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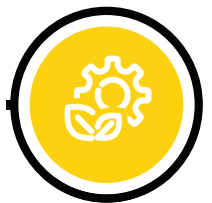
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SECTION 6

ROLLFORMING AND METAL FORMING CONSTRUCTION DATA




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ROLLFORMING AND METAL FORMING CONSTRUCTION DATA

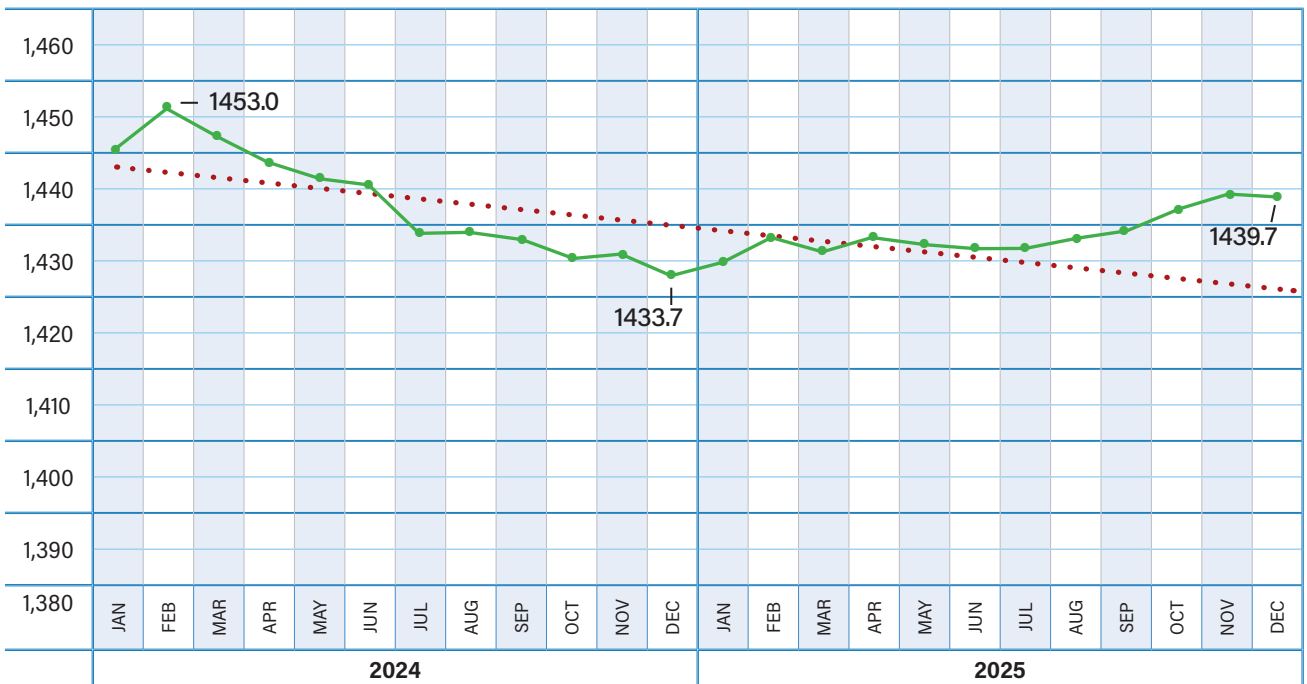
Among the markets covered in this report, the rollforming and metal forming area is probably the one most affected by the Trump administration tariff tactics in 2025. For companies in the U.S. selling machinery, it was a boon. For off-shore companies, it was at best confusing. Still, the market did well in 2025, and survey takers are generally optimistic about 2026. **c1**

Metal fabrication employment held relatively steady, but softened slightly from 2024 to 2025. Average monthly payrolls dipped from a peak of 1.453 million workers in February 2024 to a projected 1.442 million in Dec 2025, which is a marginal decline of around 0.2%. The modest pullback suggests cautious hiring as demand for fabricated components like framing, panels, and roofing systems leveled off.

Characteristics of the Rollforming and Metal Forming Industry

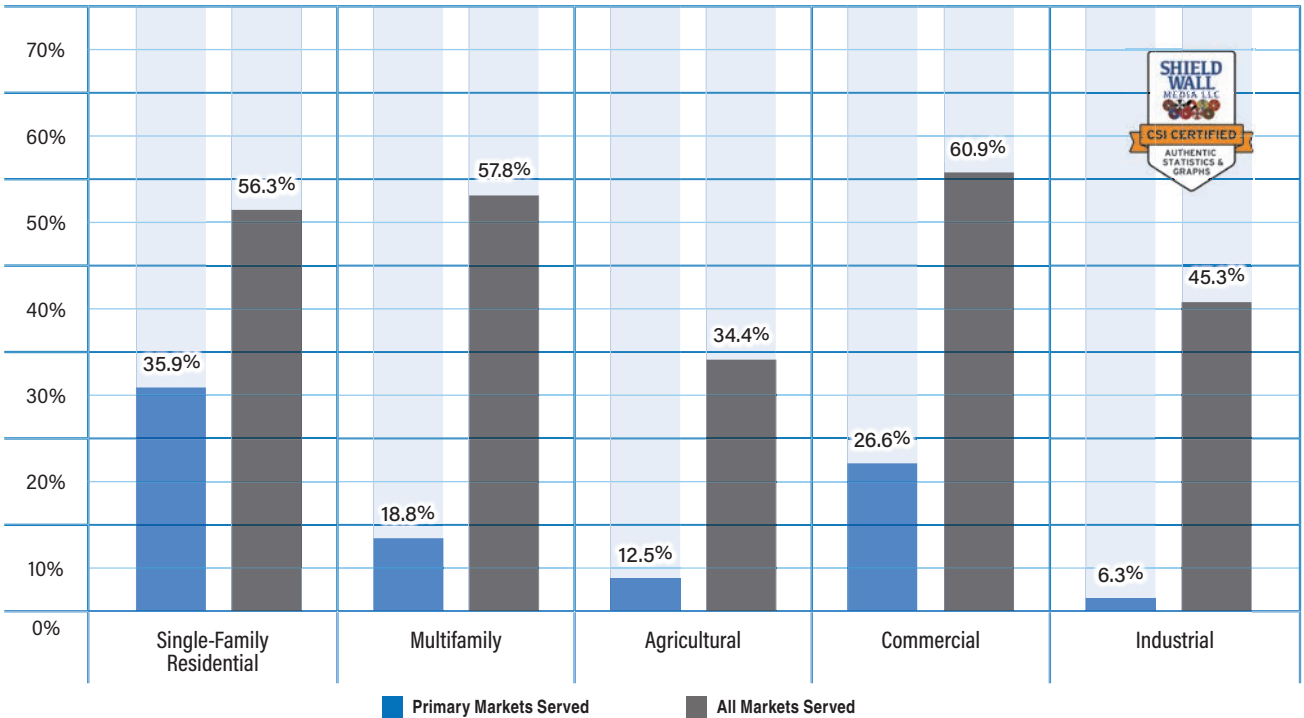
Survey takers were heavily anchored in residential work, with 35.9% identifying single-family as their primary market and nearly 18.8% focused on multifamily. Commercial follows closely, serving as the primary segment for about 26.6% of firms. Agricultural and industrial represent smaller core specialties. However, when looking at all markets served, commercial rises to the top, touching roughly 60.9% of respondents, followed closely by multifamily and single-family. This indicates broad diversification beyond primary focus areas. Industrial participation expands significantly when considered as a secondary market, while agricultural remains more niche. Overall, the data reflects

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



Source: U.S. Bureau of Labor Statistics

Chart C2 – Market Segments Served by Companies Who Do Rollforming

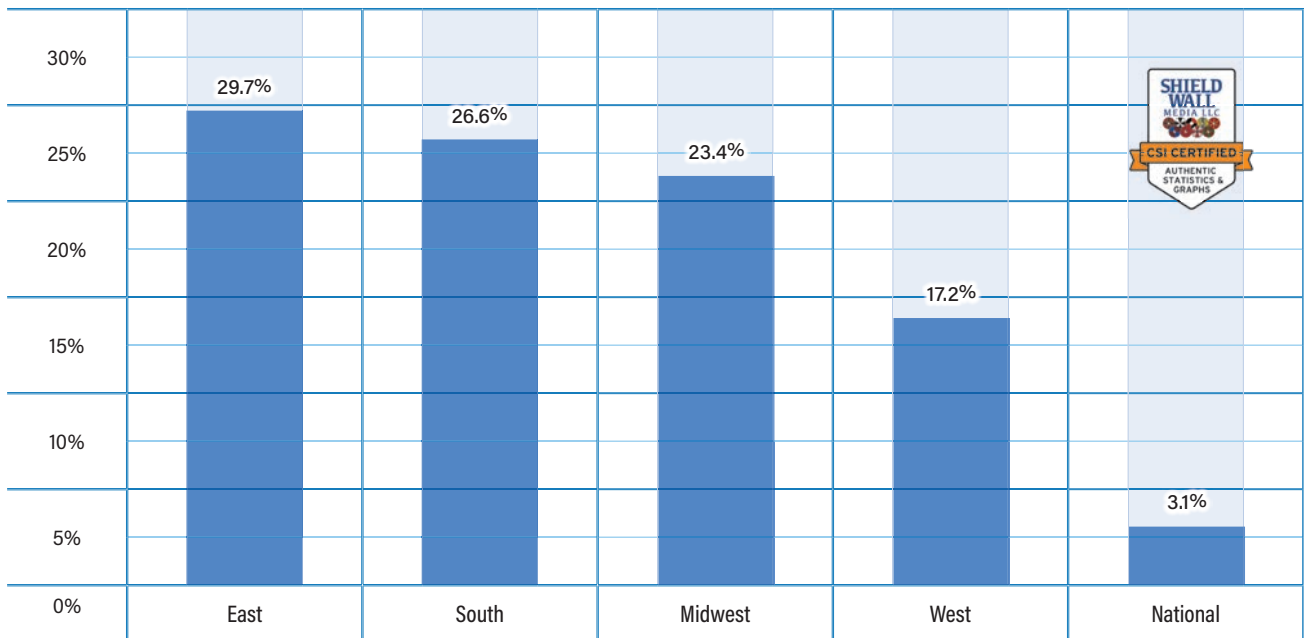


a residential foundation supported by meaningful commercial crossover. **C2**

The distribution of respondents doing rollforming work is broad and nationwide, with the strongest

representation coming from the East (29.7%) and South (26.6%). The Midwest follows at a moderate level (23.4%), while the West accounts for the smallest share of participants. The concentration in the

Chart C3 – Rollformer Locations

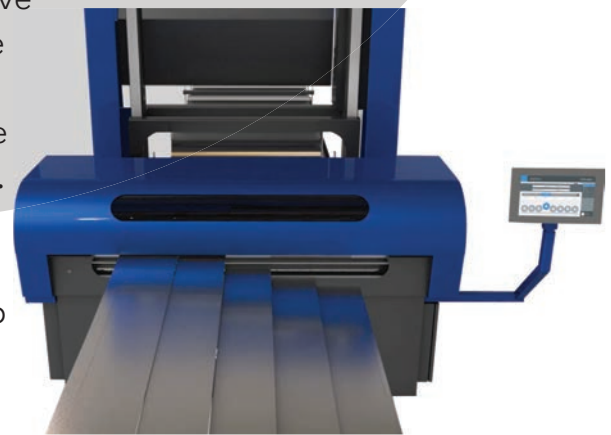


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East and South suggests the survey reflects markets with active construction pipelines and steady demand for building systems that require rollforming work **c3**

Respondents are primarily contractors and builders, who make up the clear majority of participants (35.9%). Designers (26.6%) represent a meaningful secondary group while distributors and suppliers

Chart C4 – Role in Construction

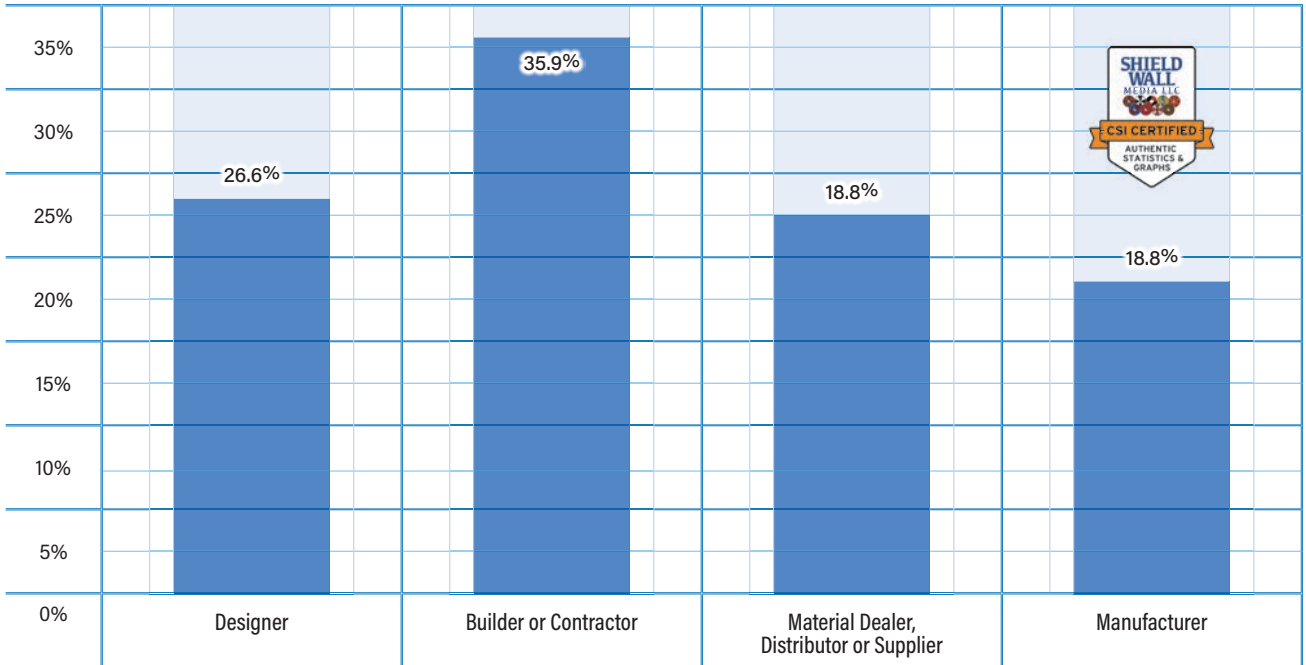
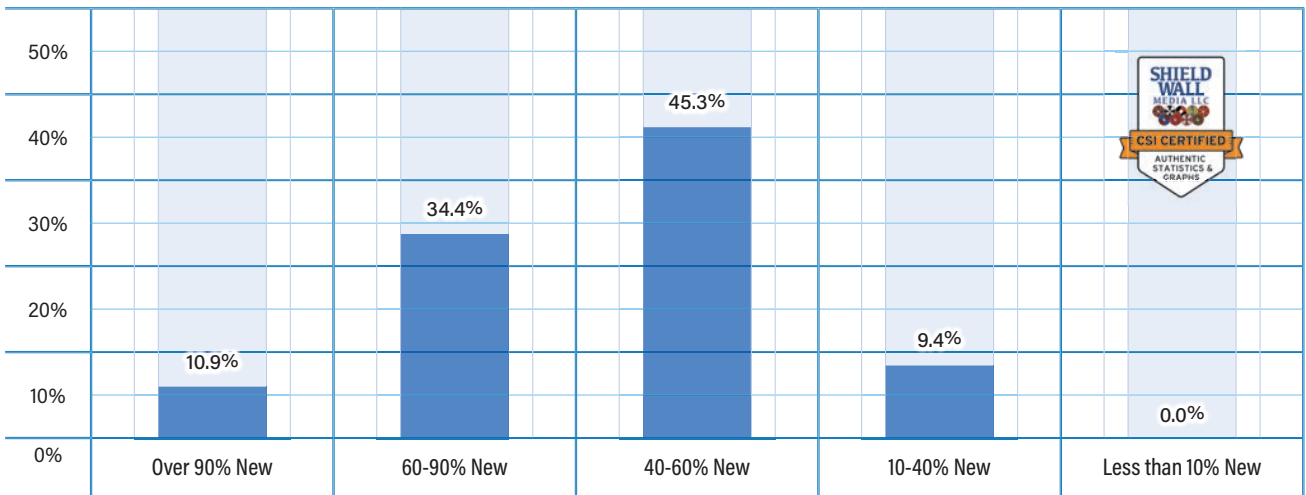


Chart C5 – Percentage of New Construction vs. Remodel



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account for a smaller but still notable share. Manufacturers are on par with distributors. Overall, the mix skews heavily toward firms directly responsible for project execution and purchasing decisions. That makes sense since there are, of course, far more contractors using rollforming machinery than there are manufacturers making them. **C4**

Rollforming respondents remain heavily weighted toward new construction. Nearly 11% report that more than 90% of their work is new, and another 34.4% generate 60% to 90% of revenue from new projects. The largest share—about 45%—falls in the balanced 40% to 60% range. Fewer than 10% lean primarily toward remodeling, and none report remodeling as their dominant activity, underscoring new construction as the sector’s core market driver. **C5**

The average job size trended noticeably upward from 2024 to 2025, signaling a shift toward larger, more complex projects. In 2024, nearly 60% of respondents reported jobs under \$25,000, with the \$10,000 to \$25,000 tier dominating. By 2025,

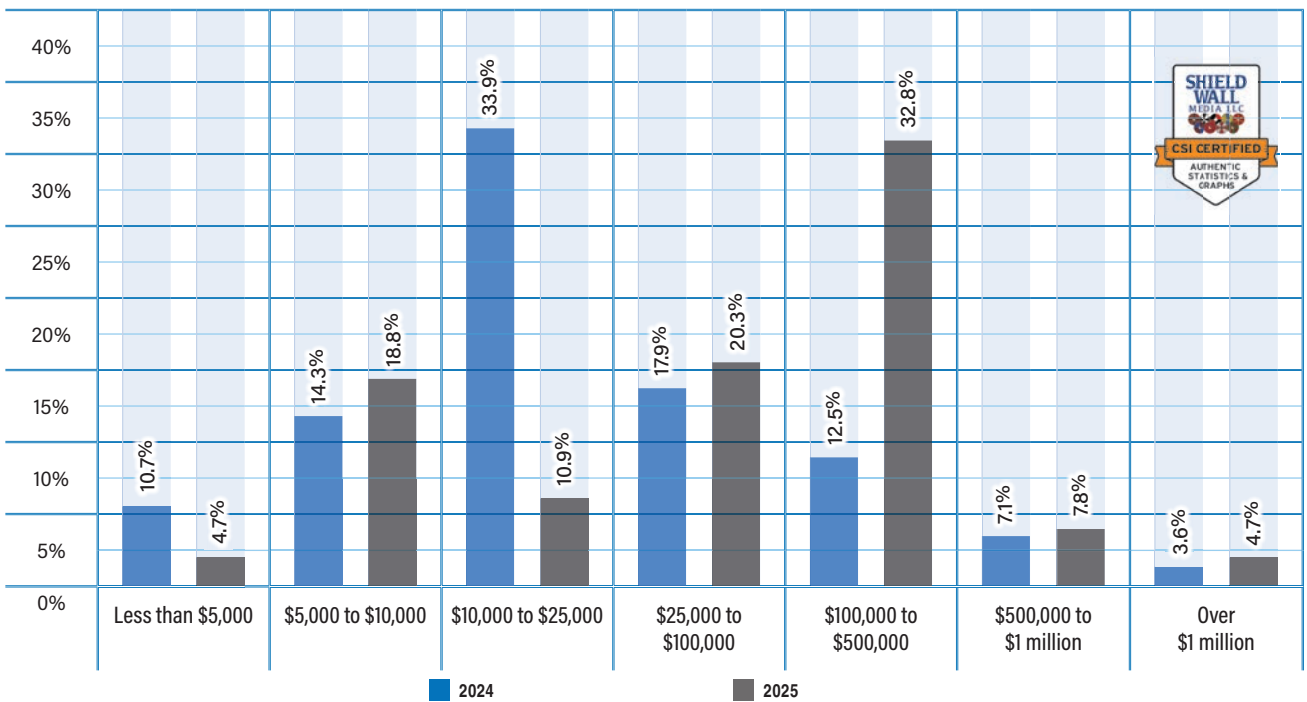
that share fell to roughly one-third. Meanwhile, midrange work between \$25,000 and \$100,000 ticked up modestly, and projects above \$100,000 nearly doubled, climbing from 23% to about 45%. The strongest growth occurred in the \$100,000 to \$500,000 bracket, indicating companies doing rollforming work are increasingly capturing higher-value commercial and large-scale residential opportunities. **C6**

Projected Industry Growth

Industry sentiment among rollforming contractors declined fractionally from the 2025 survey (reflecting 2024) to the 2026 survey (reflecting 2025). The share of respondents describing conditions as positive or the same decreased for 2025, and neutral responses edged down as well. This suggests more respondents are taking a cautious approach to the market in 2026. **C7**

Negative outlooks increased in this year’s survey.

Chart C6 – Average Job Size



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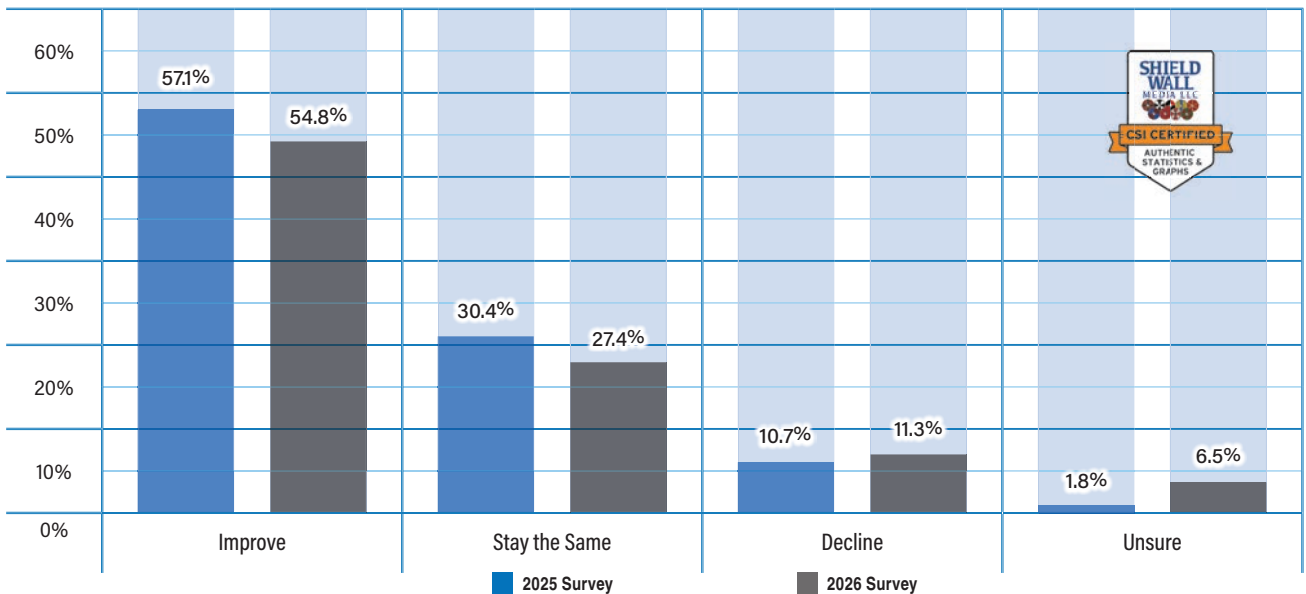


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Chart C7 – Sentiment about Construction Heading into 2026

The shift isn't dramatic, but it points to weakening confidence, perhaps imposed by unclear tariff situations. Overall, the tone transitions from cautious stability in 2025 to even more cautious stability in 2026.

Growth expectations among companies doing rollforming work vary by segment, but the overall tone is constructive with about 90% of respondents expecting markets to improve or stay the same. Industrial leads the way, with the largest share (60.3%) of respondents anticipating a growing market. Another third expect the industrial market will stay the same. Respondents were about even on the other three markets with just over 50% saying the residential, agricultural, and commercial markets will improve. **C8**

While rollforming respondents were least optimistic about the growth of the residential market (only 52.4% said it would grow in 2026), more of them expected that market to remain the same compared to other segments. The result is that rollformers' market views are shaped mainly by their pessimism. More respondents (11.1%) thought the commercial market would decline while between 8% and 9% expected the residential and agricultural

markets to slip. The industrial market, according to respondents, was least likely to see decline in 2026.

Company Size and Growth Projections

Regional performance in 2025 shows broadly positive momentum compared to 2024, though gains varied by geography. On average, 65.5% of respondents doing rollforming work reported gross sales increased year over year in 2025. Among manufacturers, tariffs may have been a large contributing factor. Wayne Troyer, sales manager, Acu-Form, Millersburg, Ohio, says, "Tariffs affected our business in a positive way. We were seeing a lot of machines coming over the pond and they really slowed it down." **C9**

New Zealand-based Howick Ltd. makes rollforming machines and faced the opposite problem. Cindy Posimani, head of global marketing and export, says, "The U.S. is our biggest market, and tariffs on U.S. imports have impacted not only the US manufacturing companies, but also our potential customer base. The frequent, unpredict-

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Chart C8 – 2026 Growth Sentiment by Market Segment

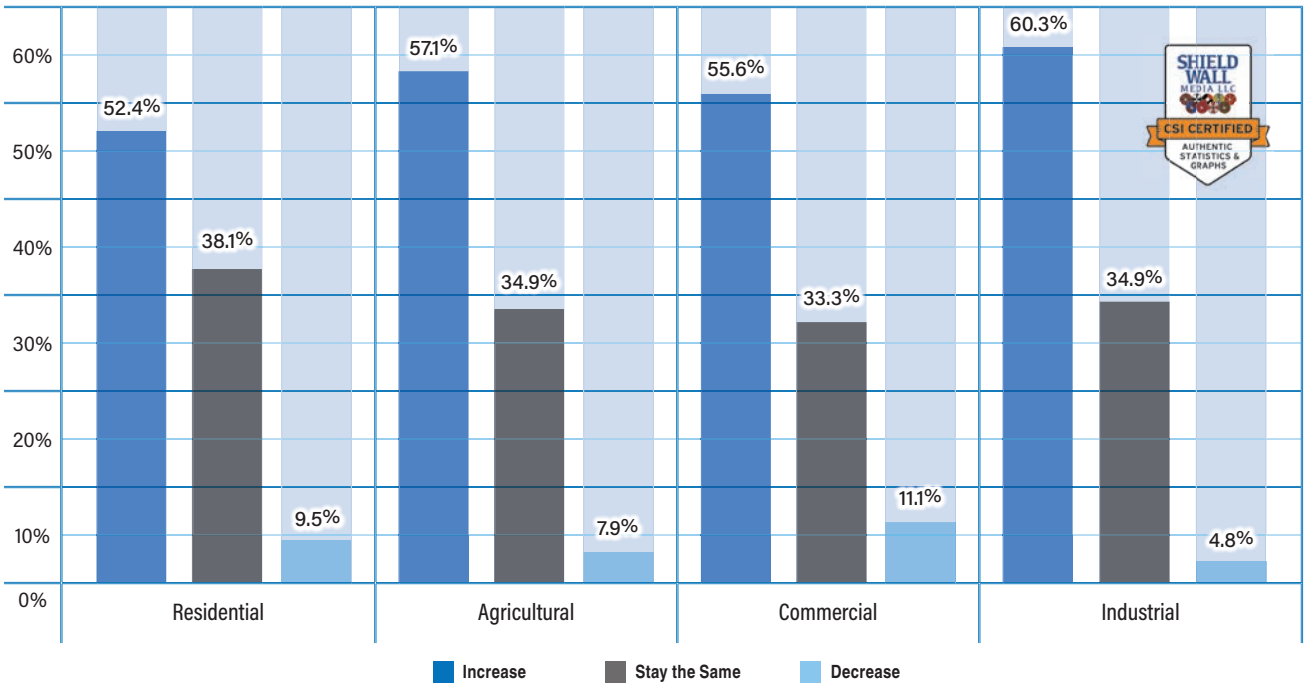
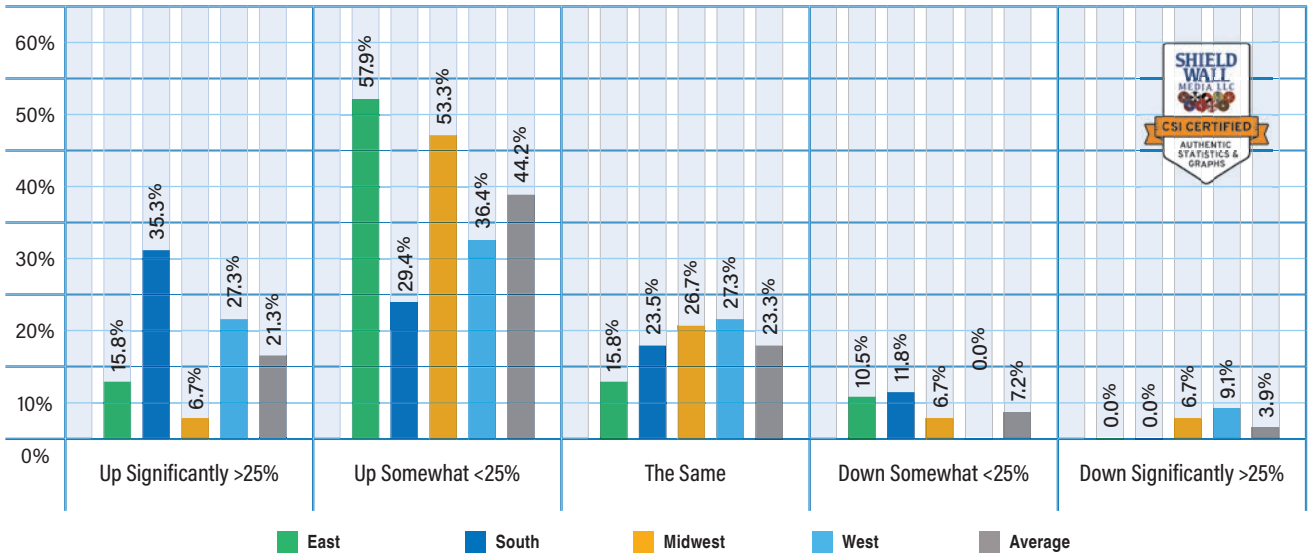


Chart C9 – 2025 Gross Sales Compared to 2024 by Region



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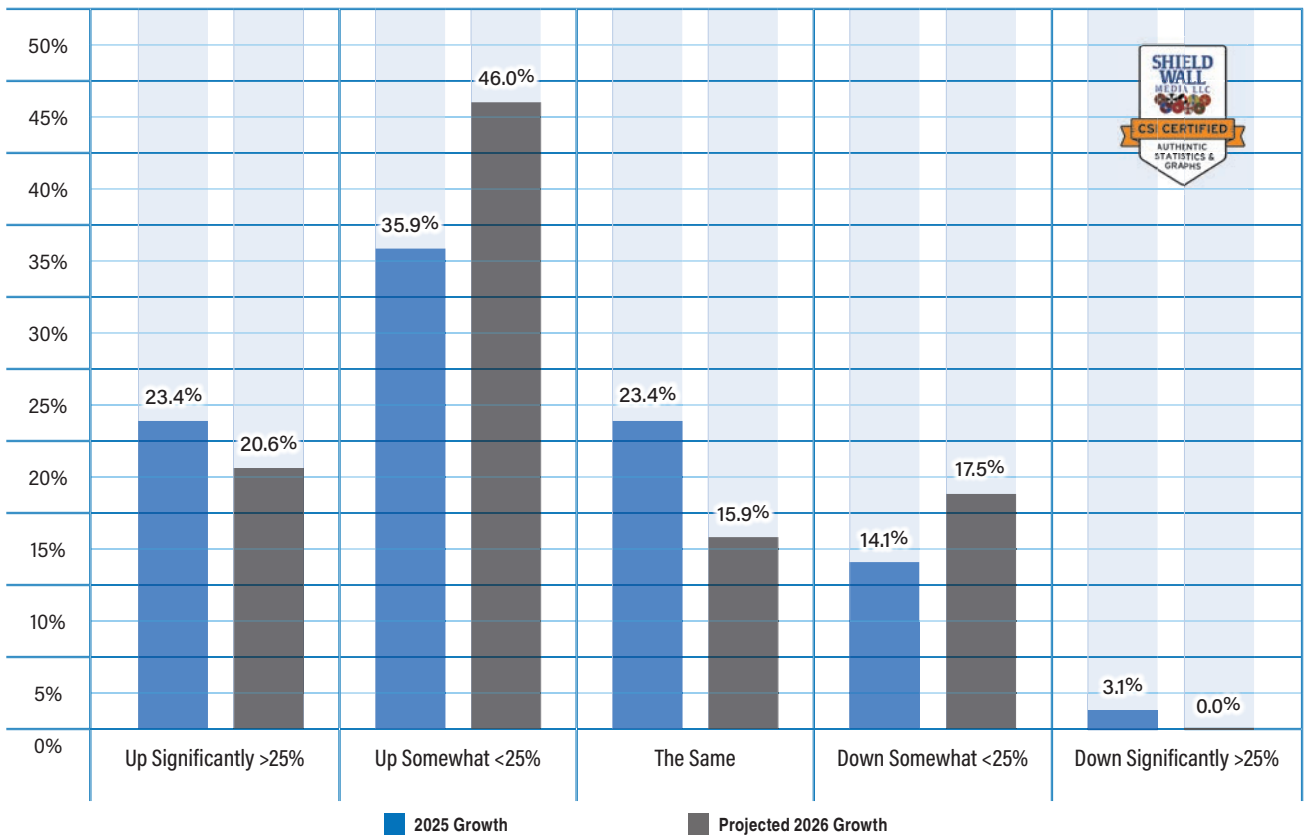
able changes in tariff policy created uncertainty amongst our customers and potential buyers and made it harder for us to supply quotations. US customers prefer shipments to be Delivered Duty Paid (DDP), where the seller assumes all costs until delivery to destination. This has become unviable for us as it is almost impossible to estimate the tariff costs. We are now supplying on Delivery at Place (DAP) or Cost Insurance Freight (CIF) where the seller assumes all costs, including tariffs.”

Looking at the regions where the companies doing rollforming performed best, we see the South posted the strongest showing, with the largest concentration of respondents (35.3%) reporting significant growth and comparatively few indicating flat or declining sales. When looking at to-

tal growth, though, 73.7% of companies in the East reported 2025 increases, which was significantly more than the other regions. The Midwest companies were least likely to report growth over 25% and most likely (13.3%) to say 2025 gross sales declined. Companies doing rollforming based in the West were least likely to say 2025 sales slipped (9.1%) but all of them reporting declines said the decline was significant.

Companies engaged in rollforming activity reported healthy growth in 2025, with 59.3% of firms experiencing year-over-year growth in 2025. Of that, almost a quarter reported significant growth of over 25%. Looking ahead to 2026, expectations tilt even more optimistic. Far more companies (46%) expect moderate growth (less than 25%) in

Chart C10 – 2025 Sales Growth Compared to 2026 Projections



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2026 compared to 2025, and that offsets the slight decline in respondents in rollforming who thought their firms would perform significantly better in 2026. **C10**

About the same percentage of respondents (17%) expected a decline in 2026 as reported one in 2025, but the decline has shifted to the be more modest. No respondents thought their business in rollforming would decline significantly in 2026.

Future Opportunities and Challenges

Expansion plans vary meaningfully by market focus. Respondents serving multifamily are slightly more growth-oriented than those in the industrial segment, with more than 90% saying they had plans to expand either next year or sometime in the future. Those working in the industrial segment, though, were more likely to have more imminent plans for expansion. Nearly 60% say they will expand operations in 2026. **C11**

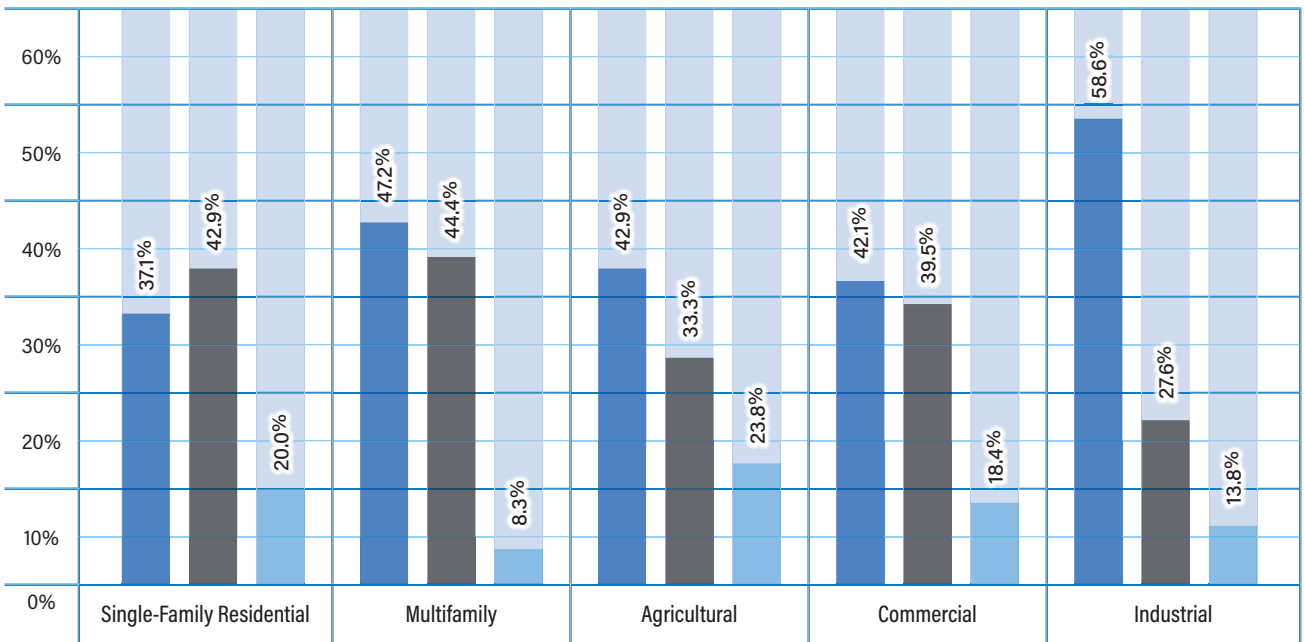
As with other niches in this report, the respondents doing work in the agricultural segment were more

optimistic. Nearly a quarter said they had no expansion plans. Tariffs have hit the agricultural sector hard—especially soybean farmers. It’s no surprise that rollforming activity would not be as robust in this market as elsewhere and caution toward expansion would be the rule of the day.

Single-family companies (80%) were as likely to have expansion plans as any, but the multifamily respondents, but they were least likely to look for expansion in 2026. That may be attributed to the uncertainty about interest rates, especially in the first quarter of the year.

Rollforming respondents’ 2026 investment plans concentrate on seven primary resource categories, led by workforce expansion. The strongest emphasis is on adding support personnel (65.4%), which firms need to fulfill demand and actively pursue new business. Combined with the focus on adding jobsite personnel, the results reflect expectations for higher job volume and larger projects as well as addressing needs caused by the long-term skilled labor shortage. Close behind are investments in

Chart C11 – Expansion Plans



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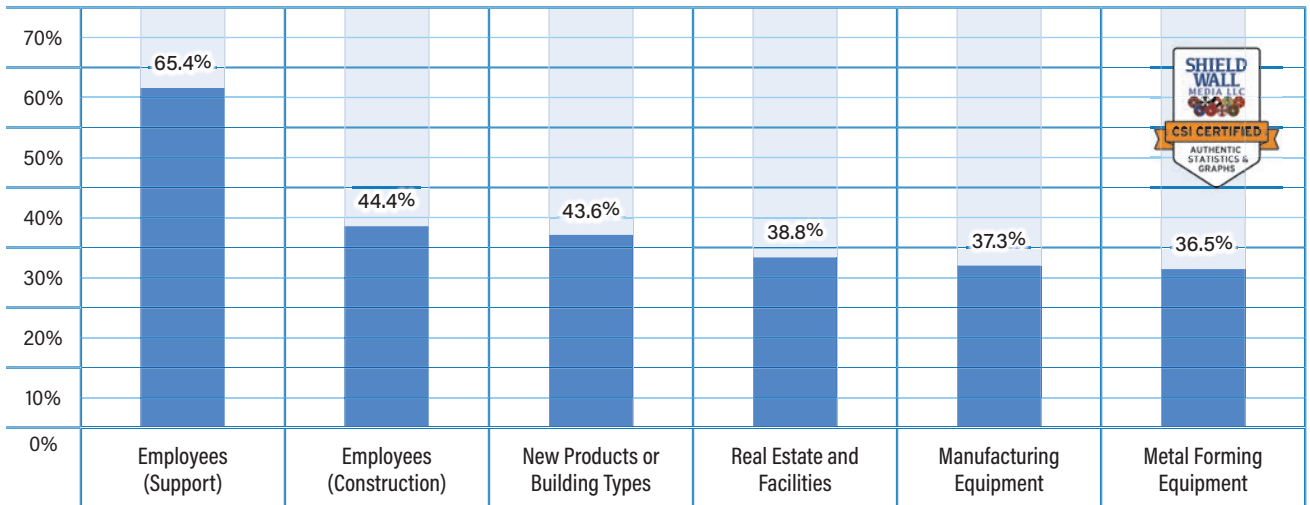
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Chart C12 – Plans to Add Resources



new products or building types (43.6%), indicating a need for diversifying revenue streams. **C12**

Add to those strategies the interest in investing in real estate of facilities, and you have a picture of a very expansion-oriented industry that is prepared to invest capital to achieve growth. Collectively, the top seven priorities underscore a balanced strategy: scale labor and equipment, then reinforce infrastructure and market reach to sustain projected growth.

Overwhelmingly, respondents doing rollforming work view new products and technology as a positive force heading into 2026. About half (48.5%) expect artificial intelligence (AI) to impact their businesses, suggesting a desire to achieve gains in

efficiency, quality, and competitiveness rather than wholesale disruption. Since AI is now integrated into design and engineering software, manufacturing software, and business management software, the influence of AI is much greater than the response from survey takers would immediately suggest. Royden Wagler, director of sales and marketing, SmartBuild Systems, cautions, “AI has not proven yet to be as valuable as many expected it to be.” **C13**

The results among companies doing rollforming create a picture of operational efficiency with the expectation of improved productivity through upgraded software and automation. That can reduce labor strain, especially in a time of a labor short-

Chart C13 – Top Five New Products or Technology Impact

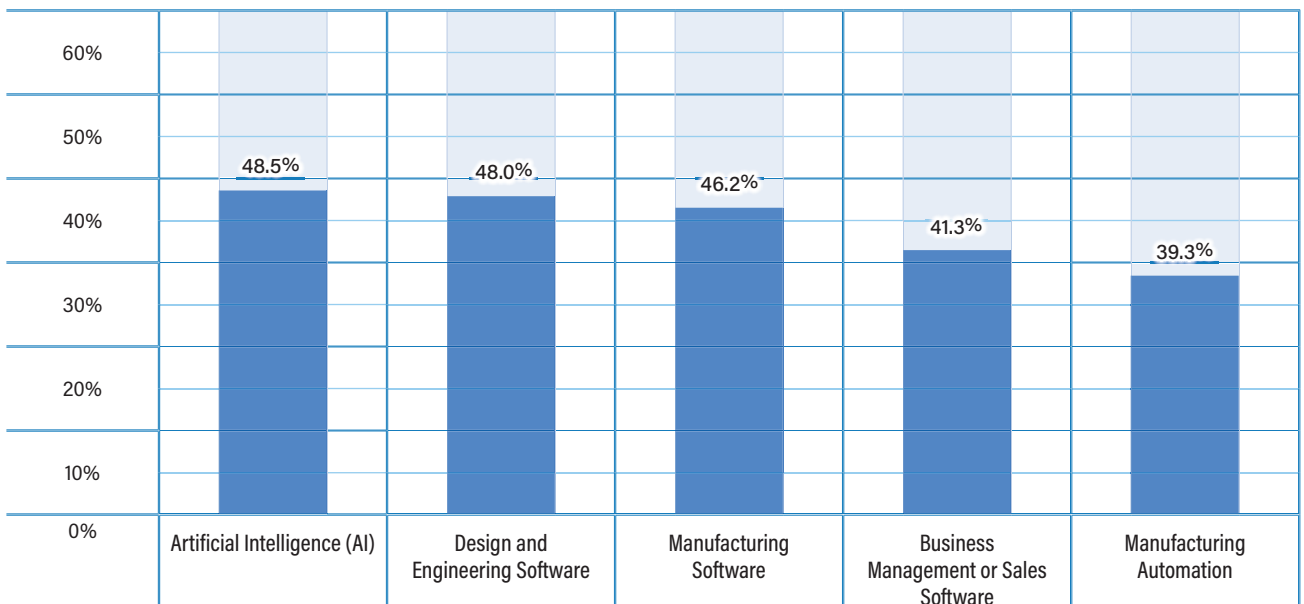
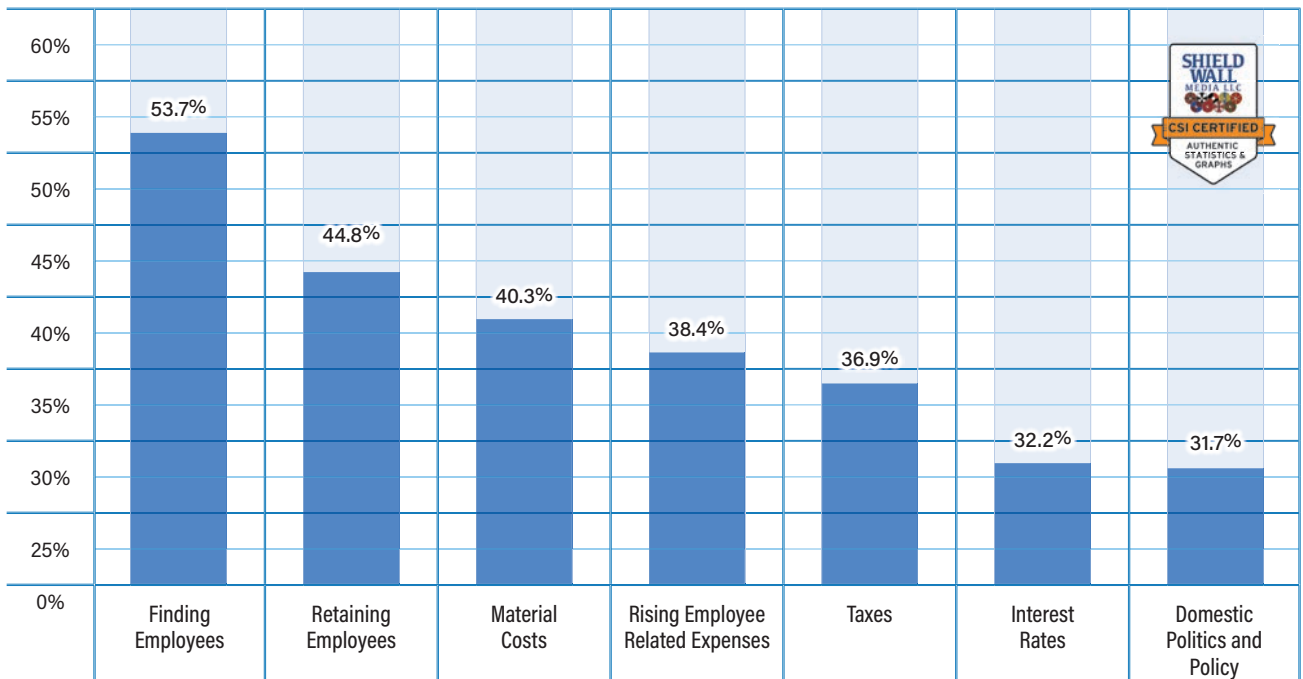


Chart C14 – Challenges in 2026



age. Close behind is enhanced precision and quality control, driven by better equipment calibration and digital integration.

Another major impact centers on workflow optimization, particularly through estimating, scheduling, and production management software that reduces errors and shortens lead times.

At the top of the list of challenges facing respondents doing rollforming work into 2026 are issues surrounding labor and cost control. Finding skilled production and installation workers remains the most frequently cited concern (53.7%), reflecting ongoing workforce shortages and rising wage pressure. Nearly as important as finding employees is keeping the ones companies have. About 44% of survey takers say that is a challenge they'll face in 2026. Part of the reason could be rising labor costs, which 38.4% cite as a challenge. **C14**

Kenneth D. Simonson, chief economist, Associated General Contractors reports that the organization's 2026 AGC of America/Sage Construction Hiring and Business outlook Survey indicated specific issues among contractors arose as challenges. "Worries

about labor quality, costs, and availability," he says, "were cited as major concerns by a majority of respondents."

Material costs, which was the number one concern in last year's survey, rank among the top challenges as well. Economic uncertainty rounds out the upper tier of concerns, as respondents weigh interest rates and concern about taxes and tax policy. The tax issue is tied to a worry about domestic policy. In this time of political upheaval, it isn't surprising response made it to the top of the list. What is surprising is rather that it doesn't rank higher.

Collectively, these top seven issues underscore a common theme: respondents expect demand to persist, but profitability will depend on controlling costs, securing labor, and navigating an increasingly competitive and regulated environment.

One major challenge that companies engaged in rollforming work faced in the recent past were material availability and supply chain disruptions. Those, of course, lead to material costs increasing. Those issues haven't disappeared entirely, and Troyer says, "One of the challenges we'll face in 2026 is long lead times."

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