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SECTION 8

COLD-FORMED METAL BUILDINGS CONSTRUCTION DATA



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SECTION 8

COLD-FORMED METAL BUILDINGS CONSTRUCTION DATA

Known for speed of construction, design flexibility, and material efficiency, cold-formed metal buildings continue to gain traction in cost-sensitive and schedule-driven projects. Used across the broader construction sector, these buildings serve residential, commercial, agricultural, and light industrial needs. Demand is supported by ongoing interest in durable, low-maintenance building solutions, while advances in engineering, prefabrication, and digital design tools are helping manufacturers and contractors deliver larger, more sophisticated structures competitively.

Characteristics of the Cold-formed Metal Buildings Industry

Companies engaged in cold-formed metal building remain heavily concentrated in residential and commercial work. Multifamily (64.6%) leads the mix when considering all markets served, followed closely by single-family residential (55.7%) and commercial construction (55.7%), indicating broad participation across mainstream building sectors. Industrial (40.5%)

and agricultural (36.7%) projects trail but still represent meaningful secondary opportunities, suggesting diversification beyond core housing and commercial demand. **c1**

When asked to identify their primary focus, respondents to the CSI survey most often cited single-family residential (35.4%), with multifamily and commercial also prominent. Overall, the data shows companies engaged in metal buildings are anchored in residential construction but supported by a healthy spread into commercial and niche segments, reflecting both specialization and strategic diversification. **c2**

Metal building respondents are broadly distributed across the United States, with the South (30.4%) representing the largest share of participants. The Midwest (25.3%) follows as the second-largest concentration, with the West (22.8%) and East (20.3%) also posting solid representation. Very few firms report operating nationwide participated in the survey, and none based in Canada. Overall, the regional mix shows the strongest activity clustered in the South and Midwest, indicating where metal building work is currently most concentrated. **c3**

Chart C1 – Market Segments Served

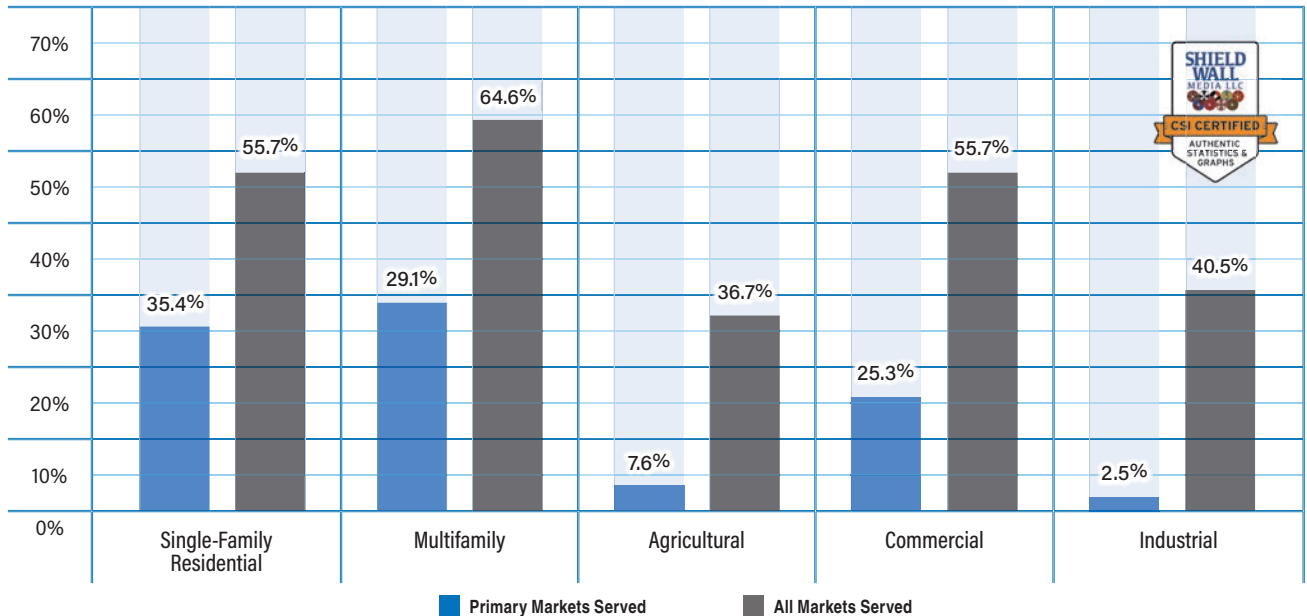
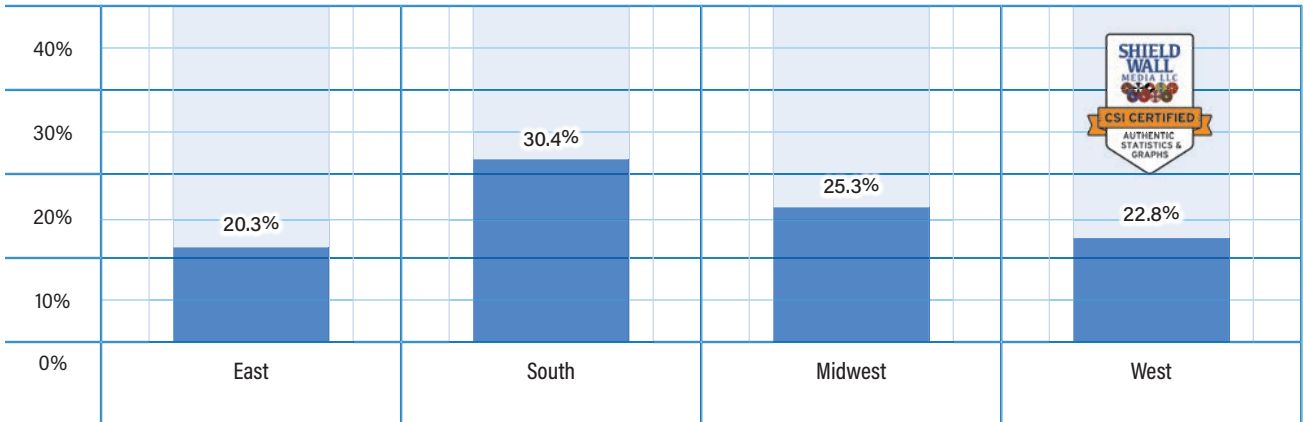


Chart C2 – Location

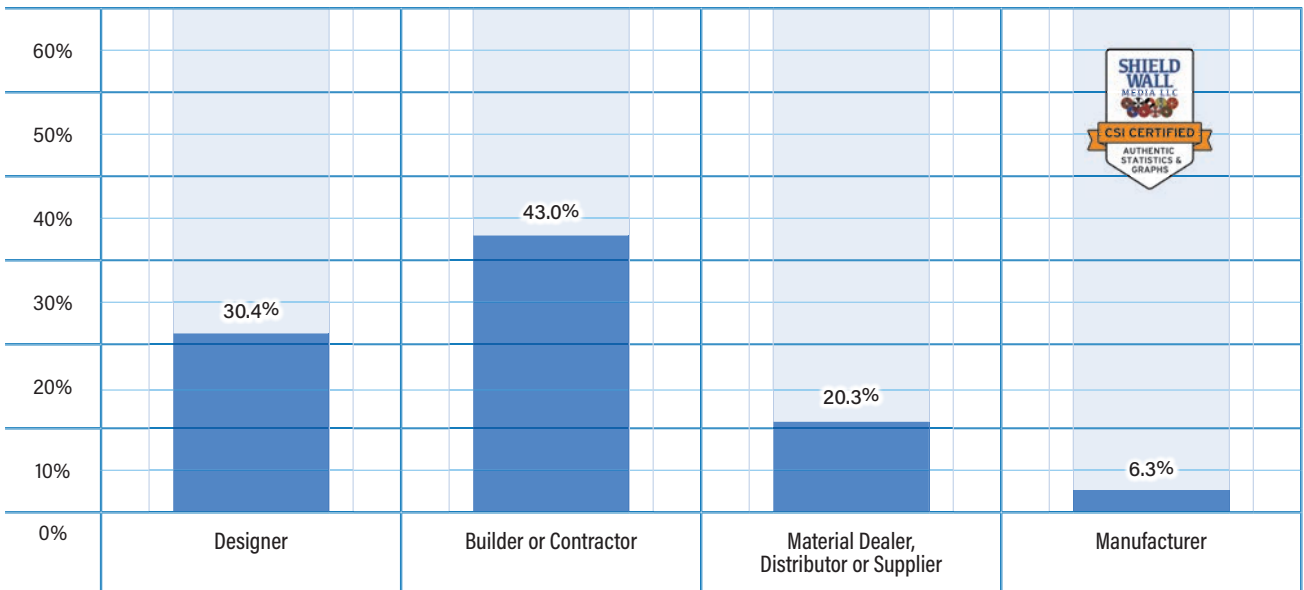


Respondents who say they engage in cold-formed metal building construction are primarily contractors (43%), representing the clear majority of participants in the survey. Manufacturers make up the smallest group (6.3%), while designers (30.4%) and distributors (20.3%) account for the remainder. The mix indi-

cates the survey results are strongly weighted toward firms directly involved in project execution rather than product supply or design services. **C4**

Survey takers doing metal building tilt strongly toward new construction activity. More than half (53.2%) say at least 60% of their work is new con-

Chart C3 – Role in Construction Process



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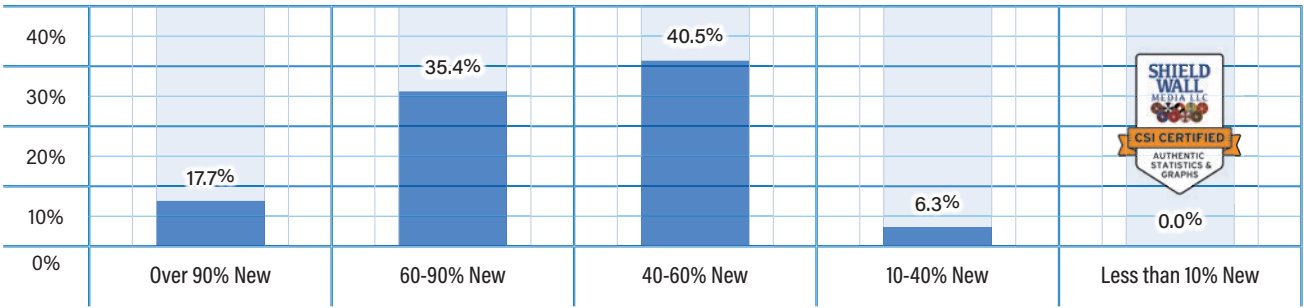


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Chart C4 – Percentage of New Construction vs. Remodel



struction and the largest share indicate that 40% to 60% of their work is new. That's followed closely by the 35.4% who report 60% to 90%. A meaningful segment (17.7%) also perform more than 90% new work. Only a small minority falls in the 10% to 40% range, and none reported doing almost exclusively remodeling work. Overall, the results show the sector is heavily driven by new builds, with remodeling playing a comparatively limited role. **C5**

The average job size among companies doing metal building shifted notably upward from 2024 to 2025. The share of smaller projects (under \$25,000) fell sharply, while larger work expanded. Most notably, the \$100,000 to \$500,000 range became the dominant category in 2025, and the portion of firms reporting jobs over \$100,000 grew to a majority

(51.9%). Smaller-ticket work lost ground across multiple brackets. Overall, the data indicates a clear move toward larger, higher-value projects in the metal building segment year over year.

Projected Industry Growth

Metal building respondents expressed a generally more positive outlook for 2026 than respondents in last year's survey did about 2025. A majority (54%) expect industry conditions to improve in 2026, representing the dominant sentiment by a wide margin. Last year, only 40% looked for improvement in the coming year. **C6**

Roughly three in ten believe conditions will stay the same, which is comparable to last year and in-

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Chart C5 – Average Job Size

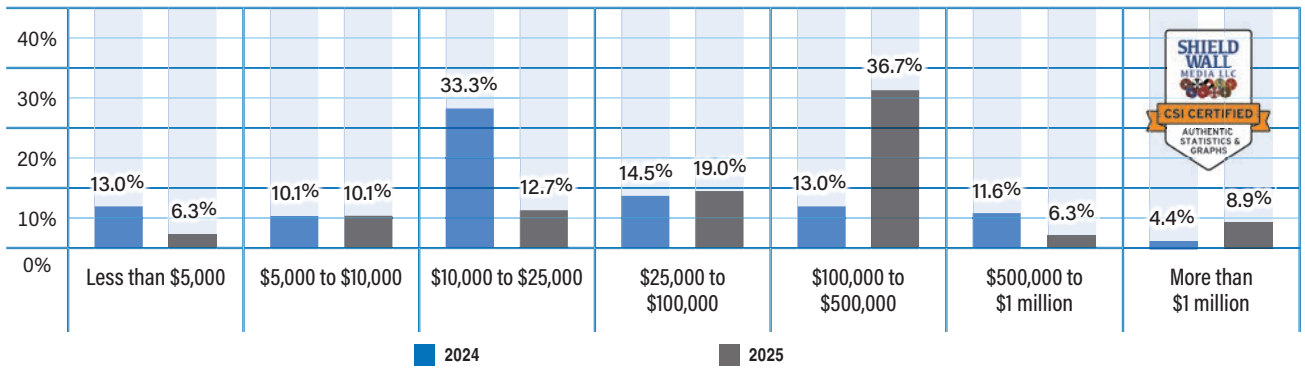


Chart C6 – Sentiment About Construction Industry in 2026

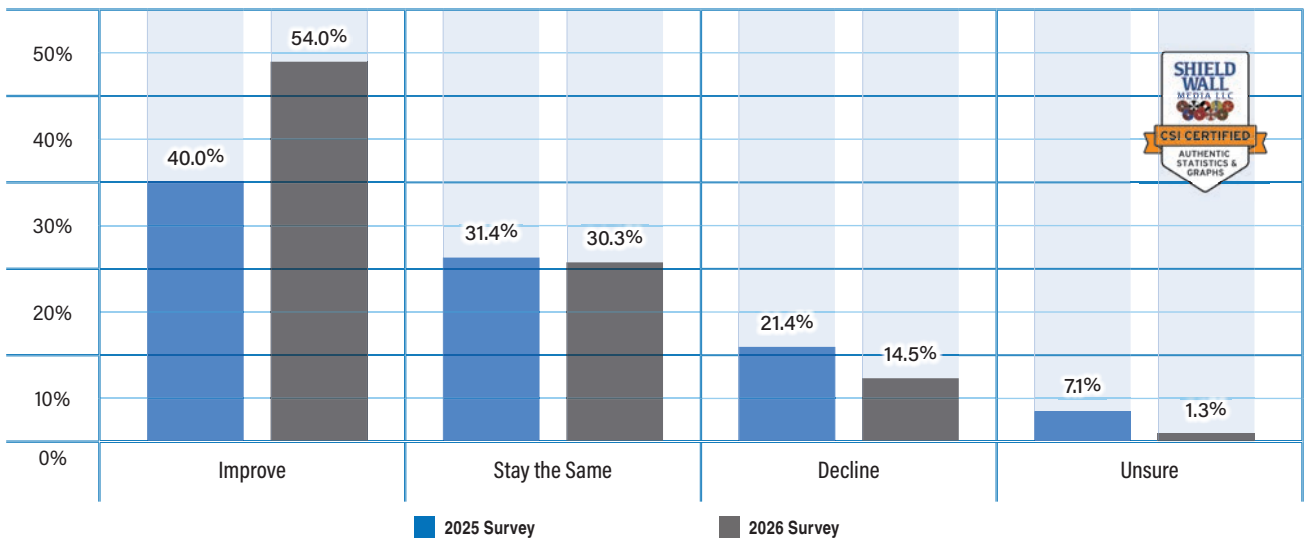
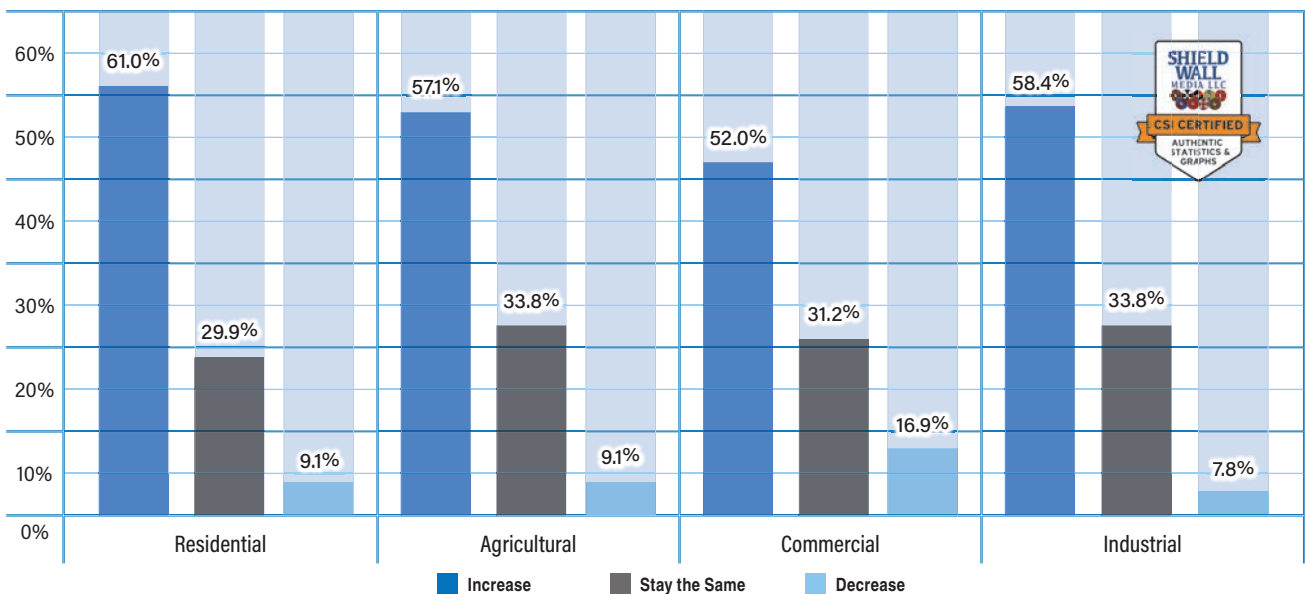


Chart C7 – 2026 Growth Sentiment by Market Segment



dicates a meaningful but secondary level of caution. Only a small minority anticipate a decline, and very few are unsure. Optimism clearly outweighs concern. Overall, the data points to guarded confidence among companies engaged in metal building, with most expecting forward momentum but some remaining watchful about market stability. **C7**

In keeping with the good feelings about the overall construction industry among companies engaged in metal building, optimism abounds about growth in each of the market segments. The residential (61%) and industrial (58.4%) markets lead the way, where the largest shares expect conditions to improve in 2026. But agricultural and commercial markets are just a tick behind.

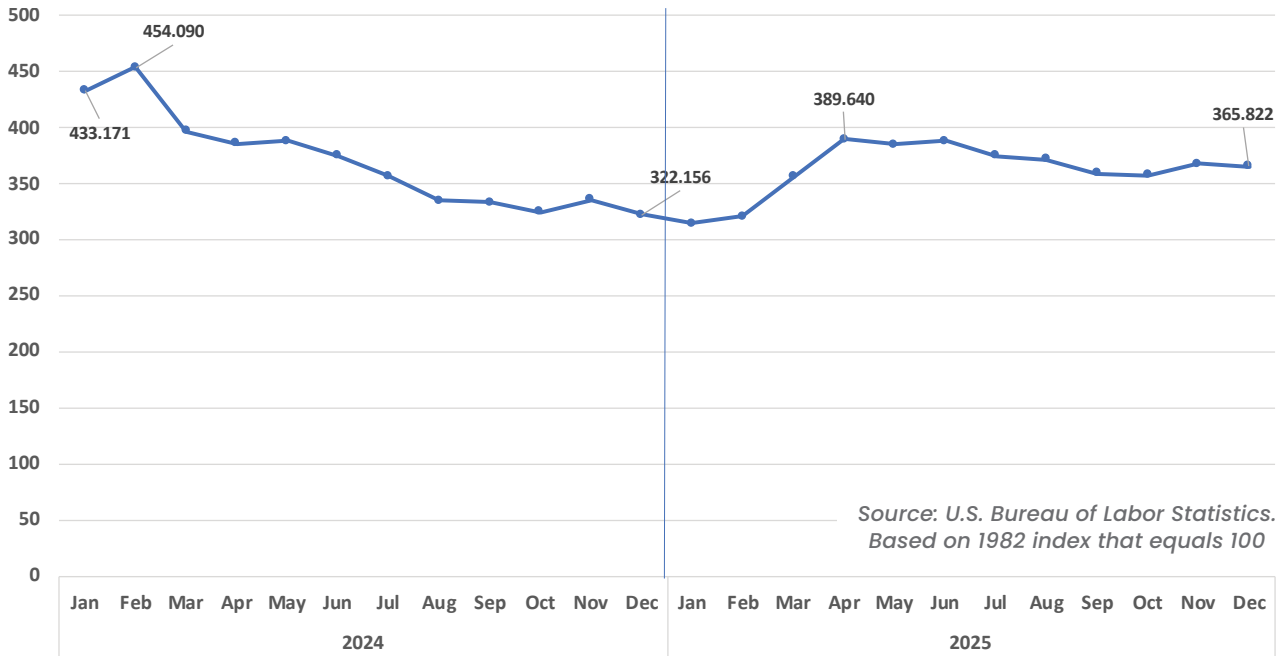
Three segments show strong positive momentum with relatively few respondents (less than 10%) predicting decline. The commercial segment is the most cautious with 52% expecting improvement but

16.9% anticipating the market will shrink. In all segments roughly a third of respondents expected 2026 to remain flat compared to 2025. Overall, respondents see residential, agricultural, and industrial as the primary growth engines, while the commercial market is expected to deliver a steadier, more measured performance in the year ahead. **C8**

According to data from the U.S. Bureau of Labor Statistics, the cold-rolled steel production price index showed moderation from 2024 into 2025, following earlier volatility. Prices eased during parts of 2024 before stabilizing and posting modest movement in 2025 rather than sharp swings. The overall trend suggests a cooling from peak pricing levels and a transition toward greater price stability.

For the construction industry, this moderation helps improve cost predictability for metal building components such as framing. While prices remain elevated compared with pre-pandemic norms, re-

Chart C8 – Cold-rolled Steel Producer Index



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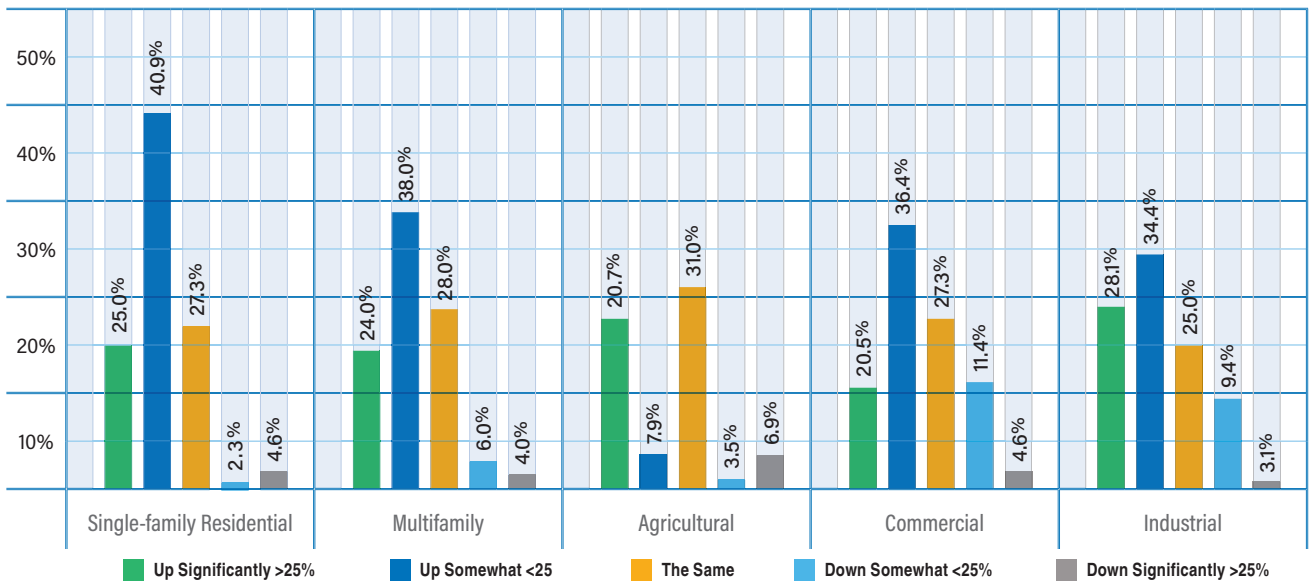


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Chart C9 – 2025 Gross Sales Compared to 2024 by Market Segment



duced volatility supports more accurate bidding, tighter margin control, and improved confidence in project planning and contract execution.

Company Size and Growth Projections

Sales growth from 2024 to 2025 among metal building respondents varied somewhat by market segment. Single-family residential posted the strongest performance, with the largest share (65.9%) of firms reporting sales increases and comparatively few (6.8%) indicating declines. Companies engaged in metal building construction who work in the commercial segment were most likely to report year-over-year declines in 2025, with 15.9% saying sales were down and just over 3% reporting the drop was significant. ^{C9}

Agricultural sales were more moderate, with a noticeable portion reporting steady results rather than significant gains. The industrial market reflected a tempered outcome. A comparatively high percentage of respondents (12.5%) said sales declined, but this segment had the highest percentage who reported significant growth with 28.1% of respondents

saying sales were up more than 25%. Across all markets, however, firms reporting growth outnumbered those reporting contraction.

One of the impacts on sales growth (and profitability) was the implementation of tariffs, which was a double-edged sword. Don Allen executive director for the Steel Framing Industry Association (SFIA) says, "Tariffs affected our members both positively and negatively. On the positive side, they helped protect domestic steel mills and the markets they serve. The negative is: tariffs increased prices for all our members, reducing profits and making steel less competitive against wood and concrete in several markets." ^{C10}

Projected sales growth from 2025 to 2026 among companies engaged in metal building shows strengthening expectations across most market segments. Residential again leads, with the largest share of respondents forecasting increases and only a small minority anticipating declines. Among residential, respondents doing multifamily work were the most optimistic about 2026 with 78% of them saying sales will increase. Companies in the single-family market also anticipate increased sales and were the most likely (27.3%) to see a significant jump in sales.

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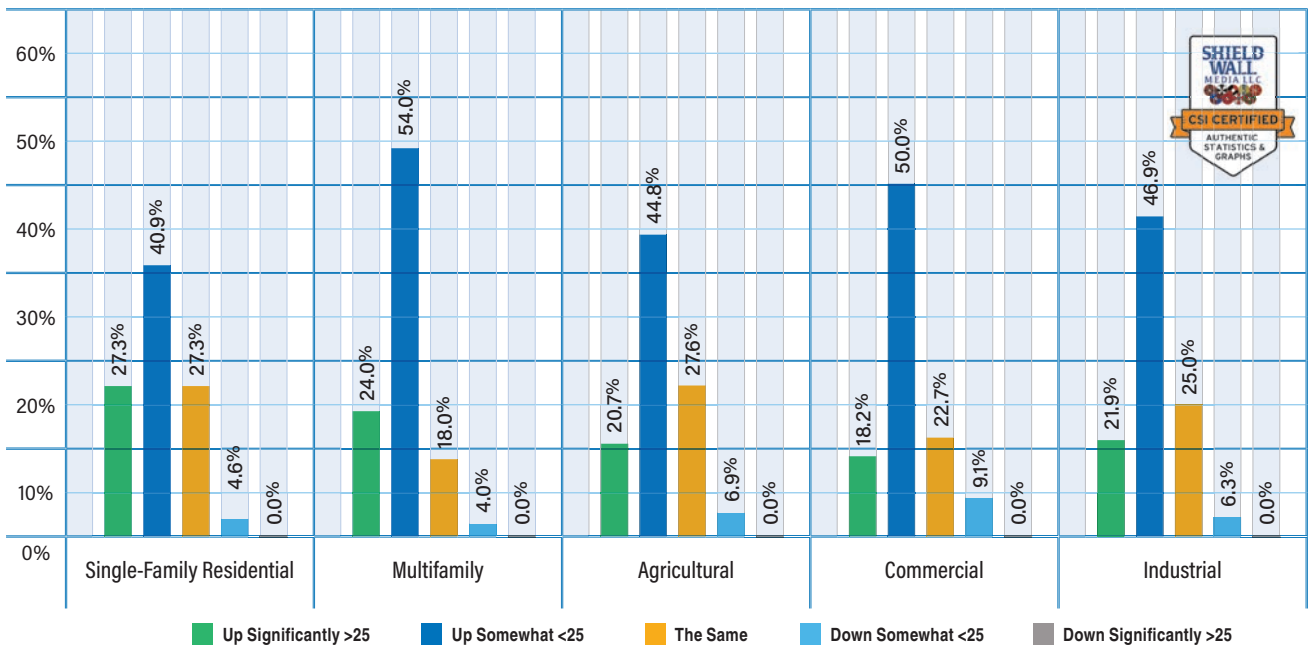
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Chart C10 – 2026 Projected Gross Sales Compared to 2025 by Market Segment



Again, companies working in the commercial segment were most likely to anticipate declines, with 9.1% of them saying 2026 sales will drop compared to 2025. No respondents in any segment think sales in 2026 will decrease significantly, though.

Agricultural optimism is more measured, with many respondents predicting flat results and a smaller—but still notable—group expecting growth. Respondents working in commercial construction reflect a similar caution as those in agricultural. Across all four segments, those expecting growth outnumber those predicting contraction. On average, 69.7% of respondents thought sales would increase in 2026, and 22.4% of them thought the increase would be significant.

Overall, respondents anticipate 2026 will bring continued growth, led primarily by the residential markets, while agricultural and industrial segments are expected to advance at a steadier pace.

Cost pressures will create a more competitive environment, though. Robert Tiffin, national accounts manager for Silvercote explains, “A handful of customers realized that market share will be the only curve available for respective growth in 2026. Not everyone can grow market share. Someone has to lose.” C11

Future Opportunities and Challenges

Expansion plans among metal building respondents are most aggressive in the residential—both single-family and multifamily—and industrial seg-

ments. In both markets, the largest share of firms report plans to expand in 2026, with fewer indicating they will delay expansion. Only a small number report no plans to expand. Companies working in the multifamily segment, in particular, indicate little interest in holding off expansion plans, with only 6.1% reporting such.

Expansion among companies serving the agricultural segment are more modest, with a sizeable portion (17.9%) not having any plans on the books, but a healthy contingent (42.9%) looking to expand operations in 2026. Respondents in commercial construction show the most conservative posture, with only 37.2% expecting to expand in 2026 and 18.6%—the highest segment—having no expansion plans now or in the future. Across all segments, firms planning to expand far outnumber those with no plans. Overall, the data reflects growth-oriented strategies concentrated in residential and industrial work, while agricultural and commercial markets are positioned for steadier, more measured development in 2026. C12

When we asked companies engaged in metal building what resources they think they will add in 2026, labor led the list by a clear margin. The largest share of respondents indicated plans to hire additional support employees (67.1%), reflecting confidence in continued project volume and bolstering their plans to expand, as discussed above. Adding field employees—the constant need in the construction industry—was identified by 48.7% of respondents, placing it second on the list just above

Chart C11 – Expansion Plans

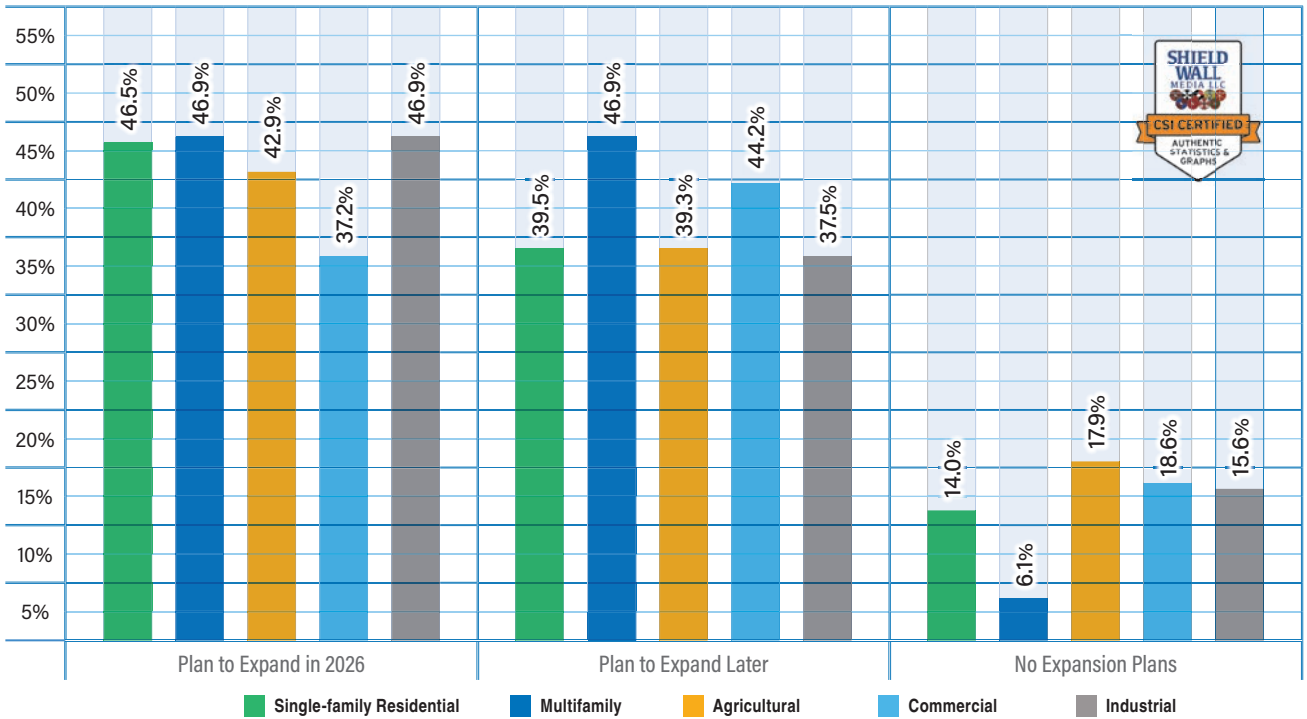
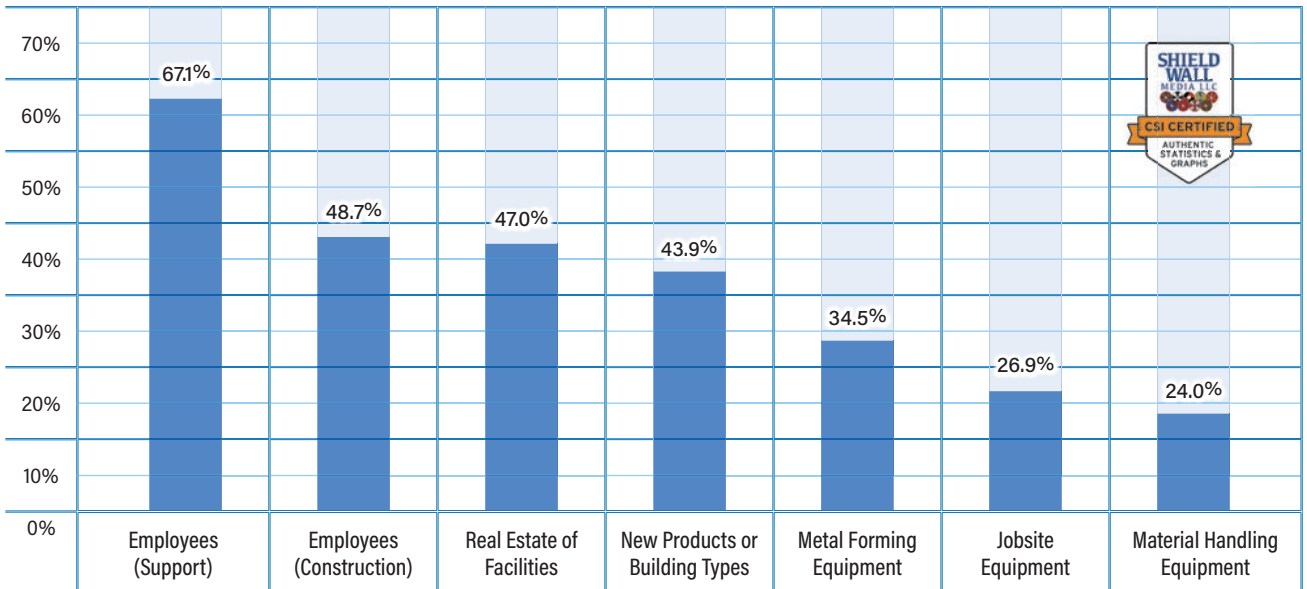


Chart C12 – Plans to Add Resources in 2026



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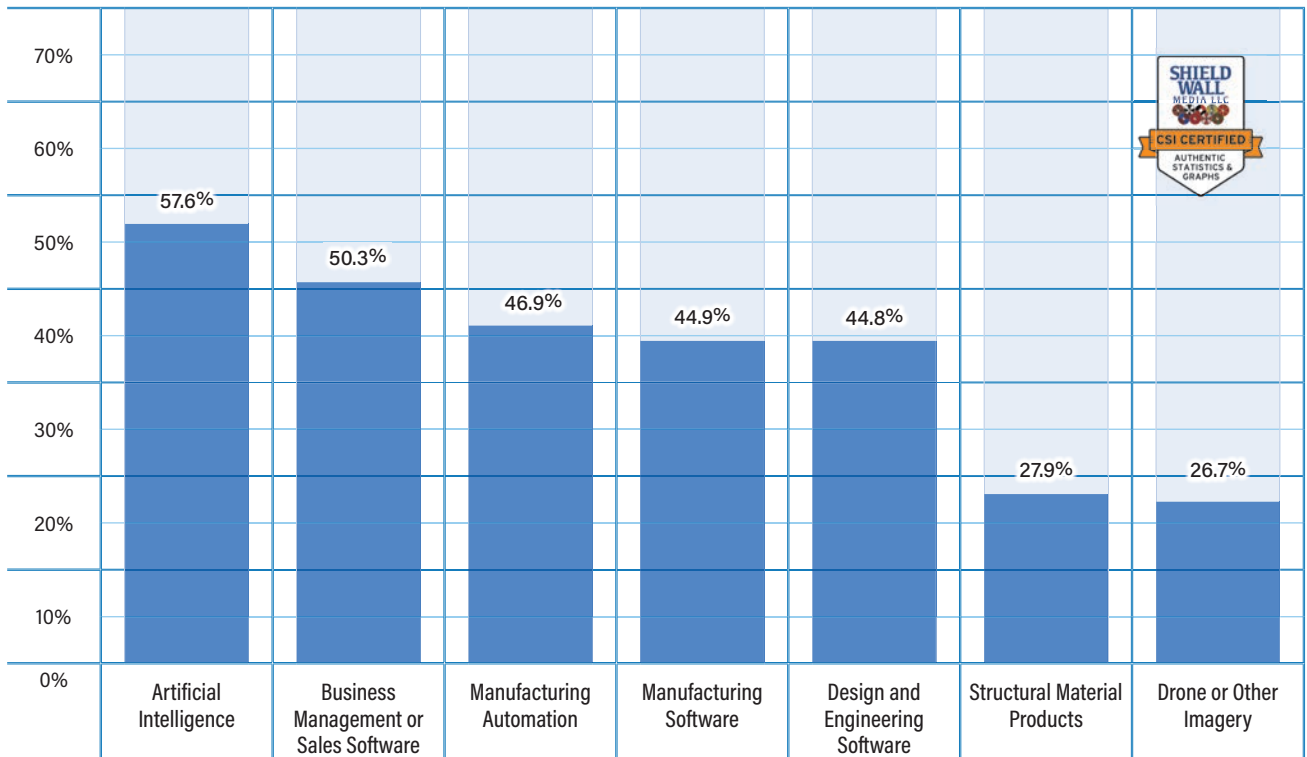


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Chart C13 – Top Seven New Products or Technology Impact



adding real estate or facilities. Equipment purchases rounded out the top seven selections for resources to add in 2026. Metal forming equipment, jobsite equipment, and material handling equipment all support the efficiency and productivity of workers in the field.

Overall, the companies are in a growth-oriented posture heading into 2026, centered primarily on expanding workforce capacity and upgrading equipment to sustain higher levels of production.

New technology and products are expected to play a significant role in shaping metal building operations, with artificial intelligence (AI) emerging as one of the most impactful developments. A large share of respondents (57.6%) anticipate AI influencing operations, which could be anything from estimating to scheduling to cost control. Business management and sales software also rank high, reflecting strong

interest in tools that streamline customer management, quoting, and financial oversight. **C13**

Manufacturing automation stands out as another major influence, signaling continued investment in labor-saving production systems. Closely related, manufacturing software is viewed as a key driver of efficiency, helping firms better manage workflows, inventory, and production timelines. Design and engineering software also scores prominently, underscoring the importance of precision modeling and faster turnaround in increasingly complex projects.

Among product innovations, structural material products rank in the top tier. Advancements in framing systems and metal components are expected to meaningfully affect project performance and competitiveness.

Overall, the leading technologies cluster around automation, digital management, and advanced

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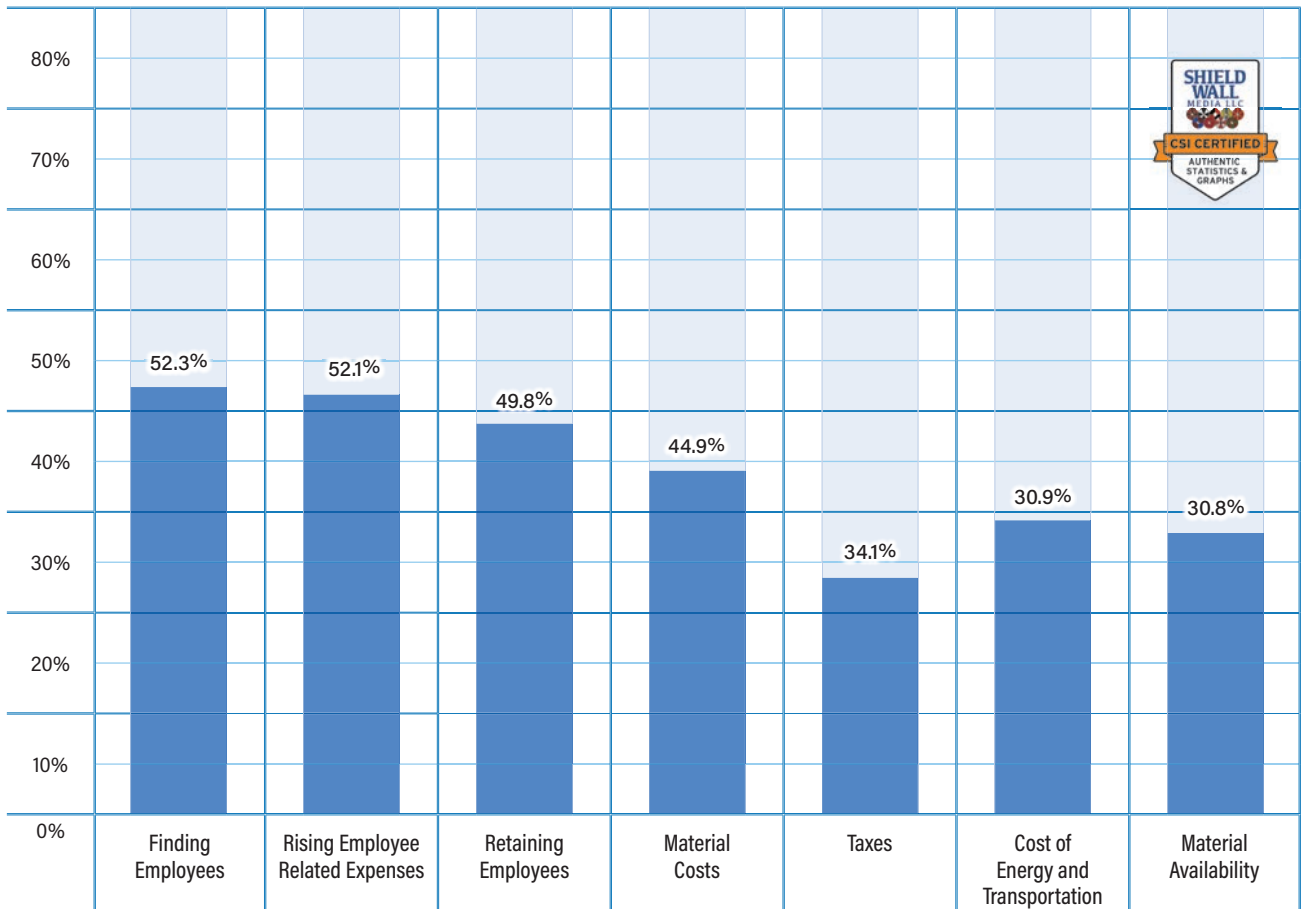


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Chart C14 – Challenges in 2026



materials—pointing to an industry focused on productivity gains, tighter coordination, and improved performance in 2026. **C14**

The impact of those products and technology will face headwinds as workforce pressures are the most significant challenge for metal building respondents heading into 2026. Finding employees ranks at the top (52.3%). Closely tied to that concern are rising employee-related expenses (52.1%) as wages, benefits, and insurance costs continue to climb. Retaining employees (49.8%) also ranks high, underscoring ongoing competition for experienced workers and the risk of turnover disrupting project schedules.

SFIA executive director, Don Allen, ties together technology and the labor shortage with technology helping to make construction jobs look more attractive to young people. “Implementing new construction technology faster is another issue we are working with other associations on,” he says. “Using tech to help relieve labor shortages and

material cost issues.”

Beyond labor, cost pressures remain prominent. The cost of materials (44.9%) is among the top concerns, reflecting continued sensitivity to steel and related input pricing. Material availability (30.8%) also appears in the top tier, indicating that while supply chains have improved, reliability remains a watch point for many firms.

Operational expenses round out the leading challenges. The cost of energy and transportation is a significant concern, affecting both production and delivery. Taxes also rank within the top seven, signaling broader worries about regulatory and financial burdens. Overall, the data shows a sector grappling primarily with labor constraints and cost control.

It’s a little surprising that interest rates did not rise to the top of this list. As Tiffin at Silvercote, says. “There have been no significant reduction in interest rates to inspire or unlock a backlog of metal building projects.”