FIELD INTELLIGENCE

Issue 001 Monday, August 17, 2026 · Biweekly, 4 pages

Automotive Services

Collision Repair · General Auto Repair · Tire & Wheel · Auto Glass · Towing & Roadside · Car Wash & Detailing

Six trades, one publication. Every item is something that moves a number on your P&L, changes what you must do by law, or changes what parts and labor cost you.

IN THIS ISSUE

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LABOR · EVERY TRADE IN THIS ISSUE

TechForce's 2026 report finds U.S. auto-service, collision and diesel shops face a combined 43,135-technician annual shortfall, with collision hiring covering only 43 percent of need.

TechForce Foundation's ninth annual Technician Supply, Demand & Opportunity Report, posted in May 2026, puts hard numbers on a problem every shop owner feels: not enough people are entering the trade. Across ten technical sectors, employers need 241,842 new technicians a year and schools graduate 101,743 — a national gap of roughly 140,000 positions annually and 1,209,218 over five years. Narrow that to automotive service, collision/autobody and diesel/heavy truck, and annual demand is 112,228 against 69,093 completions, a combined shortfall of 43,135 technicians a year, filled at just 62% nationally.

The gap is worst in collision. Autobody programs graduate 6,327 technicians a year against 14,671 openings, meeting only 43% of demand — the widest hole TechForce tracks. General automotive service fills 71% of its 70,865 openings with 50,085 completions; diesel/heavy truck fills about 48% of 26,692 openings. Pay tracks the shortage: diesel techs earn a $60,640 median, 22% above the report's $49,500 national median; collision techs earn $51,680; automotive service techs earn $49,670. Top-decile pay reaches $80,850-$87,030 across the three trades — the pay ceiling isn't the constraint, the training pipeline is.

TechForce's own analysis says the cause is recruitment, not attrition: only 3.5% of automotive technicians leave the workforce yearly, against 4.8% for the U.S. workforce overall — the shortfall isn't shops losing staff, it's schools not producing enough of them. Community college and vocational enrollment hasn't kept pace with demand for a decade, and this ninth edition shows the deficit widening rather than closing even as wages rise. For an owner, the labor market isn't going to loosen on its own; every open bay this year competes against every other shop's open bay for the same shrinking pool of graduates.

That translates directly to the P&L: unfilled bays mean turned-away work, longer cycle times, and overtime paid at a premium to keep existing staff from being poached. It also changes the calculus on training investment — a technician hired and trained in-house is cheaper over three years than the wage premium needed to poach one from a competitor, and cheaper still than the revenue lost to an empty bay. Shops in tire, glass and towing feel the same squeeze indirectly: fewer technicians pushes wages up everywhere, including for calibration, alignment and mobile-service roles competing for the same labor pool.

> **What to do about it:** Pull your last 12 months of turned-away or subcontracted work and calculate the revenue lost to unfilled bays — that number justifies a training-and-signing-bonus budget to your lender or partners. Call your nearest community college or vocational program this week and ask about sponsorship, tool-scholarship or work-study slots for the fall term; collision and diesel programs are the shortest-staffed and most receptive to shop partnerships. Benchmark your posted wages against TechForce's reported medians ($49,670 automotive service, $51,680 collision, $60,640 diesel) and put the range in every job ad — several states now require it by law. Put a retention plan in writing for technicians in their first 18 months, since that is when most attrition happens, and track it like a KPI.

Technician Supply, Demand & Opportunity Report, 9th Edition — TechForce Foundation, posted May 2026 · TechForce: More than 73,000 collision techs needed by 2029, retention partially to blame — Repairer Driven News, June 8, 2026

COLLISION REPAIR

TWO ITEMS

INSURANCE

A 473-shop April 2026 survey found only 53% of collision shops that negotiate get paid for removing pinch-weld coatings before frame anchoring, most of the time or better.

Why it matters: Collision Advice and CRASH Network's 2026 ‘Who Pays for What?’ survey, covering 49 states, tracked how eight major insurers reimburse roughly 20 frame and mechanical procedures absent from a standard estimate. Pinch-weld coating removal — required before most OEM-specified frame-rack repairs — ranked seventh of twenty for payment reliability; one in five shops has never asked for it. DRP shops got paid more often than non-DRP shops across most carriers, so independents outside a direct repair program are most exposed. This is unbilled labor on safety-required work, not a courtesy charge. Add pinch-weld removal as its own line on every frame-anchored estimate this week, photograph the procedure, and cite the survey reimbursement data back to any adjuster who denies it.

‘Who Pays for What?’ Survey: Removing Pinch-Weld Coatings Pays Off for Just Over Half of Shops — Autobody News, August 17, 2026

REGULATION

Illinois Governor Pritzker signed a right-to-appraisal law on August 7, 2026, letting either side of a total-loss dispute force independent appraisal starting July 1, 2027.

Why it matters: Public Act 104-0767 gives Illinois policyholders and insurers a formal appraisal process for disputed physical-damage and total-loss valuations, for policies issued or renewed on or after July 1, 2027. Either party can demand it without the other's consent; each side picks an appraiser within seven business days, those two have five days to value the loss, and a jointly-selected umpire breaks any tie, with two of the three binding the claim. Each party pays its own appraiser; umpire costs split evenly. It doesn't touch labor-rate or procedure disputes, but gives a customer — and you, if you're owed the difference between a paid estimate and real repair cost — a cheaper path than litigation to challenge a low valuation. Tell customers with disputed total-loss or short-pay valuations about the appraisal clause already in most policies, and flag this new right once it takes effect for Illinois-plated vehicles.

Illinois Right-to-Appraisal Bill Signed Into Law, Effective July 2027 — Autobody News, August 14, 2026

GENERAL AUTO REPAIR

TWO ITEMS

LABOR

General automotive service shops need 70,865 new technicians a year but training programs graduate only 50,085, a 29% gap, TechForce's 2026 report found.

Why it matters: General automotive service is the largest of TechForce's ten tracked trades by headcount need, a shortfall larger in raw numbers than collision or diesel despite the smaller percentage gap. Median pay is $49,670, just above the report's $49,500 all-trades median, with the top 10% earning $80,850 or more. TechForce attributes the gap to recruitment, not attrition — automotive technicians leave the workforce at 3.5% a year against 4.8% for all U.S. workers — so raising wages alone won't fill bays if fewer people enter training. Independent shops compete for the same shrinking graduate pool as dealerships, fleet operators, and the collision and diesel trades, all short-staffed too. Check whether your posted wage and any sign-on bonus beat these medians, and contact a local technical program about apprenticeship or co-op slots before the fall enrollment cycle closes.

Technician Supply, Demand & Opportunity Report, 9th Edition — TechForce Foundation, posted May 2026 · TechForce: More than 73,000 collision techs needed by 2029, retention partially to blame — Repairer Driven News, June 8, 2026

DEMAND

64% of drivers say they will keep their current vehicle until it is too costly or too hard to repair, The Zebra's 2026 insurance survey found.

Why it matters: The Zebra and Savanta surveyed 1,500 U.S. vehicle owners in April 2026 for the State of Insurance report, published August 12, 2026, as median annual premiums reached $2,079. That signals repair and maintenance demand on aging vehicles isn't going away. Forty-five percent said they'd cut coverage or raise deductibles if premiums rose 10%, and 29% would consider dropping coverage entirely — more underinsured customers likely to push back on repair estimates. Fifty-seven percent said they're driving less to save on fuel, which should mean longer intervals between routine services rather than fewer services overall. This is a demand tailwind on maintenance and wear-item work and a warning sign on collision and comprehensive claims, where more customers pay out of pocket. Build a maintenance-plan or membership offer for owners who intend to keep their car running rather than trade it in.

Drivers Say They're Deferring Repairs and Coverage as Insurance Costs Bite, Survey Finds — Autobody News, August 12, 2026

TIRE & WHEEL

TWO ITEMS

SUPPLY

Commerce set a final 76.46% antidumping rate on unnamed Chinese tire exporters and up to 78.33% on named producers in a review published August 14, 2026.

Why it matters: Commerce's final review set margins of 59.15% for Qingdao Transamerica Tire and 59.77% for Triangle Tyre; unreviewed exporters default to the 76.46% China-wide rate. Shandong Haohua's rate moved most, up from a 62.56% preliminary figure to 78.33% final — preliminary numbers used in early purchasing decisions can move sharply. This isn't a new tariff, but it confirms the duties aren't going away: the ITC voted June 23, 2026, and Commerce published notices July 7 and 16 to continue both antidumping and countervailing duty orders for five more years. Shops and distributors buying Chinese-sourced tires, or blending them into private-label lines, are exposed; tires built in Thailand, Vietnam or South Korea aren't covered. Ask your distributor in writing which SKUs are subject to these orders and whether the cost is already in your price sheet, and reprice any open fleet or dealer bid that assumed last year's landed cost.

Certain Passenger Vehicle and Light Truck Tires From the People's Republic of China: Final Results of Antidumping Duty Administrative Review; 2023-2024 — Federal Register / U.S. Department of Commerce, August 14, 2026 · Certain Passenger Vehicle and Light Truck Tires From the People's Republic of China: Continuation of Antidumping Duty Order and Countervailing Duty Order — Federal Register, July 16, 2026 · Passenger Vehicle and Light Truck Tires from China (Second Review) — Federal Register / U.S. International Trade Commission, July 7, 2026

MONEY

Tire prices rose 0.7% over the twelve months to July 2026 and 0.2% for the month alone, the slowest pace among major vehicle-cost categories, BLS reported.

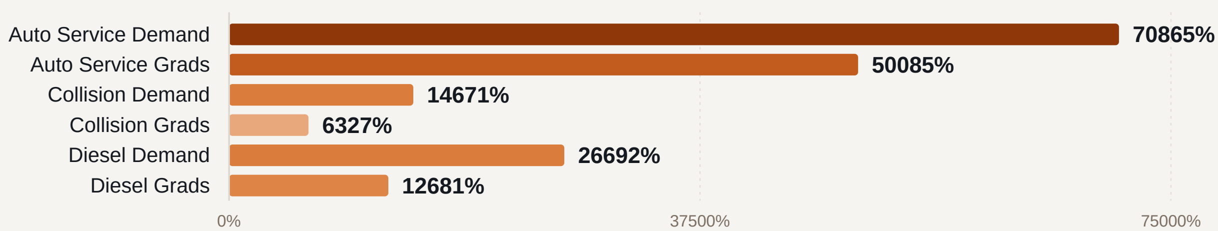
Why it matters: BLS's July 2026 CPI, released August 12, 2026, put the tires index at 0.7% YoY and 0.2% for the month, modest next to the 1.5% twelve-month rise in the broader motor vehicle parts and equipment category it sits inside. That's smaller than the antidumping duties on Chinese tires might suggest, pointing to retailers and distributors absorbing cost, competition from non-Chinese sources, or softer demand holding sticker prices down. It doesn't mean landed cost is flat — duty-paid Chinese tire cost is still elevated under the orders confirmed this summer — retail pricing just hasn't caught up yet. For a tire shop, that gap between input cost and shelf price is either margin compression already happening or a price increase still coming. Pull cost-of-goods on your top ten SKUs against a year ago and compare the delta to 0.7%; if landed cost moved more than that, your pricing hasn't kept pace and you're financing the gap yourself.

Consumer Price Index Summary — July 2026 — U.S. Bureau of Labor Statistics, released August 12, 2026 · Table 2. Consumer Price Index for All Urban Consumers (CPI-U): U.S. city average — U.S. Bureau of Labor Statistics

INFOGRAPHIC 1 / TECH SHORTAGE

Auto shops need far more technicians than training programs graduate in three key trades.

Annual job openings vs. annual program completions by sector, TechForce Foundation Technician Supply, Demand & Opportunity Report (9th ed.), posted May 2026.



Collision programs meet only 43% of annual hiring need, the worst gap of the three trades; general automotive service meets 71%, diesel 48%. TechForce attributes the shortfall to too few entering training, not technicians quitting. Owners compete for the same shrinking graduate pool as every other shop, dealership and fleet operator. Diesel's $60,640 median pay sits well above the report's $49,500 all-trades median.
Source: Technician Supply, Demand & Opportunity Report, 9th Edition — TechForce Foundation, posted May 2026

AUTO GLASS

TWO ITEMS

REGULATION

California's Motor Vehicle Glass Act passed the Senate 35-0 and cleared an Assembly committee 15-0 on August 13, 2026, heading to a third reading.

Why it matters: SB 988 passed the California Senate 35-0 on May 19, 2026. As written, it would require glass shops to tell customers, before service, whether their vehicle has ADAS and needs calibration, then confirm in writing after the job whether calibration succeeded, with an itemized invoice. It would bar transferring insurance benefits to a shop without a filed claim number and signed estimate, cap civil penalties at $500 for a first violation and $2,000 after that, and protect a customer's right to choose their shop even inside an insurer's preferred network. California is the largest single state auto glass market and its rules tend to become a template other states copy within a year or two. It hasn't been signed and could still change in the Assembly, so nothing is binding yet. Glass shops working California business should start building the pre- and post-service disclosure paperwork this bill would require now, so it isn't a scramble if it reaches the governor's desk this fall.

California SB988 | 2025-2026 | Regular Session — LegiScan (bill status, action of August 13, 2026) · California's Auto Glass Bill Would Tighten ADAS and Claims Rules — Autobody News, March 30, 2026

SUPPLY

Only about 35.6% of DRP appraisals included an ADAS calibration in the most recent quarter tracked, even though most modern windshield jobs require one, CCC data shows.

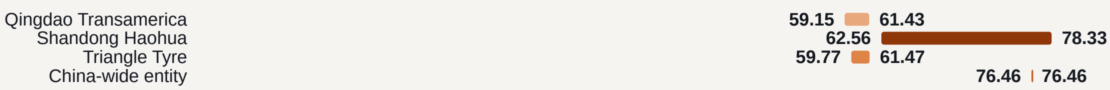
Why it matters: CCC data cited by Autobody News (Aug. 4, 2026) found calibrations in just 35.6% of DRP appraisals last tracked quarter, against 87.7% for diagnostic scans on the same jobs — real-world need, per industry estimators, may run 80-90% with only about 10% performed and documented. SCRS argues shops already have adequate access via OEM portals and aggregators like Alldata, and the real barrier is economic pressure not to bill; others blame new-model repair data reaching aggregators a year or more after launch, and missing telematics data on what equipment a vehicle carries. An unperformed or undocumented calibration on an ADAS-equipped vehicle is a liability exposure that follows the vehicle and an insurer audit target. Build a calibration-verification step into every glass job on a vehicle built since roughly 2018 — confirm ADAS fitment, perform the calibration, and keep the pass/fail report in the file, whether or not the insurer pays for it separately.

ADAS Calibration Fixes Divide Collision Industry Over Access, Data and Process — Autobody News, August 4, 2026

INFOGRAPHIC 2 / TIRE DUTY RATES

Commerce's final 2026 tire-tariff review moved one Chinese maker's dumping rate up 16 points from its preliminary number.

Antidumping duty margins on Chinese passenger and light-truck tires, preliminary (Feb. 11, 2026) vs. final (Aug. 14, 2026) results for the Aug. 2023-Jul. 2024 review period; U.S. Department of Commerce, International Trade Administration.



Three named Chinese tiremakers had their preliminary rates revised, and Shandong Haohua's jumped from 62.56% to 78.33% — a swing that can upend a purchasing decision made on preliminary numbers. The China-wide rate of 76.46% held steady. The ITC voted June 23, 2026 to keep the whole order in place five more years. None of this touches tires made outside China, so sourcing is the lever a shop or distributor controls. Source: Certain Passenger Vehicle and Light Truck Tires From the People's Republic of China: Final Results of Antidumping Duty Administrative Review; 2023-2024 — Federal Register / U.S. Department of Commerce, August 14, 2026

TOWING & ROADSIDE

TWO ITEMS

REGULATION

Pennsylvania Governor Shapiro signed a predatory-towing law on July 20, 2026 that takes effect roughly 150 days later, around mid-December.

Why it matters: Senate Bill 779, now Act 46 of 2026, passed the Pennsylvania Senate 49-1 and House 193-9. It requires tow operators to maintain a publicly accessible location during posted hours, post fees and hours where customers can see them, give written itemized statements on request, and accept cash, major credit cards and insurance checks. It bars towing without owner, law-enforcement or municipal authorization; bars requiring a customer to authorize repairs or extra storage to get a vehicle released; and requires release during business hours unless police direct otherwise. Violations bring civil penalties for repeat offenders and impoundment of the offending truck until fines are paid. Five months is enough time to fix a payment terminal or posted-hours sign, not enough to ignore it. Review your fee postings, payment acceptance and release procedures against the bill's text now, and watch for copycat bills; similar legislation is moving in multiple states.

Pennsylvania SB779 | 2025-2026 | Regular Session — LegiScan (signed by Governor July 20, 2026, Act No. 46 of 2026) · Pennsylvania Legislation Targets Predatory Towing Practices: What Carriers Need to Know — Pennsylvania Motor Truck Association

MONEY

A California bill passed 38-0 by the Senate would fine tow yards, storage lots and even body shops up to four times any wrongful charge.

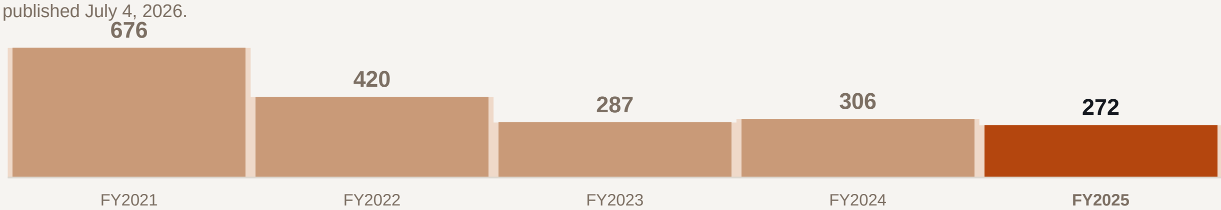
Why it matters: SB 1112 passed the California Senate 38-0 on May 20, 2026 and cleared the Assembly Judiciary Committee 12-0 on June 16. It would let a registered owner, lienholder or insurer post a bond with a county court clerk to force release of a wrongfully towed or held vehicle before sale, then file a formal violation claim within ten court days. Any business that 'knowingly participates in or profits from' a wrongful towing or storage violation faces the fourfold fine — the bill names body shops alongside tow yards and impound lots as potentially liable, not just the tower. It also requires California's Bureau of Automotive Repair to publish a consumer-rights notice by January 1, 2028, which towing companies, impound yards, storage facilities and body shops must post by July 1, 2028. If you accept vehicles from tow operators or bill storage on their behalf in California, get the arrangement in writing and confirm the tow was authorized before you take the car.

California Towing Bill Would Put Auto Body Shops on the Hook for Fines, Not Just Tow Yards — Autobody News, July 17, 2026

INFOGRAPHIC 3 / CAR WASH LENDING

SBA-backed lending for new car wash construction has fallen 60% since its 2021 peak.

SBA 7(a) gross loan approvals to car wash businesses by fiscal year, in $ millions; MMCG Invest analysis of SBA FOIA data, published July 4, 2026.



SBA-guaranteed loans to car wash businesses fell from $676 million in fiscal 2021 to $272 million in fiscal 2025, a 60% decline tracking the collapse in car wash deal pricing over the same period. A small FY2024 uptick did not hold. Less credit is good news for an operator worried about a new express tunnel opening down the street, and bad news if you were counting on an SBA loan to build or buy one yourself. Source: The US Car Wash Industry in 2026: The Gold Rush Meets Its Ceiling — MMCG Invest, July 4, 2026

CAR WASH & DETAILING

TWO ITEMS

MONEY

Mister Car Wash went private at roughly $3.1 billion in 2026 while ZIPS filed Chapter 11 with $653.9 million in debt, reshaping express-wash ownership.

Why it matters: An industry analysis published July 4, 2026 tracks the unwinding of the private-equity buildout that drove the last decade's express car wash boom. Leonard Green & Partners took Mister Car Wash private at $7.00 a share; Driven Brands exited the category, selling Take 5 Car Wash for $385 million after an $851 million goodwill impairment. Deal pricing has collapsed with it — platforms that traded at 18 to 20 times EBITDA in 2021-2022 now clear at high-single to low-double-digit multiples. SBA-backed lending for new sites fell the same 60%, from $676 million in fiscal 2021 approvals to $272 million in fiscal 2025. Easy financing and rich exit multiples that funded years of new-site competition are drying up. If a competitor's new express tunnel has been rumored for two years and hasn't broken ground, this financing picture is likely why — check comparable site permits, and if you're shopping for acquisition targets, distressed platforms are selling at a fraction of 2022 pricing.

The US Car Wash Industry in 2026: The Gold Rush Meets Its Ceiling — MMCG Invest, July 4, 2026

REGULATION

Georgia's Level 3 drought response bans driveway and fundraiser car washing but exempts permanent car wash facilities, a pattern repeating in several states' 2026 rules.

Why it matters: Drought rules active as of July 2026 draw the same line nationally — home hose-washing and charity washes get restricted first, while licensed commercial facilities, which recycle water, are exempted or regulated separately. Georgia's Level 2 response bans home washing and fundraiser washes; Level 3 exempts 'permanent car wash facilities' and commercial pressure washing. Florida's Southwest Florida Water Management District runs a Phase III order through October 1, 2026 across eleven counties, limiting home washing to one lawn-watering day per week and banning fundraiser washes outright. That's a real edge over informal and mobile competitors, but only if you can document your water use and reclaim system when asked. Get your facility's water permit and reclaim-system documentation organized now, before the next drought declaration, and confirm your county's current drought stage; rules vary block by block in Texas and by local supplier in California.

Can Your City Ban Car Washing in a Drought? What Mobile Detailers Need to Know — LusterBook, July 17, 2026

THE BACKGROUND SIGNAL

The fraud that reads your invoices before it sends one

The FBI's Internet Crime Complaint Center took 24,768 business email compromise reports in 2025, with losses of $3.05 billion — a record, after dipping to $2.77 billion in 2024 from $2.95 billion in 2023. Across all internet crime it logged 1,008,597 complaints and $20.88 billion in losses. Reported cases only, so read it as a floor.

Business email compromise, not ransomware, is the one that should concern a mechanical contractor. Someone gets into a mailbox, reads until they understand how you invoice and who pays you, then sends a real-looking progress billing with different bank details. No malware, no warning — just a payment that never arrives and an argument about who eats it. A trade that emails quotes, change orders and supplier invoices all day is the shape this is built for. The quieter number is adoption: under 20% of firms with fewer than 20 staff use AI at all.

What to do about it: You don't need a security program. You need multi-factor authentication on email and your accounting login, and one rule everybody follows: nobody changes bank details on the strength of an email or a call — you ring the number you already had on file and confirm. That covers most of it, and costs nothing. The part it doesn't — how the systems are set up — is the day job of our parent company, CyberSainya.

FBI Internet Crime Complaint Center, 2025 Internet Crime Report — reported cases only, rounded from $2,946,830,270, $2,770,151,146 and $3,046,598,558. U.S. Census Bureau, Business Trends and Outlook Survey, May 3, 2026.

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