S&P Global
Mobility

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Looking Toward 2026: Construction Upfit Hotspots

Analyze 2025 fleet growth to identify the regions driving the biggest opportunities for your business.

Executive Summary

The US construction sector is entering 2026 with strong tailwinds. S&P Global Mobility vehicle registration data shows a 6% year-over-year increase in new vehicles equipped with service and utility upfits, signaling sustained fleet investment and modernization.

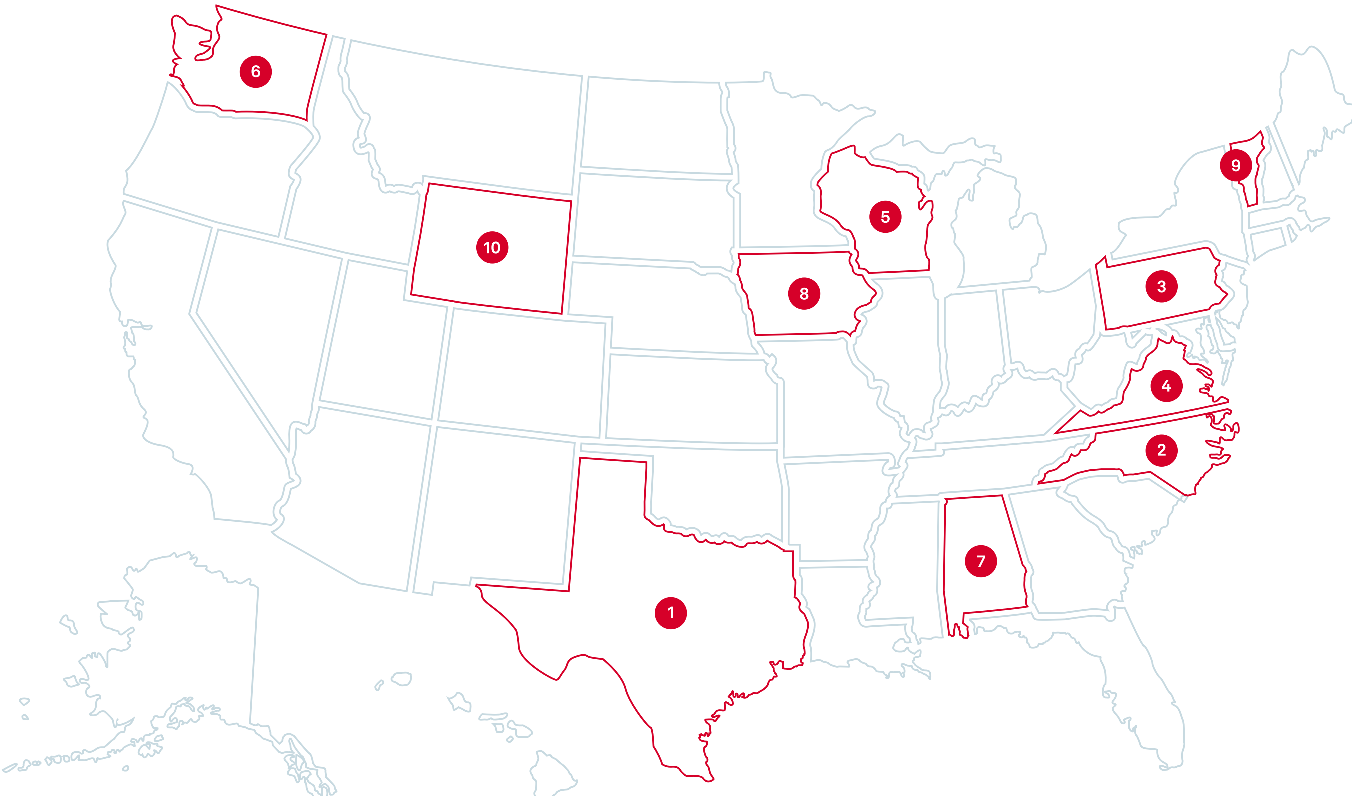
But this growth is not distributed evenly. A handful of states, including Virginia, North Carolina, Texas, and Pennsylvania, are leading the charge, while emerging markets like Vermont, Alabama, and Wyoming are showing surprising double-digit growth rates.

For upfitters, these shifts carry major implications:

- **Sales & marketing prioritization:** Knowing where fleet expansion is strongest enables smarter territory planning and business development focus.
- **Inventory & production planning:** Regional demand patterns guide allocation of chassis, materials, and upfit kits to the markets that need them most.
- **Product development & partnerships:** The trends driving growth, from EV integration to lighter materials, are shaping how upfitters should innovate in 2026.

This whitepaper uses 2025 construction-sector registration data to pinpoint where and how upfit demand is evolving, what upfit types are leading, and what strategic moves upfitters should make to capture next year's opportunities.

Top 10 Regional Hotspots for Construction Upfits in 2025



1. Texas

Total 2025 Upfits: 1,614

Growth vs. 2024: 20%

Texas remains the cornerstone of US construction activity, fueled by ongoing infrastructure investment, commercial building growth, and oil and gas sector expansion.

Most Registered Upfit Types:
Service/Utility and Dump bodies dominate, accounting for nearly half of all new upfits in the state.

Leading Fleets:
MasTec Infrastructure (211% growth, 94 new vehicles), Irby Construction, and United Rentals.

Strategic Insight:
Focus on modular and durable upfit systems that can serve multiple project types, particularly for fleets managing regional projects across Texas and neighboring states.

2. North Carolina

Total 2025 Upfits: 1,275

Growth vs. 2024: 35%

Construction in North Carolina continues to surge, led by major infrastructure and housing development around Charlotte, Raleigh, and the Research Triangle.

Most Registered Upfit Types:
Utility beds with crane support and enclosed service vans.

Leading Fleets:
Star Construction (105% growth, 73 vehicles), WW Clyde Construction (109% growth, 42 vehicles).

Strategic Insight:
Upfitters should emphasize lightweight, service-oriented designs and power management solutions, as regional fleets increasingly adopt hybrid and electric platforms.

3. Pennsylvania

Total 2025 Upfits: 1,030

Growth vs. 2024: 19%

Pennsylvania's sustained investment in bridge and road repair continues to drive steady construction fleet growth.

Most Registered Upfit Types:
Dump and service bodies, with strong adoption in municipal and contractor fleets.

Leading Fleets:
Irby Construction (82% growth, 123 vehicles) and Michels Pipeline (18% growth, 234 vehicles).

Strategic Insight:
Prioritize durability and corrosion-resistant builds, as fleets operating in the Mid-Atlantic face challenging seasonal conditions and road treatments.

4. Virginia

Total 2025 Upfits: 601

Growth vs. 2024: 38%

Virginia tops the list in percentage growth, driven by aggressive infrastructure modernization and suburban expansion in the northern corridor.

Most Registered Upfit Types:
Service/Utility and Stake/Platform beds.

Leading Fleets:
Mix of regional contractors and national rental providers like Sunbelt Rentals.

Strategic Insight:
Given Virginia's proximity to Washington D.C. and ongoing federal infrastructure projects, upfitters should anticipate strong demand from both private and public-sector fleets, especially those seeking electrified or lightweight options.

5. Wisconsin

Total 2025 Upfits: 645

Growth vs. 2024: 25%

A strong construction market anchored by highway rehabilitation and industrial projects.

Most Registered Upfit Types:
Dump and flatbed configurations.

Leading Fleets:
Regional contractors and heavy civil firms.

Strategic Insight:
Wisconsin's mix of municipal and private contracts favors versatile upfits that balance load capacity with all-season durability.

6. Washington

Total 2025 Upfits: 503

Growth vs. 2024: 25%

Washington is seeing robust growth tied to housing demand and public utilities expansion.

Most Registered Upfit Types:
Service and enclosed utility bodies.

Leading Fleets:
United Rentals, Enterprise Truck Rental, and local government fleets.

Strategic Insight:
Fleet electrification is advancing faster in the Pacific Northwest. Upfitters should emphasize battery-integrated auxiliary power systems and EV-compatible designs.

7. Alabama

Total 2025 Upfits: 396

Growth vs. 2024: 28%

A manufacturing boom and infrastructure spending are driving steady construction growth.

Most Registered Upfit Types:
Flatbeds and dump bodies for site prep and material handling.

Strategic Insight:
Target partnerships with rental fleets in Birmingham and Huntsville — growing urban centers with expanding construction needs.

8. Iowa

Total 2025 Upfits: 309

Growth vs. 2024: 26%

Growth in Iowa reflects rural infrastructure and renewable energy development projects.

Most Registered Upfit Types:
Service/Utility bodies for electrical and construction trades.

Strategic Insight:
Focus on modular, maintenance-friendly designs for fleets operating in mixed terrain and remote job sites.

9. Vermont

Total 2025 Upfits: 302

Growth vs. 2024: 35%

Small market, big growth. Vermont's sharp rise in new upfitted vehicles stems from federal infrastructure grants and municipal fleet modernization.

Most Registered Upfit Types:
Service/Utility and Dump bodies.

Strategic Insight:
Upfitters should consider small-fleet customization programs and lightweight materials suited to regional payload limits and vehicle size preferences.

10. Wyoming

Total 2025 Upfits: 201

Growth vs. 2024: 27%

Though the smallest market in total volume, Wyoming's percentage growth is significant, powered by energy and pipeline development.

Most Registered Upfit Types:
Flatbeds and dump bodies.

Strategic Insight:
Upfitters serving this region should emphasize ruggedness, cold-weather performance, and serviceability — qualities essential for remote work environments.

Top Upfits & Product Insights: What's Driving 2025 Growth

Across all construction fleets in 2025, the most common upfits reflect the tools of heavy-duty productivity — and the pace of their growth points to where the market is headed next.

UPFIT TYPE	2025 REGISTRATIONS	GROWTH VS 2024
Dump/Steel Bodies	13,457	+10%
Service/Utility Bodies	13,067	+11%
Stake/Platform/Flatbed	7,407	+8%

For 2026, two themes are shaping the next wave of product innovation:

1. Electrified Auxiliary Power Systems

Historically, jobsite power has come from PTO-driven systems or standalone generators. Increasingly, fleets are adopting battery-powered auxiliary systems, drawing energy directly from the vehicle.

- **Trend:** EV and hybrid vehicles are gaining share, and even ICE fleets are adopting idle-reduction strategies to save fuel and emissions.
- **Opportunity for upfitters:** Develop integrated power management systems and collaborate with OEMs to ensure compatibility with vehicle batteries and control systems.

2. Lightweight Materials for Payload Optimization

As more fleets adopt electric or hybrid powertrains, weight management becomes critical.

- **Trend:** Lighter aluminum or composite bodies are helping fleets maintain payload capacity while offsetting the weight of onboard batteries.
- **Opportunity for upfitters:** Invest in modular body systems and alternative materials that deliver strength without mass, giving fleets more flexibility in EV and ICE configurations alike.

Key Takeaways and Strategic Recommendations

1. Prioritize High-Growth States

Upfitters should align sales and production efforts with states showing the highest upfit registration growth:

- **High-Volume Markets:** Texas, North Carolina, Pennsylvania.
- **High-Growth Percentage Markets:** Virginia (+38%), Vermont (+35%), North Carolina (+35%).

Target these regions for dealer partnerships, regional stock programs, and sales campaigns.

2. Optimize Inventory and Production

Use state-level data to plan chassis allocation and material purchasing. Markets with high dump and service body demand (e.g., Texas, Pennsylvania, Wisconsin) will need steady steel and hydraulic system supply, while areas trending toward electrification (e.g., Washington, Virginia) may require specialized equipment integration capabilities.

3. Innovate Product Offerings

Develop upfit systems that are:

- Battery-compatible for auxiliary tools and power.
- Lightweight and modular for faster installation and better payload management.
- Standardized and durable, meeting the needs of rental and multi-user fleets.

4. Strengthen OEM and Tier Supplier Partnerships

Collaborate with vehicle manufacturers and Tier 1 suppliers to co-develop:

- Integrated auxiliary power systems.
- Lightweight body materials and energy-efficient designs.
- Electrification-ready mounting systems and wiring harnesses.

Partnership-driven innovation will ensure your products stay aligned with upcoming vehicle platforms and fleet electrification trends.

Conclusion: Plan Now to Capture 2026 Opportunities

The data is clear: 2025 has set the stage for continued construction fleet expansion across the US. The upfitter's role is evolving from a product provider to a strategic partner, one that helps fleets and rental companies stay efficient, electrified, and equipped for tomorrow's job sites.

Upfitters that act now, aligning production, sales, and innovation with the states and trends driving growth, will lead the market in 2026 and beyond.

Next Steps: Unlock the Full Data

Want to see VIN-level data for all fleets?

Connect with our team at S&P Global Mobility to unlock complete insights, from vehicle-level registration details to regional trend analysis and build your 2026 strategy with confidence.

Contact **Mark Hazel, Associate Director for Commercial Vehicle Reporting**, at mark.hazel@spglobal.com to explore the full construction upfit dataset and discover the regions, fleets, and vehicle types driving growth next year.

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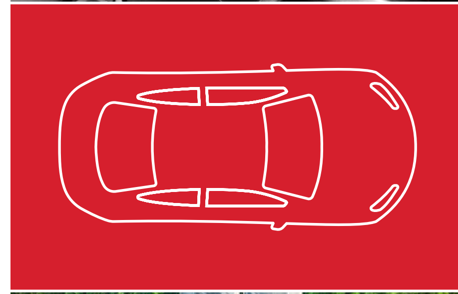

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