates, but most likely it represents owners taking on larger projects.

Overall, the year-over-year comparison points to gradual expansion rather than a dramatic shift, with post-frame builders cautiously increasing project size while maintaining a strong base of manageable, mid-range jobs.

Clear geographic differences in both scale and concentration among respondents emerges when you compare 2025 annual sales by region. The Midwest dominates overall sales volume, with a noticeably higher share of firms reporting upper-tier annual revenues. More than 54% of Midwestern respondents report annual revenues in excess of $10 million. This reflects the region's mature post-frame market, strong agricultural base, and broad acceptance of post-frame in residential and commercial applications. The South and West follow as the second-largest contributors, with sales more evenly distributed across mid-range categories, suggesting a mix of growing firms and established regional players benefiting from population growth and expanding construction activity. C6

In contrast, the East displays smaller overall sales volumes and a heavier concentration in lower revenue brackets. This market is a much smaller post-frame construction market, and fewer respondents reached the highest annual sales tiers. A fragmented market with potentially higher barriers to entry, such as regulatory complexity, land costs, or lower post-frame penetration portend smaller jobs.

Overall, markets where revenues are strong closely tracks regional familiarity and acceptance of post-frame construction. The Midwest sets the benchmark for scale, the South reflects momentum and expansion, and the West and East remain developing markets where sales growth may depend on education, code acceptance, and diversification into residential and light commercial work.

Projected Industry Growth

Respondents to the 2026 survey who are engaged in post-frame construction show a slight improvement in confidence from 2025 to 2026 when you compare the percentage who expect the next year to be the same or improve. In 2025, 80.9% said the overall construction economy would improve or stay the same. In 2026, that rose to 85.7%. C7

Those who said they were unsure remained almost identical in both years, but there was decided change in the percentage of respondents who expected the next year to be worse than the previous year. At the end of 2024, 14.9% of respondents anticipated 2025 to be worse economically. At the end of 2025, only 10.2% thought the following year would be worse.

The 2026 survey shows a clear shift toward more positive and optimistic outlooks. While neutral responses remain meaningful—suggesting continued uncertainty—the decline in negative sentiment is notable. Overall, the year-over-year comparison points to guarded optimism and suggests momentum is improving rather than peaking, setting a cautiously constructive tone for 2026.

When we looked at which market segment would improve in 2026, we got a more detailed insight. Survey takers engaged in post-frame construction expected uneven but generally positive growth across key sectors. The agricultural and commercial market segments attract the strongest growth expectations, with a clear majority anticipating moderate to strong expansion in 2026. C8

The other markets—residential and industrial—generally represent good growth expectations if slightly lower than the other two market segments. Across all markets except industrial, about 10% of respondents see a decline on the horizon. While the industrial market doesn't show the strong growth expectations of agricultural or commercial, fewer respondents report concern about a shrinking market.

Sales growth from 2024 to 2025 was uneven but generally positive across regions. The South led by a wide margin, with the largest share of firms en-

Chart C6 – 2025 Annual Gross Sales by Region

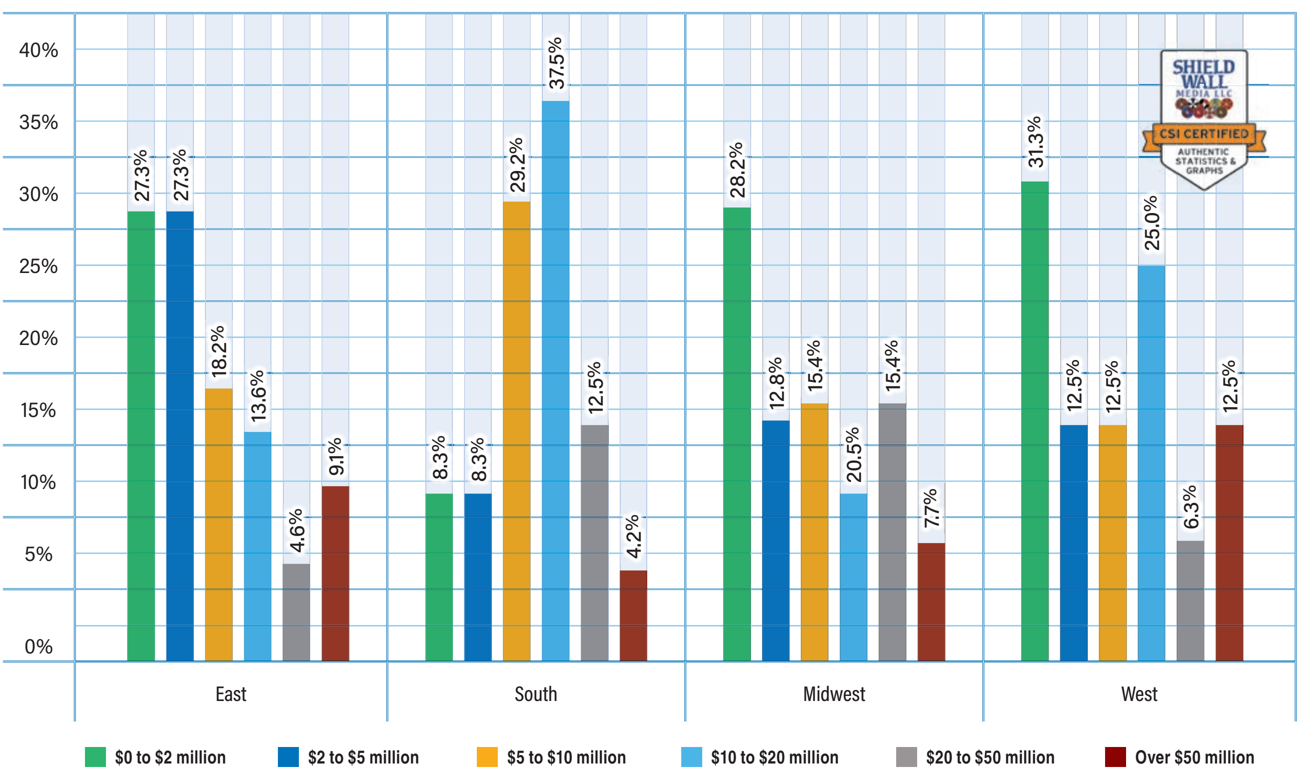
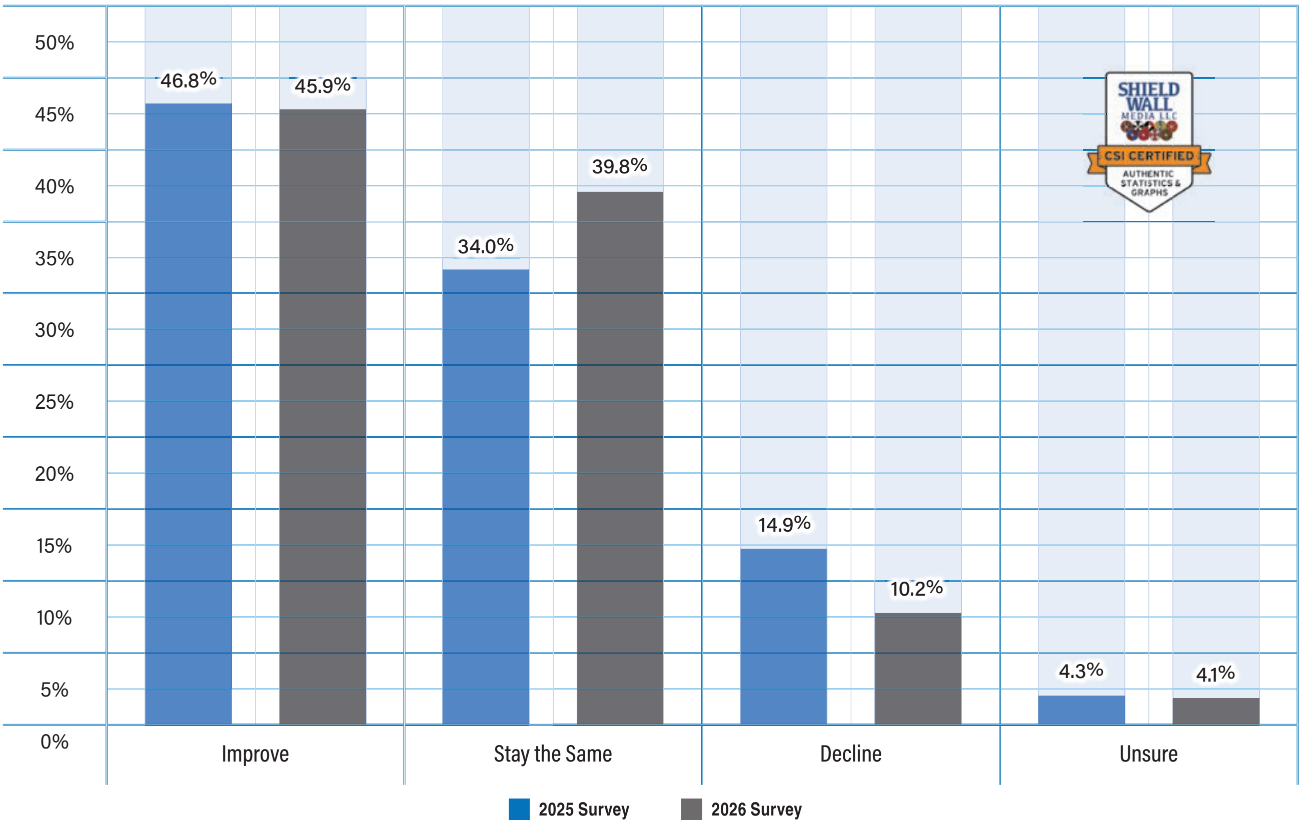


Chart C7 – 2026 vs 2025 Sentiment



gaged in post-frame construction (83.4%) reporting moderate or strong sales increases, and 41.7% of them experiencing more than 25% growth. About 50% of the respondents in the other three regions reported growth in 2025 although the amount of growth reported varied significantly. Just under a quarter of respondents in the East said growth was significant, while about a third in the West experienced significant growth. But in the Midwest, only 5.4% of respondents reported growth greater than 25%, which may be attributed to the maturity of the market for post-frame buildings. C9

These patterns suggest that regional familiarity with post-frame construction and overall construction activity played a significant role in shaping sales outcomes.

In 2026, respondents expect broad-based growth, with regional differences in intensity. The East leads expectations, with 77.3% of survey takers engaged in post-frame construction forecasting moderate to strong growth. That slight decline from 59.1% who experienced year-over-year growth in 2025 may signal an optimism about a growing market. Given the comparative lack of adoption of post-frame buildings in the East compared to other regions, the increase may just be because it's easier to grow an emerging market than a mature one. C10

Just over 45% of respondents in the Midwest and

Chart C8 – 2026 Growth Expectation by Market Segment

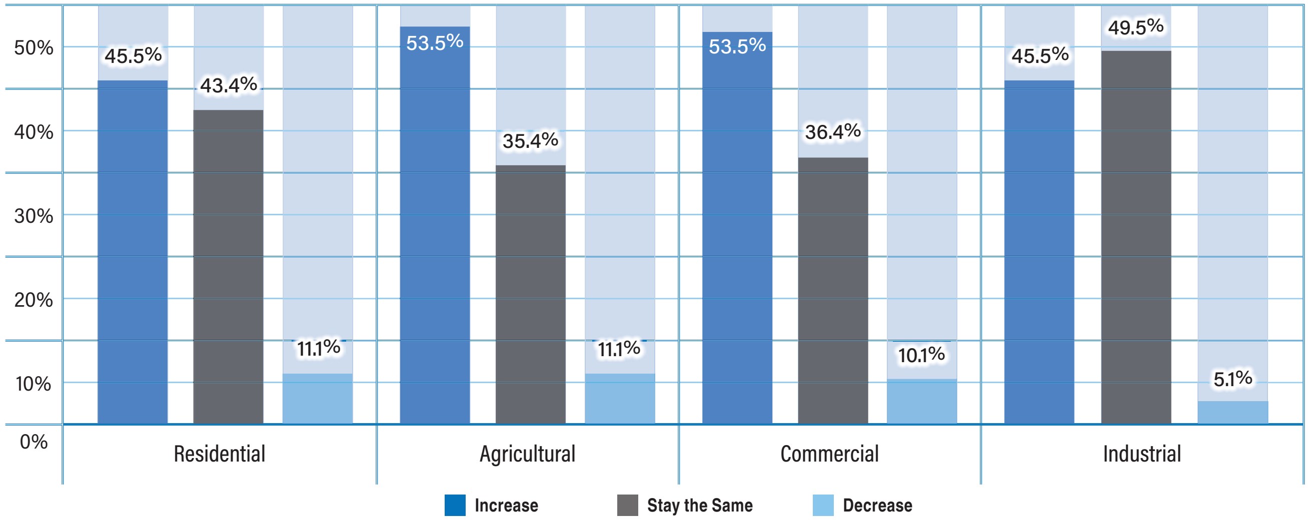


Chart C9 – Gross Sales 2025 Compared to 2024 by Region

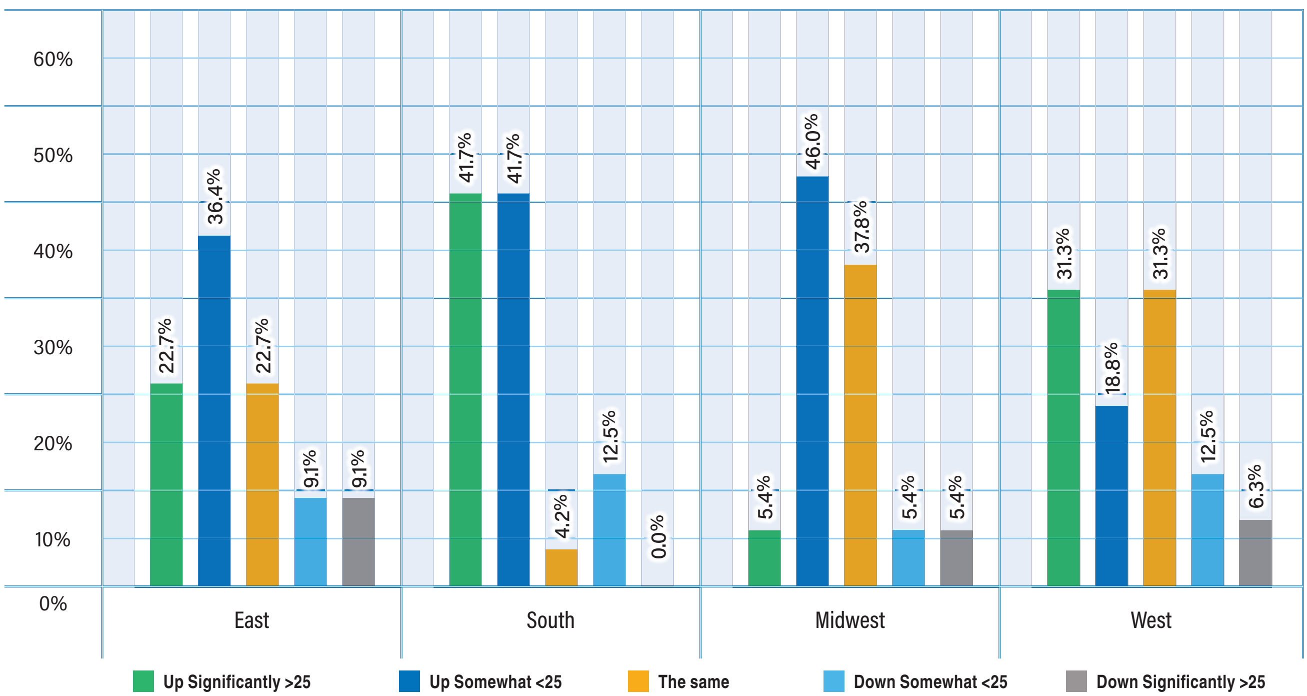
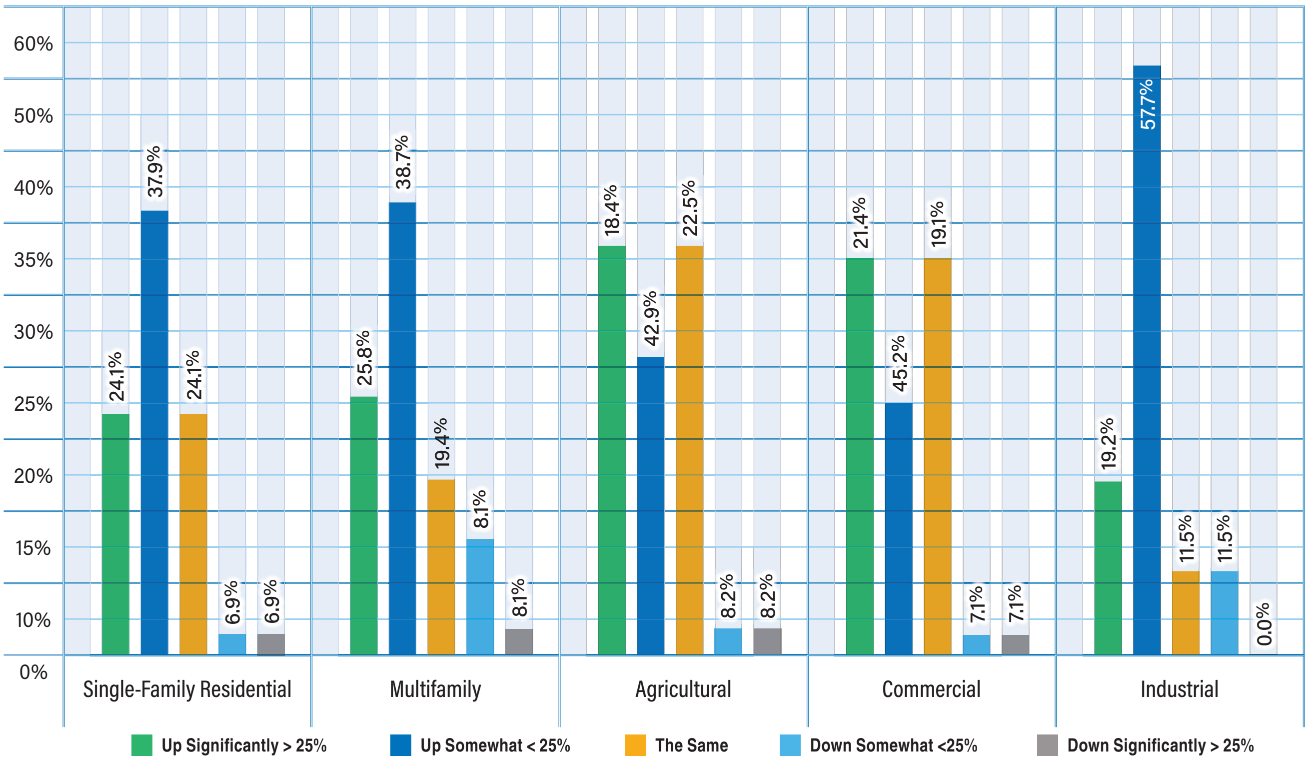


Chart C10 – 2025 Gross Sales Compared to 2024 by Market Segment



56% in the South expect growth in 2026, while only 25% in the West predicted growth. In fact, 31.3% in the West believe 2026 sales growth will decline. The skewed responses in the West and East may have as much to do with the acceptance of post-frame construction in those regions as any growth. As shown earlier, the market for post-frame construction in the South and Midwest is more mature, so growth is steadier.

Company Size and Growth Projections

Sales growth from 2024 to 2025 varied notably by market segment. Industrial markets showed the largest gains with 76.9% of respondents doing post-frame construction saying that that market segment grew. Between 61% and 67% of respondents said the other segments grew in 2025, which is strong growth across the field. However, the residential segments—single-family and multifamily—showed the lowest gains. C11

Companies in the post-frame industry were equally likely to report significant growth (more than 25%) in 2025 as overall survey respondents. About 20% of post-frame respondents and all survey respondents said they hadq significant growth in 2025. Across market segments in post-frame construction, 2024–2025 sales growth was uneven and largely propped up by industrial and commercial markets. C12

Optimism about the growth of the post-frame market in 2026 was evenly spread across the market segments with those in the single-family residential market slightly more positive. Respondents in all the markets were guardedly optimistic. About

Chart C11 – 2025 Gross Sales Compared to 2024 by Market Segment

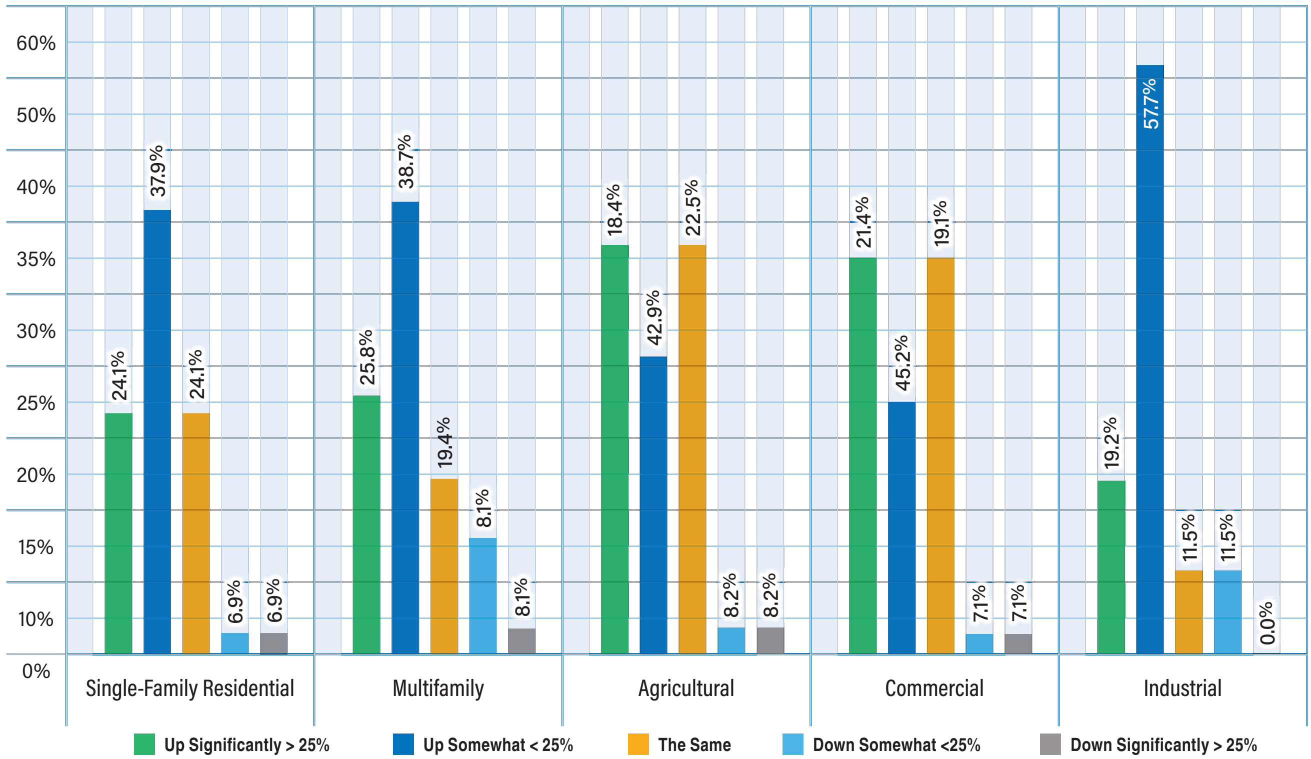
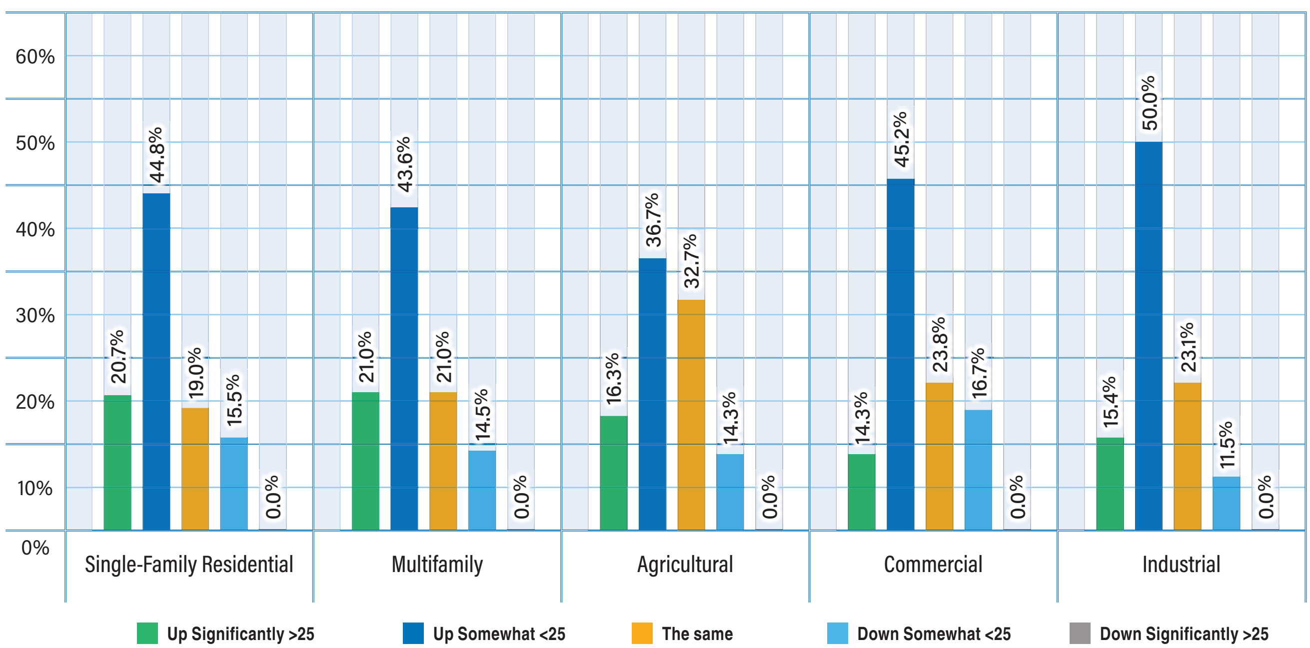


Chart C12 – 2026 Projected Gross Sales by Market Segment



20% of survey takers in the residential markets expect significant growth in 2026, but in the other markets that percentage was closer to 15%. Otherwise, across the post-frame niche, between 45% and 50% of respondents anticipated moderate growth.

The exception is the agricultural market where optimism was tempered, and respondents were much more likely to say the market would stay the same. In that instance, 32.7% expected 2026 to mirror 2025 compared to between 19% and 25% in the other segments. Mike Green, vice president of sales and marketing for Leland Industries points to a specific reason for the lower growth in the agricultural segment. "The tariffs have had the largest negative impact on our business," he says. Soybean farmers were especially hard hit with bankruptcies increasing by 55% last year. The $12 billion bailout announced by the Trump administration in December 2025 may help reverse that fortune, but it could be a while until farmers begin adding new buildings." While housing continues to lead expectations, confidence is broadening across segments, pointing to a more diversified and resilient growth outlook for 2026.

Future Opportunities and Challenges

Survey respondents are taking a measured approach to growth. In the near term, nearly half the firms plan to expand operations in 2026, reflecting

Chart C13 – Expansion Plans

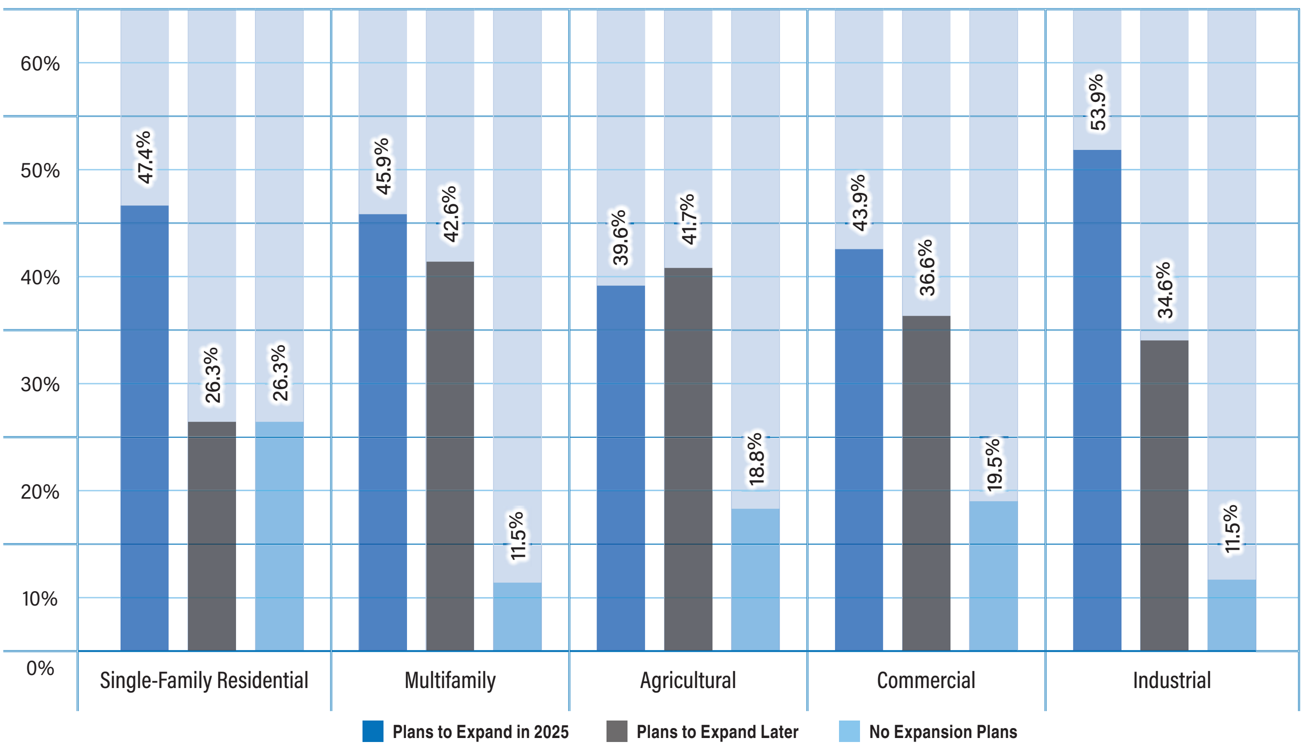


Chart C14 – Plans to Add Resources in 2026

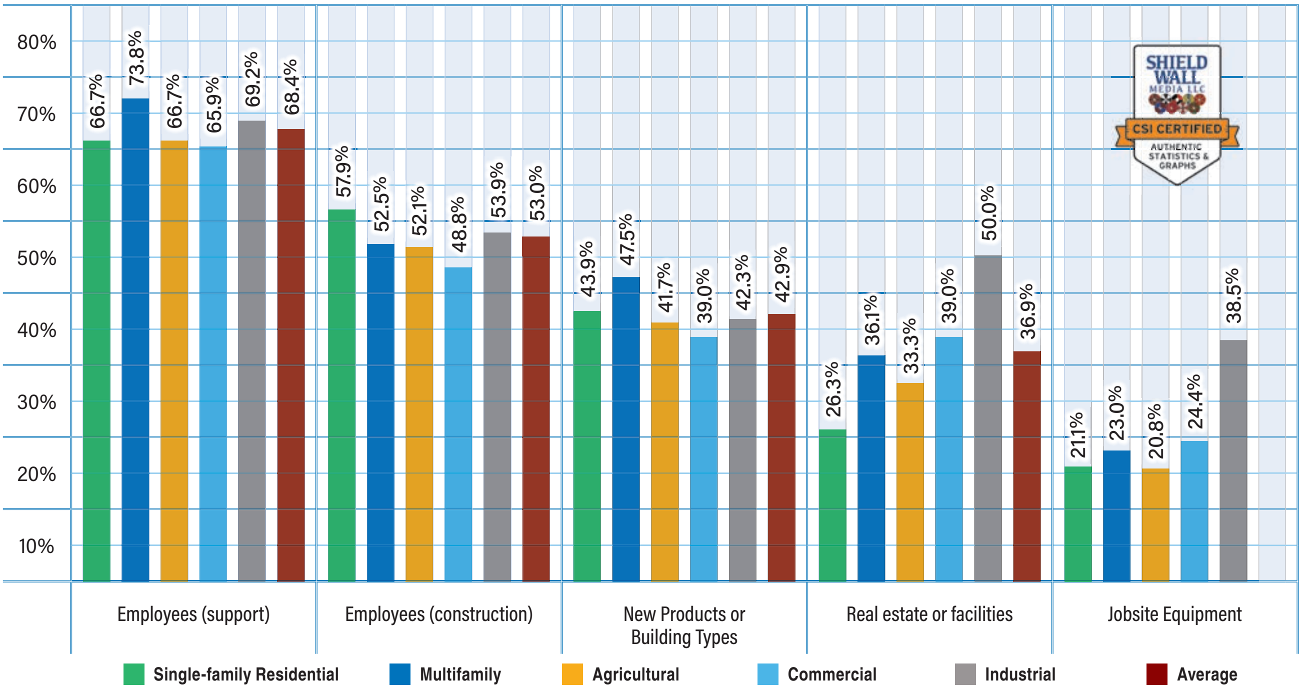
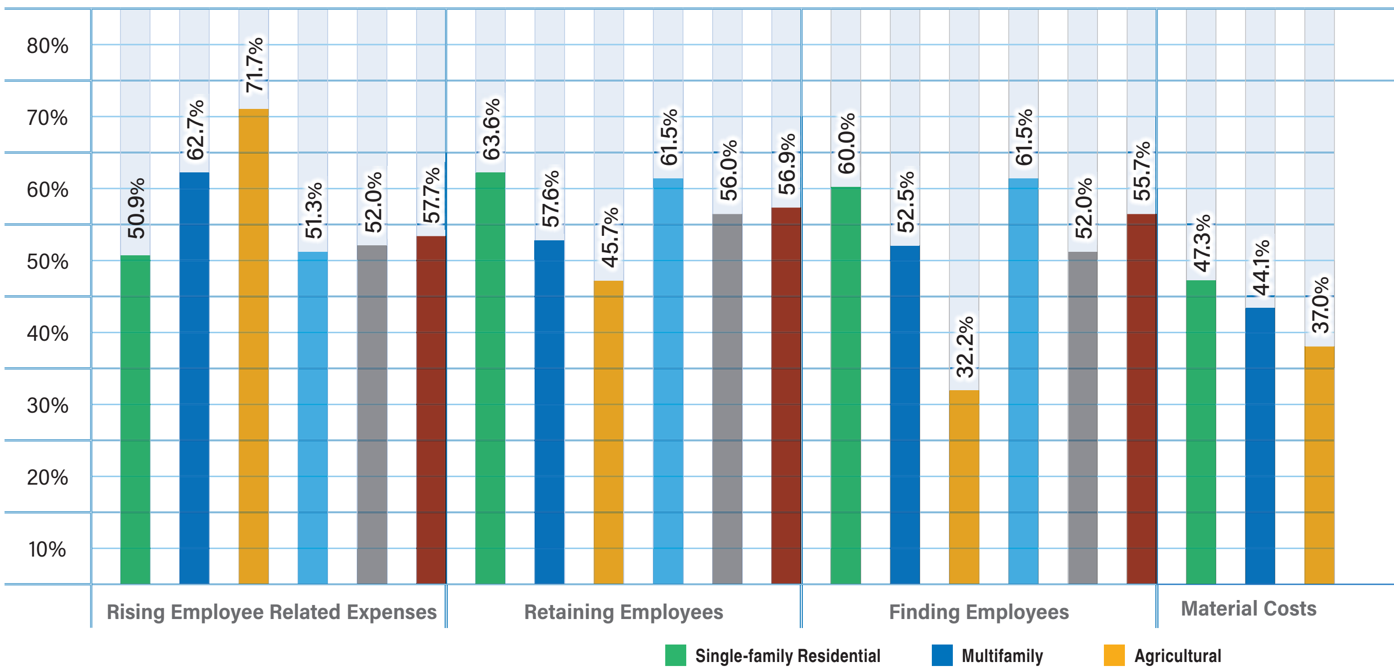


Chart C15 – Challenges in 2026



discipline after recent volatility. Slightly more than a third have plans to expand in an undetermined future. C13

When we look at these plans across market segments, companies doing post-frame construction who are in the single-family market are least likely to have any plans to expand. Part of that could be due to uncertainty about affordability issues in light of sustained higher interest rates.

Reflecting the optimism shown for growth by those in the industrial market, respondents in that segment also are more likely to have expansion plans with 53.9% saying they will expand in 2026 and a third offering plans to expand in the future.

Companies engaged in the post-frame construction industry are prioritizing people and core operational capacity over heavy capital expansion. The largest share plan to add skilled labor and support personnel, underscoring ongoing workforce constraints and the need to resolve higher workloads. These reflect investments in efficiency and productivity rather than speculative growth. C14

Fewer respondents plan significant increases in facilities, suggesting caution around fixed overhead. Overall, the pattern indicates disciplined expansion focused on execution and capacity—adding resources that directly support project delivery—while avoiding overextension as firms prepare for steadier, incremental growth in 2026.

Respondents in the post-frame construction industry expected rising employee costs would be their biggest challenge in 2026, followed by retaining employees and finding employees. Clearly, the industry is focused on the issues surrounding human resources and the recognition of cost pressures that make it more difficult to find and retain skilled labor. C15

In last year's survey, by contrast, material costs were the biggest challenge survey takers expected to face in 2025, while inflation and interest rates ranked higher than in this year's survey. Material availability, a top concern last year, didn't make the top seven challenges this year.

Interestingly, concern over taxes popped up in this year's survey, with 32.5% of respondents saying it will be a challenge in 2026. This is in spite of what is generally perceived to be a political environment focused on reducing tax burdens.