

State of the Industry — 2026

What contractors told us about growth, costs, safety, and where the industry goes next

88% owners & partners · US & Canada

80%

expect growth in the next 12 months — only 3% expect decline

54%

name fuel a top cost pressure — diesel is up \$2.63/gal from a year ago (EIA)

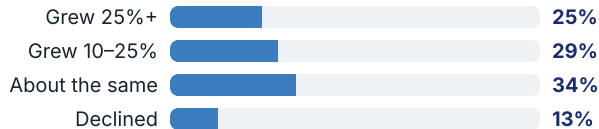
34%

have a formal written safety program — the rest are informal or have none

59%

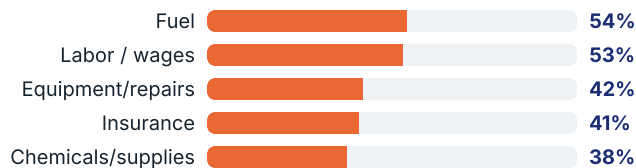
want more information on PWNA membership or training, members included

GROWTH IS REAL, BUT NOT UNIVERSAL



Revenue vs. the prior year. Nearly half didn't grow, and 44% aren't hiring right now, mostly owner-operators and businesses under \$100k.* Still, 46% plan to add a service in the next 12 months.

WHAT'S SQUEEZING MARGINS



Share naming each as a top-3 cost pressure. Top 12-month worry: competition & price pressure (51%), ahead of economic uncertainty (47%) and labor availability (40%).

THE BOTTOM LINE ISN'T EVEN

32%

report 21%+ profit margins

15%

were not profitable last year

36%

of businesses under \$100k were not profitable*

52%

pay themselves a consistent salary

Margins shown are of those who shared a figure. Owner pay tracks size: 26% of businesses under \$100k pay themselves consistently, vs. 86% at \$500k+.* Lead flow is the #1 bottleneck overall (29%) and leads for the smallest shops (40%); hiring takes over past \$250k.*

THE SAFETY & COMPLIANCE GAP

- **34%** have a formal written safety program (SDS, JHA, tailgate talks) — **33%** are inconsistent, **28%** have none yet.
- Formal programs jump with size: **22%** under \$100k vs. **65%** at \$500k+. PWNA members: **42%** vs. **27%** of non-members.*
- **Ladders & fall protection** is the top safety concern (43%), ahead of chemical handling (20%) and roof work (14%).
- Only **27%** use reclaim/containment when required; **27%** rarely do, and **10%** aren't sure what's required.
- **89%** carry general liability and **80%** of shops with employees carry workers' comp* — documentation and reclaim practice are the gap.

MARKETING & OPS LAG THE GROWTH

- **Repeat customers & referrals (about two-thirds each)** drive leads — paid channels barely register (Google Ads 16%).
- **88%** have a website, but **52%** pay no one for marketing help.
- Only **18%** respond to a new lead within 5 minutes; **46%** take until "same day."
- **36%** still schedule by calendar, text, and phone calls — half of shops under \$100k.*

IN THEIR OWN WORDS

"Price, stop racing to the bottom. Too many companies are working for employee wages."

— survey respondent

"Recommended pricing guidelines...would help educate customers, discourage unrealistic low-ball pricing, and support contractors who invest in quality, training, insurance, and professionalism."

— survey respondent

"Answer the phone and get the quote out!"

— on what worked best last year

Training demand is business-side, not just technical

More than half want training in sales & pricing (57%) and commercial bids/contracts (57%), then equipment maintenance (41%) and safety & compliance (40%).

59% want more info