

# State of the Mobile Compressed Air Industry Report

Survey Results 2025





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# 2025 Overview

Since its launch in 2020, VMAC's State of the Mobile Compressed Air Industry Report has become essential for fleet professionals and service businesses working with mobile compressed air. What began as a benchmarking tool has evolved into a trusted annual snapshot of the industry, offering insights into trends, challenges, and opportunities across fleets, equipment, and compressor technologies. The report is shared among industry experts and cited in both print and digital publications.

Over the past five years, the report has matured to reflect the changing conditions facing the industry. From spotlighting the impact of COVID-19 in its early editions to covering truck chassis shortages, global supply chain upheavals, rising interest rates, and global tariffs, VMAC has continuously adapted its survey focus to reflect the current issues facing industry professionals.

In 2025, resilience amid a shifting global trade outlook remains a dominant theme, as businesses continue to face persistent challenges such as labor shortages and economic pressures, thus having to become increasingly agile and better equipped to adapt to these challenges.

This report would not be possible without the insights provided by industry professionals. By contributing real-world feedback, it helps VMAC create meaningful, actionable data to help businesses not only survive, but thrive today.

"Thank you to every trusted partner who contributed to this report, as it has evolved these past five years from benchmarking trends into becoming the primary reference for professionals who work with mobile compressed air.

I value the industry experts who share their experience through our survey; their feedback turns data into guidance that organizations can use to make informed decisions in demanding markets."

- *Tod Gilbert, President, VMAC*







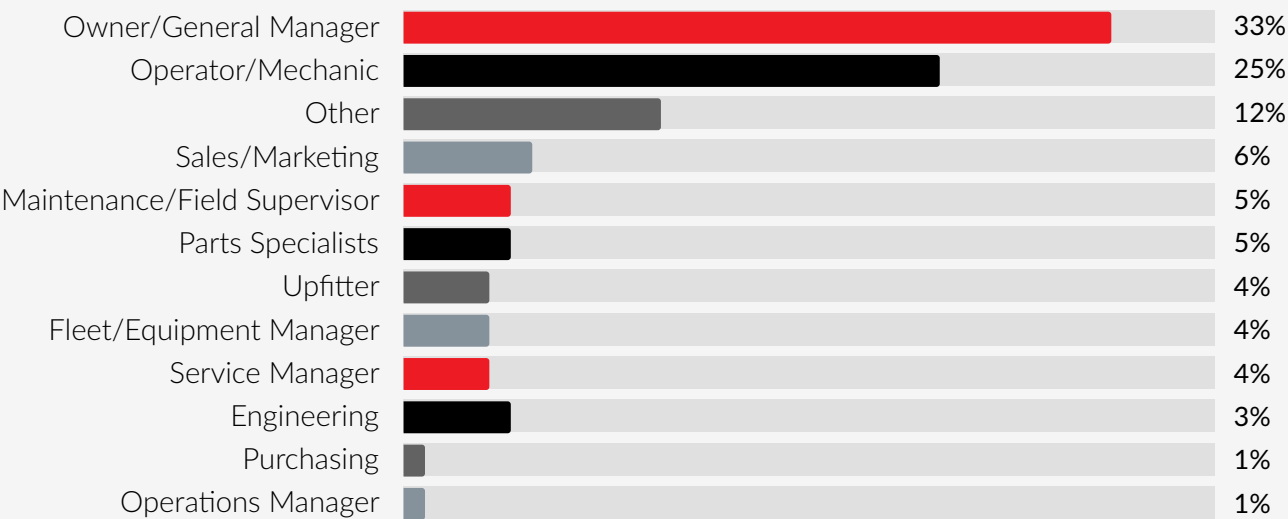
# Methodology

The 2025 State of the Mobile Compressed Air Industry online survey was conducted between December 2024 and April 2025, gathering responses from professionals across North America.

Participants represented a wide range of sectors where mobile compressed air plays a critical role, including equipment repair, construction, agriculture, transportation, service truck upfitting, oil and gas, mobile tire service, landscaping, municipal and utility infrastructure, forestry, and mining.

Despite the diversity in industries and job titles, respondents are united by a common need for mobile compressed air. This reliance highlights the industry's broad impact and the importance of understanding its evolving landscape.

## Respondents



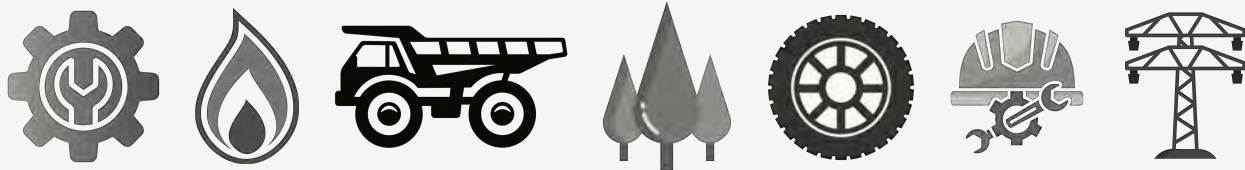
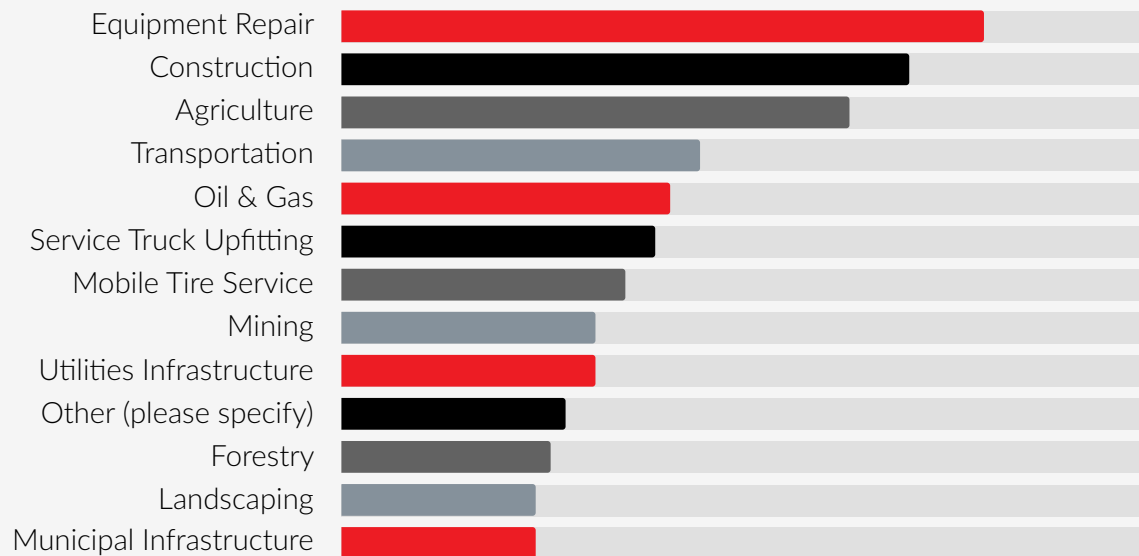
The results reveal a strong representation of decision-makers and frontline professionals within the compressed air industry. Owners and general managers comprised the largest group of respondents at 33%, followed by operators and mechanics at 25%, indicating a blend of strategic oversight and hands-on expertise. Although 12% identified their role as "other," sales and marketing professionals (6%), field supervisors (5%), and parts specialists (5%), the responses reflect involvement from diverse operational sectors. Upfitters, fleet managers, service managers, engineers, and purchasers comprised smaller percentages, highlighting a broad range of perspectives shaping the compressed air industry today.







# Type Of Business



The top industries represented in the survey are equipment repair at 43% and construction at 38%, which were similarly aligned with the findings from the 2024 State of the Mobile Compressed Air Industry Report.

The most significant shifts in respondents came from the landscaping industry, which languished, dropping from 8th to 11th, and municipal infrastructure which dipped from 9th to 12th, representing two of the least represented industries.

## DID YOU KNOW?

More than 60% of respondents prefer to purchase or lease new service vehicles compared to used vehicles.

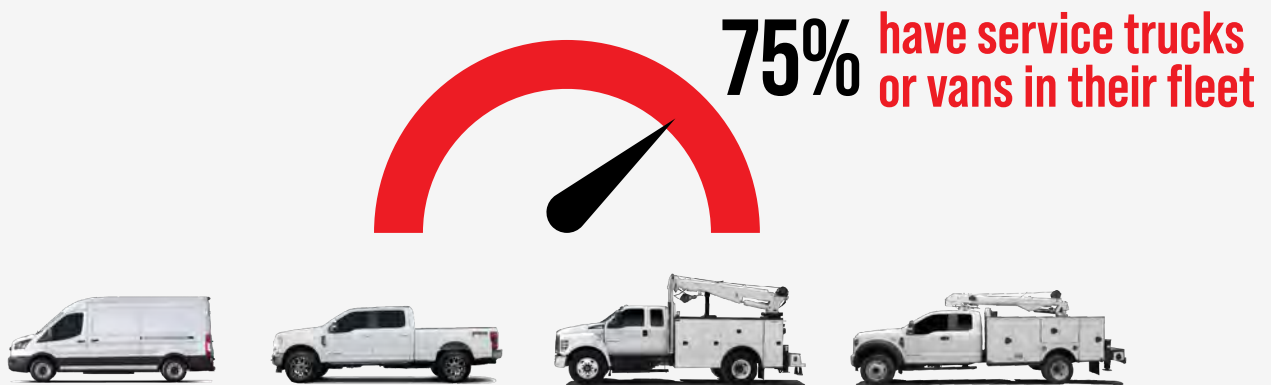




# Service Vehicles & Fleets

- 🚛 Fleet sizes within the mobile compressed air industry are not expected to increase, remaining at the same levels as experienced in 2024.
- 🚛 Most service vehicles are now under 6 years of age.
- 🚛 Service vans and trucks in fleets are expected to remain at the same levels as 2024.
- 🚛 EV drops in favor with fleet managers.

## Number Of Vehicles In Your Fleet



Three-quarters of survey respondents (75%) stated that they have service trucks or vans as part of their company's fleet, while 15% report that they have 6-25 service trucks.

### DID YOU KNOW?

#### The First Truck-Mounted Air Compressor Developed in 1905.

The world's first truck-mounted air compressor hit the scene in 1905, thanks to Atlas Copco.

This game-changing invention made it possible to bring compressed air to remote, rugged job sites, which was no small feat back then. Powered by an internal combustion engine, it laid the groundwork for mobile air power as we know it.

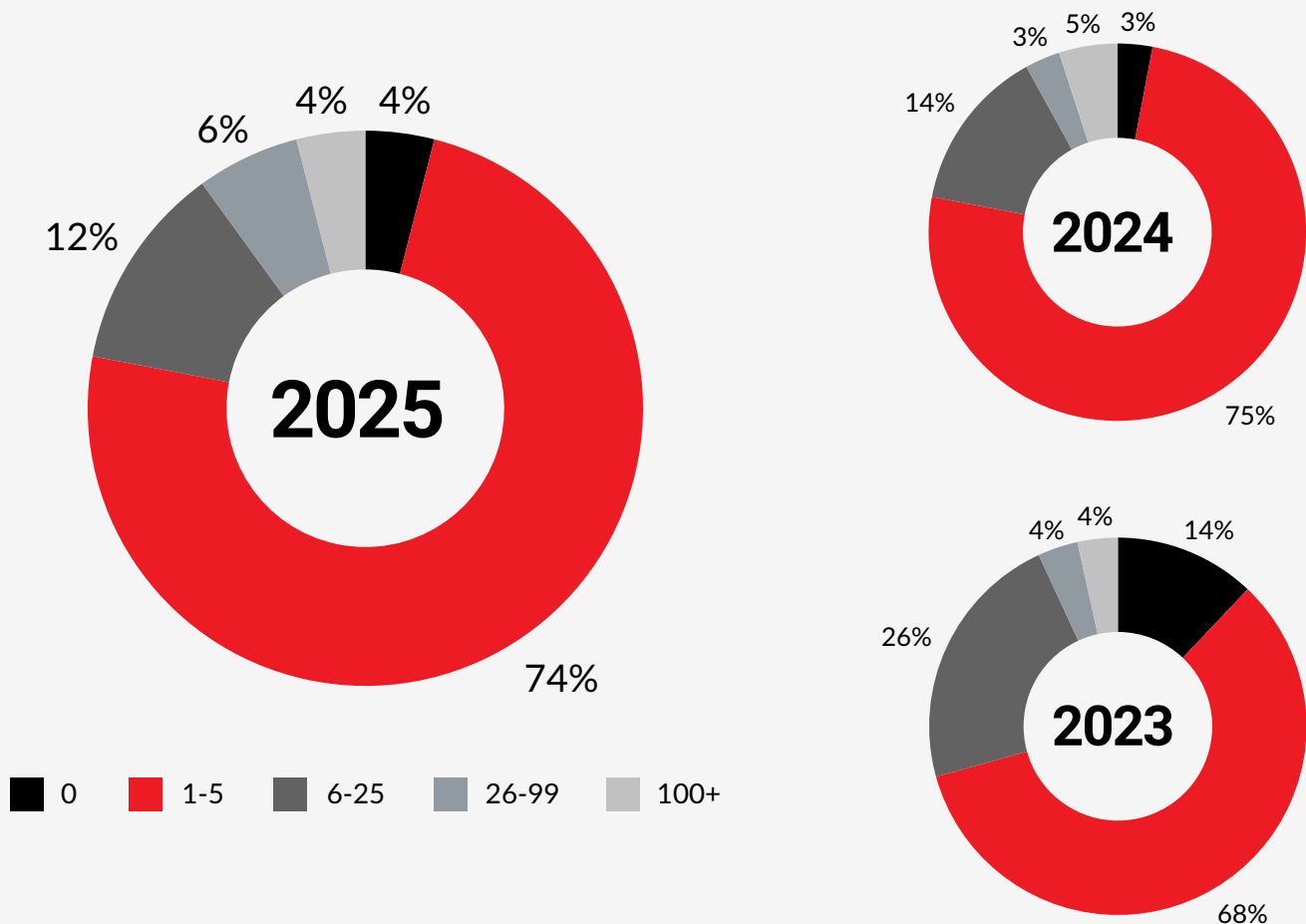
#### 1905 First Portable Screw Compressor





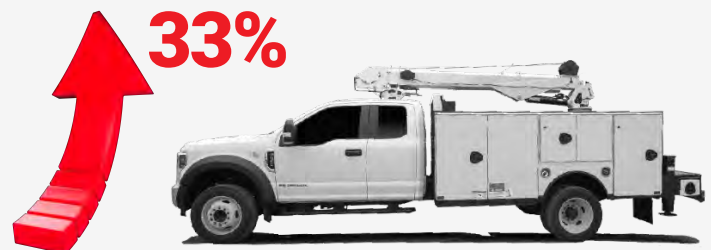
# 3 Out of 4 Survey Respondents Have 1-5 Service Trucks In Their Fleet

Number Of Service Trucks In Your Fleet



## Equipment Trends: Service Trucks

**67%** of respondents indicated that they anticipate maintaining the number of service trucks in their fleet, while 33% indicated that the number will increase.

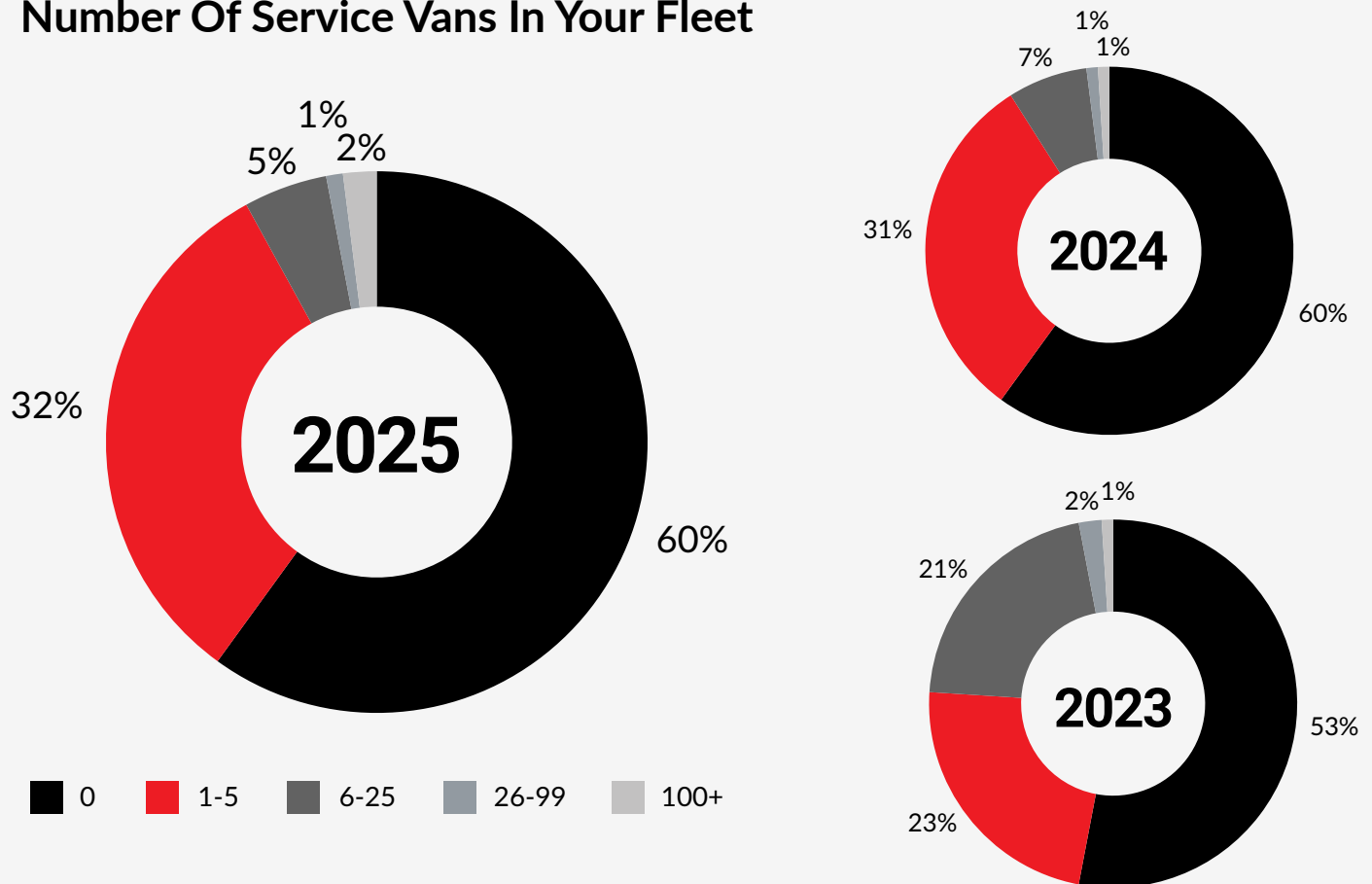






# Service Vans Decline in Popularity With Fleets

Number Of Service Vans In Your Fleet



## Equipment Trends: Service Vans

This year, 40% of respondents reported having service vans in their fleets, consistent with the findings (40%) last year. Among those with vans, 86% plan to keep their current number, 13% expect to add more, and just 1% anticipate cutting back. 60% of all respondents still do not use service vans, preferring service trucks for their fleet.



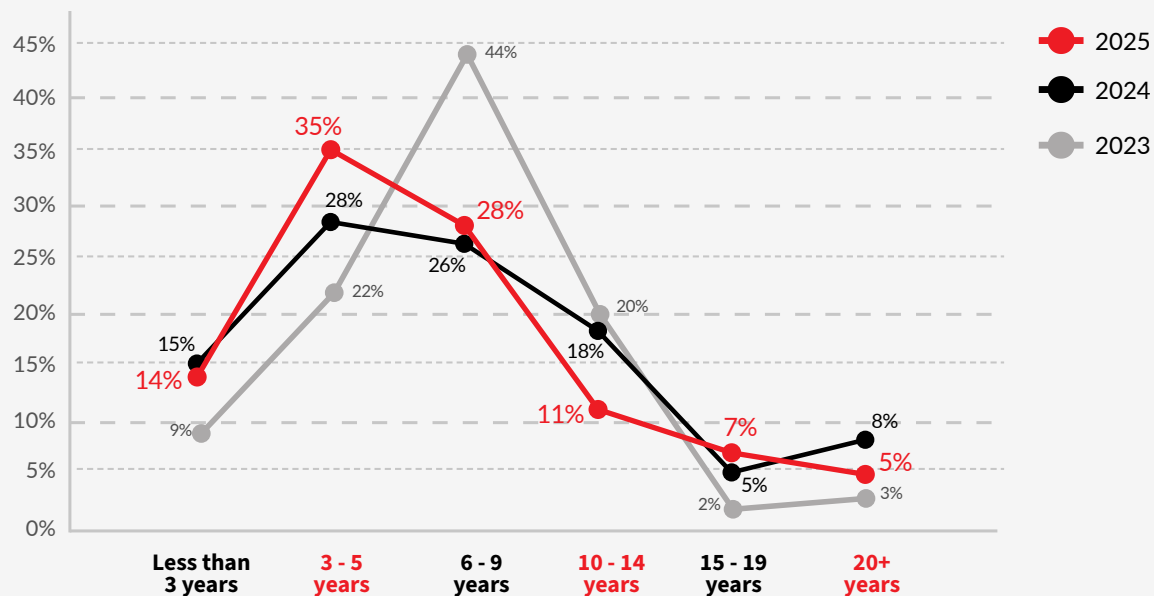


# 4 Out of 5 Service Vehicles Are Under 10 Years Of Age

## Average Age Of Service Vehicle In Your Fleet

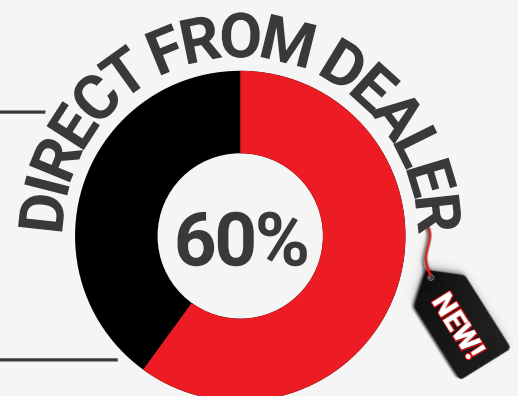
The survey revealed that 77% of respondents report having a service vehicle between 0 and 9 years. This figure is slightly higher than in 2024, which saw only 69% of service vehicles under 10 years of age. An additional 11% of respondents indicated that their vehicles fall within the 10 to 14-year range, while the remaining 12% operate vehicles 15 years of age or older.

Notably this year's data saw an unusual spike in vehicles aged 3–5 years, increasing from 28% in 2024 to 35% in 2025. Additionally, there was a significant decline in the number of vehicles aged 10–14 years, decreasing from 18% in 2024 to 10% in 2025.



### DID YOU KNOW?

60% of respondents prefer to purchase/lease new service vehicles directly from dealers compared to private sellers (23%), fleet management companies (9%), or at auction (8%).





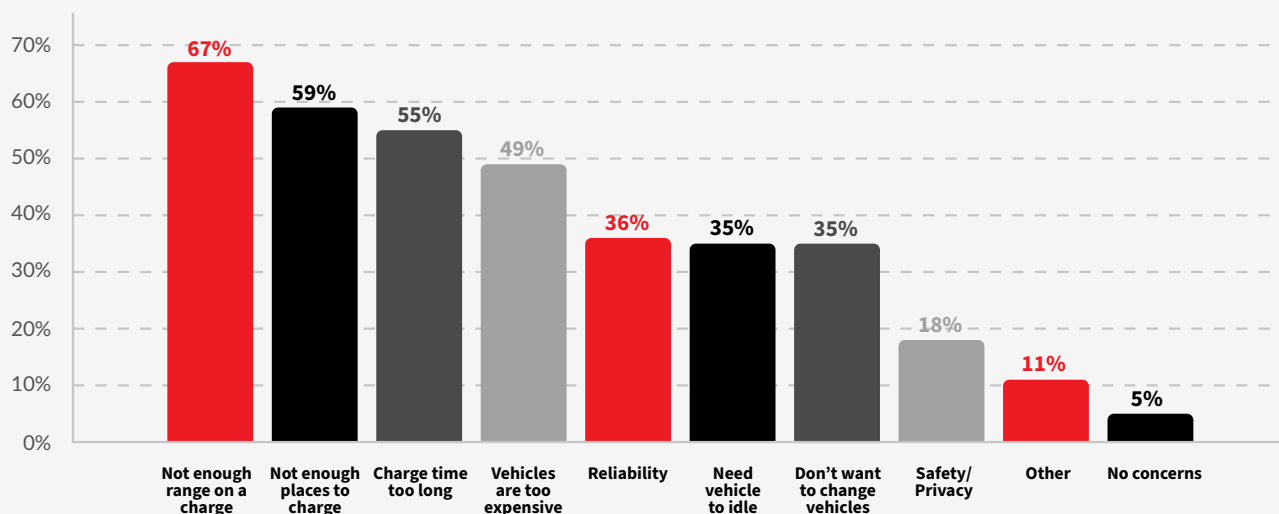
# Lingering Concerns About Electric Vehicle Adoption

As the push toward an electrified future accelerates, many remain hesitant to fully embrace electric vehicles (EVs). Key concerns continue to slow broader adoption with the most cited issues being limited driving range (67%), insufficient charging infrastructure (59%), and long charging times (55%).

Other significant concerns reported by respondents include additional vehicle cost (49%), operational limitations, such as the inability for EVs to idle when needed (35%), and concerns about overall reliability (36%).

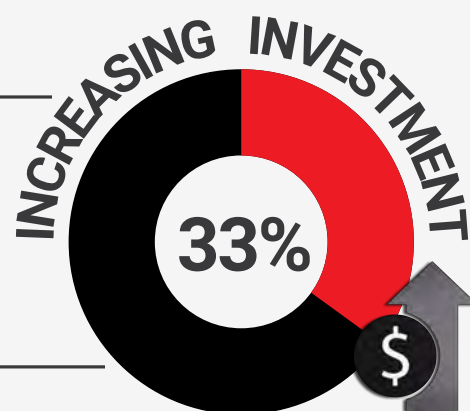
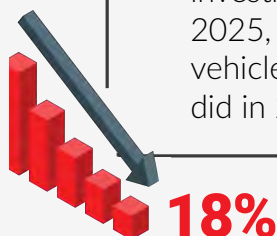
Additional comments reveal a wide array of apprehensions, from political influences and performance in cold climates, to concern about vehicle quality and an overall skepticism towards EV technology.

This year, only 5% of respondents reported having no concerns about transitioning to an EV service vehicle—a sharp drop compared to 17% in 2024. The road to widespread EV adoption may still be fragile as public support appears to be lagging.



## DID YOU KNOW?

49% of respondents do not plan to increase their investment in new service vehicles or equipment in 2025, while 33% say they will invest in new service vehicles, and 18% expect to invest less than they did in 2024.



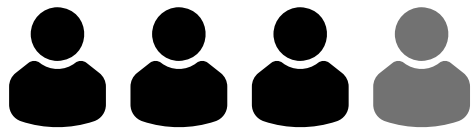




# Air Compressors & Equipment

Air compressors remain vital across diverse industries and are an important piece of equipment for service vehicles. Respondents demonstrated a strong preference for rotary screw technology, especially for UNDERHOOD® and gas driven air compressors.

- 🔧 Air compressors remained the most important piece of equipment on service vehicles.
- 🔧 3 in 4 respondents prefer rotary screw air compressors.
- 🔧 Rotary screw air compressors are valued for their performance, quality, and size and weight.



## Almost 3 Out Of 4

### Prefer Rotary Screw Air Compressors

## Rotary Screw Air Compressors Valued For:

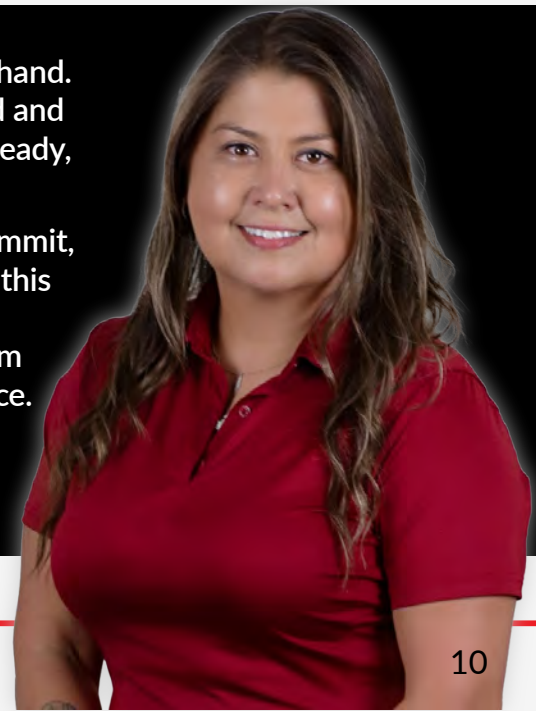
- 🔧 Performance
- 🔧 Quality
- 🔧 Size
- 🔧 Weight



“VMAC’s 2025 survey continues to reflect what we’re seeing firsthand. With nearly 80 percent of service vehicles now under 10 years old and 49 percent of respondents planning to hold capital investments steady, reliability is still the top priority.

Rotary screw compressors remain the go-to for that reason. At Summit, more than 55 percent of the trucks we’ve built or have scheduled this year include a VMAC system. Our customers consistently choose them for their strong performance, smaller footprint, and long-term durability. Efficient, dependable air systems are not just a preference. They are essential for keeping operations running in the field.”

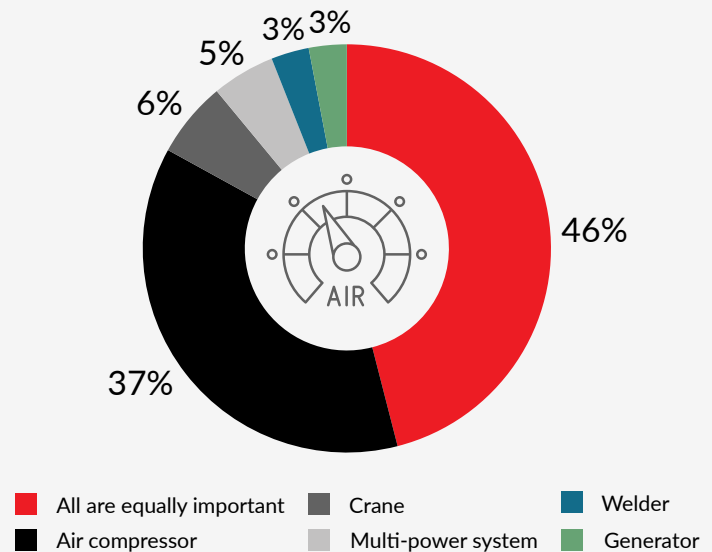
- Sondra Kirby, Marketing Manager, Summit Truck Equipment





# Air Compressors Considered Most Important Equipment in Service Truck Industry

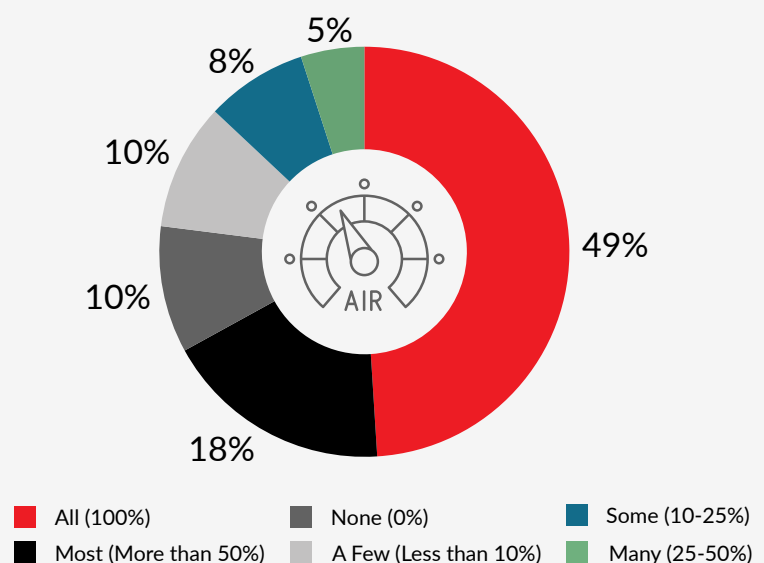
When asked to identify the most important piece of equipment on their service vehicle, nearly half of respondents (46%) stated that all equipment is equally important, highlighting the need for a fully equipped vehicle. However, the air compressor stood out as the single most essential component for 37% of respondents, far surpassing other equipment such as cranes (6%), multi-power systems (5%), generators (3%), and welders (3%).



# Nearly One in Two Have Service Trucks Equipped with an Air Compressor

49% of respondents reported that all their service trucks are equipped with an air compressor. For them, it's not optional, it's essential. From inflating tires to powering pneumatic tools, air compressors are critical for mobile operations.

18% stated that more than 50% of their service trucks include an air compressor, while 10% advised they do not currently have an air compressor, and another 10% said that less than 10% of their service fleet have an air compressor.

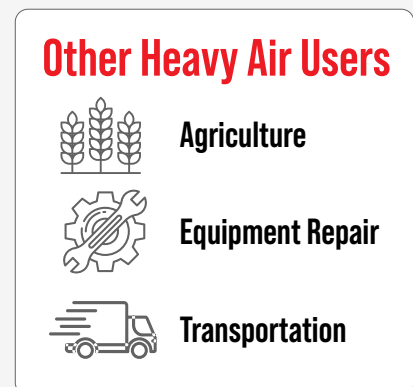
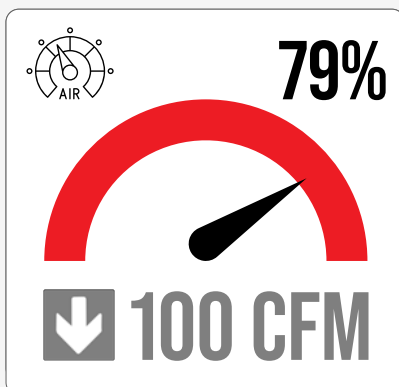
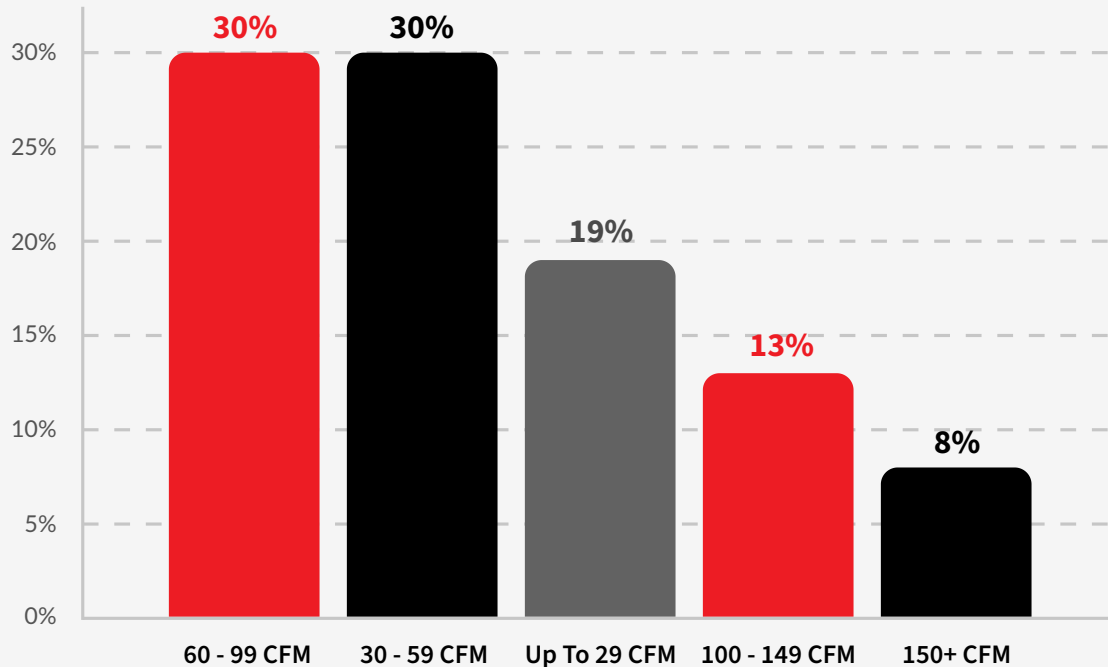




# Majority Require Under 100 CFM On Their Service Vehicles

Over 79% of survey respondents reported requiring less than 100 CFM of air for tools on their service vehicles, regardless of fleet size or industry. However, the most demanding air users, those requiring 150 CFM or more, are predominantly found in the construction sector.

Other industries identified as heavy air users include agriculture, equipment repair, and transportation, where high-powered pneumatic tools are essential to daily operations.





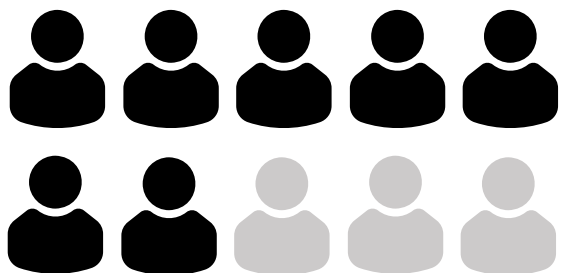


# More than 70% of Air Users Prefer Rotary Screw Air Compressors

More than seven out of ten survey respondents indicated a clear preference for rotary screw air compressors over reciprocating models. This trend has remained relatively consistent across surveys conducted since 2020, highlighting the reliability and efficiency that rotary screw compressors offer for service vehicle applications. Their continuous airflow, compact design, and lower maintenance requirements make them a favored choice among professionals who rely on dependable air power in the field.

However, recent data suggests a modest decline in this preference, likely influenced by the lower upfront cost of reciprocating compressors. Previous surveys showed 75–81% of respondents favoring rotary screw units, slightly higher than this year's survey findings (72%).

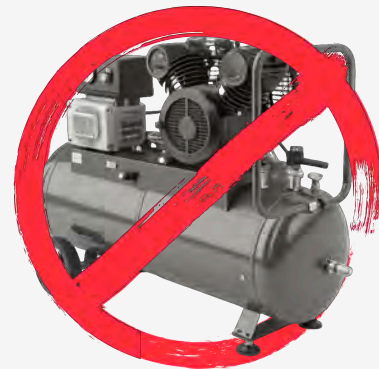
The overall trend clearly continues to demonstrate that rotary screw compressors are the industry standard for performance and durability.



**7/10 Prefer**   
**Rotary Screw**  
**Air Compressors**

## THE FAVORED CHOICE BECAUSE:

-  **Reliability & Efficiency**
-  **Continuous Airflow**
-  **Compact Design**
-  **Lower Maintenance Needs**

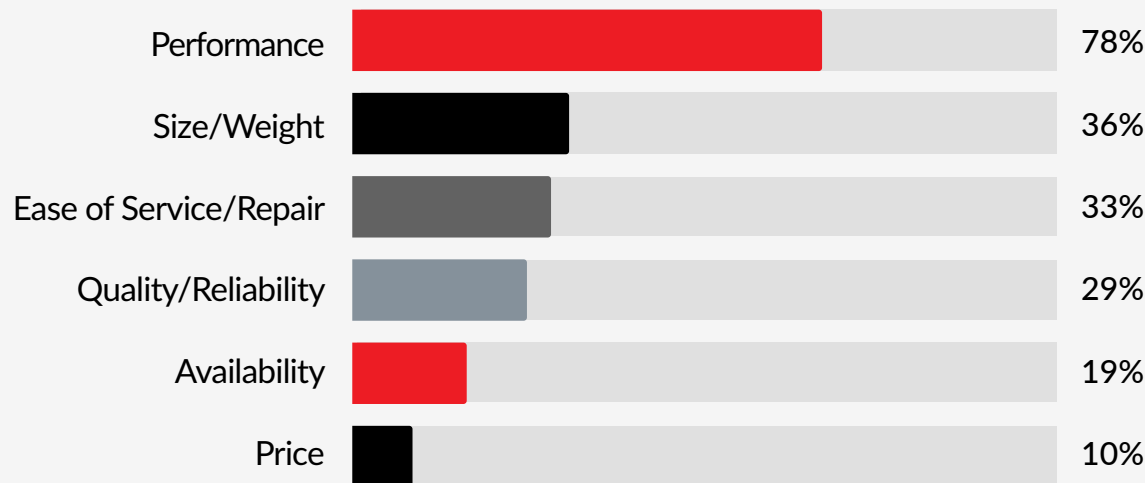




# Rotary Screw Air Compressors Chosen for Performance

The 2025 survey results continue to align with trends observed from 2020 through 2024, with a significant majority of respondents (72%) indicating a preference for rotary screw air compressors. Superior performance (78%) remains the most influential factor in this preference, reflecting the ongoing demand for high-efficiency, continuous-duty equipment in service vehicle operations.

In addition to performance, respondents also cited other key advantages of rotary screw compressors, including compact size and reduced weight (36%), and quality and ease of service and repair (33%). These findings reinforce the enduring reputation of rotary screw compressors as the preferred choice for professionals seeking dependable and efficient air solutions across a range of industries.



## DID YOU KNOW?

Survey respondents who opt for reciprocating air compressors primarily do so because of cost. In fact, price was the most common reason (63%) cited for choosing reciprocating models over rotary screw air compressors. While reciprocating compressors may offer budget-friendly appeal, performance and long-term operational benefits remain key differentiators driving the continued preference for rotary screw technology.

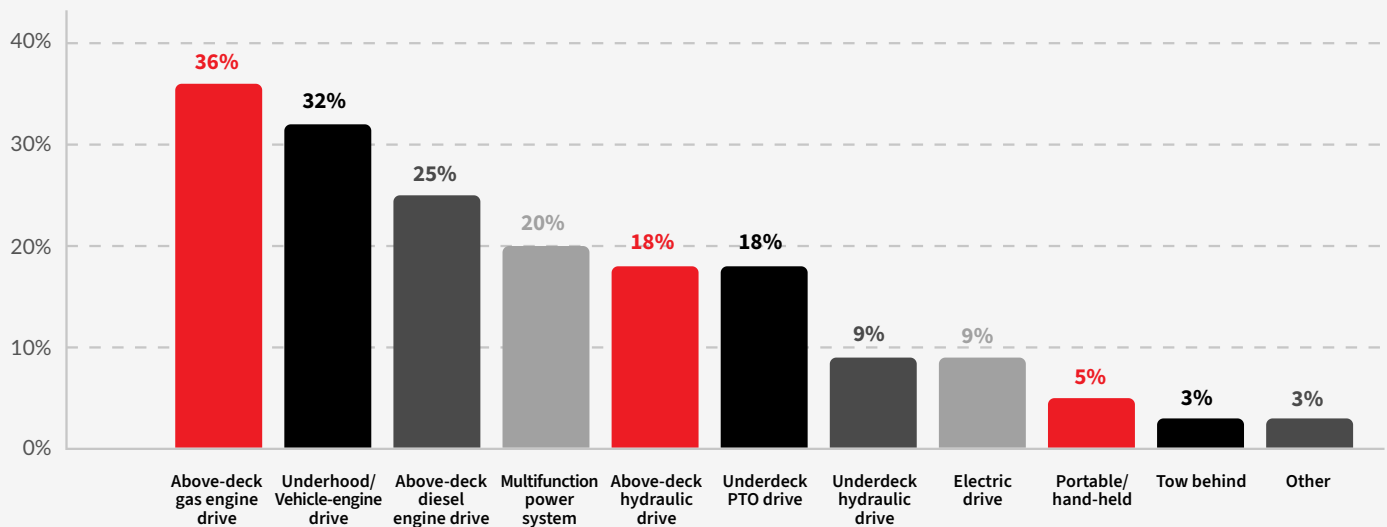




# Gas-Driven Air Compressor Edges Out UNDERHOOD as Most Preferred System

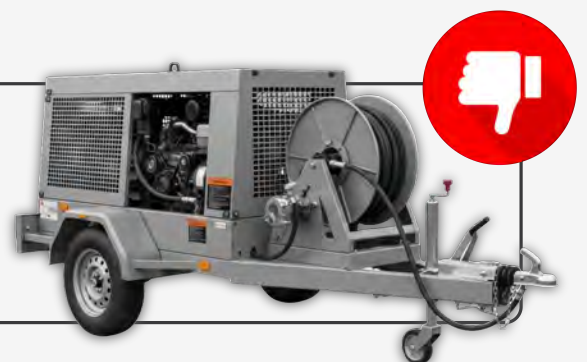
Over the past several years, the competition for “most preferred air compressor” has been closely contested, with UNDERHOOD, hydraulic-driven, and gas engine-driven models frequently trading positions. In a notable shift this year, above-deck gas engine drive air compressors edged into the lead with 36%, narrowly surpassing UNDERHOOD, which came in at 32%. This change marks a departure from last year, when UNDERHOOD held the top spot with 33%, while gas-driven models followed at 29%.

Despite this shift, UNDERHOOD air compressors remain a strong favorite, particularly among municipal fleets and those outfitting service vans. Their compact design, reduced vehicle weight impact, and integration with the engine make them especially attractive for operators focused on maximizing space and minimizing idle equipment. While preferences may fluctuate year to year, UNDERHOOD continues to hold a solid position as a reliable and efficient solution in specialized fleet applications.



## DID YOU KNOW?

Tow-behind air compressors ranked as the least popular option in this year's survey, earning just 5% of the vote. Their bulkier design and limited integration make them less desirable for modern service vehicle applications.



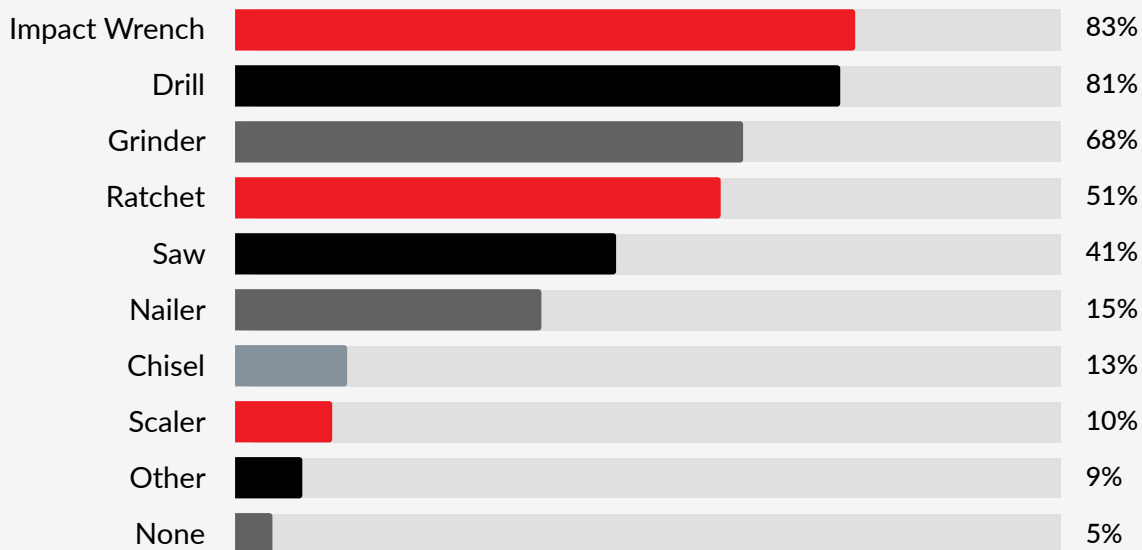




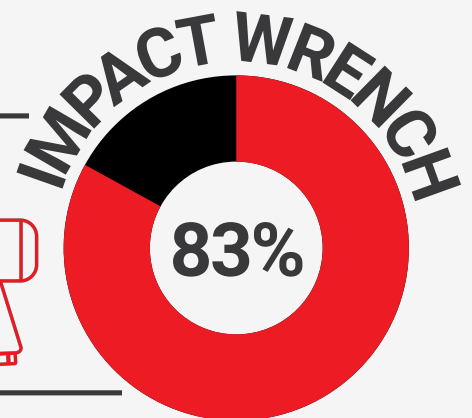
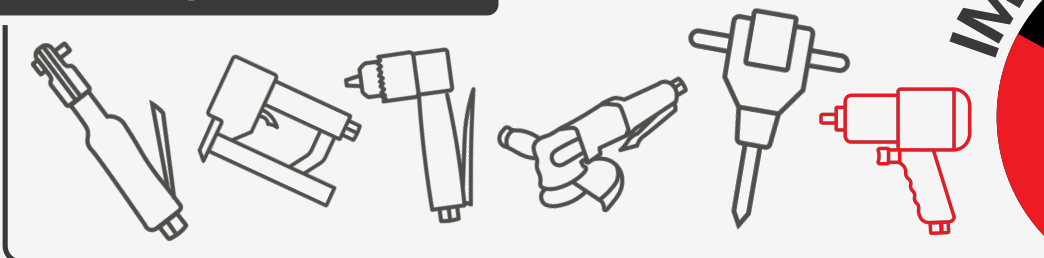
# Impact Wrench is Most Commonly Used Handheld Air Tool

The 2025 survey results highlight a continued reliance on a wide variety of air tools among service vehicle operators, with impact wrenches leading the pack. An overwhelming 83% of respondents reported using impact wrenches in their daily operations, followed closely by drills at 81%. Grinders (68%) and ratchets (51%), also remain essential, indicating a strong need for consistent and versatile air power in the field.

Other commonly used tools include saws (41%), and to a lesser extent, nailers (15%), chisels (13%), and scalers (10%). Interestingly, only 5% of respondents indicated that they do not use any air tools on their service vehicles. These results underscore the importance of equipping service vehicles with the right air system to support a wide range of critical tasks.



## Most Popular Air Tool

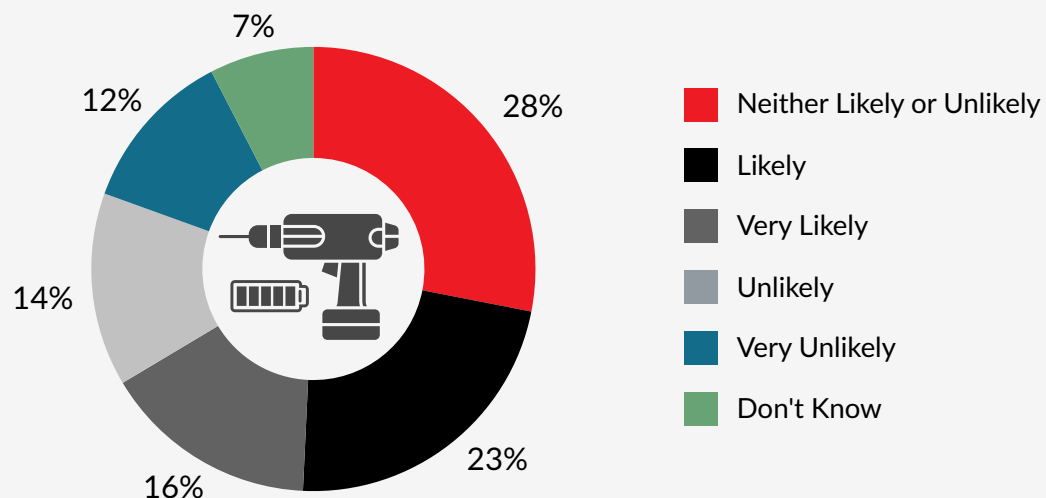




# Industry Split on Future of Battery-Powered Tools Replacing Air Tools

Survey results revealed a divided outlook on the future of handheld battery-powered tools replacing air tools. While 39% of respondents believe it is either “likely” or “very likely” that battery-powered tools will eventually take over, 28% remained neutral, selecting “neither likely nor unlikely,” suggesting that while interest in battery-powered tools is growing, air tools continue to hold a strong and reliable presence in the field.

This split indicates a cautious industry watching the evolution of tool technology while maintaining trust in proven air-powered systems.



“Compressed air is still critical on modern jobsites, so we spec a broad lineup of VMAC vehicle-mounted compressors that work seamlessly with our custom truck builds and keep crews, from single-truck owners to large fleets, working safely and efficiently. As EV chassis move from concept to reality, we are already engineering solutions around VMAC’s new e30 all-electric rotary screw compressor, strengthening our shared commitment to deliver innovative, reliable equipment to worksites.”

- Scott Cassels,  
President & Chief Operating Officer, General Body & Equipment Ltd.



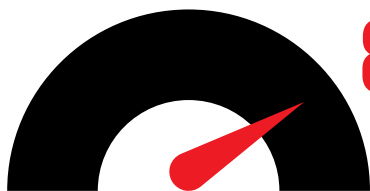
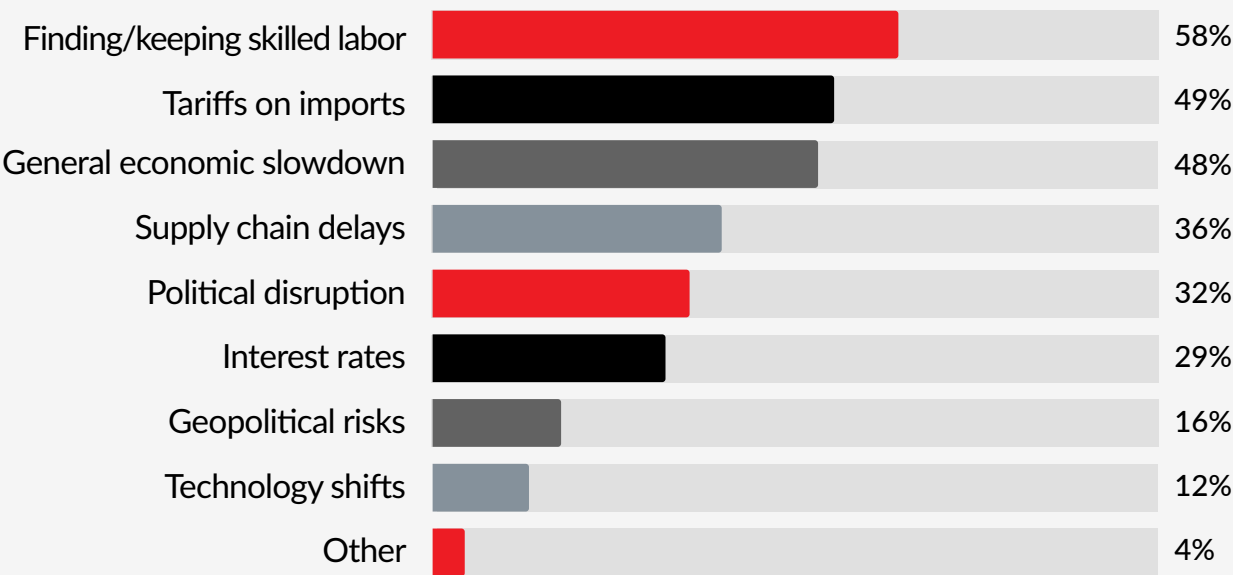


# Business Impacts

New concerns, including labor shortages, general economic slowdown, and global tariff challenges are impacting the industry. Despite these challenges, more than 80% of respondents agree conditions will improve or hold steady over the next twelve months.

Several key issues impact business operations over the next 12 months were noted, with the most pressing concern being the ongoing challenge of finding and retaining skilled labor, cited by 58% of respondents. This was followed closely by worries about tariffs on imports (49%), and a general economic slowdown (48%). Additional concerns included supply chain delays (36%), political disruption (32%), and rising interest rates (29%), while fewer respondents pointed to geopolitical risks (16%) and technology shifts such as AI or digital disruption (12%) as significant threats.

## Key Issues Impacting Business Operations Over The Next 12 months



**80%** agree conditions will improve or hold steady.



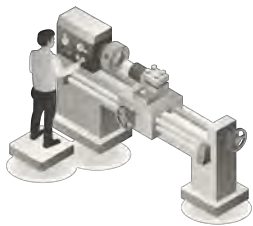


# Labor Shortages Persist as Businesses Brace for Challenges

Businesses across a range of industries are preparing for a demanding year ahead, with 58% of survey respondents identifying the recruitment and retention of skilled labor as their most significant concern. However, this figure has dropped from last year, when 72% of respondents noted labor shortage as the key challenge facing businesses.

The ongoing workforce challenge not only threatens day-to-day operations but also hampers long-term planning, productivity, and growth. As experienced technicians and specialized workers become harder to find, companies may face delays in service delivery, increased training costs, and greater competition for talent.

The data underscores the urgent need for workforce development initiatives and strategic talent management to ensure continued operational efficiency in a tightening labor market.



**58%** concerned about recruitment and retention of skilled labor.

**DOWN FROM**  
**72%**  
**IN 2024**

“While labor shortages, a cooling economy and tariff pressures present challenges for the trucking industry, VMAC's survey reveals genuine optimism. With 41% of respondents expecting improved conditions and another 41% forecasting stability, this majority underscores the market's resilience.

By prioritizing innovation, strategic planning and operational efficiency, and harnessing technologies such as artificial intelligence, businesses are well positioned to transform today's challenges into long-term growth opportunities.”

- Rob Beukema, Vice President, Work Truck West







# Economic Uncertainty and Trade Pressures Arise

In addition to workforce shortages, businesses are increasingly concerned about broader economic pressures, as 48% of respondents cited fears of a general economic slowdown, 49% pointing to tariffs on imports, and 32% highlighting political disruption. These factors contribute to a highly uncertain operating environment, making it more difficult for businesses to forecast demand, manage costs, and maintain steady access to critical equipment and materials.

Companies are facing increased uncertainty and greater difficulty in strategic planning - forcing many to adopt more cautious, cost-conscious approaches in the year ahead.

## Broader Economic Pressures Include:

**48%** **ECONOMIC SLOWDOWN**



**49%** **TARIFFS ON IMPORTS**



**32%** **POLITICAL DISRUPTION**



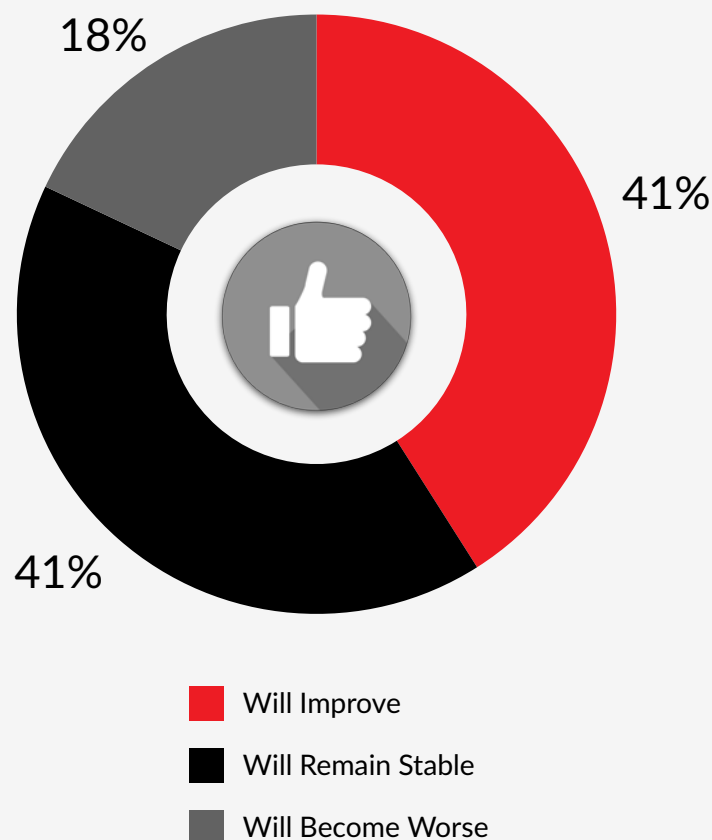


# Cautious Optimism Amid Industry Challenges

Despite ongoing challenges such as labor shortages, rising interest rates, and supply chain disruptions, respondents shared a cautiously optimistic outlook with almost half of respondents (41%) believing that business conditions will improve over the next 12 months, while an additional 41% expect conditions to remain stable. This strong majority indicates a sense of resilience and confidence in the industry's ability to adapt.

This optimistic sentiment suggests that many businesses are finding ways to navigate current obstacles through innovation, operational efficiency, and strategic planning. While only 18% anticipated worsening conditions, the industry continues to evolve as renewed growth and long-term stability are expected.

## How Do You Feel About Business Conditions Over The Next 12 Months?



### WAYS BUSINESSES WILL NAVIGATE OBSTACLES



**Innovation**



**Operational Efficiency**



**Strategic Planning**

# Thank You...

We want to extend our sincere thanks to everyone who took the time to participate in the State of the Mobile Compressed Air Industry survey. Your responses have provided invaluable insight into the challenges, priorities and emerging trends shaping the compressed air market today. By sharing your firsthand experiences, from requirements on service fleets to the growing emphasis on energy-efficient systems, you have helped create a clear picture of where our industry stands and where it is headed. Your input will guide our ongoing efforts to develop solutions that deliver unmatched reliability, performance and value.

We remain committed to translating these insights into products and services that address real-world needs, drive operational efficiency and support long-term success.

Thank you for your candid feedback and continued partnership.




***Congratulations to Ethan St. Amant, a Field Services Technician with EquipmentShare, who was our 2025 SOTI survey draw winner.***

## About VMAC

VMAC designs and manufactures the most innovative mobile air compressors and multi-power systems available. With almost 40 years of history, VMAC is the leading air compressor manufacturer in North America. VMAC has earned a reputation for air compressors and multi-power systems with extraordinary build quality, durability, and reliability, and confidently backs its air compressors with a VMAC Lifetime Warranty. Operators and fleet managers in construction, agriculture, mobile mechanic, tire service, utilities, mining, and oil and gas industries rely on VMAC systems to work in the most challenging applications, climates, and environments.

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