

State of the Industry: U.S. Commercial & Foodservice Equipment Field Service

A comprehensive, data-driven analysis of the \$74 billion U.S. commercial equipment service crisis. Covering technician shortages, repair cost escalation, equipment downtime, right-to-repair, and the case for AI-powered field service.

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Executive Summary

The U.S. commercial and foodservice equipment service industry is a \$74 billion market defined by a paradox: the equipment is getting smarter, but the service model is not. American restaurants spend \$28 billion per year on equipment repairs and maintenance, and lose an additional \$46 billion annually to equipment downtime. These are not abstract figures. They represent closed drive-throughs during peak lunch hours, spoiled inventory from refrigeration failures, and franchise operators spending more time managing repair tickets than running their businesses.

This report synthesizes data from SEC filings (Starbucks, McDonald's, Chipotle, RBI, Yum!, Wendy's, CAVA 10-K filings), earnings call transcripts, CFESA industry standards, the Aquant 2024 Field Service Benchmark Report (covering 24 million+ work orders across 145 service organizations and 582,000 technicians representing \$7.71 billion in service costs), the 86 Repairs State of Repairs series, Bureau of Labor Statistics workforce projections, FTC regulatory filings, MachineQ/Comcast restaurant operator surveys, and public financial disclosures from the largest equipment manufacturers.

Three forces are converging. First, the technician workforce is disappearing: BLS projects 608,100 annual openings in maintenance and repair through 2034, yet applications for technical jobs fell ~50% between 2020 and 2022. Only 3,000+ CFESA-certified foodservice equipment technicians serve all of North America. Second, equipment complexity is accelerating: modern commercial kitchens feature IoT-connected combi ovens, digitally locked ice cream machines, and sophisticated refrigeration systems requiring specialized diagnostic knowledge. Third, the cost of failure is compounding: repair costs have risen 31% since 2021, emergency service calls average \$754, and a single refrigeration breakdown can result in \$3,000 to \$50,000 in spoilage losses.

The fundamental insight is that this is a knowledge problem, not a labor problem. Technicians spend 80% of mean time to repair on diagnosis, not the actual fix. Low-performing technicians cost over 80% more per job than top performers. If every

technician performed at the level of the top 20%, the industry could save an estimated 22% in total service costs, or over \$6 billion annually.

\$74 billion: the combined annual cost of equipment repairs (\$28B) and downtime losses (\$46B) for U.S. restaurants alone. This does not include convenience stores, grocery, healthcare, or industrial foodservice.

\$74B

TOTAL MARKET (R&M +
DOWNTIME)

80%

OF MTTR SPENT ON
DIAGNOSIS

22%

POTENTIAL COST SAVINGS
WITH AI

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Market Overview: A \$74 Billion Problem

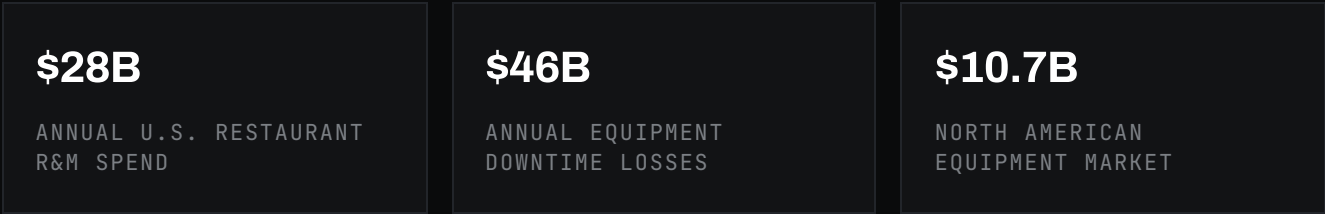
The scale of the U.S. commercial and foodservice equipment service market is frequently underestimated, even by industry participants. According to 86 Repairs, American restaurants spend \$28 billion annually on equipment repairs and maintenance, and lose an additional \$46 billion to equipment and infrastructure downtime. Combined, this represents a \$74 billion annual burden on an industry already operating on razor-thin margins.

The equipment feeding this demand is substantial. The North American foodservice equipment market is valued at \$10.7 billion (Grand View Research, 2025), with the U.S. capturing 84.8% of the regional market. U.S. commercial cooking equipment manufacturing generates \$8.4 billion in annual revenue (IBISWorld, 2025). Globally, the foodservice equipment market is projected to grow from \$46 billion in 2025 to \$73 billion by 2035 (Future Market Insights).

The parts distribution ecosystem tells an equally compelling story. Parts Town Unlimited, the largest independent foodservice equipment parts distributor, reached \$2.5 billion in revenue in 2024, a 2.5x increase from \$1 billion just three years earlier. This growth

reflects both rising repair volumes and rising costs. Parts costs alone increased 21% in a single year, per 86 Repairs data.

The U.S. Department of Energy has documented that reactive, unplanned maintenance costs 3 to 9 times more than planned maintenance. Yet the vast majority of the restaurant industry remains trapped in a reactive model, dispatching technicians only after equipment has already failed. The average restaurant repair incident requires 24.15 touchpoints before resolution (86 Repairs 2020).



Sources: 86 Repairs, Grand View Research, U.S. Dept. of Energy, Parts Town Unlimited, NACS 2024

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The First-Time Fix Rate Crisis

The first-time fix rate (FTFR) is the single most important metric in field service. Every failed first visit multiplies cost, extends downtime, and erodes customer trust.

CFESA benchmarks that a competent, properly equipped technician should achieve an FTFR of 60% or better. This means even under optimal conditions, 4 in 10 calls require a return visit. Across 24 million work orders analyzed by Aquant, the median FTFR is 75-76%. Best-in-class organizations (top 20%) achieve 88-89% (Aberdeen Group). The bottom 20% operate at just 55-59%.

The gap is knowledge, not technology. Top-performing technicians have 10 to 20 years of experience with specific equipment. They have internalized the failure modes, diagnostic shortcuts, and parts requirements. Bottom-performing technicians cost over 80% more per job, and their failed first visits cascade into an average of 2.75 total visits, adding approximately 14 days to resolution (Aquant 2024). Each truck roll carries a true total cost of \$800 to \$1,000+ (TSIA/CareAR).

If every technician performed like the top 20%, the industry would save an estimated 22% in total service costs. On \$28 billion in annual spend, that is over \$6 billion in potential savings.

Aquant/BusinessWire, 2024

60%

CFESA FTFR BENCHMARK

88-89%

BEST-IN-CLASS FTFR

2.75x

AVG VISITS WHEN FIRST
FIX FAILS

Sources: CFESA Industry Standards, Aquant 2024 Benchmark (24M+ work orders, 145 orgs), Aberdeen Group, TSIA/CareAR

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The Knowledge Gap: Diagnosis, Not Repair

The central insight in understanding the field service crisis is that the bottleneck is not the repair itself but the diagnosis. Technicians spend 80% of mean time to repair (MTTR) identifying what went wrong. The actual hands-on fix, once the problem is identified, is typically fast (Reliable Plant).

This is fundamentally a knowledge problem. An experienced technician who has worked on specific equipment for a decade will diagnose an issue in minutes. A less experienced technician facing the same equipment for the first time may spend hours. Aquant quantifies this: low-performing technicians cost over 80% more per job. Bottom-performing organizations take four times longer to resolve issues and have approximately three times more visits per asset.

Industry-average wrench time (actual hands-on repair) is just 25-35% of a technician's shift (UpKeep). The remainder is consumed by travel, diagnosis, paperwork, parts sourcing, and administrative tasks. Resolving a single restaurant repair incident requires

an average of 24.15 touchpoints (86 Repairs 2020). Parts availability compounds the challenge: 51% of field service executives cite parts unavailability as the top cause of failed first-time fixes (Aberdeen/ServicePower).

AI-assisted service shows dramatic improvements: 94% accuracy vs. 71% without, and resolution times of 3.2 hours vs. 18.6 hours, an 83% reduction (Salesforce State of Service).



Sources: Reliable Plant, Aquant 2024, UpKeep, 86 Repairs, Aberdeen/ServicePower, Salesforce State of Service

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The Technician Workforce Crisis

The skilled trades labor crisis is a present emergency. The Bureau of Labor Statistics projects 608,100 annual openings in maintenance and repair occupations through 2034. These openings arise from retirements, career changes, and new demand. Yet the pipeline to fill them is collapsing.

The retirement-to-replacement ratio is 5:2: for every five skilled technicians leaving, only two enter (ACCA). The average age of HVAC/R professionals is 55, and 29% of service technicians are over 55. SMACNA estimates the current shortage at 110,000, projected to reach 300,000+ by 2031.

For foodservice equipment, the certified pool is alarmingly small. CFESA reports only 3,000+ certified technicians across all of North America, serving hundreds of thousands of commercial kitchens. Out of 450+ CFESA member companies, only ~30 have achieved the top-tier certified company designation. The demand-to-supply ratio is 4:1 (CustomerThink).

Training timelines compound the problem. Basic proficiency takes 6-18 months. Complex equipment mastery requires 4+ years (RDO Equipment). Annual technician turnover runs at 35%, with each departure costing ~\$15,000 (Quixy). The departing technician takes their accumulated diagnostic knowledge with them, an unrecoverable loss. Deloitte and the Manufacturing Institute project 3.8 million manufacturing workers needed by 2033, with up to 1.9 million positions potentially unfilled.

608K

ANNUAL REPAIR JOB
OPENINGS THRU 2034

5:2

RETIREMENT TO
REPLACEMENT RATIO

3,000+

CFESA-CERTIFIED TECHS
IN N. AMERICA

Sources: BLS, ACCA, SMACNA, CFESA, Deloitte/Manufacturing Institute, CustomerThink, Quixy

06

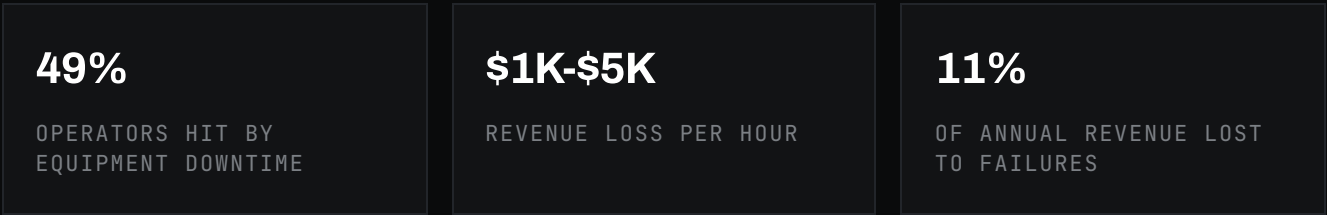
Equipment Downtime: The Revenue Killer

Equipment failures during peak hours strike at the most profitable part of a restaurant's business. For QSRs and convenience stores, 40-60% of daily revenue is generated during lunch and dinner rushes. Equipment downtime during these windows is not an inconvenience. It is a direct, measurable revenue loss.

The MachineQ/Comcast 2026 Restaurant Readiness Report, surveying over 400 U.S. QSR and fast-casual operators, found that 49% experienced significant downtime from equipment failure. Among those, 24% estimated revenue losses of \$1,000 to \$5,000 per hour of disruption. Viam estimates that unplanned equipment failures can cost a single QSR location up to 11% of annual revenue.

Refrigeration failures are particularly devastating. Spoilage losses range from \$3,000 to \$8,000 for small/mid-size restaurants, and \$15,000 to \$50,000+ for high-volume kitchens (Penguin Trailer). Three of the top six QSR breakdowns involve refrigeration. Cold-side equipment accounts for 27.46% of all service calls at \$765.60 average cost (86 Repairs).

The McDonald's ice cream machine saga illustrates the problem at scale: 10-15% of machines out of service nationally at any given time (32% in New York), each costing \$625/day in lost sales. Taylor earned \$75 million per year from McDonald's maintenance alone.



Sources: MachineQ/Comcast 2026 Report (400+ operators), Viam, 86 Repairs, Penguin Trailer, McBroken.com

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Repair Cost Escalation

Repair and maintenance costs are rising faster than inflation, driven by technician shortages, parts constraints, and increasing equipment complexity. This is structural, not cyclical.

Foodservice equipment service costs have risen 31% since 2021 (86 Repairs). Year-over-year increases track at ~18%. Emergency service requests average \$754. Emergency labor rates run \$150-\$250/hr before parts. Annual QSR maintenance budgets range from \$25,000-\$40,000 per location (BOH.ai).

The cost structure varies by equipment type. HVAC repairs average \$1,019.90 per invoice, the highest of any category. Cold-side equipment accounts for 27.46% of calls at \$765.60 average. Hot-side represents 18.82%, plumbing 15.26%, HVAC 9.80%. Equipment lifecycles are long but maintenance-intensive: ovens 10-15 years, fryers 7-10 years, commercial refrigeration 10-15 years. Throughout these lifecycles, cumulative repair costs can approach or exceed original equipment cost.

31%

SERVICE COST RISE SINCE
2021

\$754

AVERAGE EMERGENCY
SERVICE CALL

21%

PARTS COST INCREASE IN
ONE YEAR

Sources: 86 Repairs State of Repairs 2020-2025, BOH.ai

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The Service Crisis Inside America's Largest Chains

Every major restaurant chain is grappling with the same problem: equipment that is more complex, more expensive to service, and harder to keep running. Their SEC filings bury maintenance costs in a single line ("expensed as incurred"), but earnings calls and operational data reveal a crisis that grows with every new location.

Starbucks paused its \$450M Siren equipment rollout after only 10% of stores had received it. The new system was supposed to transform store operations, but deployment proved too disruptive.

"We can't have stores closed for two weeks or three weeks or whatever it is. That is too disruptive... we've got to figure out how we can do it for less."

Brian Niccol, CEO, Starbucks Q4 FY2024 Earnings Call

McDonald's franchisees are trapped in a repair monopoly. Taylor ice cream machines cost \$18,000 each and require \$700/quarter maintenance contracts. According to Kytch lawsuit filings, Taylor-authorized technicians charge up to \$300 per 15-minute increment. Taylor earns an estimated \$75 million per year from McDonald's maintenance alone (Inc.com). At any given moment, 15% of machines are broken nationally, costing each franchise \$625/day in lost sales. The Q4 2024 earnings call contained zero mentions of equipment or maintenance, because it is a franchise-level cost invisible at the corporate level.

Chipotle carries \$1.22 billion in gross equipment on its balance sheet (10-K 2024). As a 100% company-operated chain, it bears every dollar of maintenance cost directly. Their 10-K explicitly states "maintenance and repairs are expensed as incurred," burying the cost in operating expenses.

“The new high-efficiency equipment package improves prep by two to three hours and results in hundreds of basis points of improvement in comp sales.”

Scott Boatwright, CEO, Chipotle Q4 2025 Earnings Call

RBI (Burger King) committed \$550 million in its Royal Reset program for kitchen equipment and remodels: every dollar of new equipment creates years of future service demand. Yum! Brands (98% franchised) pushes all equipment costs to franchisees, each independently managing \$375K-\$606K in equipment with no centralized service support. CAVA management stated bluntly on their Q3 2025 earnings call: "We have continued to have higher maintenance expense than what we were to anticipate."

\$75M/yr

TAYLOR MAINTENANCE
REVENUE FROM MCDONALD'S

2-3 wks

STORE CLOSURE PER
STARBUCKS EQUIPMENT
SWAP

\$625/day

LOST PER MCDONALD'S
BROKEN ICE CREAM
MACHINE

Sources: Starbucks, McDonald's, Chipotle, RBI 10-K filings; KFC FDD; Inc.com; CAVA Q3 2025 Earnings Call

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Equipment Makers Built the Machines. Not the Service.

The largest foodservice equipment manufacturers sell billions in hardware every year, but the aftermarket service layer remains fragmented, under-invested, and dependent on a shrinking pool of independent technicians they do not control.

Middleby, the largest commercial foodservice equipment manufacturer, generates nearly \$4 billion in annual revenue. Their CFO disclosed on the Q4 2024 earnings call that customers "have lost some of their maintenance and service abilities." OEMs see the service crisis as a revenue opportunity for themselves, but their business model is fundamentally about selling equipment, not fixing it.

“Food Processing customers have lost some of their maintenance and service abilities. Our expectation is to increase the percentage of that piece of the pie for all the businesses.”

Middleby CFO Bryan Mittelman and CEO Tim FitzGerald, Q4 2024 Earnings Call

The result: millions of installed units with no unified service intelligence layer. OEM IoT platforms have connected less than 8% of the installed base even after years of investment. Replacement parts costs jumped 21% in a single year (86 Repairs), and across all of North America there are only 3,000 CFESA-certified technicians serving hundreds of thousands of commercial kitchens. The entire certified workforce fits in a high school gym.

Parts Town Unlimited, the largest independent parts distributor, grew from \$1 billion to \$2.5 billion in revenue in just three years, a direct reflection of accelerating repair demand that the OEMs are not equipped to serve.

\$3.9B

MIDDLEBY ANNUAL REVENUE

3,000

CERTIFIED TECHS SERVING
ALL OF NORTH AMERICA

21%

PARTS COST INCREASE IN
ONE YEAR

Sources: Middleby Q4 2024 Earnings Call, CFESA, 86 Repairs, Parts Town

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Right to Repair: The Regulatory Tide

The right-to-repair movement reached a landmark milestone in October 2024, when the U.S. Copyright Office granted a DMCA exemption for commercial food equipment repair. For the first time, restaurant owners and third-party technicians can legally bypass software locks to repair soft-serve machines, espresso machines, refrigerators, and ovens.

This was driven largely by the McDonald's/Taylor ice cream machine controversy. Taylor's C602 machine costs \$18,000 per unit, is required in every McDonald's, and could only be repaired by Taylor-authorized technicians. Taylor earns an estimated \$75 million per year from McDonald's maintenance alone (Inc.com). The average franchise lost ~\$60,000/year from ice cream machine issues (\$36,000 in downtime revenue plus \$24,000 in repair costs).

Kytch, which developed an aftermarket monitoring device for Taylor machines, filed a \$900 million lawsuit against McDonald's. The FTC and DOJ filed a joint comment in March 2024 supporting repair exemptions for commercial equipment. Colorado enacted the broadest state-level right-to-repair law, effective January 2026. The regulatory direction is clear: the era of manufacturer lock-in on equipment repair is ending. This creates significant opportunity for technology-enabled service providers who can aggregate equipment knowledge and deliver it to a broader, more accessible technician workforce.

Oct 2024

DMCA EXEMPTION FOR FOOD
EQUIPMENT

\$75M/yr

TAYLOR MAINTENANCE
REVENUE FROM MCDONALD'S

\$900M

KYTCH LAWSUIT VS.
MCDONALD'S

Sources: U.S. Copyright Office, iFixit, FTC/DOJ joint comment (March 2024), Inc.com, Reed Smith

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Convenience Store Foodservice Boom

Convenience store foodservice has overtaken cigarettes as the largest in-store revenue category, driving an explosion in equipment complexity and maintenance needs across 152,000+ U.S. stores.

Foodservice accounted for 28.7% of in-store sales and 39.6% of in-store gross margin in 2024, up from just 11.9% of sales in 2004. That 2.4x increase represents millions of new commercial kitchen units deployed with no corresponding service infrastructure built.

As c-stores deploy combi ovens, fryers, and commercial refrigeration, their equipment service needs converge with QSRs. But unlike large restaurant chains, most c-store operators have zero in-house service teams and no equipment maintenance expertise. They depend entirely on an external service workforce that is shrinking. Annual QSR maintenance budgets run \$25,000-\$40,000 per location (BOH.ai), and c-stores adopting the same commercial kitchen equipment face identical costs with less infrastructure to manage them.

39.6%

C-STORE GROSS MARGIN
FROM FOODSERVICE

Zero

IN-HOUSE SERVICE TEAMS
AT MOST C-STORE CHAINS

\$25K-\$40K

ANNUAL MAINTENANCE COST
PER QSR LOCATION

Sources: NACS 2024, CSP Daily News, BOH.ai

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Private Equity & Field Service Roll-Ups

Private equity has identified field service as one of the most attractive roll-up opportunities in the American economy. Fragmented markets, recurring revenue, mission-critical services, and skilled labor scarcity create a compelling investment thesis. The scale of PE activity in adjacent services sectors signals the trajectory for foodservice equipment service.

Alpine Investors' Apex Service Partners has completed 107+ acquisitions across the home services sector. Goldman Sachs acquired Sila Services for approximately \$1.7 billion. Capstone Partners reports PE add-on deals targeting HVAC providers rose 88% year-over-year through June 2025 (S&P Global Market Intelligence). PE accounted for 8% of HVAC deals in 2023, jumping to 23% in 2024 (Axial).

Platform companies trade at 8-10x+ EBITDA; add-ons at 4-6x, creating immediate multiple arbitrage. PKF O'Connor Davies describes residential HVAC as "midway through a consolidation cycle," while commercial services remain early-stage. ServiceTitan IPO'd in December 2024 at approximately \$7.5 billion valuation with \$772M in ARR. The PE wave in HVAC is a leading indicator for foodservice equipment service, where the same structural dynamics apply.

\$7.5B SERVICETITAN IPO VALUATION	88% YOY RISE IN PE ADD-ON DEALS	8-10x PLATFORM EBITDA MULTIPLES
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Sources: S&P Global Market Intelligence, Capstone Partners, Axial, PKF O'Connor Davies

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AI Can Now Close the Knowledge Gap

The previous sections prove the core problem: 80% of repair time is spent on diagnosis, not the fix itself, and the experts who carry that diagnostic knowledge are retiring. For the first time, AI can encode that expertise and deliver it to any technician in real time.

This is not about monitoring equipment or scheduling trucks. Multimodal AI models that combine computer vision, voice interaction, and large language models can now do what only experienced technicians could: look at a machine, interpret the symptoms, and walk someone through the repair. AI-assisted service resolution already achieves 94% accuracy versus 71% without (Salesforce State of Service), and cuts average resolution time from 18.6 hours to 3.2 hours.

Operators are responding: 46% plan to increase technology budgets in 2026, outpacing spending on staffing, equipment, or menu expansion (MachineQ/Comcast 2026).

Gartner projects that 40% of enterprise applications will include task-specific AI agents by end of 2026, up from less than 5% in 2025. By 2029, agentic AI will autonomously resolve 80% of common service issues without human intervention.

The companies that capture proprietary, equipment-specific knowledge and build closed-loop learning systems from real field operations will establish durable competitive advantages. Every completed repair generates more training data, creating a compounding moat that grows with scale.

94%

AI-ASSISTED ACCURACY

83%

FASTER RESOLUTION WITH
AI

80%

SERVICE ISSUES RESOLVED
BY AI AGENTS (2029)

Sources: Salesforce State of Service, MachineQ/Comcast 2026, Gartner, Aberdeen Group

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What Comes Next

This report documents an industry at a breaking point. The workforce that built decades of institutional repair knowledge is retiring. The equipment they serviced is being replaced by machines that are more complex, more software-dependent, and harder to diagnose. Costs are compounding. And the service model connecting these pieces has not changed in 30 years.

The data points to a single structural gap: knowledge transfer. The problem is not a shortage of people willing to turn wrenches. It is that the diagnostic expertise required to fix modern commercial equipment lives in the heads of a shrinking number of senior technicians, and it leaves the industry every time one of them retires.

This is the problem FieldLink was built to solve.

FieldLink is an AI-powered field service platform that captures expert-level equipment knowledge and delivers it to any technician in real time. Using multimodal AI that combines computer vision, voice interaction, and large language models, FieldLink guides technicians through complex repairs hands-free via smart glasses or any camera-equipped device. The AI sees what the technician sees, interprets the symptoms, and walks them through the fix step by step.

The platform is built on private, equipment-specific data obtained through direct OEM partnerships, not scraped from the public internet. Every completed repair feeds back into the system, creating a closed-loop learning cycle where the AI gets more accurate with every job. This is not a chatbot answering general questions. It is a purpose-built diagnostic intelligence trained on the specific machines, failure modes, and repair sequences that matter.

FieldLink is not selling software to broken service companies. It is building the new service model from the ground up: AI-powered triage that resolves issues remotely before a truck rolls, intelligent dispatch that sends the right technician with the right parts, real-time guided repair that closes the knowledge gap on site, and automated service documentation that eliminates paperwork and captures every detail for continuous improvement.

The \$74 billion problem documented in this report will not be solved by incremental improvements to the existing model. It requires a fundamentally different approach: one where expertise is encoded in AI, delivered at scale, and compounded with every repair. That is what FieldLink is building.

Send anyone. Fix anything. FieldLink turns any technician into an expert by delivering the right knowledge, at the right time, through AI.

All statistics in this report are sourced from publicly available industry reports, SEC filings, government data, and trade association publications. No data points are fabricated or estimated without explicit citation. Key sources include:

CFESA: Industry standards, certified technician data, training program information

86 Repairs: State of Repairs Reports (2020-2026), R&M cost data, equipment categories

Aquant: 2024 Field Service Benchmark Report (24M+ work orders, 145 orgs, 582K techs, \$7.71B in service costs)

MachineQ/Comcast: 2026 Restaurant Readiness Report (Censuswide survey, 400+ QSR/fast-casual operators)

Bureau of Labor Statistics: Occupational outlook data for maintenance/repair occupations through 2034

SEC Filings: Starbucks, McDonald's, RBI, Chipotle, Yum! Brands, Wendy's, CAVA, Middleby Corporation 10-K and 8-K filings

U.S. Copyright Office / FTC / DOJ: DMCA exemption rulings, joint comments on right-to-repair

NACS: 2024 convenience store industry data on foodservice growth and margins

Grand View Research: North American foodservice equipment market analysis

MarketsandMarkets: Field service management software market sizing

Gartner: AI agent predictions, enterprise application forecasts

Aberdeen Group / ServicePower: First-time fix rate benchmarks, parts availability data

Deloitte / Manufacturing Institute: Manufacturing workforce projections through 2033

Salesforce: State of Service report, AI-assisted resolution metrics

ACCA / SMACNA: HVAC/R workforce demographics, shortage projections

S&P Global / PKF O'Connor Davies: PE and M&A activity data in field service

Parts Town Unlimited: Revenue data, parts distribution market

Rational AG / Hoshizaki / Ali Group: OEM financial data, connected equipment platforms

iFixit: Right-to-repair advocacy, Taylor ice cream machine analysis

This report was prepared by the FieldLink team for informational purposes. FieldLink is not affiliated with any of the organizations cited unless otherwise stated. All data reflects the most current publicly available information as of April 2026.

