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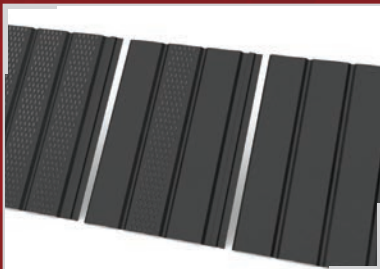
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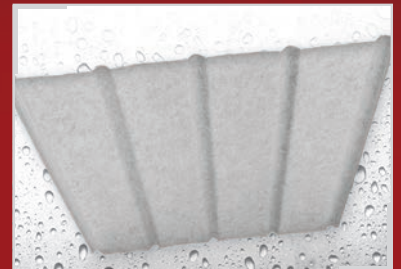
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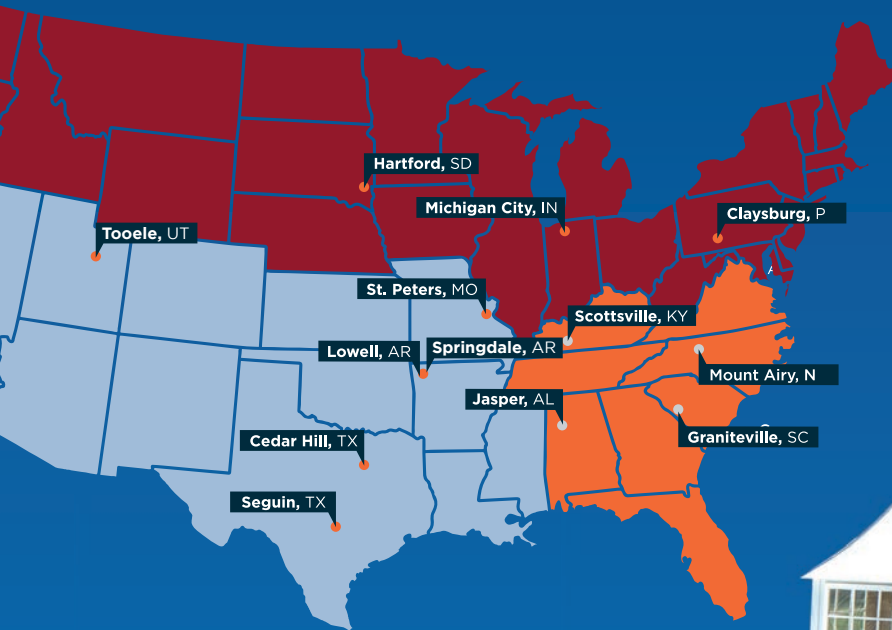
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SECTION 5

METAL ROOFING AND RESIDENTIAL ROOFING DATA



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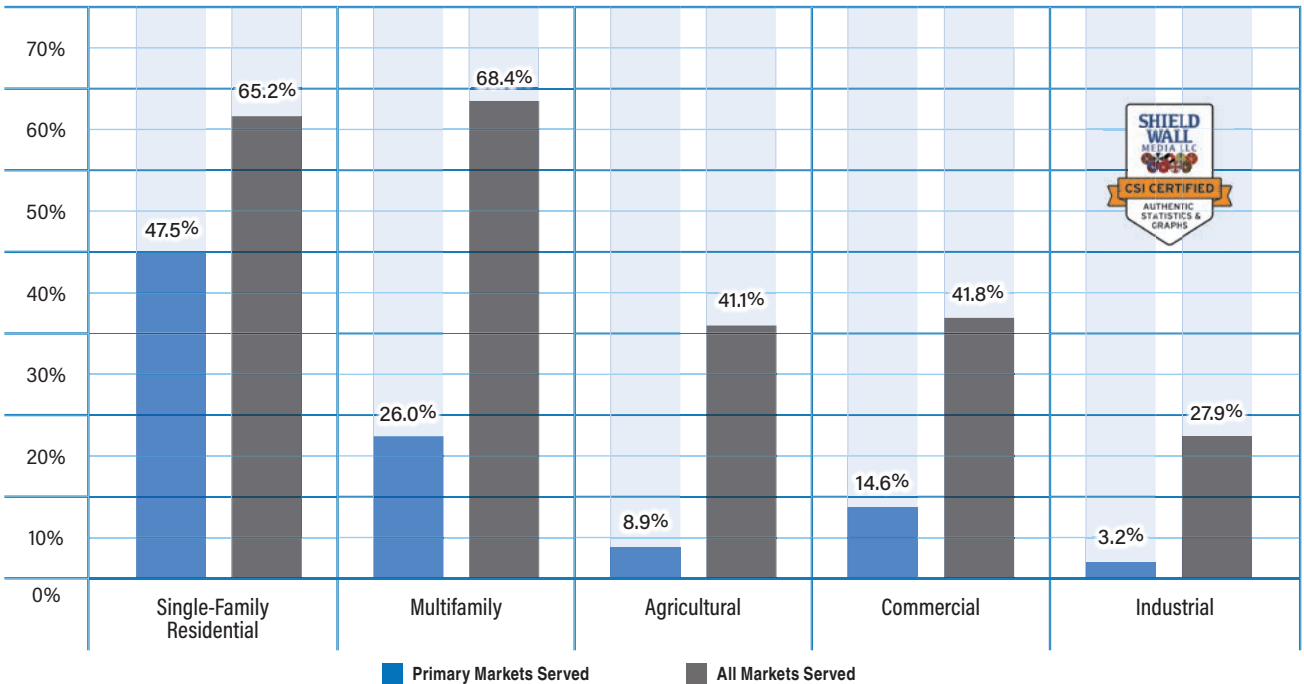
SECTION 5

METAL ROOFING AND RESIDENTIAL ROOFING DATA

Beginning in January 2025, the interest in metal roofing has increased in large part due to the fires in Los Angeles that January that destroyed more than 18,000 homes in the Pacific Palisades, Altadena, and other communities. Dwellings in the wildland-urban interface (WUI)—a transition zone between wilderness and areas of human development—have increased over the years, and those buildings need a greater degree of resilience due to the unique nature of the environment. Metal roofing can help supply that.

Renee Ramey, executive director, Metal Roofing Alliance, says, “As homeowners and builders reassess risk in wildfire-prone regions like the Pacific Palisades, there’s a clear shift in priorities toward resilience and long-term performance. Metal roofing’s non-combustible, Class A fire-rated performance and proven resistance to embers and radiant heat have helped elevate it from a niche product to a mainstream solution. That growing awareness is reflected in industry trends: metal roofing’s share of the residential roofing market has climbed sig-

Chart C1 – Market Segments Served by Companies who Primarily do Metal Roofing and Those Who Work in Metal Roofing



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nificantly in recent years, with data showing metal roofing now capturing a meaningful percentage of new installs and forecast to grow steadily as climate-driven extreme events influence homeowner purchase decisions.”

Characteristics of the Metal Roofing Industry

Across a diverse mix of markets, companies engaged in residential construction—particularly single-family—clearly dominate the participation in the survey, accounting for the largest share of respondents. Nearly half (47.5%) identify single-family residential as their primary market, far ahead of multifamily at 26.0%. Commercial (14.6%), agricultural (8.9%), and industrial (3.2%) trail well behind, indicating that most firms still build their core business around housing rather than large-scale nonresidential projects. **C1**

This becomes more revealing when looking at all markets served, which highlights diversification. While only a quarter claim multifamily as their main focus, more than two-thirds (68.4%) report doing some multifamily work—the highest participation of any segment. Single-family remains broad at 65.2%, but the higher multifamily share suggests many contractors are branching into apartments or condos to balance cyclical swings

in detached housing. Roughly four in 10 serve commercial (41.8%) or agricultural (41.1%) projects, showing meaningful secondary revenue streams, while industrial remains a niche market at 27.9%.

Overall, the survey portrays a residential-first industry with flexible operators. Most firms keep a homebuilding base but supplement it with multifamily and light commercial jobs, spreading risk and capturing more opportunities as markets shift. **C2**

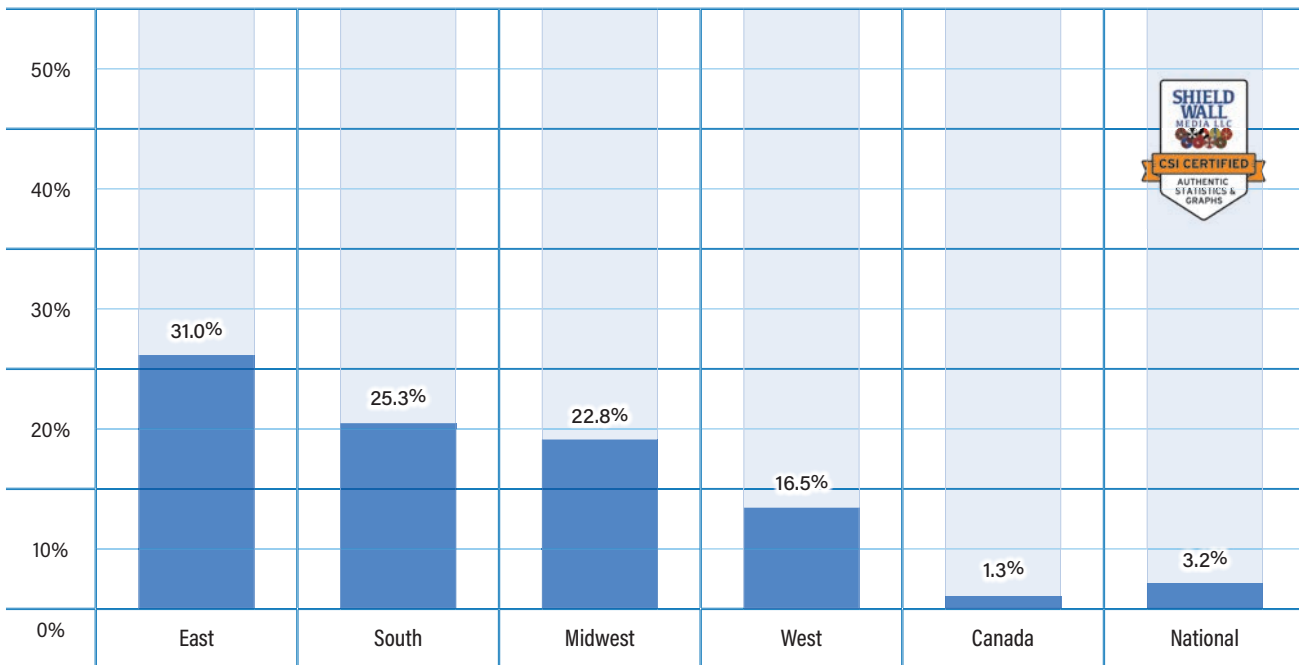
Survey participation is strongest in the East, which accounts for 31% of respondents. The South follows at 25.3%, with the Midwest close behind at 22.8%. Together, those three regions represent roughly four out of five responses, giving the survey a broad footprint across the country’s traditional construction strongholds for metal roofing.

The West accounts for about 16% of participants, a meaningful but smaller share compared to the eastern half of the U.S. A small percentage identify as operating nationally (about 3.2%), while Canadian respondents make up just over 1%

Overall, the regional distribution suggests a well-balanced national sample with a slight tilt toward the East and South—areas that historically experience steady residential and commercial construction activity—while still reflecting input from all major U.S. regions. **C3**

Builders and contractors represent the largest share of respondents at nearly 41.8%, underscor-

Chart C2 – Metal Roofer Locations





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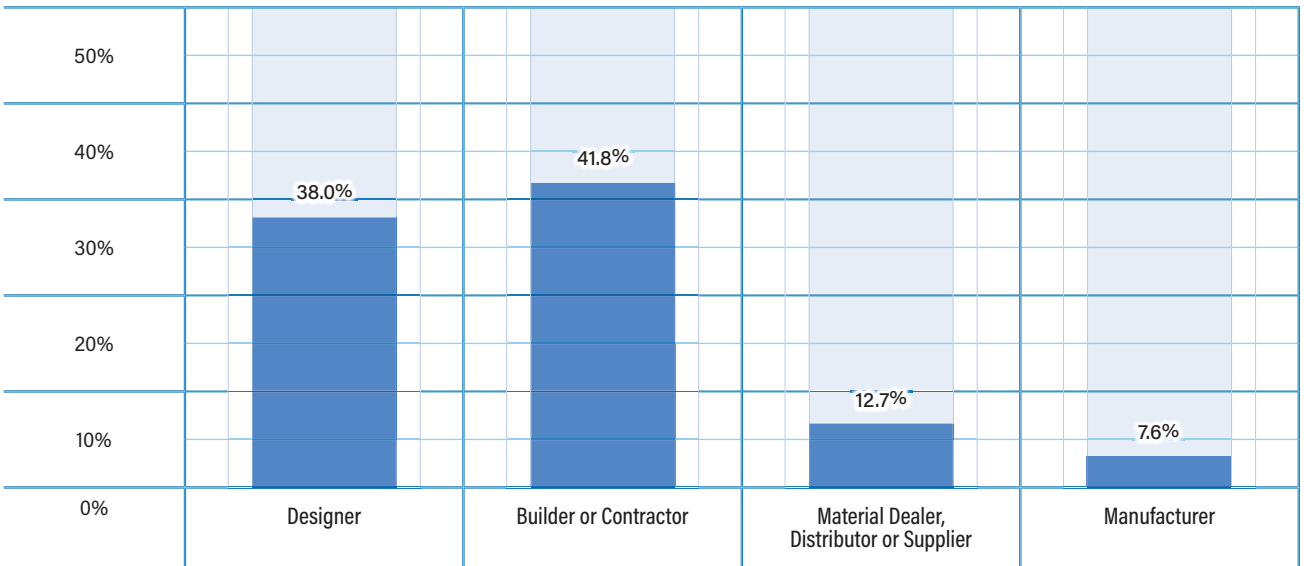
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Chart C3 – Role in Construction Process



ing the survey’s strong connection to field operations. Designers follow closely at 38%, highlighting significant input from the planning and specification side. Suppliers account for 12.7%, while manufacturers make up roughly 8%. Overall, the results reflect a respondent base led primarily by project execution professionals, with meaningful representation from upstream partners. **C4**

Respondents lean heavily toward new construction, though many maintain a balanced mix. The largest share (36.1%) report that 40–60% of their

business is new work, while another 30.4% generate 60–90% from new construction. More than one-fifth derive over 90% of revenue from new projects. In total, more than half (51.9%) do at least 60% of their work in new construction. Only about 12% rely primarily on remodeling, indicating a strong new-build orientation overall. **C5**

Average project size is trending upward, with a clear concentration in mid- to upper-tier work. The largest share of respondents in 2025 (26.6%) report average jobs between \$100,000 and \$500,000,

Chart C4 – New vs. Remodel

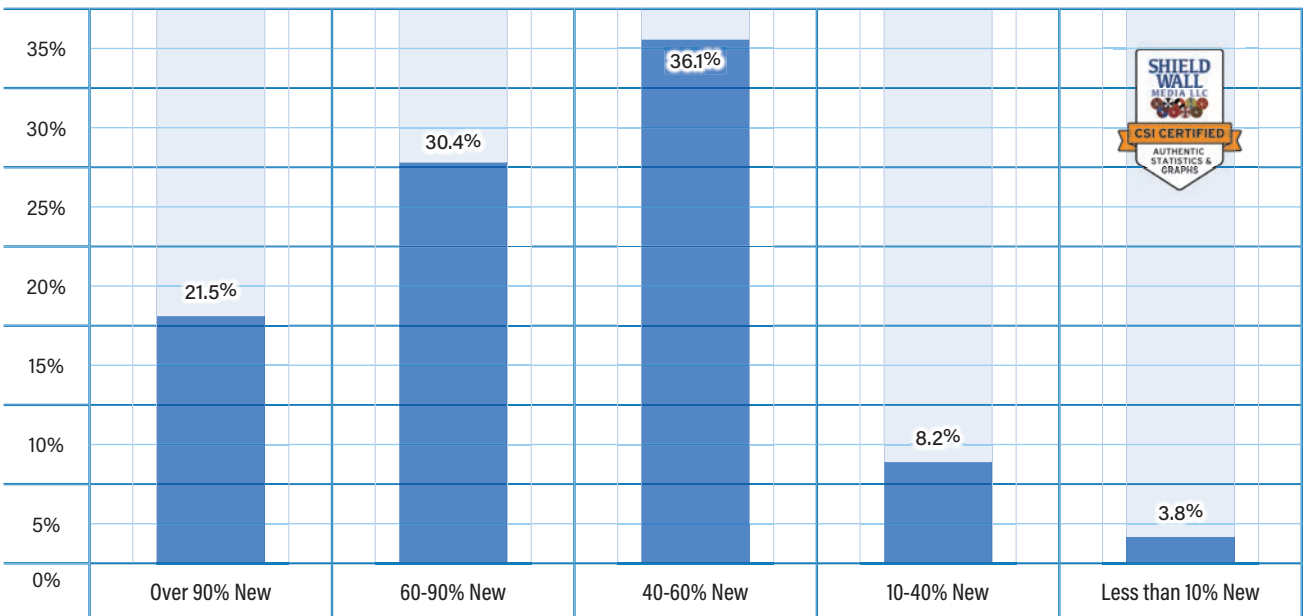
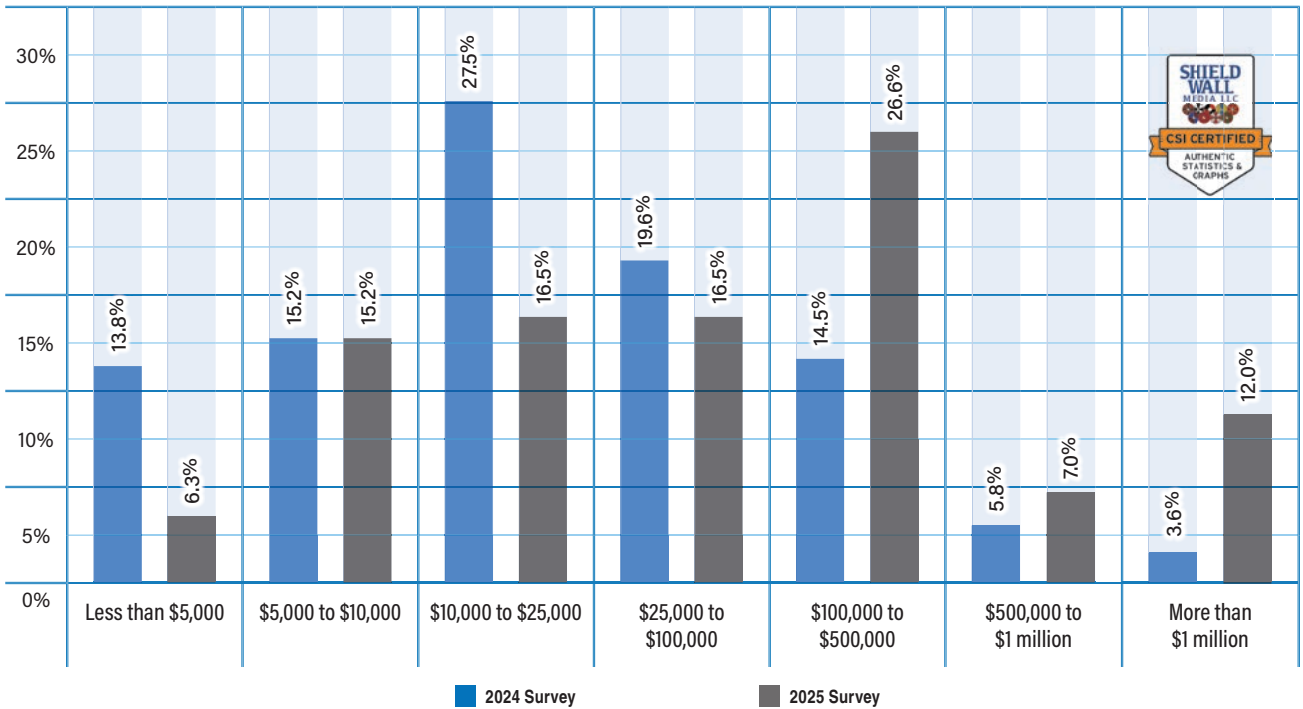


Chart C5 – Average Job Size



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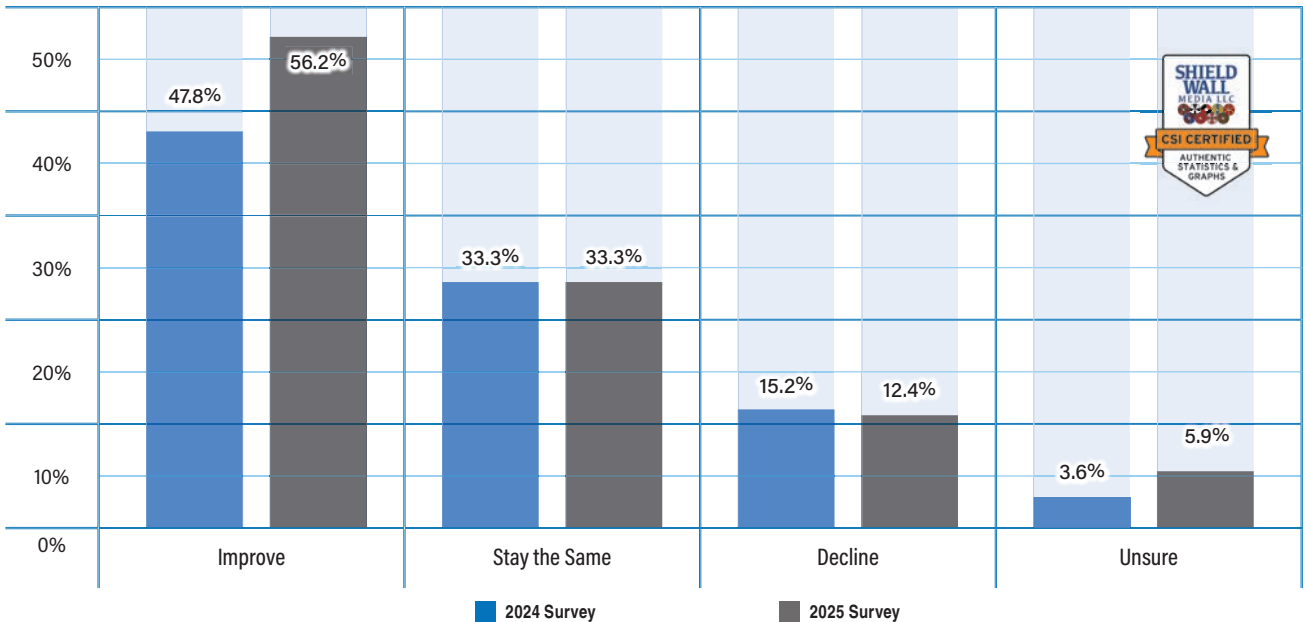
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Chart C6 – Sentiment About Construction Industry in 2026

making it the dominant category. Another 12% average more than \$1 million per project, signaling meaningful participation in large-scale work. Smaller jobs under \$10,000 account for roughly 21% combined, while mid-range projects between \$10,000 and \$100,000 remain steady but less dominant. Overall, the distribution points to a market increasingly driven by higher-value projects.

Future Opportunities and Challenges

Industry sentiment has strengthened among companies doing metal roofing projects heading into 2026, with a clear majority expressing optimism. More than 56% expect business conditions to improve, up noticeably from about 47.8% in the prior year's survey. ^{C6}

At the same time, the share anticipating stable conditions has declined to 25.5%, suggesting that many who were previously neutral have shifted toward a more positive outlook.

Those expecting a downturn represent a relatively small portion—just over 12%—and that figure has edged down year-over-year. A modest increase in respondents who are unsure, now nearly 6%, reflects some lingering caution.

Overall, the distribution shows confidence outweighing concern by a wide margin. But there are unspoken concerns. Royden Wagler, director of sales and marketing, Smartbuild Systems, points to a problem going into 2026, but also a solution. "Labor shortages continued across the industry," he says, "pushing builders to look for ways to quote faster and reduce errors." ^{C7}

Growth expectations are broadly positive across all major construction segments, with commercial leading the way. About 63% of respondents doing metal roofing anticipate increased commercial activity, the highest optimism among the four sectors. Agricultural follows closely at 60%, reflecting strong confidence in that niche, a traditionally strong metal roofing market.

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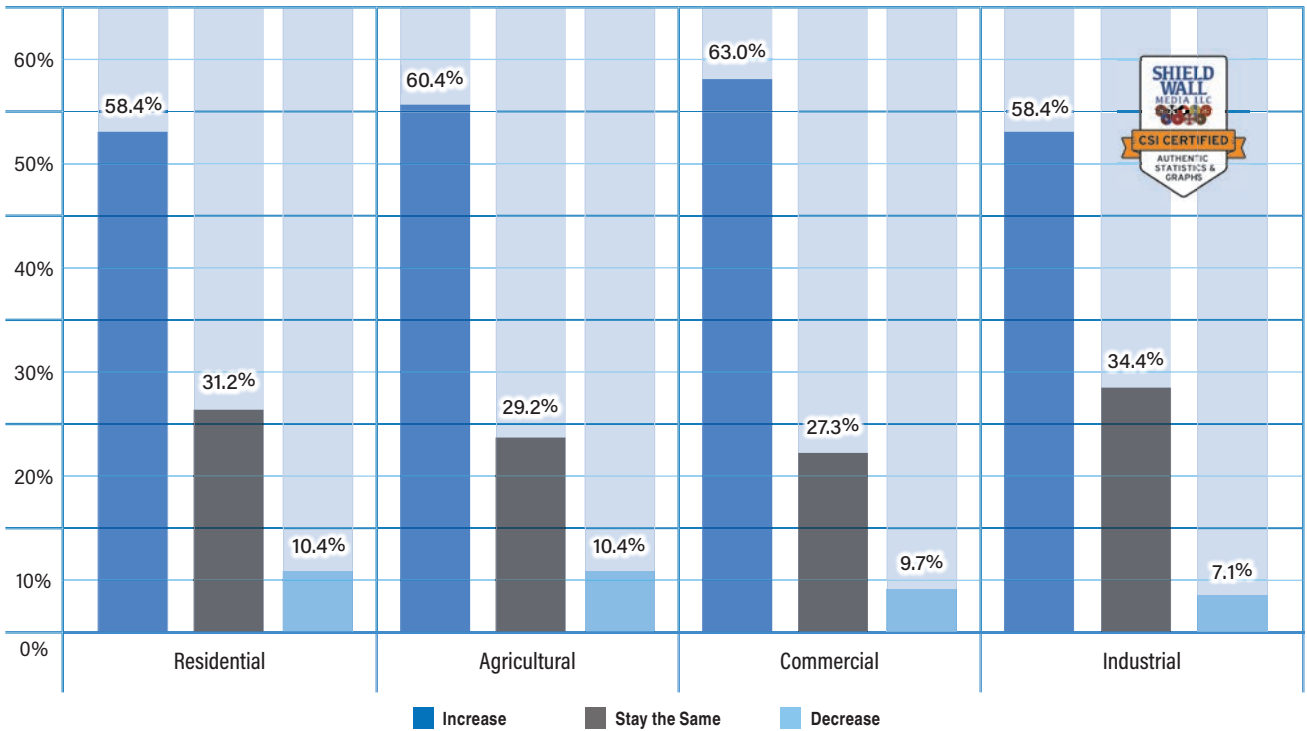


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Chart C7 – 2026 Growth Sentiment by Market Segment



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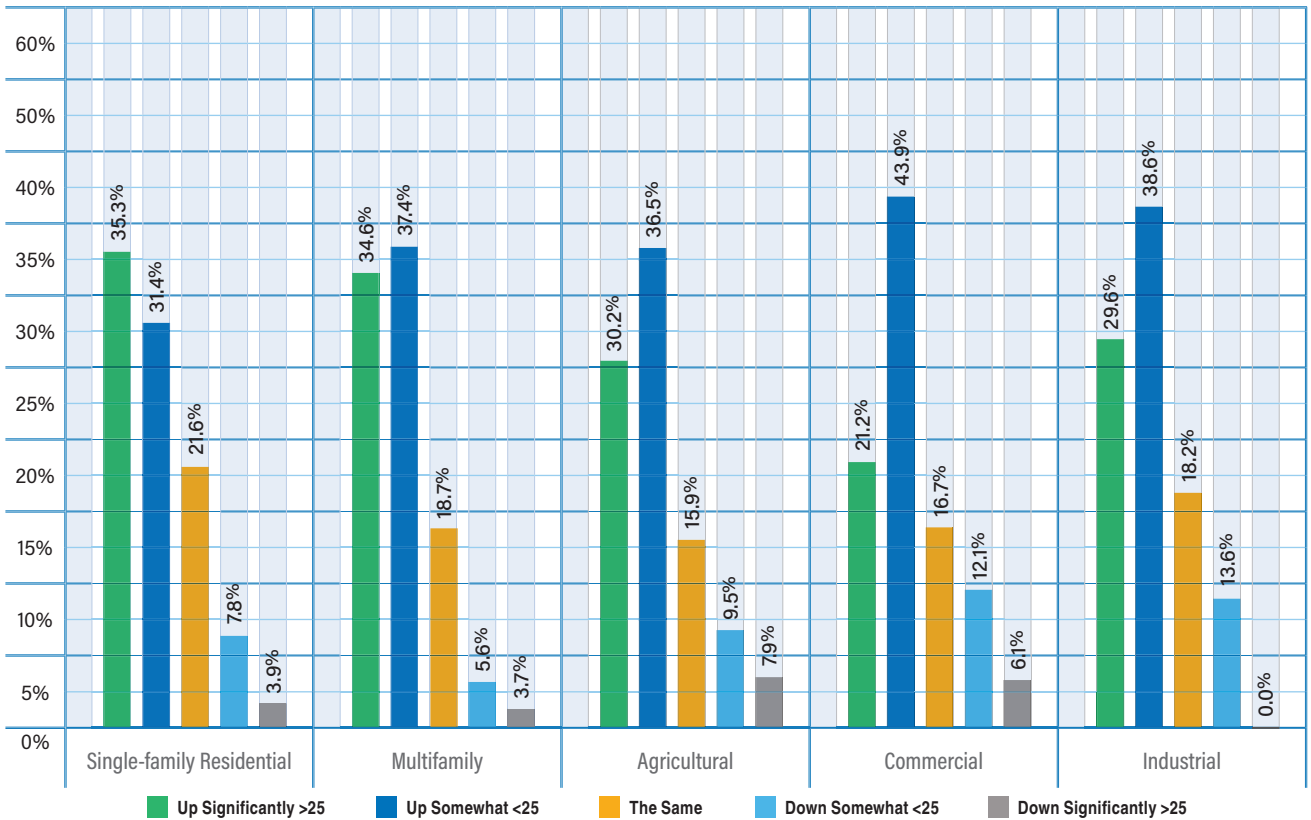
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Chart C8 – 2025 Gross Sales Compared to 2024 by Market Segment



Residential and industrial markets both post solid outlooks, with 58.4% expecting growth in each. Industrial stands out for having the lowest share predicting decline—about 7%—and the highest percentage expecting stable conditions, suggesting steady expansion rather than volatility.

Across all sectors, fewer than 11% foresee contraction, underscoring a generally upbeat industry mood. The distribution indicates consistent confidence, with commercial and agricultural slightly outperforming residential and industrial in growth sentiment.

Company Size and Growth Projections

The companies engaged in metal roofing who responded to our survey reported generally positive

gross sales increases in 2025. About two thirds said they experienced growth and approximately one third said the growth was significant. Gary Davel, director of sales in metal roofing for ProVia reports, “We saw a marked uptick in interest with distributors wanting more quotes and knowledge of our products.” C8

Nearly 72% of multifamily respondents reported increased sales, the highest growth rate among the sectors. Industrial followed at roughly 68.2%, while single-family and agricultural both posted gains of about 66.7%. Commercial trailed slightly but still showed solid momentum, with 65.1% reporting growth. Those differences are markedly small.

Significant increases—greater than 25%—were most common in single-family and multifamily

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work, highlighting strong residential demand. Declines were relatively limited, generally staying in the low-to-mid teens, with agricultural and commercial experiencing slightly higher pullbacks than other sectors. Overall, the distribution underscores a year of expansion, with growth clearly outpacing contraction across the board. **C9**

Projected sales growth among companies engaged in metal roofing from 2025 to 2026 was strongly positive across all segments of respondents, with expectations more concentrated on moderate gains. Companies working in the single-family market lead all segments, with 73.3% anticipating higher sales, including about one-third expecting increases above 25%. Industrial follows closely at about 72.7% projecting growth, which is statistically nearly identical to respondents in single-family. Most (54.6%) foresee gains under 25%. Multifamily also shows solid momentum at 71%, while agricultural and commercial trail slightly but still approach 68% expecting expansion.

Commercial and industrial respondents are particularly weighted toward “up somewhat” rather than dramatic increases, suggesting steady, sustainable improvement. Declines remain limited in

every segment, generally near or below 14%. Overall, the outlook points to continued expansion in 2026, driven more by incremental growth than by sharp surges.

Future Opportunities and Challenges

Expansion plans are widespread among companies doing metal roofing work, with a majority of respondents signaling near-term plans. Overall, just over 53% report immediate plans to expand in 2026, while another 30.9% anticipate expanding in 2027 or later. Only 15.6% indicate no expansion plans at all. **C10**

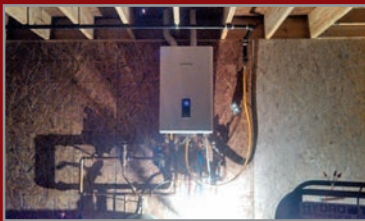
Firms in the multifamily and single-family markets are the most aggressive, with roughly 59% planning immediate expansion. Industrial follows closely at 54.6%. Commercial and agricultural respondents are somewhat more measured, though nearly half in each segment still intend to expand in 2026. Agricultural and commercial firms also show a comparatively higher share planning longer-term growth rather than immediate moves.

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Chart C9 – 2026 Projected Gross Sales Compared to 2025 by Market

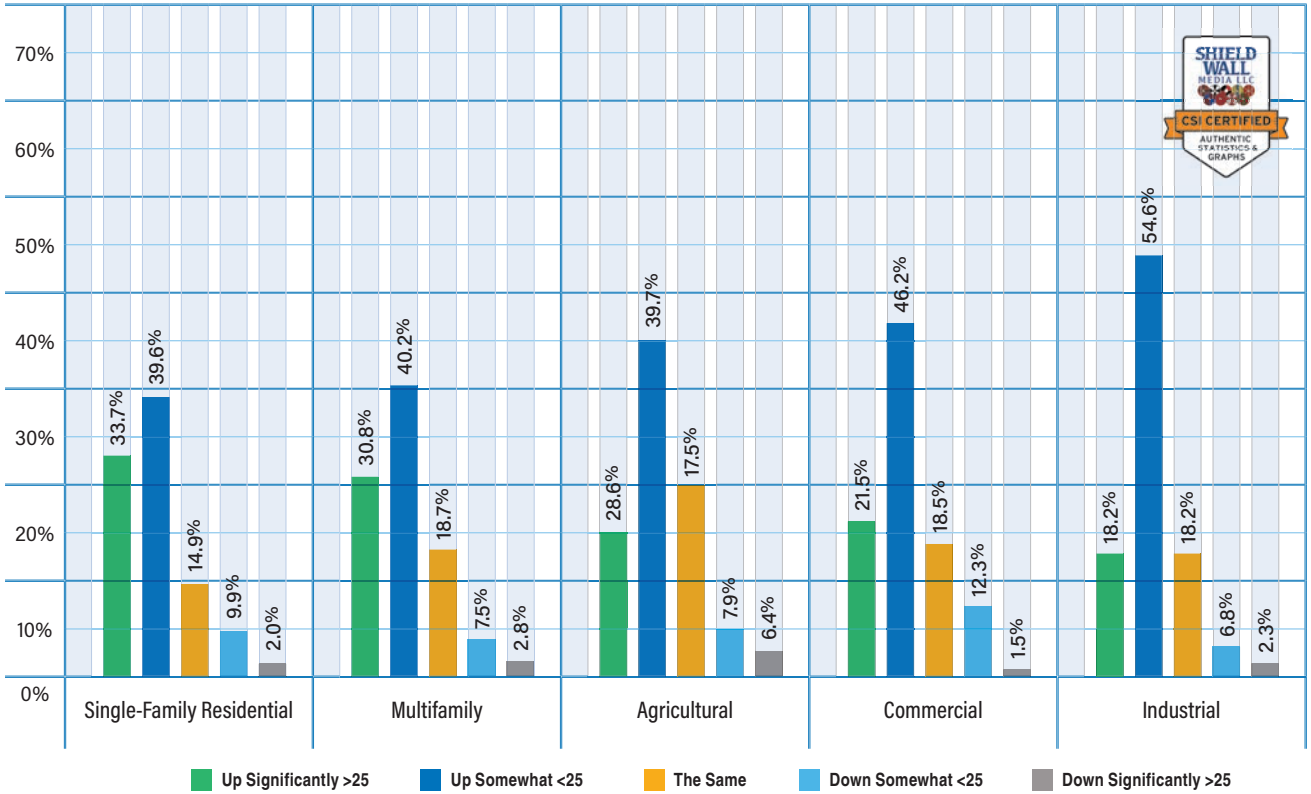


Chart C10 – Expansion Plans

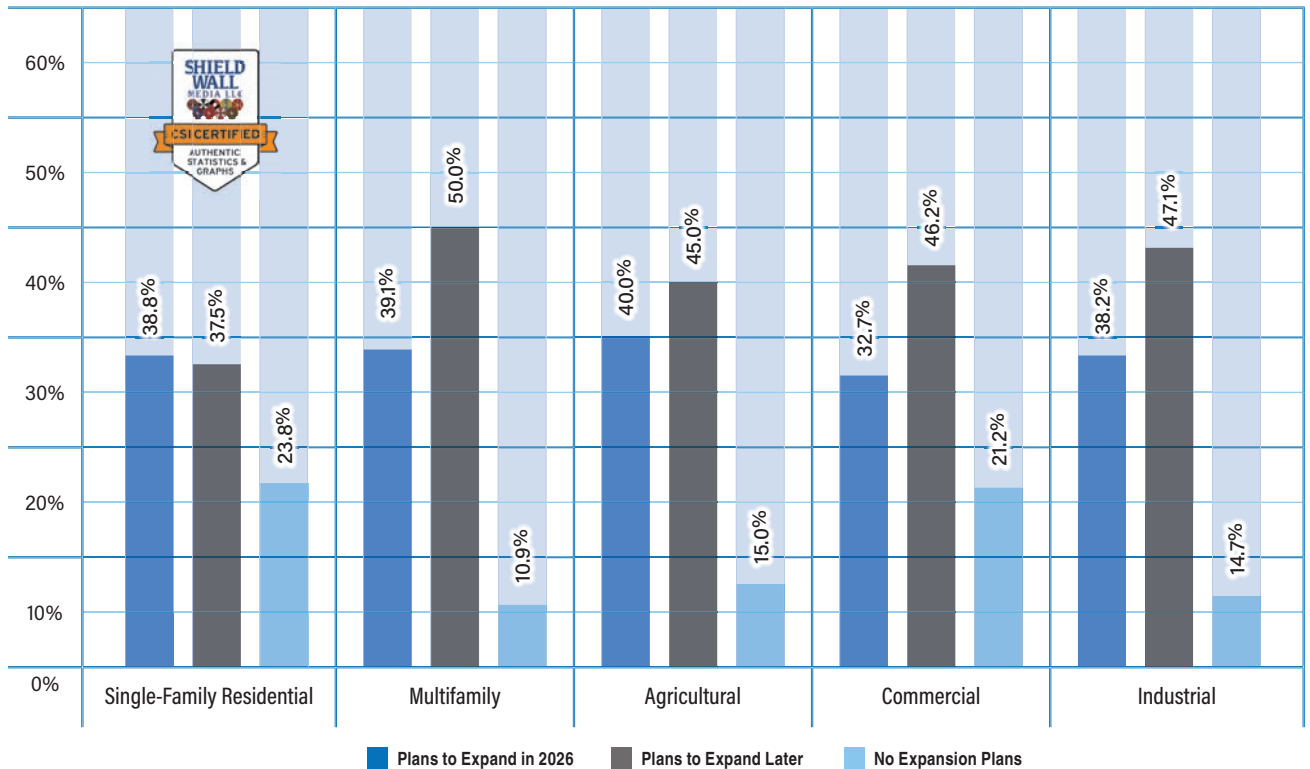


Chart C11 – Plans to Add Resources in 2026

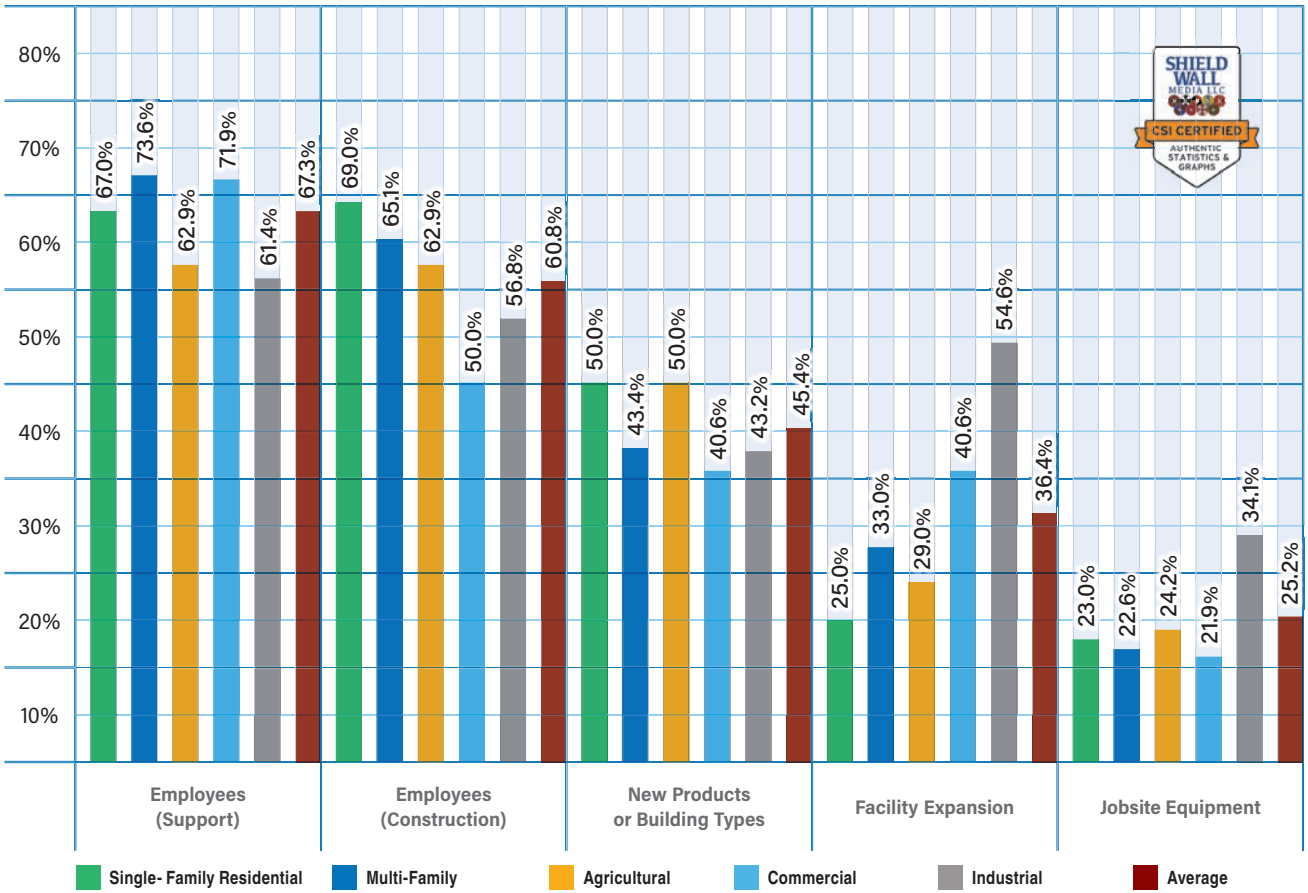
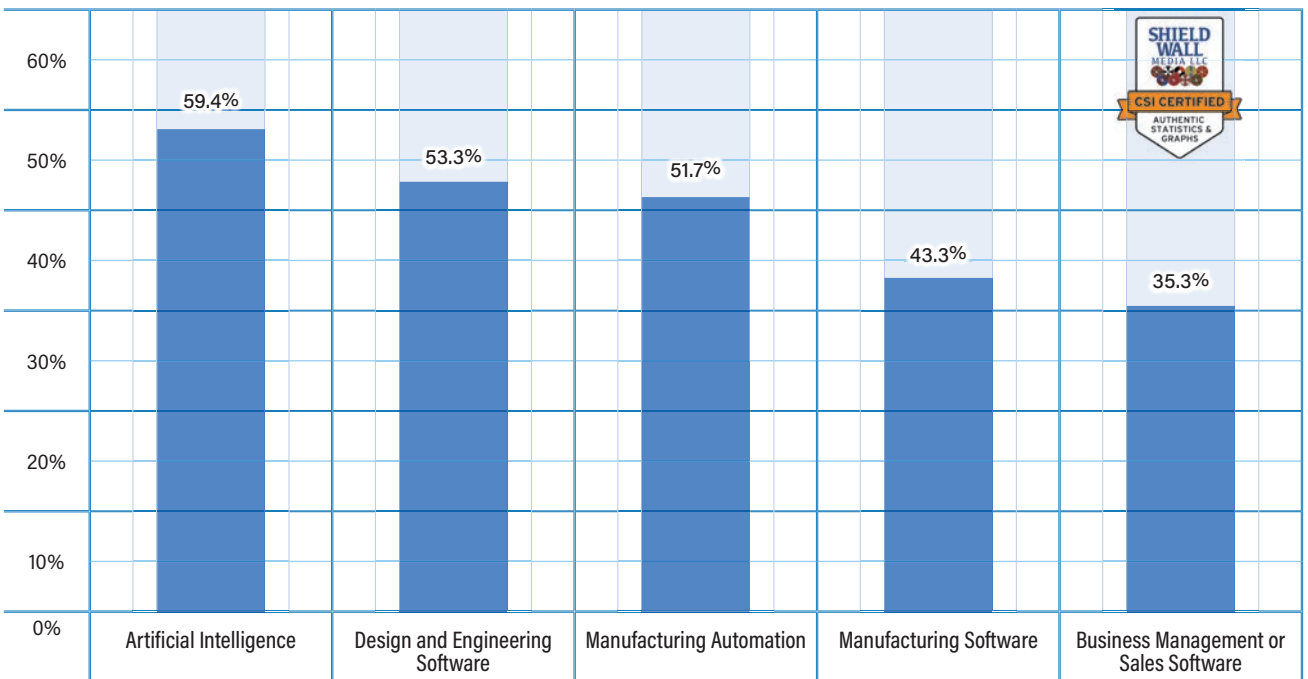


Chart C12 – Top Five New Products or Technology Impact





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The distribution points to a confident industry posture for metal roofing and meets the ongoing increases in market share, with most companies preparing to scale operations either now or in the near future rather than holding steady.

Hiring tops the list of planned investments for 2026, with 67.3% of respondents planning to add construction employees and 60.8% also expanding support staff. Multifamily and commercial firms are especially focused on strengthening back-office teams, while single-family respondents slightly prioritize field labor. ^{C11}

Beyond staffing, 45.4% intend to introduce new products or building types, signaling a push toward diversification. Facility expansion is also notable at nearly 36.4% overall, led by industrial firms, where more than half anticipate adding or upgrading real estate. It's not shown on the chart, but equipment purchases remain targeted: roughly one-quarter plan to invest in jobsite equipment, while 20% or more in certain segments expect to add metal forming, manufacturing, or capital equipment.

The pattern suggests companies are preparing for growth by scaling people first, then selectively investing in facilities and specialized equipment. That's especially optimistic in light of economic uncertainty and other market at the end of 2025 when this survey was in the field. Davel cites fluctuating steel and aluminum prices caused by global demand and tariffs. But those are offset for met-

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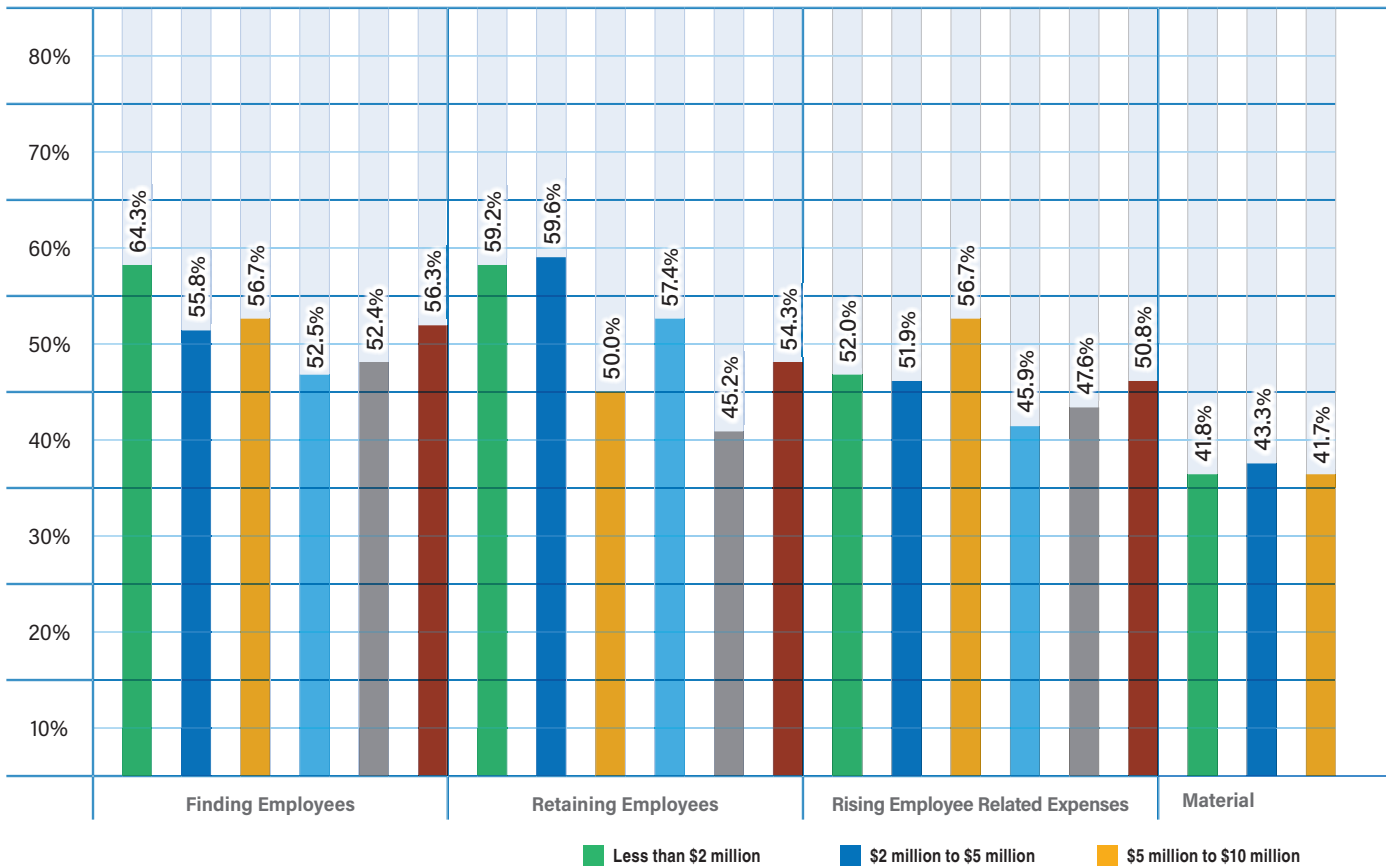
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Chart C13 – Challenges in 2026

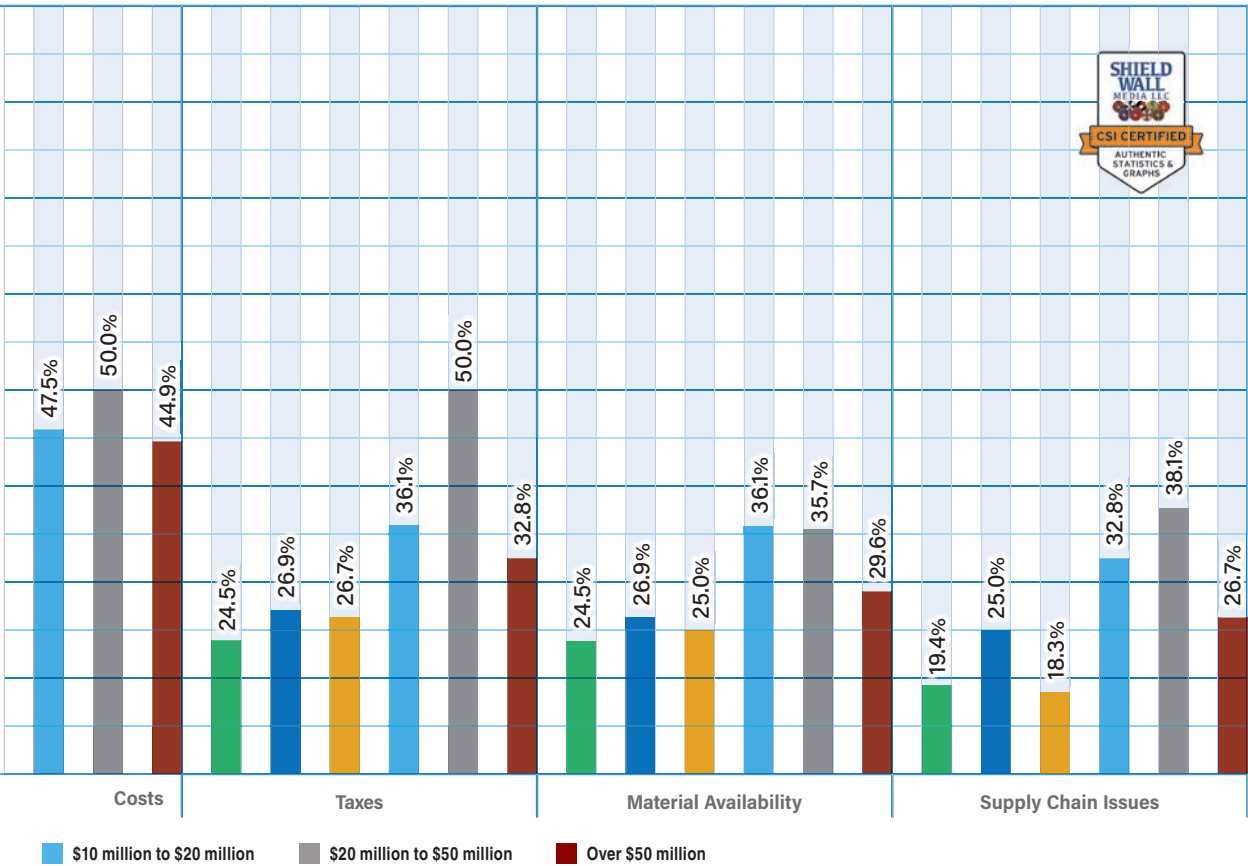


al roofing by rising asphalt shingle prices making metal roofing more comparable.

One specific piece of good news is what’s happening in Florida where, “There is a growing trend... where insurance companies are more favorable toward metal roofing rather than asphalt shingles,” Davel says. **C12**

Artificial intelligence (AI) stands out as the technology most likely to reshape the metal roofing industry, cited by 59.4% of respondents overall and leading in every major segment. Design and engineering software follows closely at 53.3%, underscoring continued reliance on digital planning tools. Manufacturing automation and related software also rank high, each





approaching or exceeding 45% in several market segments, particularly industrial and multifamily.

Business management platforms and sales software draw moderate interest, especially among commercial and industrial firms.

Overall, the pattern shows companies prioritizing digital intelligence and automation to drive efficiency, productivity, and competitive advantage. That is corroborated by Royden Wagler, director of sales and marketing, Smartbuild Systems, who says, “Builders who don’t modernize risk losing business.”

Labor-related pressures clearly dominate the 2026 landscape. More than half of respondents doing work in metal roofing cite finding employees (56.3%) and retaining employees (54.3%) as top concerns, with roughly 50% also pointing to rising employee-related expenses. This pattern is consistent from year to year and across all major segments, particularly in the single-family and multifamily markets. ^{C13}

Material costs remain a significant issue, with 44.9% identifying the cost of materials as a challenge. Material availability and broader supply

chain issues have eased somewhat compared to previous years when disruption peaked. Nearly 30% still flag availability concerns, though, and more than one-quarter point to ongoing supply chain complications.

Economic and policy factors also weigh heavily. Taxes, which in previous years, have been at the lower end of the challenges spread, are near the top now with 32.8% saying they see them as a difficulty in 2026.

Other concerns in previous years, such as inflation, don’t make the top cut. One surprising result is how little respondents are worried about interest rates. Among many of the people we talked to, almost all cited interest rates as a dampener on growth. Kenneth D. Simonson, chief economist for Associated General Contractors says, “Persistently high interest rates are also likely to deter investors and force issuers of municipal bonds...to spend more of the bond proceeds on interest payments, leaving less for construction.”

Robert Tiffin, national accounts manager, Silvercote is more specific. “No significant reduction in interest rates to inspire/unlock a backlog of orders.”