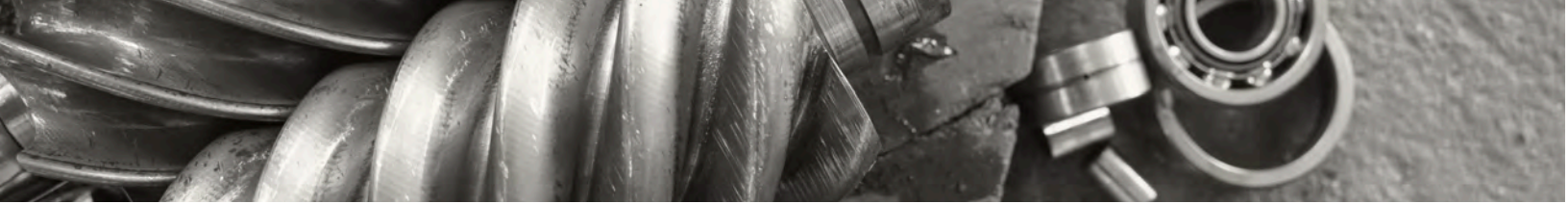


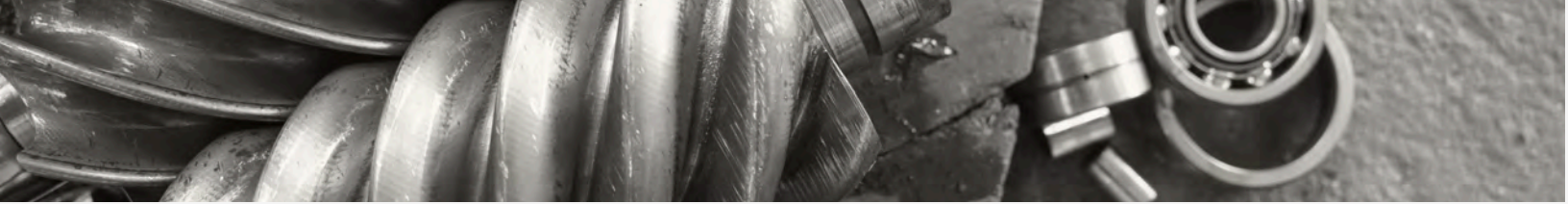


2026 State of the **Mobile Compressed Air** Industry Report



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2026 Overview

The 2026 State of the Mobile Compressed Air Industry Report reflects an industry that remains resilient, practical, and focused on measured growth. Compared to 2025, respondents reported stronger representation across core sectors, with equipment repair and construction continuing to lead. Participation from transportation, agriculture, mobile tire service, oil and gas, mining, infrastructure, forestry, and utilities further demonstrates the broad range of industries that depend on mobile compressed air.

Fleet data points to steady confidence and continued investment. Nearly 78% of 2026 respondents reported operating service trucks or vans, compared to 75% in 2025. The percentage expecting their service truck fleets to grow increased from 33% to 39%, while almost 68% now prefer purchasing or leasing new vehicles, up from just over 60% the previous year. Most respondents continue to operate smaller fleets, reinforcing the importance of equipment that delivers dependable performance, versatility, and value within limited vehicle space and payload capacity.

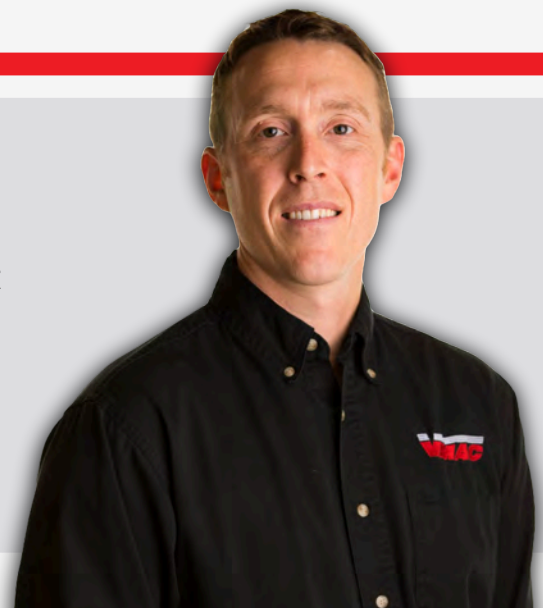
Mobile compressed air continues to play a central operational role. In 2026, 37% of respondents identified the air compressor as their most important individual piece of service vehicle equipment, while another 41% considered all major equipment equally important. Battery-powered tools continue to gain acceptance, with approximately 48% believing they are likely or very likely to replace some air tools, compared to 39% in 2025. However, continued use of pneumatic impact wrenches, grinders, ratchets, and other high-demand tools indicates that compressed air remains essential for applications requiring sustained power, durability, and dependable performance.

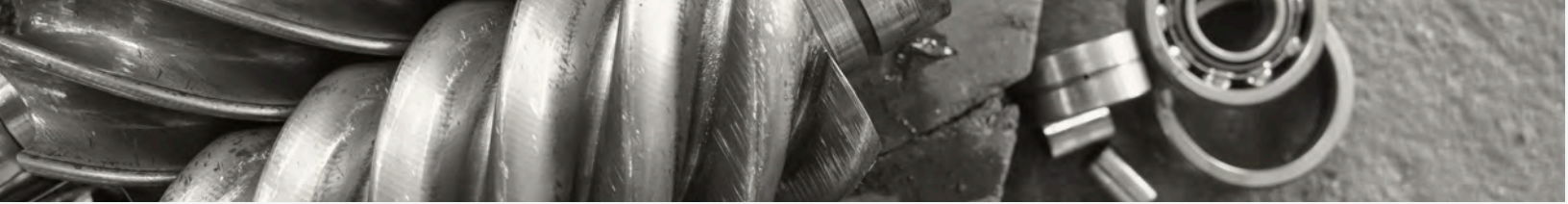
Economic conditions became the leading business concern in 2026, while concerns related to labor, tariffs, supply chains, and interest rates declined from their 2025 levels. This shift suggests that companies are increasingly focused on market demand and broader economic conditions rather than the operational disruptions that dominated previous years. Overall confidence improved, with 90% of respondents expecting business conditions to remain stable or improve during the next 12 months, compared to 82% in 2025. The findings portray an industry that is carefully managing uncertainty while continuing to invest in fleet capacity, equipment productivity, and long-term operational readiness.

“Thank you to everyone who contributed to the 2026 State of the Mobile Compressed Air Industry Survey.

Your insights provide valuable industry intelligence that helps businesses understand emerging trends, benchmark performance, and make informed decisions for the future.”

- Tod Gilbert, President, VMAC



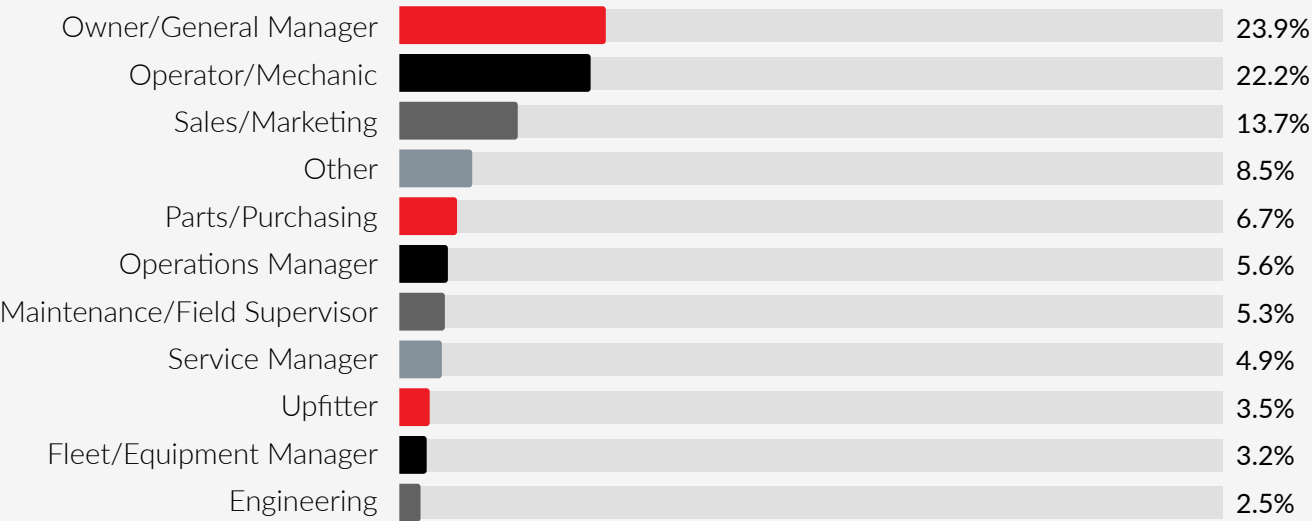


Methodology

The 2026 State of the Mobile Compressed Air Industry survey gathered responses from participants across North America representing equipment repair, construction, transportation, agriculture, mobile service, oil and gas, mining, up-fitting, forestry, utilities, and municipal infrastructure.

Equipment repair (50.7%) and construction (47.2%) represented the largest respondent groups, followed by transportation (36.3%) and agriculture (32.4%). The survey reflects input from industries that rely heavily on mobile compressed air and service vehicle operations.

Respondents



The 2026 respondent base reflects a broad operational perspective across the mobile compressed air industry. Owners and general managers accounted for 23.9% of respondents, followed by operators and mechanics at 22.2%. Sales and marketing represented 13.7% of responses, with additional participation from parts and purchasing personnel, operations management, maintenance supervisors, and service managers.

The results provide insight from both decision-makers and front-line personnel involved in purchasing, operating, specifying, and maintaining mobile compressed air systems.



EQUIPMENT REPAIR

50.7%



CONSTRUCTION

47.2%



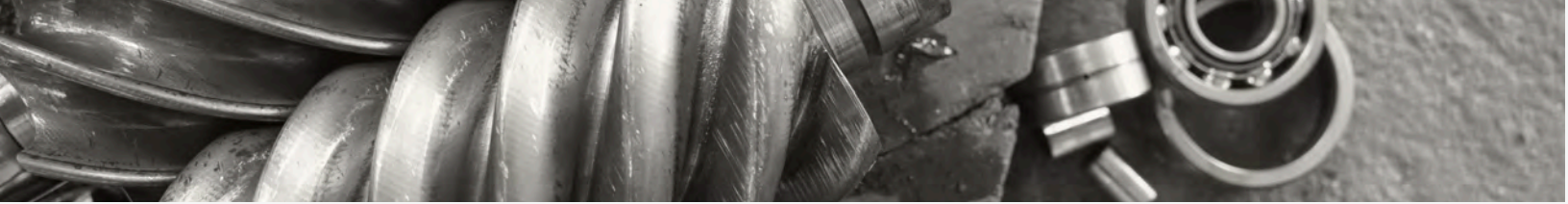
TRANSPORTATION

36.3%



AGRICULTURE

32.4%



Service Vehicles & Fleets

The 2026 survey confirms that service trucks and vans remain central to mobile operations across the industry.

More than 76% of respondents reported operating service trucks or vans within their fleet. Fleet expansion remains limited, with most companies maintaining existing fleet sizes rather than aggressively growing.

The data also shows a continued focus on fleet optimization and longer vehicle retention cycles. Most service vehicles fall within the 3-to-9-year range, reinforcing a balanced approach to equipment lifecycle management and capital investment.

Overall, the industry continues to prioritize reliable, field-proven service vehicle platforms capable of supporting mobile compressed air and pneumatic tool applications.



Fleet Size & Composition

In 2025, fleet growth had already plateaued, with most respondents indicating that fleet sizes and the number of service trucks and vans would remain consistent with 2024 levels.

The 2026 data confirms that this trend has held steady.

Fleet expansion remains limited, with the majority of companies maintaining existing fleet sizes rather than scaling up. This indicates that fleets have largely reached an operational equilibrium, where optimization of existing assets is prioritized over expansion.



Average Age of Service Vehicles



Average Age

32%

3-5 years

20%

6-9 years

18%

10-14 years

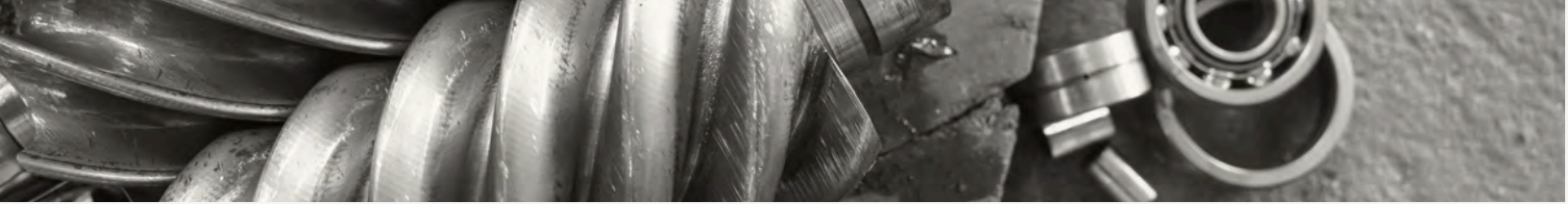
Service vehicle fleets remain relatively modern in 2026, although respondents are extending equipment life cycles.

The largest concentration of vehicles falls within the 3-to-5-year category at 31.8%, followed by 6 to 9 years at 20.1% and 10 to 14 years at 17.9%.

Only 14% of respondents reported fleets with vehicles under three years old, while older vehicles over 15 years represented a small portion of fleets.

When purchasing vehicles, 64.9% of respondents prefer buying new rather than used units, with dealers remaining the primary purchasing channel.

Businesses continue investing in modern fleets while balancing replacement cycles with long-term asset utilization.



Service Trucks In Fleet

The 2025 survey results established a clear baseline for fleet composition: the mobile compressed air industry is dominated by small fleets, with almost 3 out of 4 respondents operating between 1–5 service trucks (73%).

Mid-sized and larger fleets remain a smaller portion of the market, reinforcing the industry's reliance on lean, field-focused operations.

Fleet growth expectations also remain conservative. Nearly 60% of respondents expect service truck counts to remain unchanged, while 39% anticipate growth and only 2% expect reductions.

The findings indicate that companies continue to prioritize utilization and productivity from existing assets while maintaining stable fleet structures.



3 Out Of 4

Are operating
between 1-5
service trucks
in their fleet



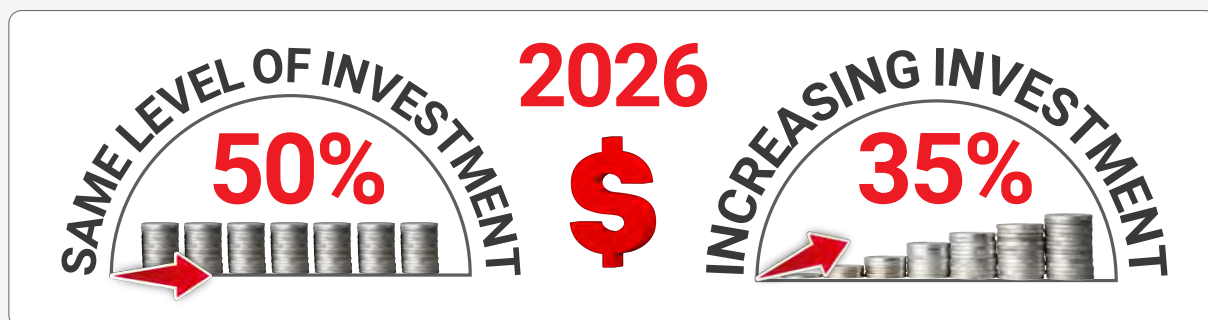
Fleet Growth Expectations

In 2025:

- » 67% of respondents planned to maintain fleet size
- » 33% expected growth

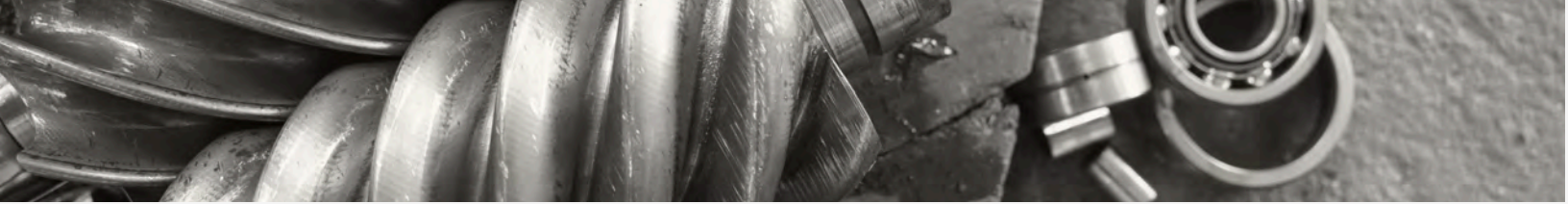
In 2026, this expected growth has not meaningfully materialized. Instead, the 2026 data shows:

- » 50% of companies plan to keep spending the same
- » Only 35% plan to increase spending



76% of businesses surveyed operate service trucks or vans, proving mobile workforces continue to drive demand for compressed air systems.





Service Vans in Fleet

Service vans continue to serve a secondary but stable role within the mobile compressed air industry.

Among respondents, 67% reported operating no service vans, while 26.8% operate fleets with 1 to 5 vans. Larger van fleets remain uncommon.

Fleet expectations also remain steady. More than 78% of respondents expect van counts to remain unchanged, while 20.7% anticipate increases.

The results reinforce that service trucks remain the dominant vehicle platform, while vans continue to support lighter-duty and application-specific service environments.

The 2026 data confirms that service van adoption has not materially changed.

Vans remain a secondary or situational vehicle choice rather than a core fleet standard. There is no indication of increased penetration or a shift away from truck-dominant fleets.

This reinforces a consistent industry structure:

- » Service trucks remain the primary platform
- » Vans are used selectively, based on application and environment
- » Vans are less suited for heavy-duty or multi-function builds
- » Vans are more common in urban or lighter-duty service environments



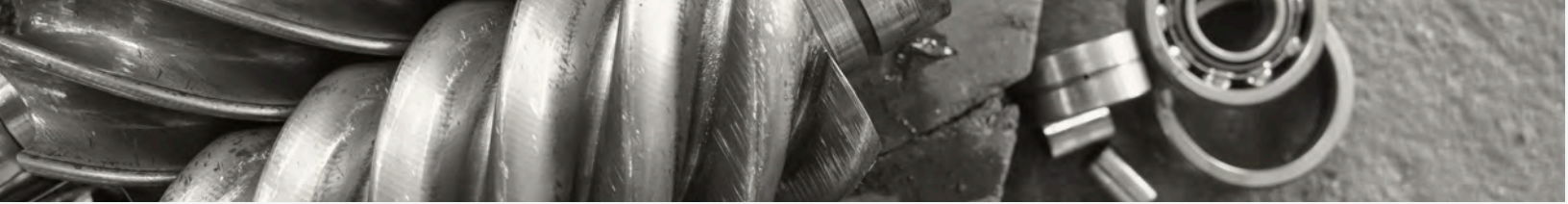
Continuous-duty rotary screw air compressors are designed to run all day without needing cool-down periods between tool use.



Expect Van Counts To Remain Unchanged



Of Respondents Do Not Operate Service Vans



Average Age of Service Vehicles

Service vehicle fleets remain relatively modern in 2026, although operators are extending equipment life cycles.

The largest concentration of vehicles falls within the 3-to-5-year category at 31.8%, followed by 6 to 9 years at 20.1% and 10 to 14 years at 17.9%.

Only 14% of respondents reported fleets with vehicles under three years old, while older vehicles over 15 years represented a small portion of fleets.

The data suggests that businesses continue investing in modern fleets while balancing replacement cycles with long-term asset utilization.

The 2025 findings showed a strong shift toward newer fleets, with 77% of service vehicles under 10 years old, driven largely by a spike in vehicles aged 3–5 years.

The 2026 data confirms that fleets remain relatively modern, but the trend toward newer vehicles has begun to level off. This suggests fleets are aging slightly, not due to neglect, but due to longer retention cycles.

The 2025 spike in newer vehicles, particularly in the 3–5-year range, is not being repeated in 2026.

Instead, fleets appear to be:

- » Holding onto mid-life vehicles longer
- » Delaying replacement timing
- » Maximizing value from existing assets



77% Of service vehicles are under 10 years old.

0-3 years

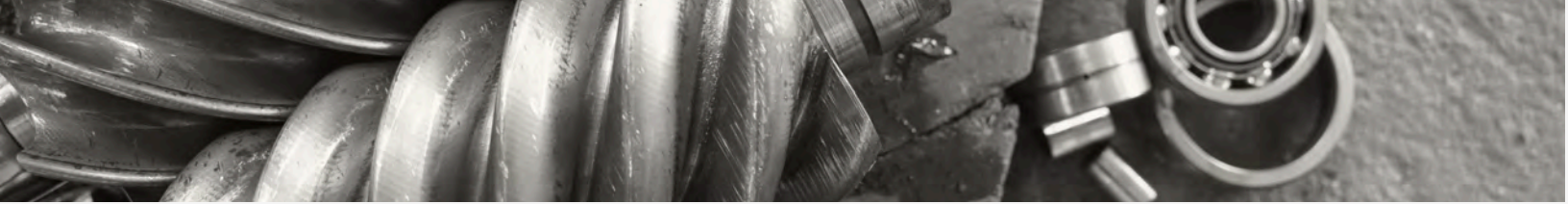
14%

3-5 years

31.8%

6-9 years

20.1%



Electric Vehicle Adoption

The 2026 survey results show continued hesitation toward electric service vehicle adoption.

The leading concerns include range limitations (66.7%), charging time (57.0%), charging infrastructure availability (55.3%), and cost (49.1%). Reliability concerns were also significant at 36.8%.

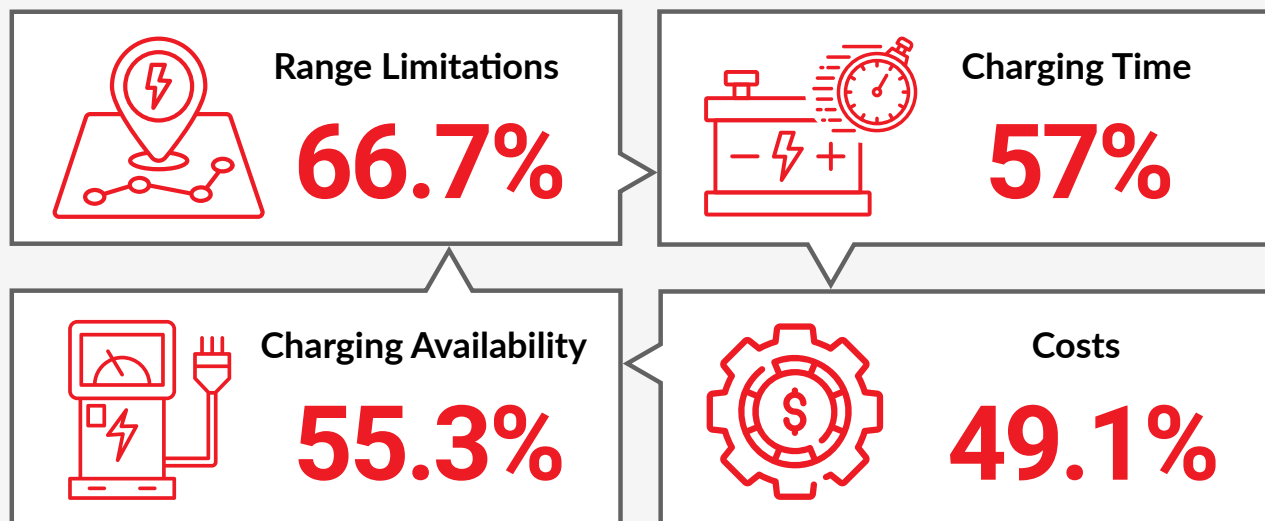
Operational challenges such as remote jobsite access, vehicle change resistance, and idling requirements continue to limit adoption across many applications.

Future purchasing plans also remain limited. Only 5.7% of respondents plan to purchase electric vehicles, while hybrid adoption remains similarly low.

The findings indicate that while interest in electrification exists, most fleets continue to prioritize proven diesel or gas vehicles for service applications.

The figures are largely unchanged in 2026 compared to 2025, the consistency across years signals that these are no longer perceived barriers, they are persistent operational constraints.

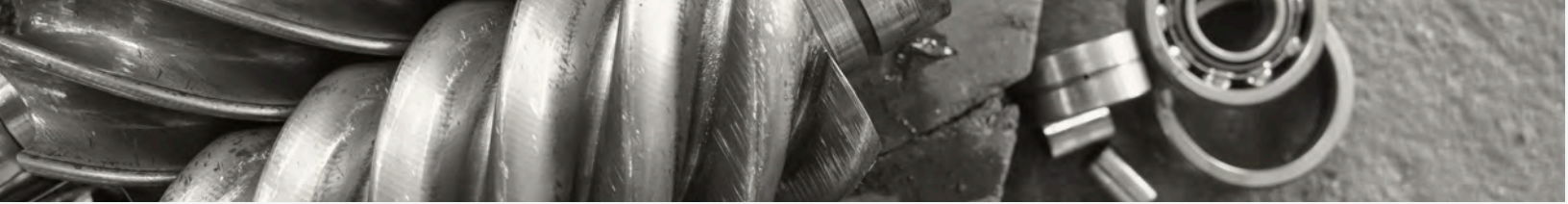
In 2025, concerns were broad and included skepticism around EV technology, politics, and performance. In 2026, qualitative responses show a shift toward limitations, including cold weather performance, remote jobsite access, and upfit compatibility challenges.



DID YOU KNOW?

Air compressors are commonly used in remote locations where electrical power may not be available or reliable.





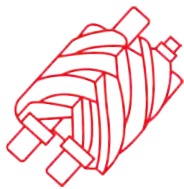
Air Compressors & Equipment

Air compressors remain foundational to service vehicle productivity in 2026.

More than 35% of respondents identified the air compressor as the single most important piece of equipment on a service vehicle, while 41.3% stated that all equipment is equally important within an integrated work setup.

Rotary screw compressors continue to dominate the market, with more than 72% of respondents preferring rotary screw technology over reciprocating compressors.

72%



*Prefer Rotary Screw
Air Compressors*

**Rotary Screw Air Compressors
Valued For:**

- Performance
- Quality
- Size
- Weight

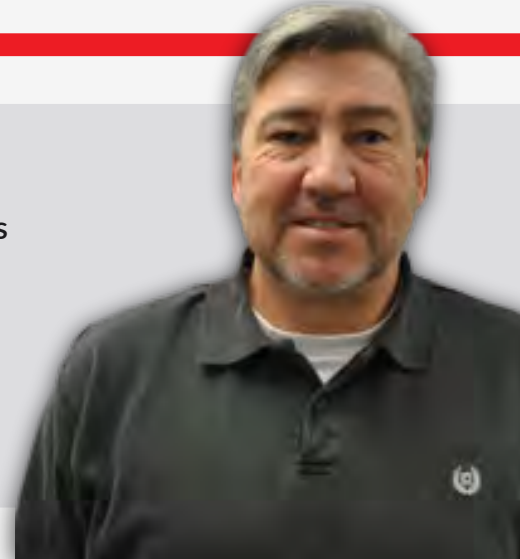


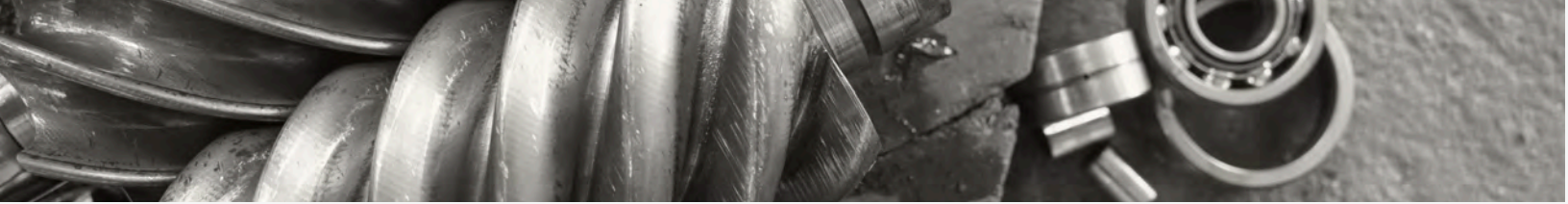
DID YOU KNOW?

Compressed air can power tools in harsh environments where electric tools may be unsafe due to moisture, dust, or explosive conditions.

“Compressed air remains fundamental to service truck productivity, whether it is viewed as the most important piece of equipment or as part of a fully integrated work system. These findings reinforce how strongly professionals depend on reliable compressed air to keep crews productive and equipment operating in the field.

- Randy Moon, Publisher, Modern Work Truck Solutions





Importance of Air Compressors on Service Vehicles

Air compressors continue to play a critical role across service fleets in 2026.

Among respondents, 35.2% identified the air compressor as the single most important piece of equipment on their service vehicle, ranking well ahead of multi-power systems, welders, cranes, and generators.

Air compressors have been essential service truck equipment for decades, and the 2026 results confirm their continued fleet-wide importance: 45.8% of respondents have compressors installed on every service truck, while another 11.2% have them on most vehicles in their fleet.

2026 data shows:

- » 46% of fleets have air compressors on every service truck
- » 11% of fleets have compressors on more than half their service trucks

From inflating tires to powering pneumatic tools, air compressors are critical for mobile operations.



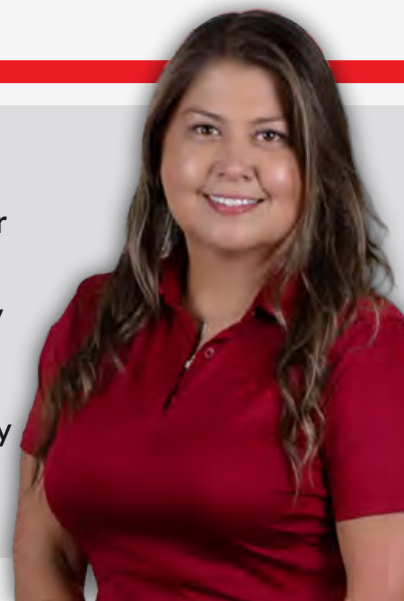
Have air compressors on every truck on every service truck in their fleet

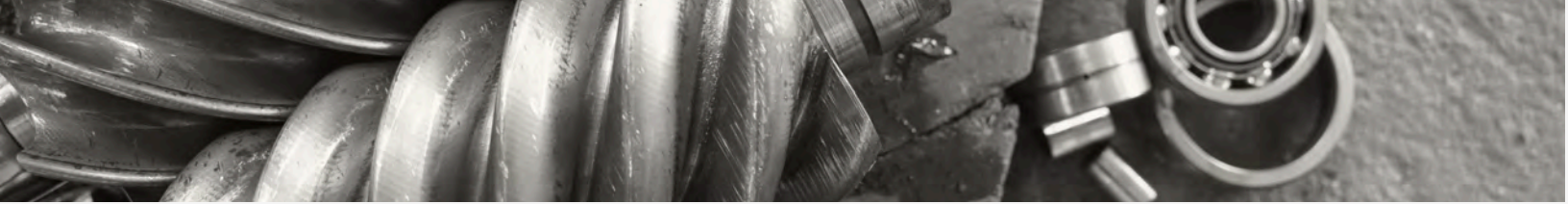


“What stands out in our build data is how broadly rotary screw compressors are being adopted. They are not limited to large national fleet programs. We also see strong demand from customers who purchase only 1 to 5 trucks per year.

For a small business, every service truck has to earn its place. One truck may support a significant share of the company’s field work, so uptime, efficient use of space, and dependable air delivery are critical. The continued preference for rotary screw technology reflects the value businesses of every size place on keeping technicians productive and work moving in the field.”

- Sondra Kirby, Marketing Manager, Summit Truck Equipment





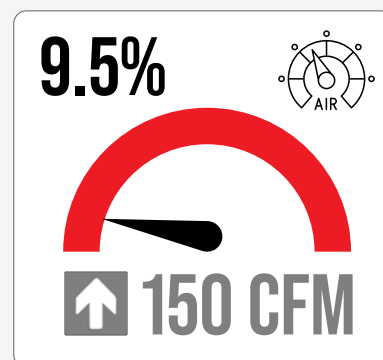
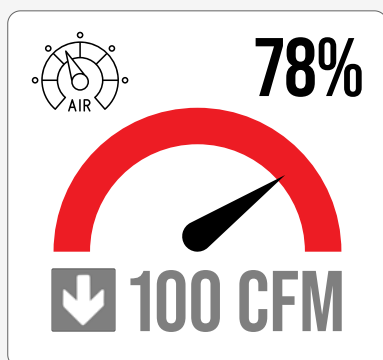
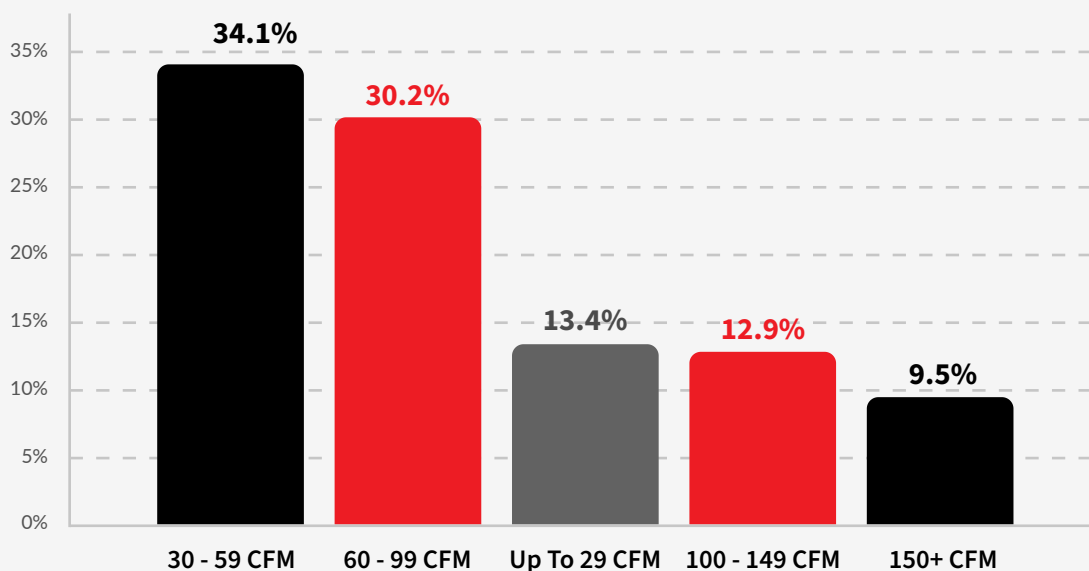
Air Demand Requirements on Service Vehicles

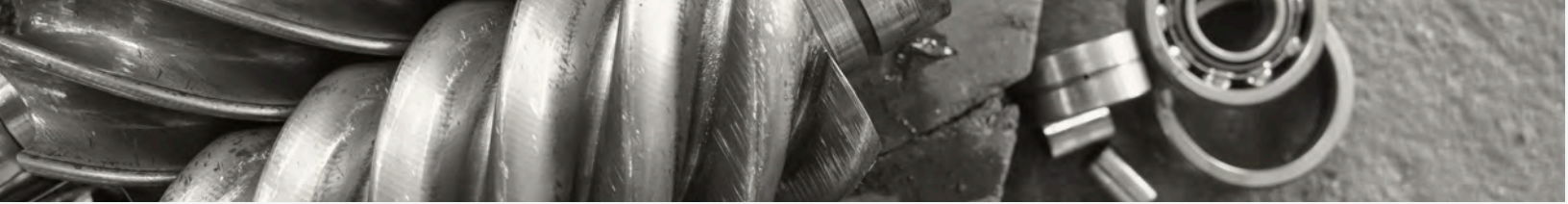
In 2026, more than 78% of respondents reported requiring less than 100 CFM, remaining largely consistent with the 79% recorded in 2025. These findings reinforced the industry's reliance on compact, efficient air systems capable of supporting common pneumatic tools.

Higher airflow applications remain more specialized, with only 9.5% of respondents requiring more than 150 CFM.

This more detailed distribution highlights that mid-range applications (30–99 CFM) represent a substantial share of real-world use, supporting tools such as impact wrenches, tire service equipment, and general pneumatic repair tools.

With results remaining similar to 2025, the 2026 findings suggest a continued emphasis on matching airflow requirements to specific applications rather than relying on guesswork about CFM needs.





Preference for Rotary Screw Compressors Strengthened in 2026

The 2026 survey results reinforce rotary screw air compressors as the clear industry standard, with more than 73% of respondents indicating a preference for rotary screw systems, compared to just 27% favoring reciprocating compressors.

When compared to 2025, this signals a continued move toward higher-performance air solutions across service vehicle applications.

Almost 3 out of 4 Air Users Prefer Rotary Screw Air Compressors

Rotary screw air compressor operators continue to prioritize:

- » Reliable performance in demanding job-site conditions
- » Continuous airflow without duty cycle limitations
- » Compact, vehicle-integrated designs that maximize space
- » Lower maintenance requirements over the life of the system

At the same time, the 27% preference for reciprocating compressors in 2026 highlights that cost-sensitive segments of the market still exist, particularly where lower upfront investment is a primary driver.



**3/4 Still Prefer
Rotary Screw
Air Compressors**

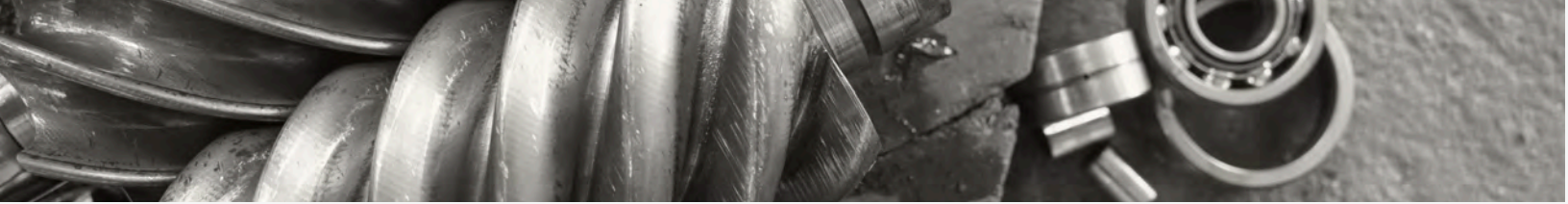
THE FAVORED CHOICE BECAUSE:

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



DID YOU KNOW?

Compressed air is often called the “fourth utility” after electricity, natural gas, and water because of how essential it is across industries.



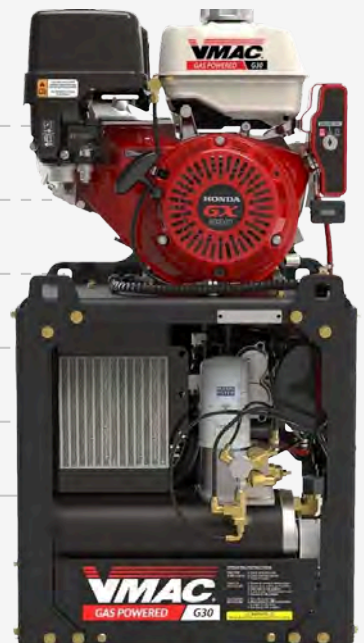
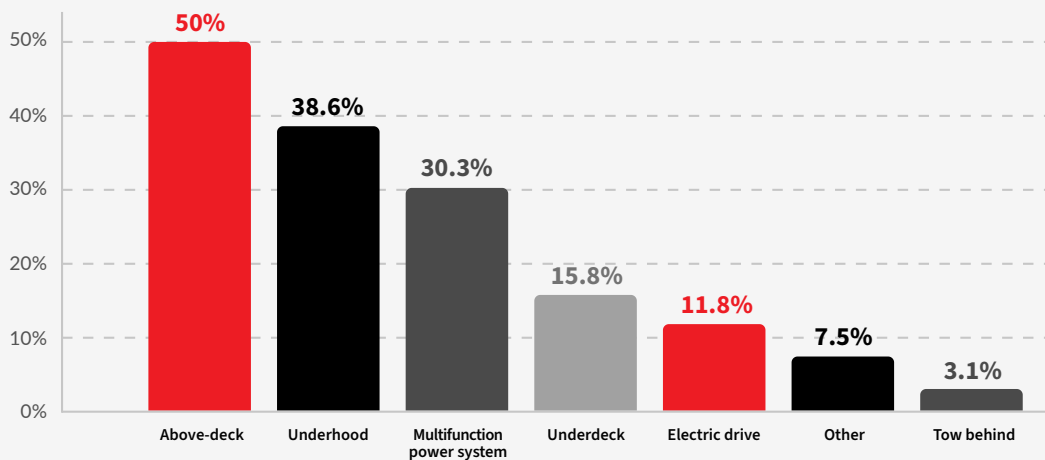
Gas-Driven Air Compressor Edges Out UNDERHOOD® as Most Preferred System

Integrated compressed air systems continue to dominate fleet preferences in 2026. Above-deck (gas/diesel/hydraulic) systems were the most preferred configuration at 50%, followed by UNDERHOOD® systems at 38.6% and multifunction power systems at 30.3%. Electric systems accounted for 11.8%.

In 2025, above-deck gas engine-driven systems led at 36%, followed by UNDERHOOD® at 32% and multifunction power systems at 20%. The market at that time reflected a relatively balanced mix between standalone power and integrated solutions.

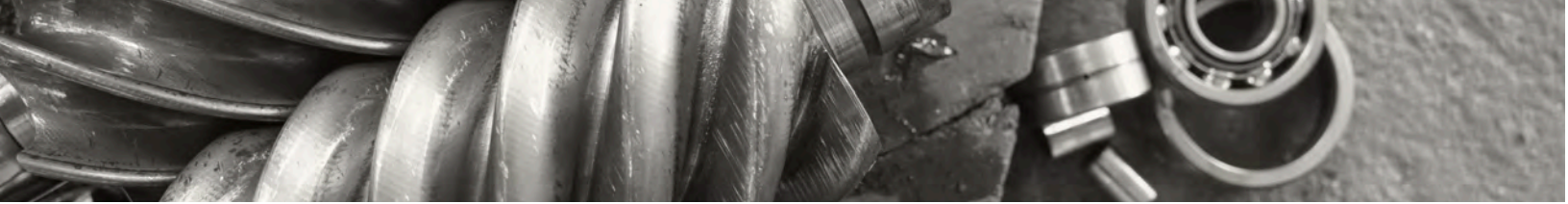
By 2026, that balance shifted decisively. The data points to a clear industry pivot toward integration, efficiency, and space optimization:

- » UNDERHOOD® growth signals continued demand for compact, engine-integrated systems, particularly in space-constrained or weight-sensitive applications.
- » Underdeck dominance reflects a strong shift toward PTO-driven setups that free up deck space while delivering continuous-duty performance.
- » Multifunction decline suggests that while versatility remains valued, fleets may be prioritizing dedicated, purpose-built systems over all-in-one configurations.



DID YOU KNOW?

Pneumatic tools powered by compressed air are often lighter than electric equivalents because they do not contain internal motors or batteries.



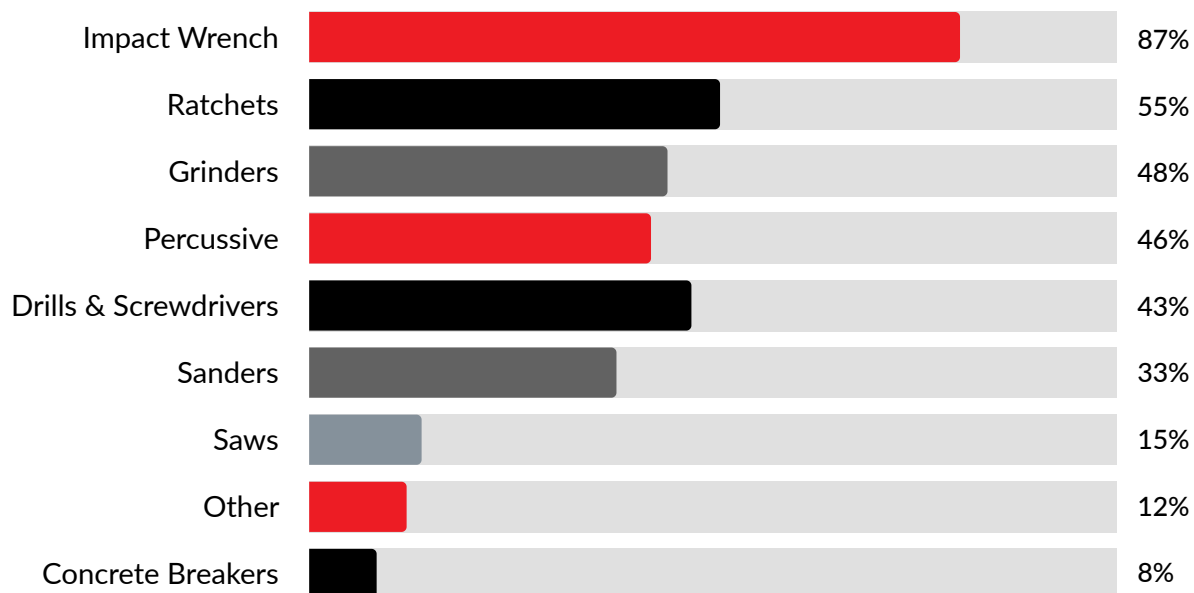
Impact Wrenches Hold the Top Spot as Tool Usage Remains Stable in 2026

Pneumatic tool usage remains strong and consistent across the mobile service industry.

Among pneumatic-specific tools, impact wrenches led at 86.0%, followed by ratchets (54.8%), grinders (47.8%), and percussive tools (45.7%).

The continued reliance on pneumatic tools reinforces the importance of dependable mobile compressed air systems capable of supporting high daily usage and demanding field conditions.

Most Used Pneumatic Tools



Most Popular Air Tools



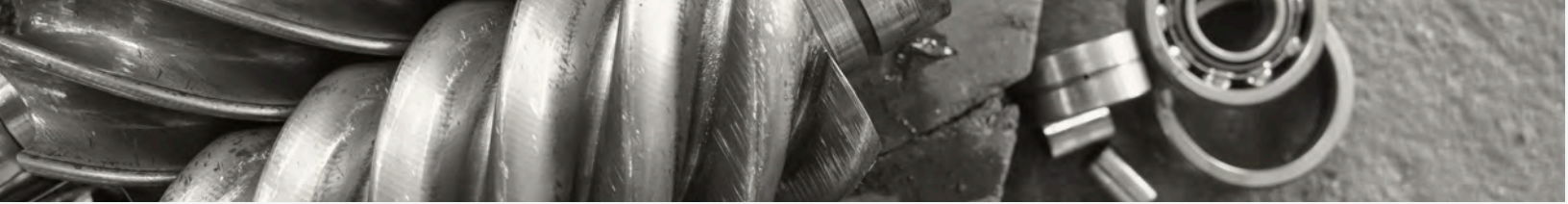
86%



55%



48%



Industry Still Split on Battery Tools, But Momentum Is Building

The industry remains divided on the long-term replacement of air tools with battery-powered alternatives.

Nearly one-third of respondents (30.3%) believe battery tools are likely to replace air tools, while 15.4% consider it very likely. At the same time, 33.4% remain neutral on the issue.

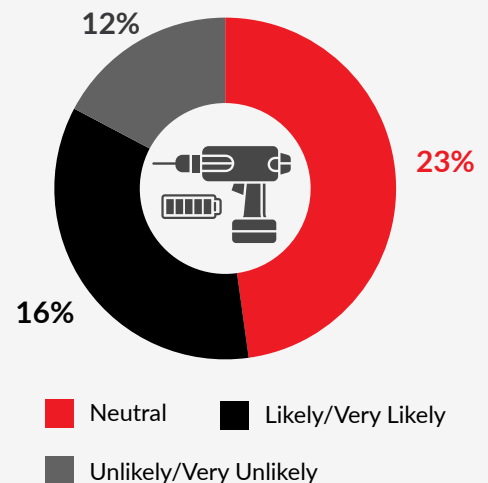
Only 16.5% viewed battery replacement as unlikely or very unlikely.

The findings suggest that battery-powered tools continue gaining acceptance, although compressed air remains deeply integrated into many professional service applications.

The 2025 results showed a divided outlook on battery-powered tools replacing air tools, with 39% viewing it as likely and 28% remaining neutral, reflecting cautious interest.

In 2026, sentiment shifted more noticeably:

- » Likely / Very Likely: increased to 45.7% (from 39%)
- » Neutral: increased to 33.4% (from 28%)
- » Unlikely / Very Unlikely: dropped to 16.5% (from 26%)



“Modern battery-powered tools give mobile service teams more flexibility without asking them to sacrifice valuable truck or van space. As battery capacity and tool performance continue to improve, technicians – whether in the shop, on a jobsite, or in the field – can handle the demands of work while freeing up space for newer tools, parts, or simply a more workable service environment.”

- Kevin Linger, Managing Editor & Producer, Fleet Equipment Magazine





Labor Shortages Decline as Economy Concerns Rise for Businesses

Economic conditions are the leading concern for businesses entering 2026. More than 60% of respondents identified the economy as their primary concern over the next 12 months. Labor ranked second at 37.3%, followed by supply chain challenges (32.5%) and tariffs (30.3%).

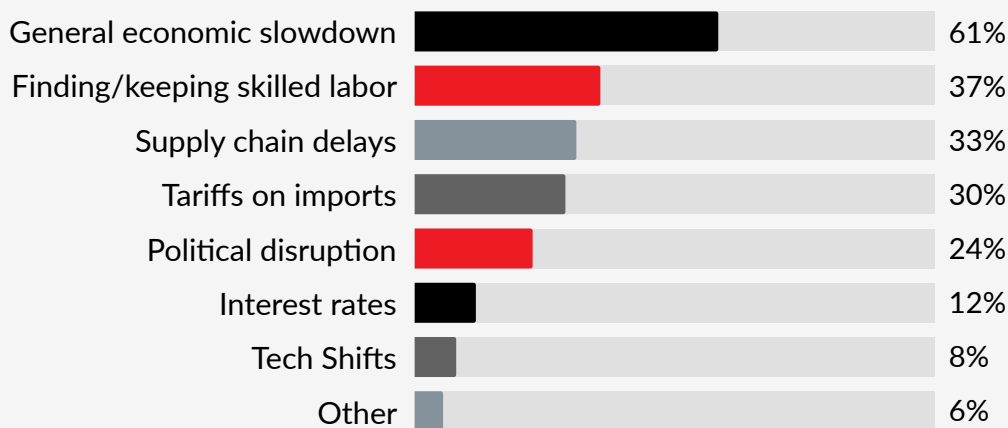
Politics (23.7%), interest rates (12.3%), and technology shifts (8.3%) were lower-ranked concerns.

The results indicate that businesses remain focused on economic uncertainty, cost management, and maintaining operational stability while navigating changing market conditions.

In 2025, the leading business concerns were finding and keeping skilled labor (58%), tariffs on imports (49%), and general economic slowdown (48%). Supply chain delays (36%), political disruption (32%), and rising interest rates (29%) followed, while geopolitical risks (16%) and technology shifts (12%) ranked lower. More than 80% of respondents still believed conditions would improve or hold steady over the next 12 months.

The 2026 results show a clear shift from a labor concerns to economic concerns.

Key Issues Impacting Business Operations Over The Next 12 months:

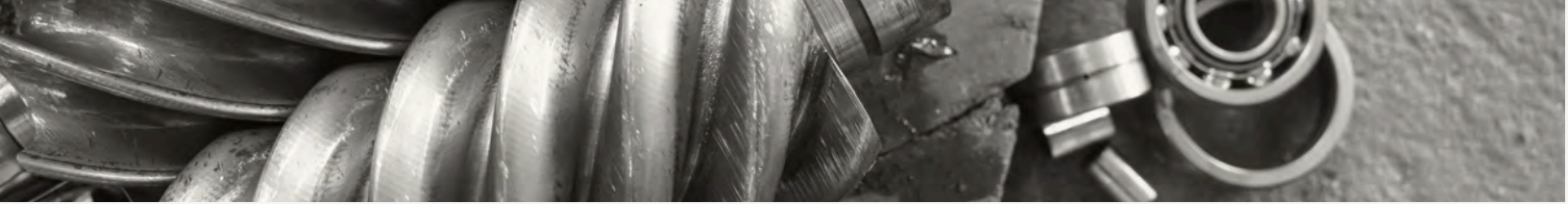


**ECONOMIC
SLOWDOWN**



**UP
13%
FROM 2025**





Labor Shortages Improve as Businesses Brace for Challenges

Labor shortages remain a concern across the industry, although workforce pressures have moderated compared to previous years.

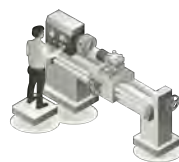
In 2026, 37.3% of respondents identified labor as a key business concern, placing it behind broader economic conditions.

Labor shortages remained a central concern in 2025, with 58% of respondents identifying recruitment and retention of skilled workers as their most significant challenge. While this marked an improvement from 72% in 2024, labor constraints still dominated the conversation, impacting productivity, service delivery, and long-term planning across the industry.

By 2026, that pressure eased considerably. The percentage of respondents citing labor as a key issue dropped, representing a meaningful shift in business priorities. Rather than leading the list of concerns, labor moved into a secondary position as broader economic factors began to take precedence.

This change signals a transition in the industry. Labor shortages have not been resolved, but they are no longer the defining constraint they were in previous years. Instead, businesses appear to be stabilizing their workforce challenges while turning their attention toward navigating economic uncertainty and external market pressures.

37% concerned about recruitment & retention of skilled labor.

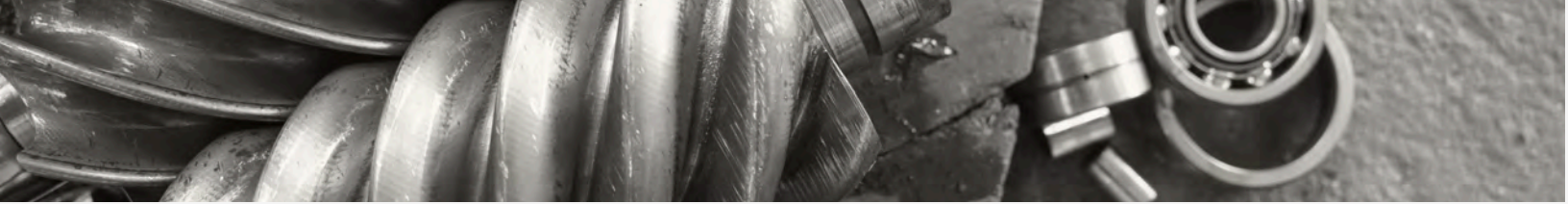


DOWN
21%
FROM 2025

“The easing of labor shortages is an encouraging sign for service truck and van businesses, providing greater stability for recruitment, training, and workforce development. While economic and market pressures remain, companies that continue investing in skilled people, efficient equipment, and adaptable fleet strategies will be well positioned for long-term growth.”

- Rob Beukema, President, Work Truck West





Economic Uncertainty and Trade Pressures Arise

Economic uncertainty continues to shape business decision-making across the mobile compressed air industry in 2026.

More than 60% of respondents identified the economy as their primary concern, making it the most significant issue facing businesses over the next year.

This shift indicates that the industry's focus has moved from a mix of external risks to a more concentrated concern around overall economic conditions. In 2025, businesses were reacting to multiple overlapping pressures, particularly trade and policy-related challenges. In 2026, the broader economy is now shaping decision-making more than any single external factor. Companies are still operating cautiously, but the concern is less about isolated disruptions and more about sustained economic headwinds impacting demand, investment, and growth.

KEY ISSUES IMPACTING BUSINESS OVER THE NEXT 12 MONTHS:

70%

**ECONOMIC
DOWNTURN**



37%

**LABOR
ACCESSIBILITY**



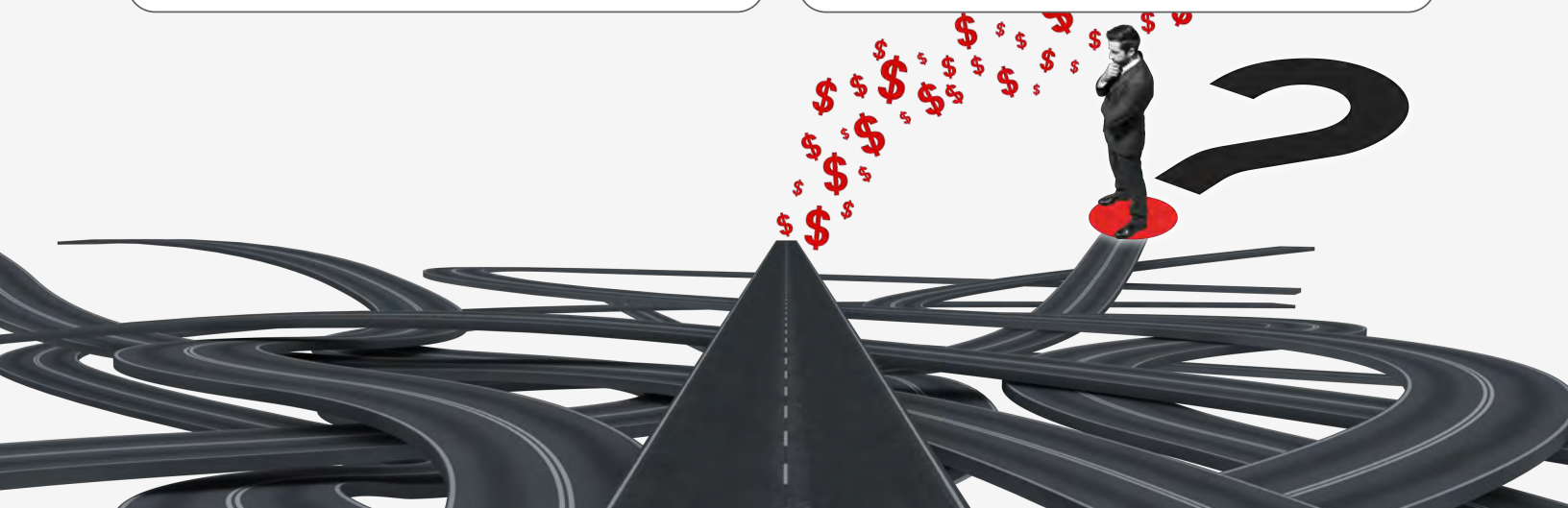
32%

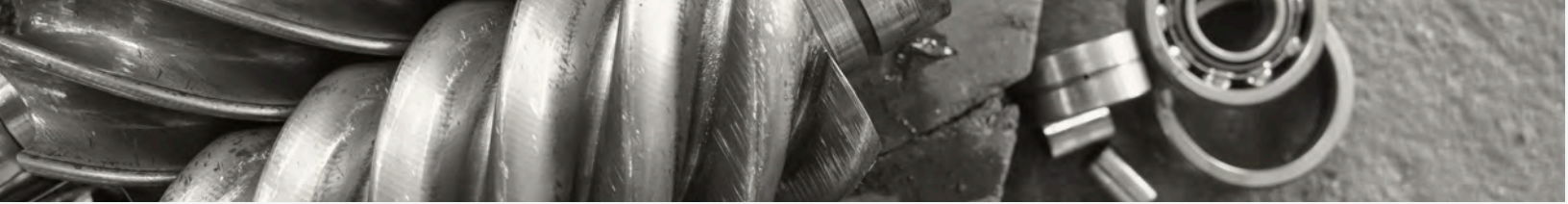
**SUPPLY CHAIN
ACCESSIBILITY**



30%

**TARIFFS ON
IMPORTS**





Business Outlook for Next 12 Months

In 2025, the industry demonstrated strong resilience despite ongoing pressures, with 82% of respondents expressing a positive outlook, including 41% expecting conditions to improve and 41% anticipating stability, while only 18% believed conditions would worsen. This reflected a balanced but confident mindset, where businesses acknowledged challenges such as labor shortages and supply chain disruptions but remained optimistic about their ability to adapt and grow.

In 2026, that cautious optimism remains firmly in place, but the drivers behind it have shifted. While most respondents still expect conditions to improve or remain stable, other forward-looking indicators suggest a more measured stance. For example, 51.3% of businesses expect spending to remain the same, 38.6% expect increases, and 10.1% anticipate reductions, indicating that companies are holding steady rather than aggressively expanding.

This comparison highlights a subtle but important evolution. In 2025, optimism was driven by confidence in overcoming operational challenges through innovation and efficiency. In 2026, optimism persists, but it is more conservative and grounded in stability. Businesses are still confident in the industry's resilience, but they are increasingly prioritizing controlled spending and steady performance as they navigate broader economic uncertainty.

90%
**POSITIVE
OUTLOOK**



38.6%

**Expecting Improved
Conditions**

51.3%

**Anticipating
Stability**



DID YOU KNOW?

Rotary screw air compressors provide 100% duty cycle performance, meaning operators can run tools continuously without stopping for recovery time.



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.

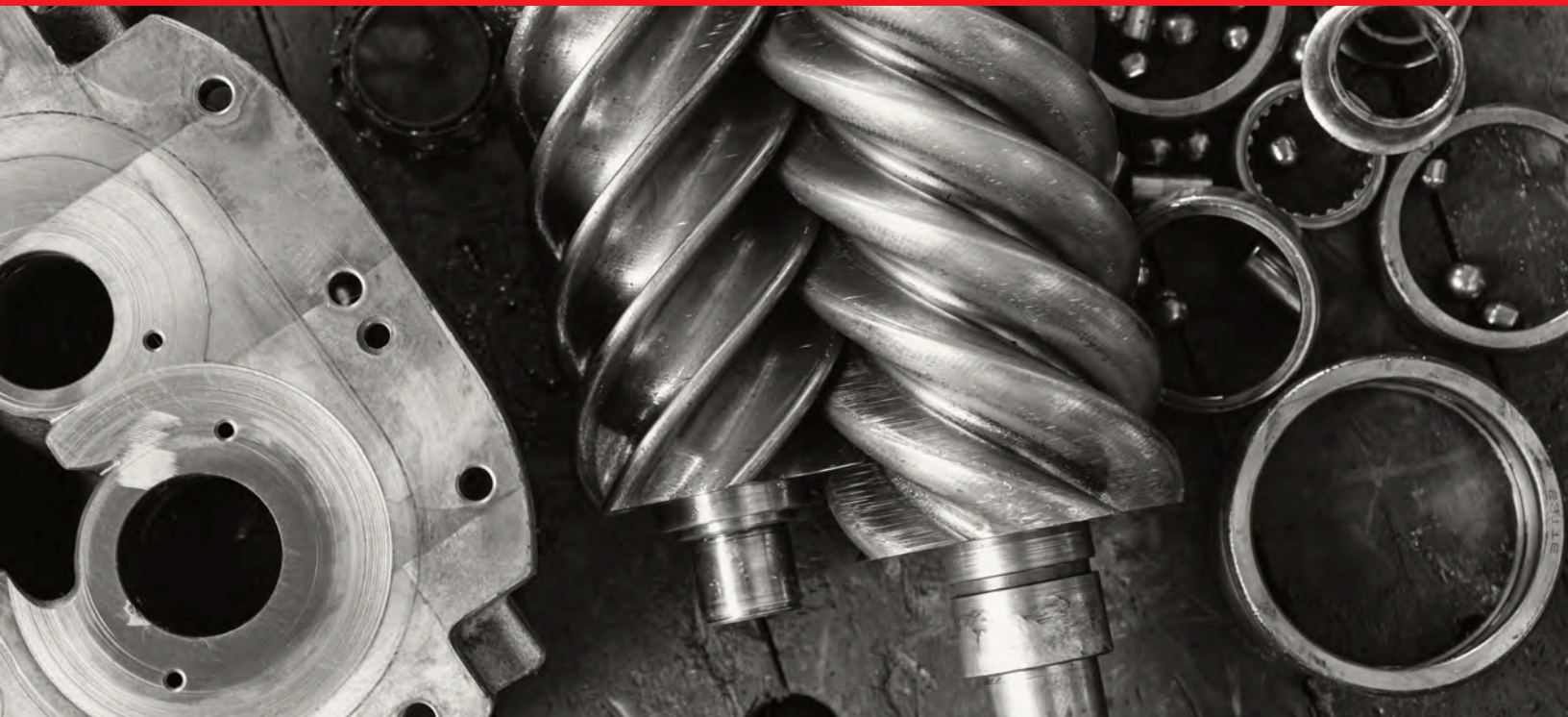
Thank you for your candid feedback and continued partnership. As well, congratulations to Peter Chapman of California, who was our 2026 survey draw winner!



***Congratulations to
Peter Chapman
who was our 2026
State of the Mobile
Compressed Air Industry
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. Visit our website: vmacair.com.



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