HVAC market insights: read the right measure

Historical query edition: 12 October 2026; FY2020-FY2026 through 30 September 2026. FY2026 reporting is provisional. Payette selected-source check: 14 October 2026.

Shared industry-code baseline

Industry code 238220 includes plumbing, heating and air-conditioning contractors. This reported U.S. baseline is not an HVAC-only market and is not additive to a Plumbing episode. Net obligations are funding commitments/adjustments, not cash paid, company revenue or a price to quote.

Seven-year net obligations	Distinct awards with activity	Actions
$6,523,419,931.79	24,980	50,462

Awards with activity are distinct contract/order identities in the selected period. Actions are transaction records on them; several actions can belong to one award. Annual award counts overlap and must not be summed into a unique national total.

Annual context and the latest two years

Fiscal year	Net obligations	Awards with activity	Actions
2020	$828,698,282.34	5625	7842
2021	$756,857,663.51	5420	7521
2022	$922,908,472.26	5135	7562
2023	$970,316,130.30	5095	7060
2024	$1,090,570,113.84	5099	7247
2025	$972,671,801.87	4731	6880
2026	$981,397,467.67	4257	6350

Period/cutoff applies to every table. Reporting lags and adjustments remain possible; no record-by-record engineering/specialty classification is inferred from aggregate controls.

All top ten states

Reported shared 238220 net obligations, FY2020–FY2026 through 30 September 2026; query edition 12 October.

Rank	State	Net obligations
1	California	$786,773,610.73
2	North Carolina	$458,117,192.77
3	Florida	$364,503,641.76
4	Texas	$303,841,875.23
5	Virginia	$301,617,633.67
6	Maryland	$290,971,814.08
7	Illinois	$282,379,860.50
8	Georgia	$265,100,453.29
9	New York	$264,115,415.91
10	Ohio	$185,496,030.20

Follow the coded location to named facilities, purchased services and buying offices. Verify actual performance addresses and multi-site scope; deduplicate award identities across combined service areas. State, city and ZIP totals overlap and must not be added.

The state ranking explicitly covers exactly 50 states. It is not an eligibility/win-probability ranking.

All top ten reported cities

Reported shared 238220 net obligations, FY2020-FY2026 through 30 September 2026; query edition 12 October.

Rank	Reported city/state	Net obligations
1	Camp Lejeune, NC	$273,038,741.72
2	Washington, DC	$231,564,063.36
3	San Diego, CA	$190,072,898.90
4	Orlando, FL	$98,533,699.33
5	Cherry Point, NC	$93,293,265.58
6	Dayton, OH	$82,613,672.84
7	Great Lakes, IL	$81,496,740.13
8	Edwards, CA	$72,748,503.42
9	Warner Robins, GA	$67,012,787.77
10	Eielson Afb, AK	$66,967,632.10

Follow the coded location to named facilities, purchased services and buying offices. Verify actual performance addresses and multi-site scope; deduplicate award identities across combined service areas. State, city and ZIP totals overlap and must not be added.

City/ZIP scope includes the District of Columbia, unlike the 50-state table. Place of performance is distinct from the agency or supplier address.

All top ten reported ZIP codes

Reported shared 238220 net obligations, FY2020–FY2026 through 30 September 2026; query edition 12 October.

Rank	ZIP (text)	State	Net obligations
1	28547	NC	$245,666,854.44
2	20301	DC	$97,174,477.58
3	28533	NC	$93,293,265.58
4	60088	IL	$81,496,740.13
5	32899	FL	$77,573,150.31
6	93524	CA	$70,244,483.31
7	31098	GA	$67,012,787.77
8	99702	AK	$66,967,632.10
9	40121	KY	$62,731,452.70
10	08641	NJ	$61,625,993.87

Follow the coded location to named facilities, purchased services and buying offices. Verify actual performance addresses and multi-site scope; deduplicate award identities across combined service areas. State, city and ZIP totals overlap and must not be added.

Preserve leading zeros such as 08641. A ZIP result is not every building, equipment item or service visit on a contract.

Idaho: state context and a quiet coded service area

Period	Net obligations	Awards	Actions
FY2025	$1,804,952.76	26	43
FY2026	$4,620,104.20	35	57
seven_year	$15,771,861.97	127	301

The selected McCall/Council ZIPs 83638/83612 had no matching coded historical actions in the retained query. This is not missing award dollars, a zero-price bid, free work or proof of no future demand. Current notices require a separate search.

A narrower HVAC-description size sample

New means first recorded action in available history, allocated to its fiscal year. Inclusion requires cumulative funding above $0 AND reconstructed full potential above $1 through 30 September 2026. Potential includes options; not annual service price or cash paid. Description matching is a sensitivity sample, not every HVAC contract.

Scope/year	Included / excluded	Below $250K	$250K to < $1M	At least $1M
ID / FY2025	7 / 0	5	2	0
ID / FY2026	11 / 0	9	1	1
USA / FY2025	1279 / 35	942	233	104
USA / FY2026	1119 / 13	856	175	88

Scope/year	Median reconstructed full potential
ID / FY2025	$87,931.92
ID / FY2026	$14,290.08
USA / FY2025	$74,372.96
USA / FY2026	$61,056.00

Included/excluded counts retain the exact source denominator; tiny Idaho samples need context. Retained SQL/aggregate reviews are separate from all-award classification and individual history validation.

Three actual examples: different mechanical jobs

FAA means Federal Aviation Administration.

Retained official metadata retrieved 12 October; cumulative funding through 30 September 2026. Recorded periods are metadata, not an attestation that performance happened exactly as planned.

Preventive maintenance - Coeur d'Alene

Award 1284LL25P0061; $87,931.92; Cumulative funding through 30 Sep 2026. Recorded period: 1 Oct 2025-30 Sep 2027.

Inspect actual service scope, equipment and integration responsibilities, purchasing route and qualification evidence. Do not divide multi-year funding into an invented annual price or apply this amount as a Payette quote.

R22 chiller replacement · Boise

Award 36C26024C0018; $2,439,153.35; Cumulative funding through 30 Sep 2026. Recorded period: 25 Jun 2024-8 Aug 2025.

Inspect actual service scope, equipment and integration responsibilities, purchasing route and qualification evidence. Do not divide multi-year funding into an invented annual price or apply this amount as a Payette quote.

FAA HVAC upgrade · Cascade

Award 697DCK26C00278; $590,000; Cumulative funding through 30 Sep 2026. Recorded period: 22 Sep 2026-16 Dec 2026.

Inspect actual service scope, equipment and integration responsibilities, purchasing route and qualification evidence. Do not divide multi-year funding into an invented annual price or apply this amount as a Payette quote.

A dated forecast, not an open bid

Department of Homeland Security (DHS) planning record F2026074890 describes replacement of HVAC at the helicopter high bay in Elizabeth City, North Carolina. Estimated range $1M-$2M; estimated solicitation release 24 May 2027. Official primary-source observation: 14 October 2026. Listed vehicle: Design/Build Construction Services II (Regional); industry code 236220 is adjacent construction, not part of the shared 238220 baseline.

Read the official forecast record

Verify current record/vehicle access and later notice changes. This is not a guaranteed release, unrestricted prime opportunity or an open solicitation. The retained forecast query was limited to 30 results, not a census.