



# State Of The Mobile Compressed Air Industry Report

*Survey Results 2024*

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# Why We Create This Report

Since its inception in 2020, VMAC's State Of The Mobile Compressed Air Industry Report has offered a comprehensive benchmarking tool for businesses utilizing mobile compressed air, enabling you to compare yourself and your business against peers in various industries.

The report tracks industry challenges and trends in fleets, general equipment, and air compressors. In doing so, it has generated a significant following and the report results are circulated within businesses, shared by experts, and featured in online and print publications.

Over its multi-year span, the survey has adapted to reflect the changing industry environment. In the 2021 report, we focused on the COVID-19 pandemic, but the report has since evolved to address the truck chassis delays, global supply chain disruptions, rising interest rates, and labor shortages.

Despite significant challenges, the work truck industry remains resilient, and our data shows that while challenges still exist, business is expected to be less tumultuous than in recent years.

By gathering insights from you, the hard-working professionals putting in the work, VMAC aims to provide up-to-date data and analyses to help you make decisions that allow your business to succeed and grow.

## Methodology & Participants

VMAC surveyed 271 people between December 2023 and March 2024. Each participant spent an average of 7 minutes answering 31 questions and submitted answers to an online survey to share their perspective on the state of the industry.

Compressed air unites businesses from numerous industries, including equipment repair, construction, agriculture, transportation, service truck upfitting, oil & gas, mobile tire service, landscaping, municipal and utilities infrastructure, forestry, and mining.

Regardless of their job titles and industries, the need for mobile compressed air keeps people connected.



# SURVEY RESPONDENTS

VMAC surveyed 271 professionals in the mobile compressed air industry survey, asking respondents to identify their job title/function and the industries they work in:

- » Owners and operators/mechanics represent 59% of respondents
- » Equipment repair and construction work are the most represented industries, followed by agriculture



"Thank you to everyone who contributes to this report; your input is critical to ensuring the teams working at equipment manufacturers are providing solutions that meet industry needs.

As you'll see in the report, the past few years have brought uncertainty in the market, making it difficult for businesses to plan. However, the service truck industry continues to provide critical services to power the projects that provide shelter, food, energy, and transportation to our communities.

As our industries persevere through the economic, supply chain, and political uncertainties while navigating new technology, we remain united in getting the right tools in the right hands to keep those critical projects and services running."

***Tod Gilbert**  
President, VMAC Global Technology Inc.*



# Owners And Operators/Mechanics Represent 59% Of Respondents

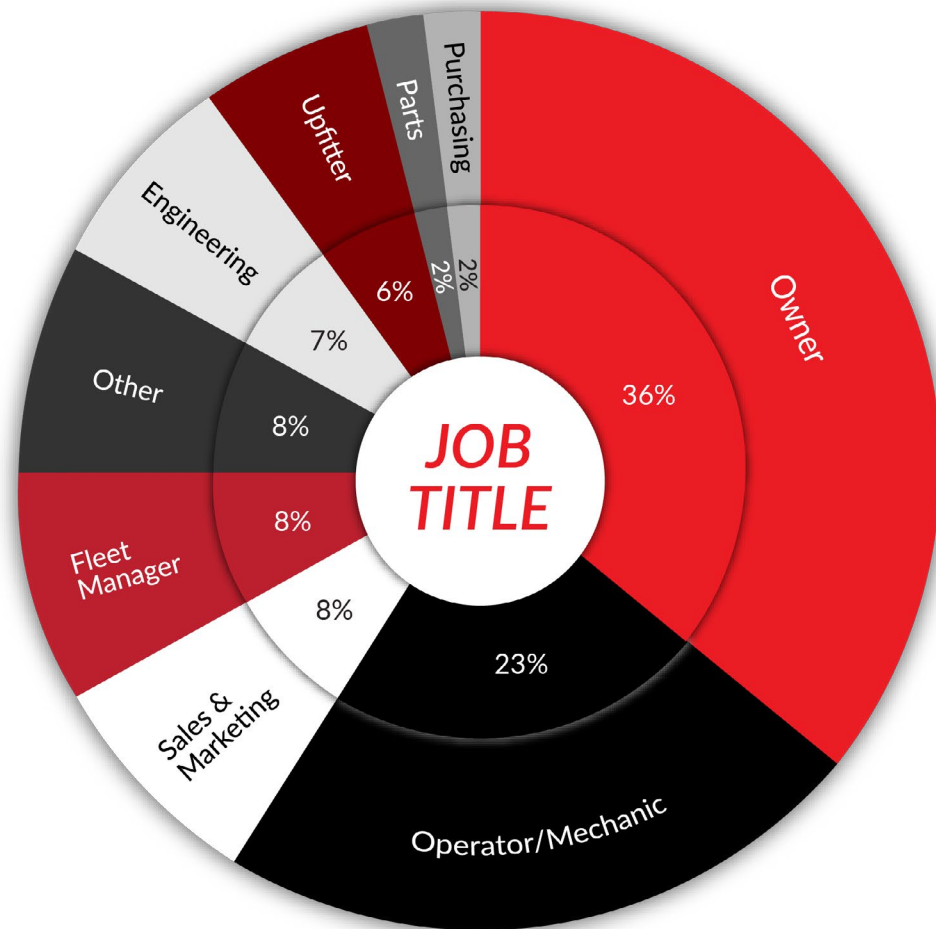
The 2024 survey respondents were asked to identify their current job title, and over half of respondents (59%) identified themselves as owners and operators/mechanics. This sample is almost identical to the 2023 and 2022 surveys, when this group represented 62% of respondents both years.

This year, owners accounted for 36% of respondents, while operators and mechanics represented almost a quarter of those surveyed at 23%.

Other respondents included sales and marketing staff (8%), fleet managers (8%), people in engineering (7%), and upfitters (6%). Those in parts and purchasing departments each represented 2% of respondents.

The “other” category included people in management positions, including general managers, service managers, operations managers, shop managers, and maintenance and field supervisors.

Q | Select the job title/function that best describes you:



# Equipment Repair And Construction Continue To Be The Top Industries Represented

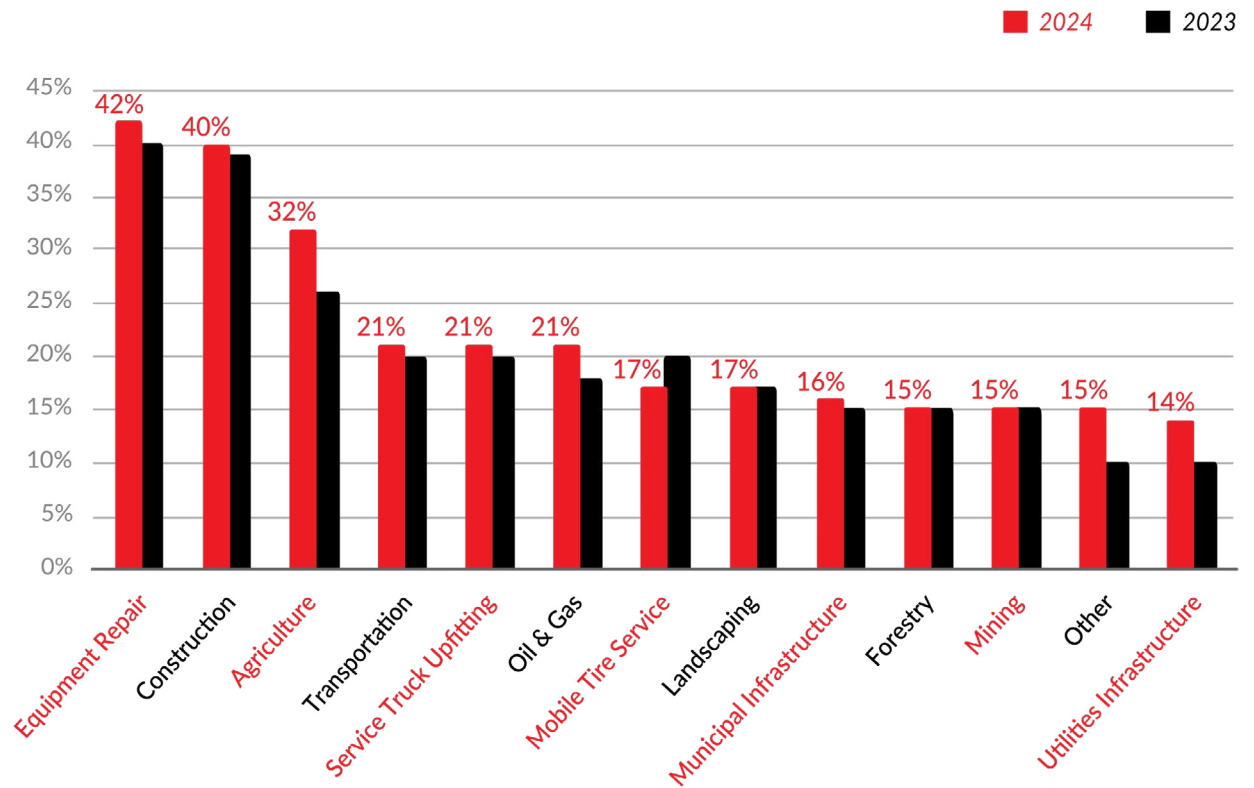
The top industries represented in the survey are equipment repair at 42% and construction at 40%.

The most significant shift in respondents came from the agriculture industry, which grew from 1 in 4 in 2023 to 1 in 3 in 2024.

The representation of other industries remained steady, with transportation, service truck upfitting, and oil & gas each being served by 21% of respondents.

The least represented industries continue to be mining (15%) and utilities infrastructure (14%).

Q | What industry do you serve? Check all that apply:



# SERVICE VEHICLES & FLEETS

Fleets within the mobile compressed air industry appear to be recovering from some supply chain and chassis shortage challenges, as fleets return to age brackets seen in past years.

- » Most service vehicles are under 10 years of age
- » Service vans continue to provide value to fleets
- » EV concerns remain a roadblock to the future



"Cautiously navigating the evolving landscape of the mobile compressed air industry, fleet managers prioritize operational efficiency while grappling with the looming specter of electrification.

With service vans continuing to provide invaluable support, the industry is also cautiously exploring opportunities in the electric vehicle market. As concerns over range, charging infrastructure, and costs persist, fleet managers are adopting a nuanced approach, balancing innovation with practicality. In this resilient industry, the path forward lies in a delicate balance between embracing change and mitigating risks.

Additionally, the notable spike in the 6-9 year age segment in last year's survey data, potentially attributed to chassis supply issues, underscores the challenges of maintaining fleet age amidst external disruptions."

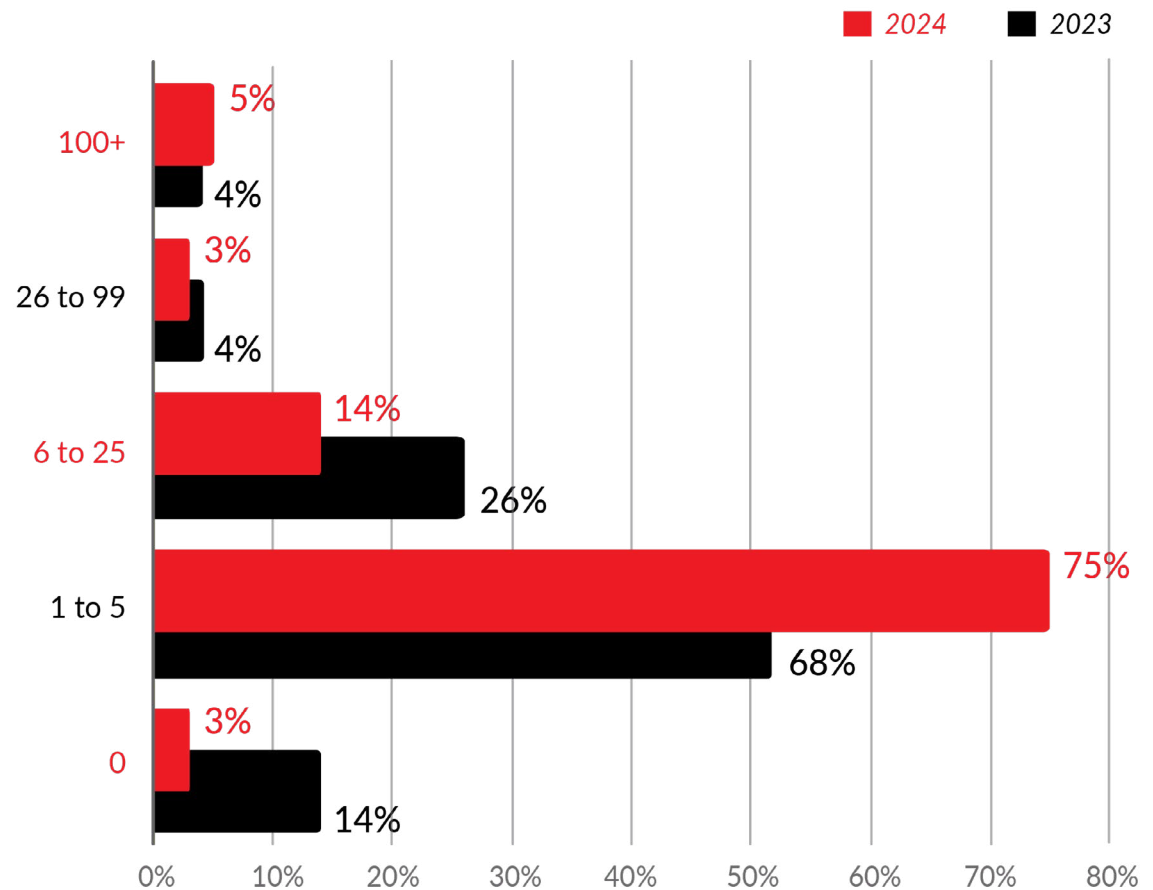
**LAUREN FLETCHER**  
*VP of Content | Bobit*

# Three Out Of Four Survey Respondents Have 1-5 Service Trucks In Their Fleet

Three-quarters of survey respondents (75%) have 1-5 service trucks in their fleet, while another 14% have 6-25 service trucks. Only a small percentage of respondents have larger truck fleets.

The few survey respondents who indicated zero service trucks in their fleets utilize service vans instead.

## Q | How many service trucks do you have in your fleet?





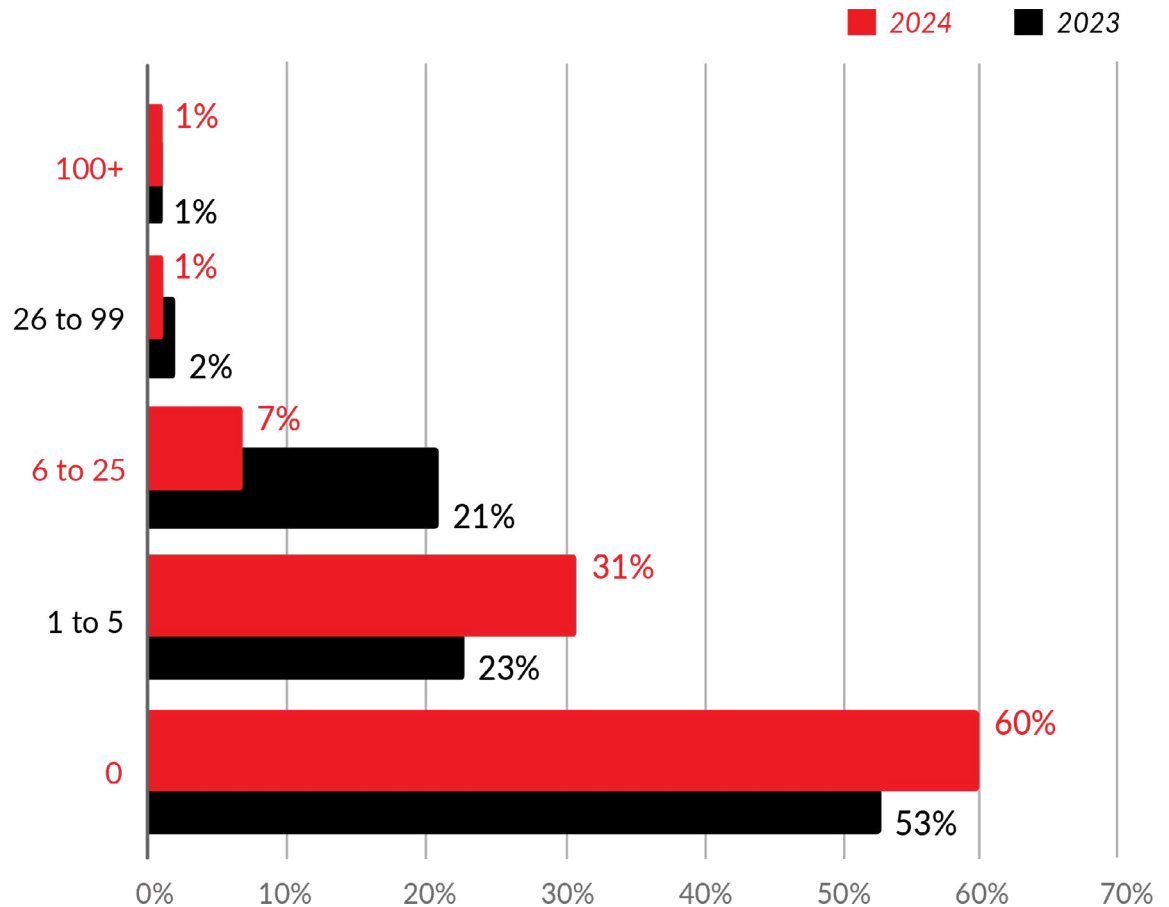
# Service Vans Decline In Popularity With Small Fleets

While a significant number of survey respondents have service vans within their fleet (40%), it is a notable decline from the 47% who had service vans in last year's survey.

Larger fleets with 5-25 service trucks are most likely to have vans within their fleet, although fleets of all sizes utilize service vans.

Of those who already have vans, nearly half (47%) expect the number of service vans in their fleet to increase, and only 2% anticipate a decrease, suggesting that operators continue to find immense value in these vehicles.

## Q | How many service vans do you have in your fleet?



# Two Out Of Three Service Vehicles Are Under 10 Years Of Age

Two-thirds of survey respondents (69%) stated their average age of service vehicles is 0-9 years old, while another 18% indicated their fleet vehicles are typically 10-14 years old.

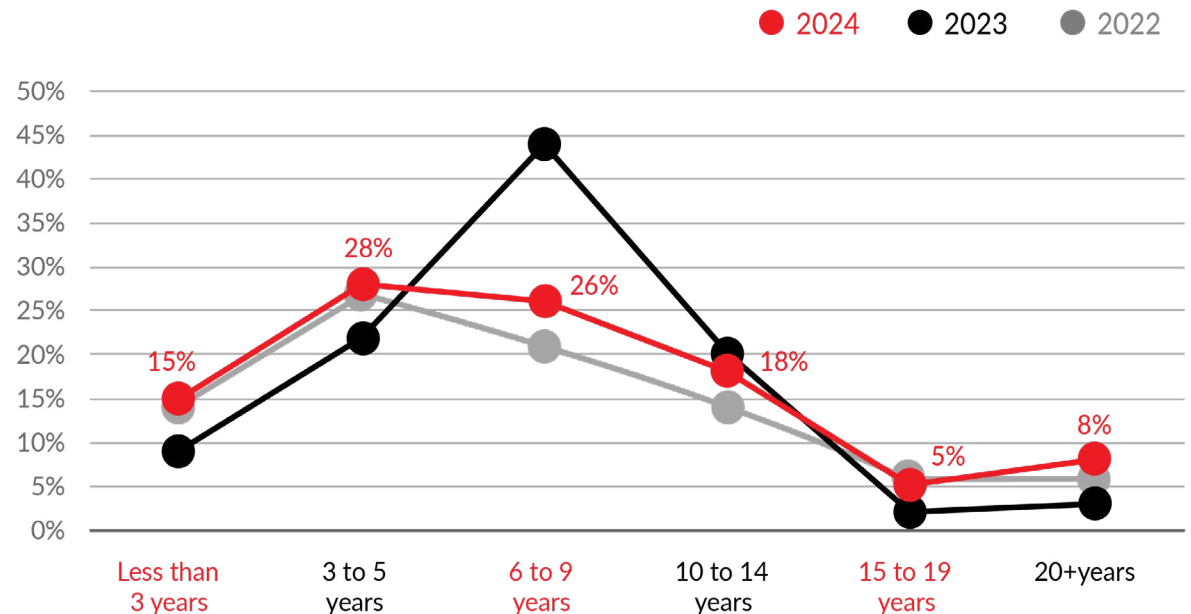
The remaining 13% of respondents' service vehicles are over 15 years old. This answer was typically chosen by respondents with 1-5 service trucks in their fleet, indicating that single-vehicle and small fleets are the least likely to replace trucks regularly.

This conclusion is further supported by the answers of fleets with 6+ vehicles, as 86% of these respondents have an average vehicle age within the 0-9 year segments.

There was a prominent spike in the 6-9 year segment in last year's survey data, temporarily breaking the smoother data trend seen in all other years. It is possible this spike in age segment was due to chassis supply issues, which made it temporarily difficult to replace vehicles on their typical schedule.



## Q | What is the average age of the service vehicles in your fleet?



# Many Concerns Remain With Switching To Electric Service Vehicles

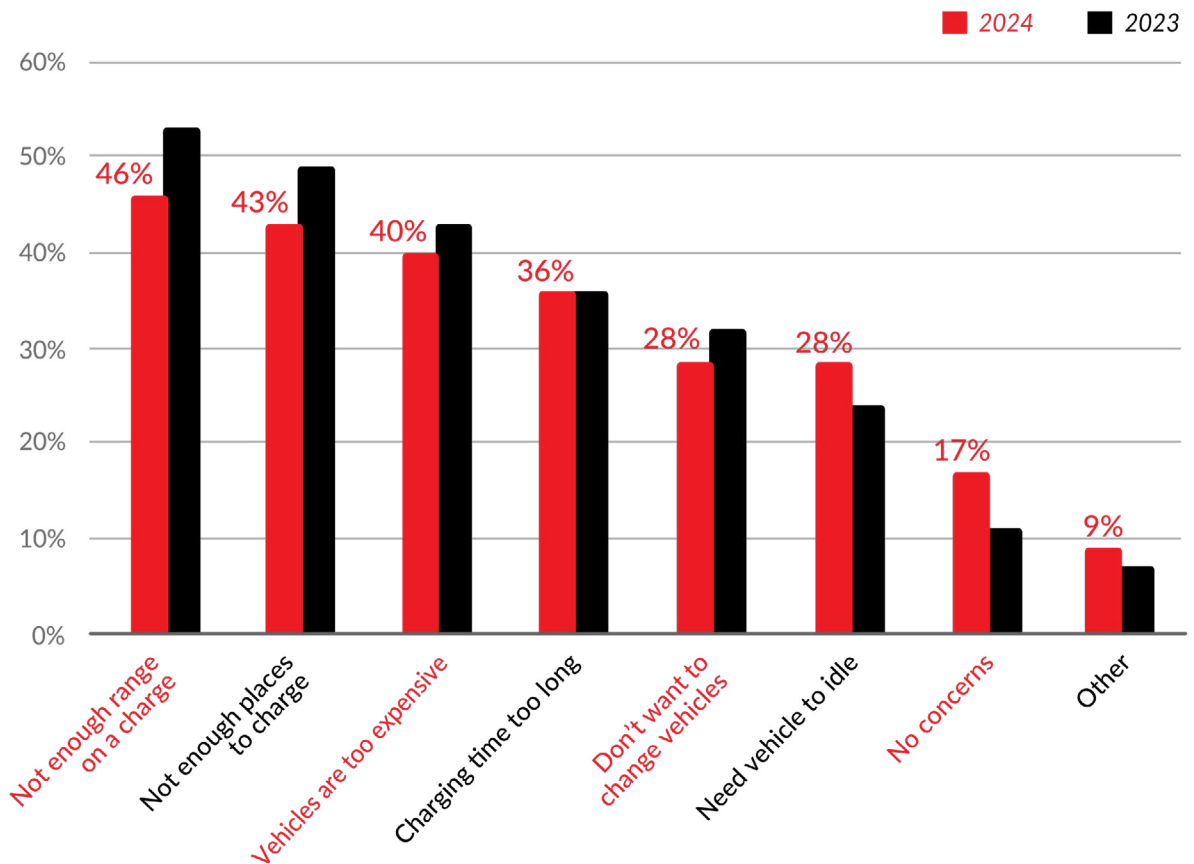
When asked to imagine an electric future, many survey respondents suggest they still have concerns. The top concerns relayed are not enough range on a charge (46%), not enough places to charge (43%), and vehicles are too expensive (40%).

Respondents' concerns also include lengthy charge times (36%), not wanting to change vehicles (28%), and the need for vehicles to idle (28%).

Comments within the "other" response share a range of additional EV concerns, including political motives, cold climate concerns, quality concerns, and general distrust of the technology.

While only 17% of respondents do not have concerns about switching to an EV service vehicle, this is a notable increase from the 11% without concerns last year, suggesting EV concerns may be diminishing over time.

**Q | Do you have any concerns about switching to an EV service vehicle in the future? Check all that apply.**



# AIR COMPRESSORS & EQUIPMENT

Air compressors remain vital across numerous industries and are a crucial piece of equipment on most service vehicles. Respondents in this year's survey demonstrated a strong preference for rotary screw technology, especially UNDERHOOD® and gas driven air compressors.

- » Air compressors are the #1 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
- » UNDERHOOD air compressors are the most desired system



"Comparing Summit Truck Bodies' data with the insights from VMAC's 2024 survey results, we've observed some compelling trends. Notably, 58% of Summit customers specifying out a service or lube truck request to include an air compressor, and 73% of these requests are for a rotary screw compressor rather than a reciprocating compressor.

Looking at CFM, 40 CFM rotary screw air compressors are the most popular model, accounting for 81% of all air compressor sales. Our customers consistently choose rotary screw air compressors for their reliability, smaller size, and lighter weight compared to other above-deck air compressors. These preferences align with VMAC's survey findings, highlighting the market's ongoing demand for efficient, high-performance air compressor solutions."

**Sondra Kirby**  
*Marketing Manager, Summit Truck Equipment*



"Air compressors are crucial across multiple industries, especially on service vehicles. Our customers prefer rotary screw air compressors for their superior performance, quality, and optimal size and weight, aligning with VMAC's survey data.

VMAC's survey data shows UNDERHOOD and gas-driven air compressors as top choices, underscoring the industry's need for lightweight, compact, and reliable solutions. At Work Truck West, we see strong interest in UNDERHOOD and Direct-Transmission Mounted PTO-driven air compressors, as customers seek space and weight savings on their trucks, while valuing reduced maintenance and increased productivity on job sites."

**Rob Beukema**  
*Vice President, Work Truck West*

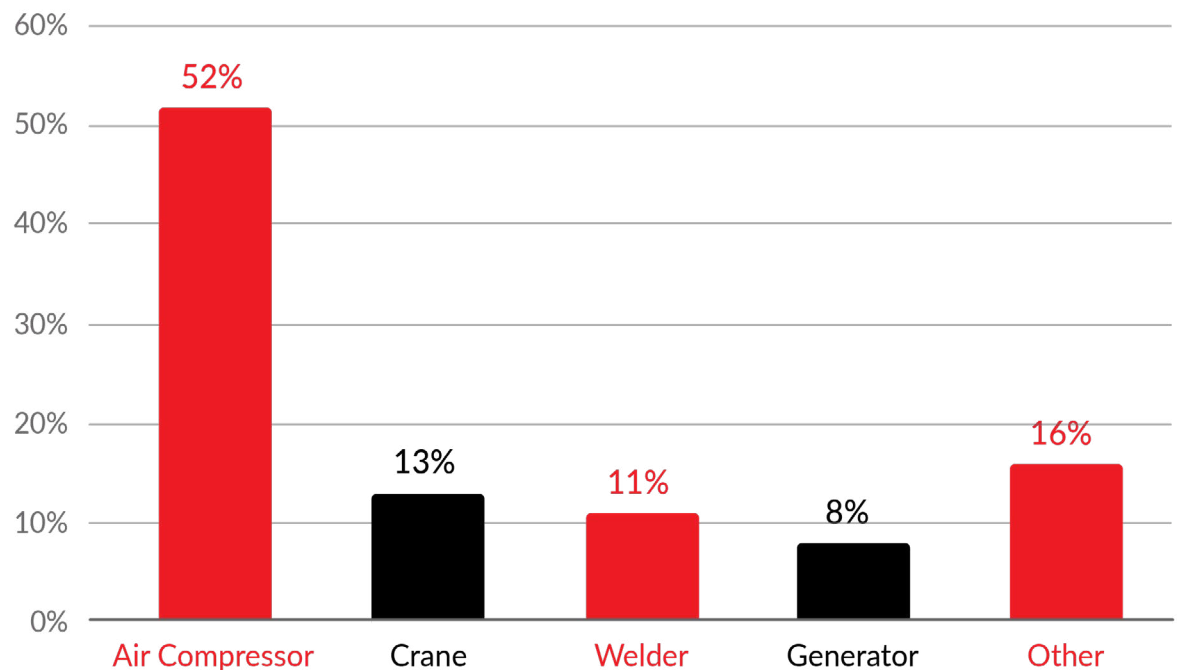


# Air Compressors Remain Most Important Piece Of Equipment

Over half of survey respondents (52%) state that air compressors are the most important piece of equipment on their service vehicles. Another 13% selected crane, 11% chose welder, and 8% picked generator.

Another 16% of respondents chose “other” with a few distinct themes in the comments, including multi-power systems and miscellaneous tools such as vacuums, sand blasters, and hand tools. Other comments suggested all upfitted equipment is equally important, and that the human operator is most important of all.

Q | What is the most important piece of equipment on your service vehicle?

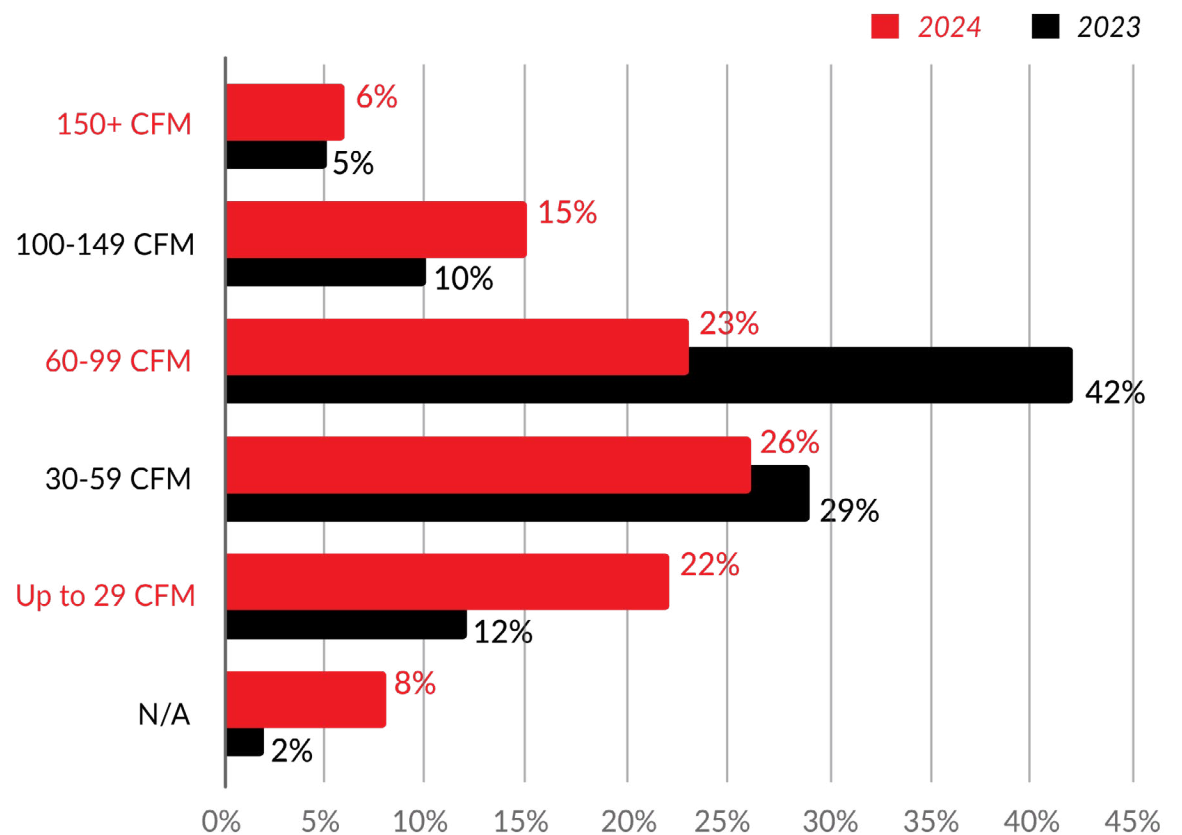


# Most Require Under 100 CFM On Their Service Vehicles

Most survey respondents (71%) require under 100 CFM for air tools on their service vehicle, regardless of their fleet size or the industry they work in.

However, the heaviest users of air—those who require 150+ CFM—are most likely to work in the construction industry. Other heavy air industries identified in our survey include agriculture, equipment repair, and transportation.

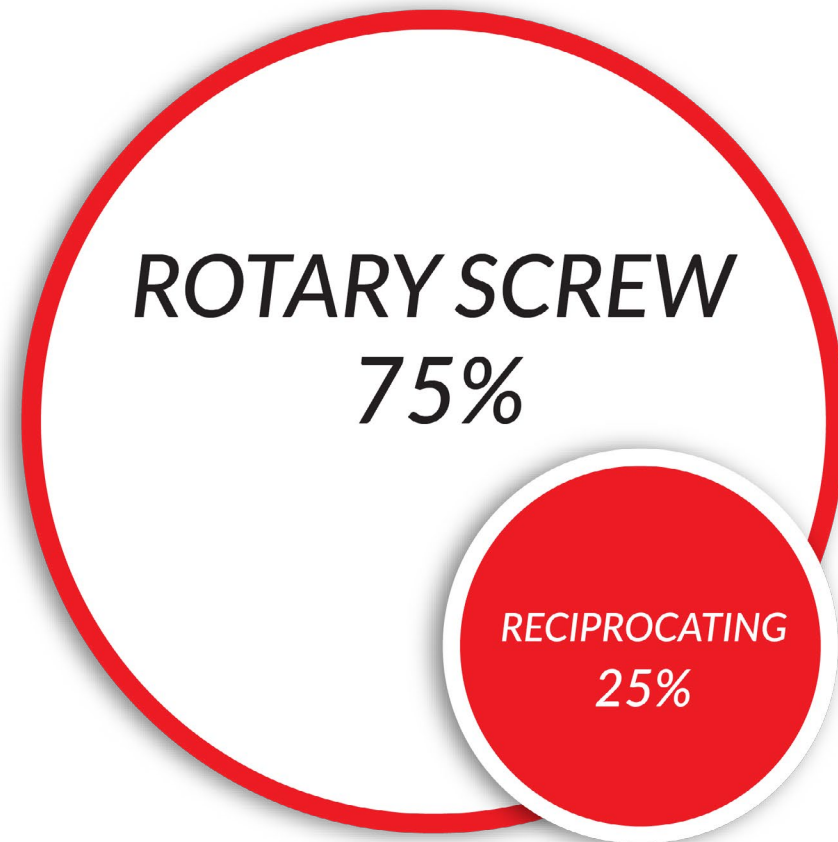
## Q | What CFM range best fits your requirements for your service vehicles?



# 75% Of Air Users Prefer Rotary Screw Air Compressors

3 out of 4 survey respondents say they prefer rotary screw air compressors over their reciprocating counterparts. This result has remained consistent with every survey over the past 4 years, in which the preference for rotary screw air compressors has ranged 75-81%.

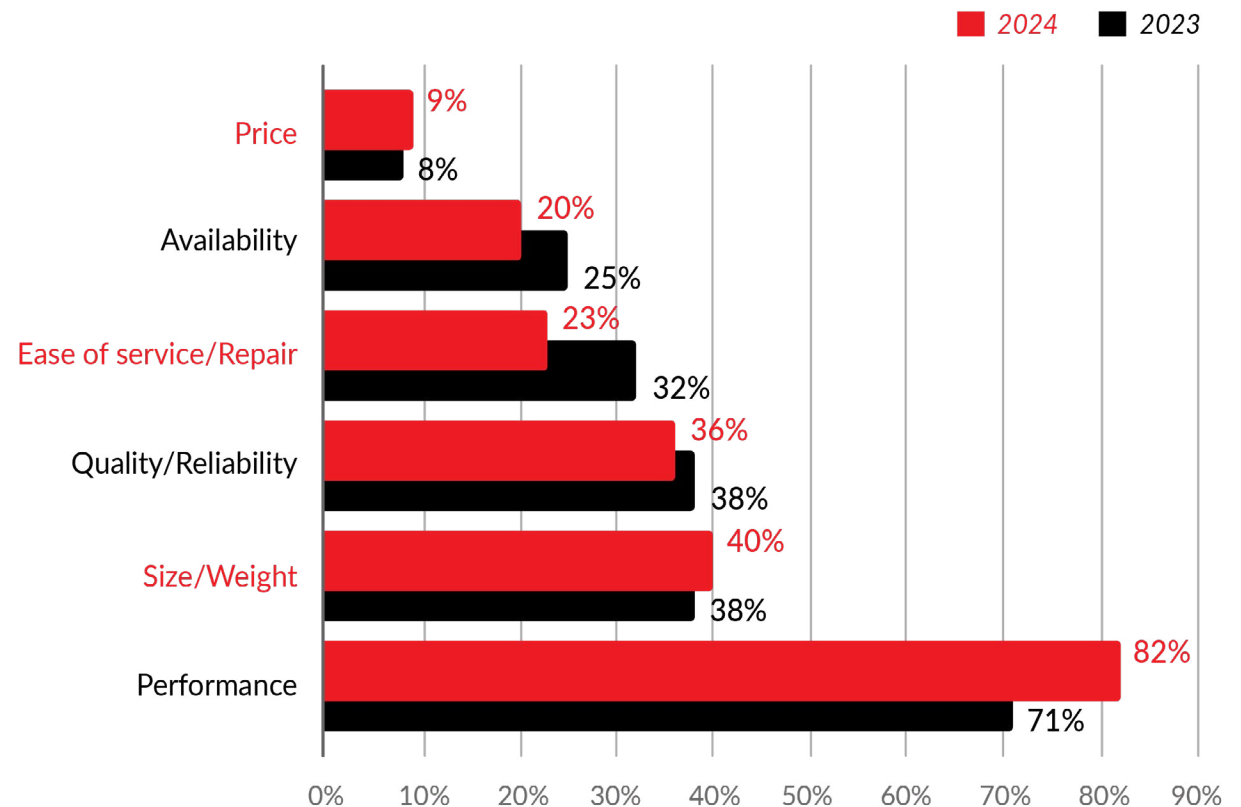
**Q |** Do you prefer rotary screw or reciprocating air compressors for service vehicles?



# Rotary Screw Air Compressors Consistently Preferred For Performance

Following the trends of 2020-2023, the vast majority of survey respondents (82%) prefer rotary screw air compressors because of their superior performance. Additional reasons include size and weight (40%), quality and reliability (36%), and ease of service and repair (23%).

Q | Why do you prefer rotary screw air compressors for service vehicles? Check all that apply.



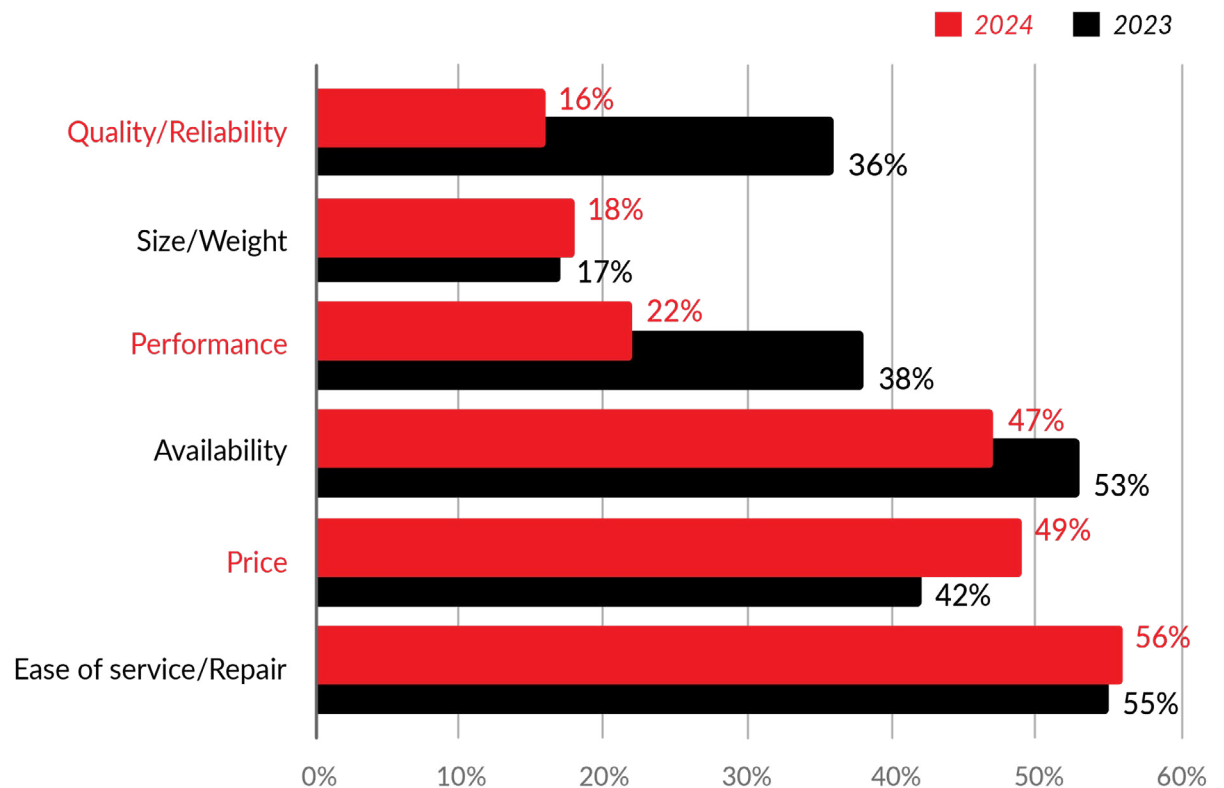


# Reciprocating Air Compressors Valued For Ease Of Service

Consistent with surveys in past years, respondents who prefer reciprocating air compressors typically appreciate them because of their ease of service and repair (56%). The next most popular answer is price (49%), followed by availability (47%).

Both quality and performance lost a significant amount of confidence over the past year, falling from 36% to 16% and 38% to 22%, respectively.

**Q | Why do you prefer reciprocating air compressors for service vehicles? Check all that apply.**

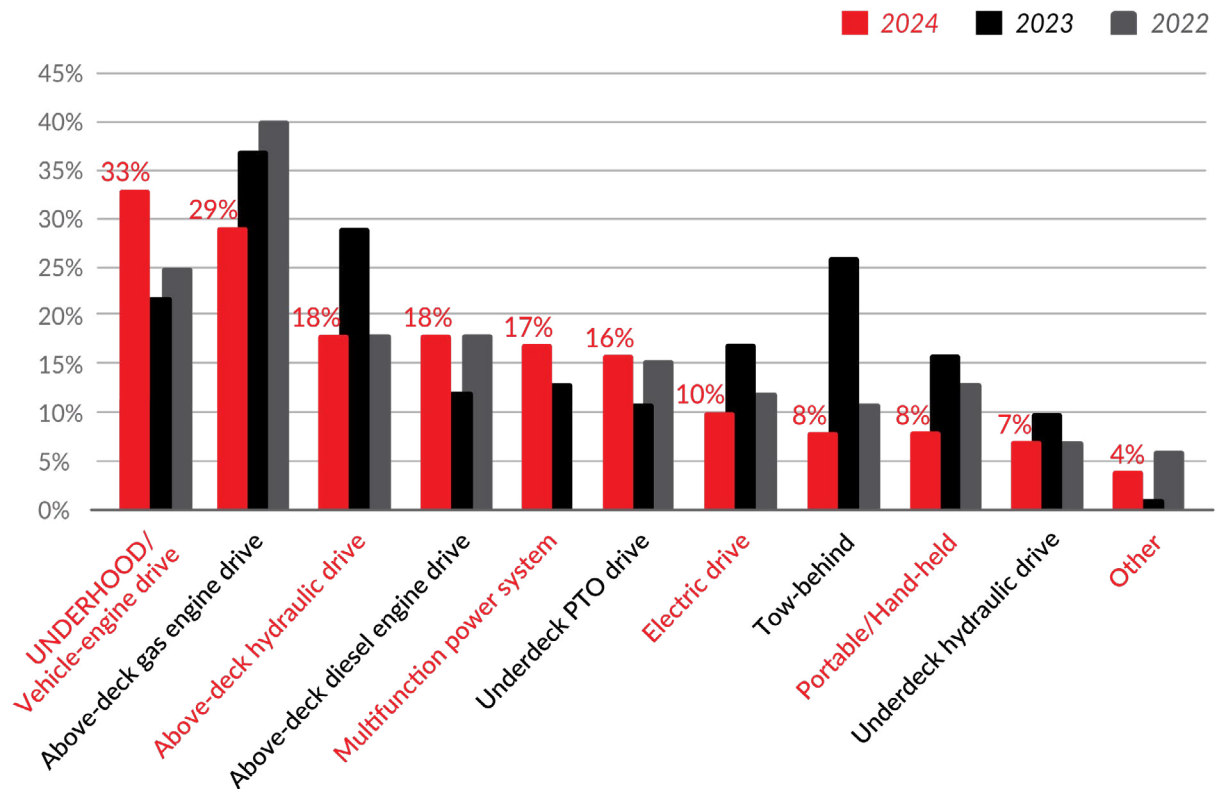


# UNDERHOOD® Dethrones Gas Drive Air Compressor As Most Preferred System

It has been a tight race for “most preferred air compressor” over the past several years, with UNDERHOOD®, hydraulic driven, and gas driven air compressors in fierce competition. UNDERHOOD narrowly took the top spot this year with 33% of votes, compared to gas driven air compressors at 29%.

UNDERHOOD air compressors are popular with municipal fleets, and are highly sought after for service van upfits.

**Q |** What type of air compressor system do you prefer on service vehicles? Check all that apply.



# BUSINESS IMPACTS

Supply chain issues continue to challenge the industry, along with new concerns, including rising interest rates and labor shortages. Despite these challenges, most respondents agree conditions will improve or hold steady over the next twelve months.

- » The global supply chain challenge negatively impacted 62% of respondents
- » 75% of those negatively affected by supply challenges cite rising costs of materials, equipment, and trucks
- » A growing number of businesses report increased expenses, the inability to plan, and uncertainty due to rising interest rates
- » Almost half of respondents have been negatively affected by labor shortages
- » 72% of those affected by labor shortages are unable to fill job vacancies



"Over the last year and heading into 2024, central banks in North America appeared poised to initiate interest rate cuts. Now, inflation is on a good downward path, though growth in interest rate-sensitive parts of the economy remains strong, creating some risk.

Generally, North American economies are experiencing strong employment growth, strong wage growth, and, in some pockets, record population growth. A focused and strategic approach to business and operations will mute any continued volatility in labor, materials or other investments."

***Brent Johnston***  
***CEO, VMAC Global Technology Inc.***



"Similar to last year, inflation affected by labor, cost of living, and higher-cost materials resulted in higher COGs. We're seeing material availability improvements in some commodities. However, more specialized equipment manufacturers are extending lead times and implementing allocations.

In an effort to reduce the impact of increased material costs, proactive businesses are actively seeking alternative supply chain strategies and technologies. This approach is designed to ensure operations remain resilient and adaptable in the face of changing market conditions."

***Yolande Freed Dunbavin***  
***Supply Chain Manager, VMAC Global Technology Inc.***



# Price Increases And Uncertainty Are Growing Impacts Of The Supply Chain Challenges

When asked how the supply chain challenges impacted business, 62% of respondents said negatively.

Of those negatively impacted, three out of four respondents (75%) indicated they have been affected by price increases on materials, equipment, or trucks—an increase from 64% last year.

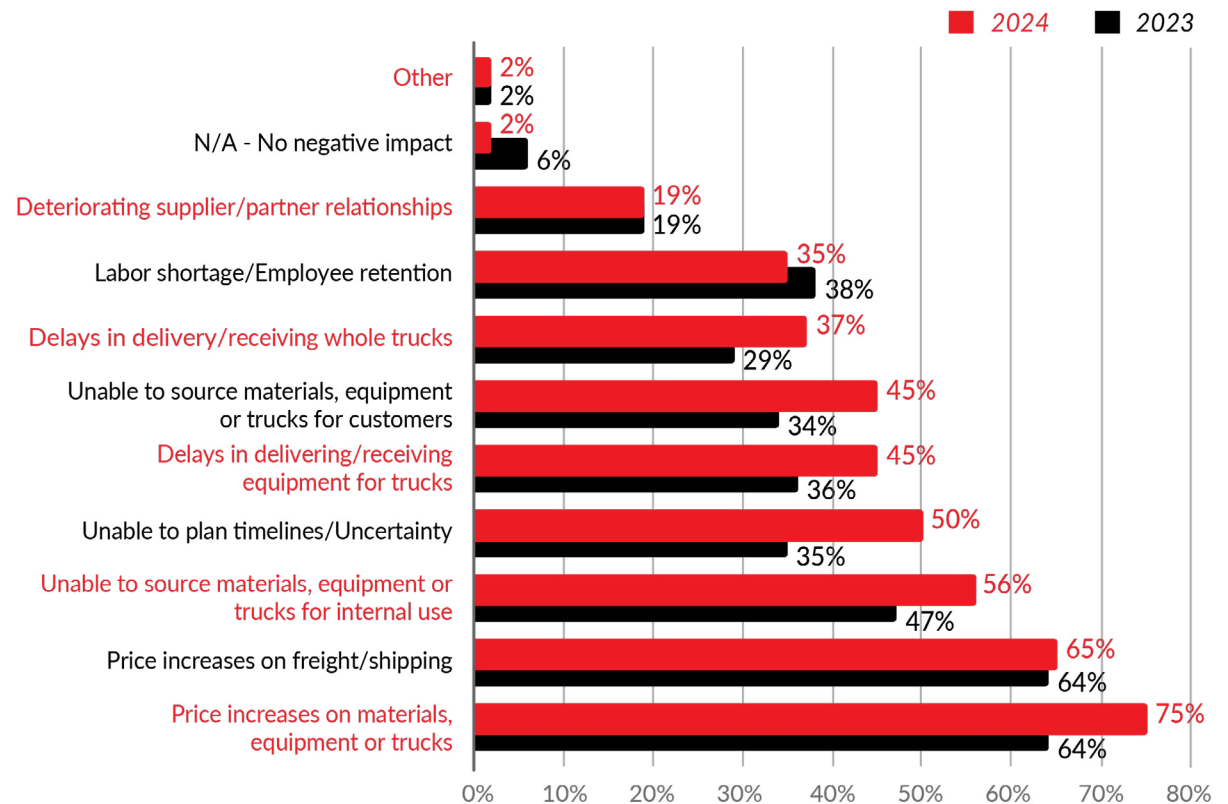
Almost two-thirds of respondents (65%) also have been impacted by price increases on freight and shipping, practically identical to last year's 64%. Over half (56%) are unable to source materials, equipment, or trucks for internal use, up from 47% in 2023.

One significant shift for 2024 is the number of people who cite being unable to plan timelines and uncertainty as a major concern, growing from 35% of respondents in 2023 to 50% in 2024.

Almost every category grew year over year, suggesting those negatively impacted by the supply chain challenges continue to feel the effects across costs, material sourcing, and planning.



**Q |** How have supply chain challenges impacted your business? Check all that apply.



# Most Businesses Report Increased Expenses Due To Rising Interest Rates

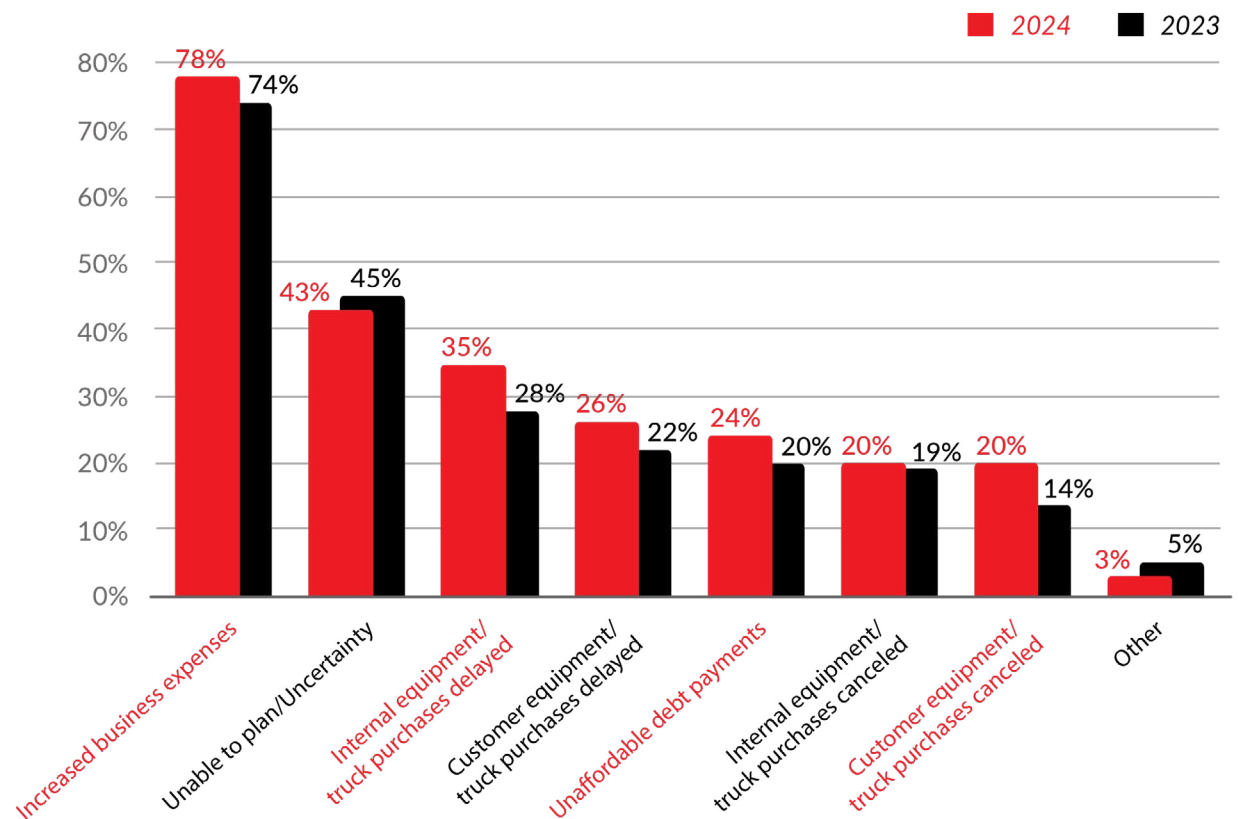
Over half of respondents (54%) report they are negatively impacted by rising interest rates, which is an increase from 48% in 2023.

Of those negatively impacted respondents, 78% note increased business expenses, which is up from 74% last year.

Another 43% cite uncertainty and the inability to plan, 35% experienced delays with internal equipment or truck purchases, and 26% selected delays with customer equipment or truck purchases.

Comments in the other category include a general sentiment that everything is too expensive.

**Q |** How have rising interest rates impacted your business?  
Check all that apply.



# Job Vacancies And Employee Retention Are Top Impacts Of The Labor Challenges

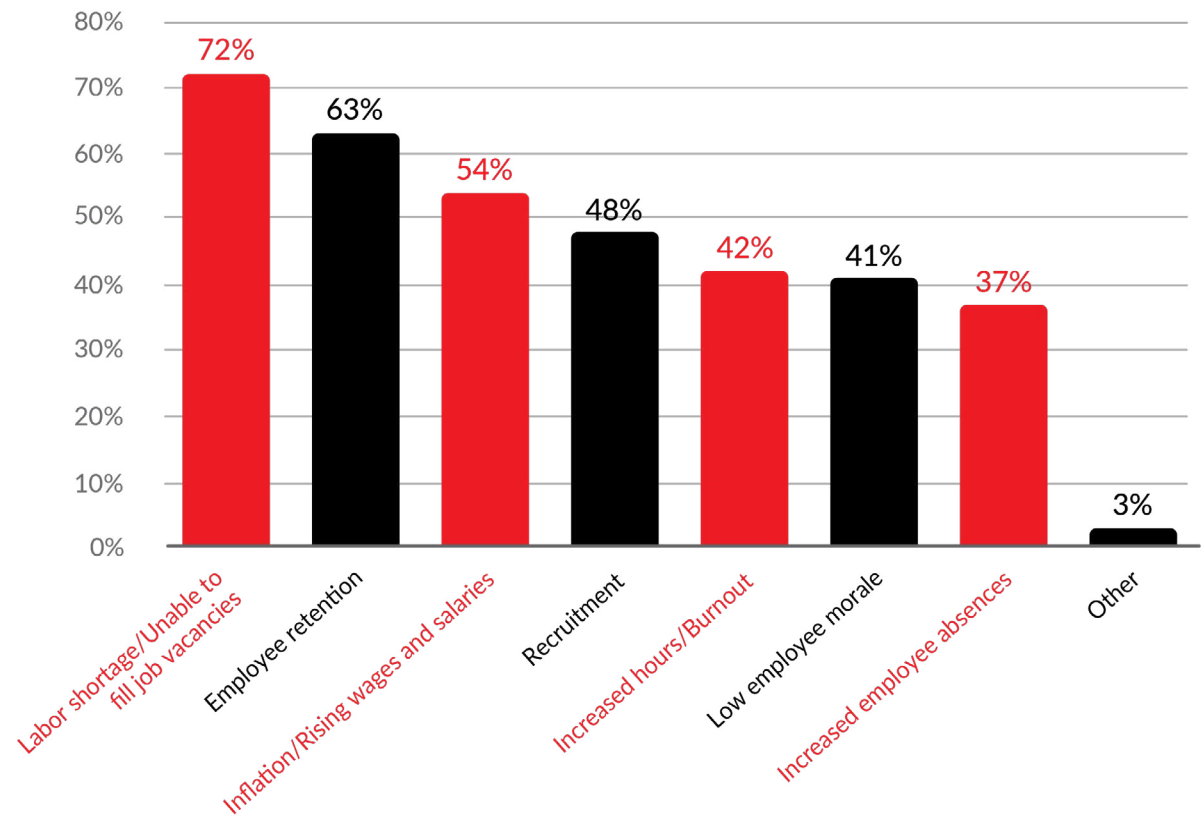
A new question was added to the 2024 survey, asking how labor challenges have impacted businesses. Just under half of respondents report a negative impact (44%).

Of those negatively affected by the labor shortage, almost three-quarters (72%) indicate they are unable to fill job vacancies, while 63% cite employee retention challenges. Over half of respondents (54%) are challenged with inflation and rising wages and salaries.

Recruitment (48%), increased hours and burnout (42%), low employee morale (41%), and increased employee absences (37%) are also concerns.

In the “other” category, some survey respondents note the labor shortage still exists, but they’re starting to fill production floor positions. Experienced workers, however, are still challenging to find.

**Q |** In what ways have labor challenges impacted your business? Check all that apply.



# Respondents Predict The Same Or Better Business Conditions For The Coming Year

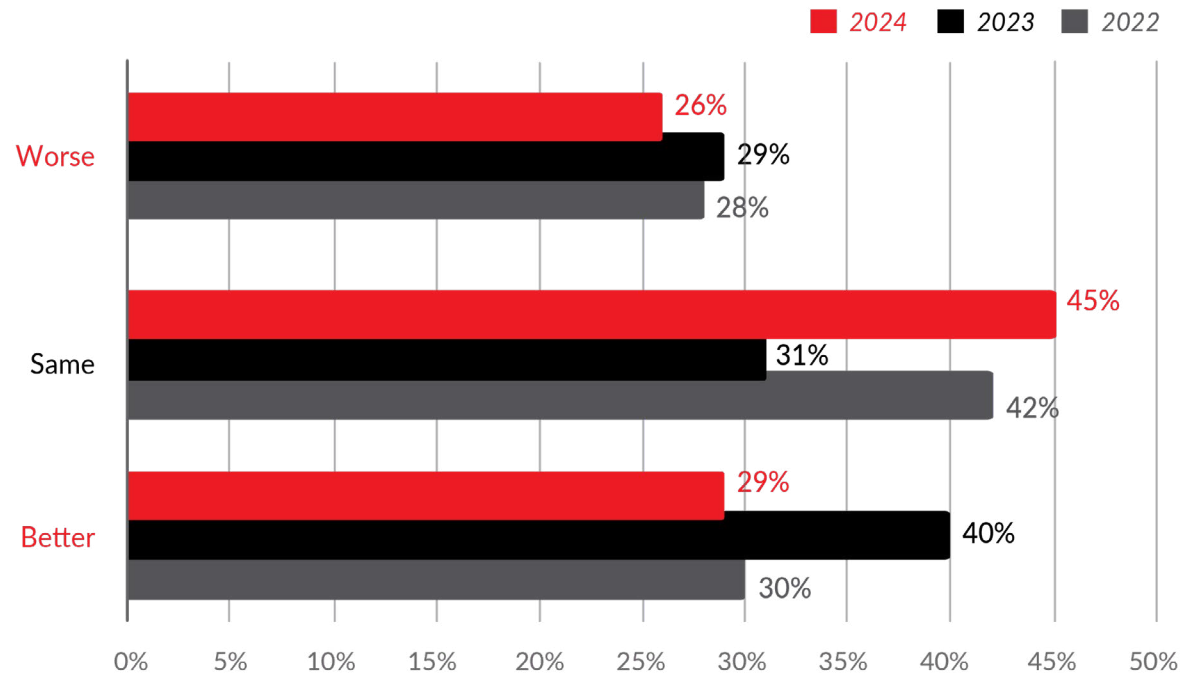
Respondents were cautiously optimistic when asked to predict business conditions for the upcoming year, with 74% predicting conditions to be the same or better.

Last year, predictions for better conditions spiked to 40%, a significant shift from 30% in 2022. This suggests that last year was a positive turning point for the industry. This year, 29% of respondents predict better conditions.

Meanwhile, predictions for the same conditions increased from 31% to 45% year over year, while predictions for worse conditions decreased from 29% to 26% year over year.

These 2024 results suggest that respondents think business conditions are stabilizing for 2024.

Q | What do you think business conditions will be like in the next 12 months?



# ABOUT VMAC

## *The Leader in Compressed Air Innovation®*

VMAC designs and manufactures the most innovative mobile air compressors and multi-power systems available. With over 35 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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