



European Mechanical Installation Monitor Q4 2025

Training needs
January 2026

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European Mechanical Installation Monitor

Gain valuable insights into the European mechanical installation market with our quarterly analysis. Conducted through 676 detailed phone interviews with registered HVAC installers and plumbers across six key European markets, our research captures the latest trends and behaviours driving the industry.

Discover Industry Insights

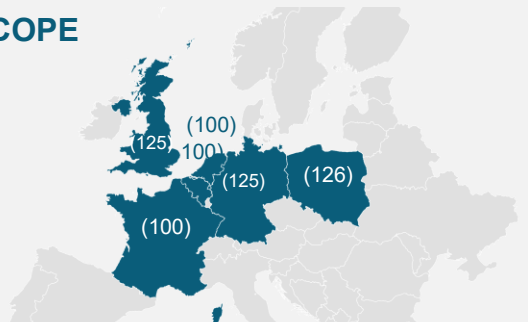
Our research provides a comprehensive overview of the European mechanical installation market, featuring:

- **Fixed Part:** Economic developments of installation companies in Europe, including order book and turnover trends.
- **Quarterly Themes for 2025:**
 - Q1: Sustainability
 - Q2: Services in the installation market
 - Q3: Purchase channels
 - **Q4: Training needs**

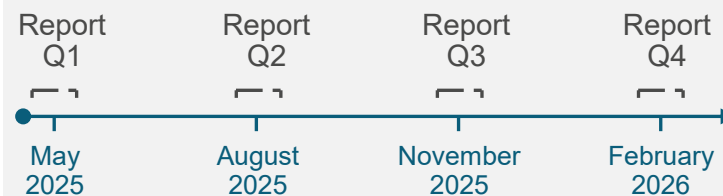
Stay ahead of the curve with data-driven insights and in-depth analysis tailored to your business needs.



COUNTRY SCOPE



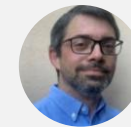
THE TIMELINE



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About **target group** & methodology



Surveying HVAC installation companies...

Interviewed companies need to provide HVAC installation services, but they may also do other activities in addition (electrical installation, etc.). Most interviews are conducted with owners/ directors or purchasers of these companies.

... selected from a country-representative database

USP possesses an international database of HVAC installation companies, which is constantly updated. Respondents are thus not part of a fixed panel; the sample varies from wave to wave.

... through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient number of interviews, in order to provide insights which can be relied on. These phone interviews are conducted by fixed fieldwork partners, located in the respective countries.

... weighting the results based on company size groups

Country results are weighted so that all three company size groups* have an equal influence on the total. As typically most interviews are conducted with small companies, we believe it is important to correct in order for large companies to have an equal impact on the 'total' results. This way the results are not heavily influenced by many smaller companies.

* **Group 1:** 1-4 FTE; **Group 2:** 5-14 FTE; **Group 3:** 15+ FTE

About the Q4 theme topic



TRAINING NEEDS in the installation sector...

This chapter will give insight into installers' experiences with training courses in the past year and their training needs for the future. The installation sector is facing a major challenge in the shortage of experienced and knowledgeable labour. One remedy to the shortage is to provide training to installers. It is therefore crucial for manufacturers, who are often a source of training, to understand installers' training needs.

...helps to understand installers' experiences with training courses and their future training needs

To provide the necessary insights, we covered the following topics:

- The way of attending trainings and future expectations
- Preferred ways of training
- Relevant training topics and preferred settings
- The best timing for trainings
- Certification
- Labour shortage

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Business Development:

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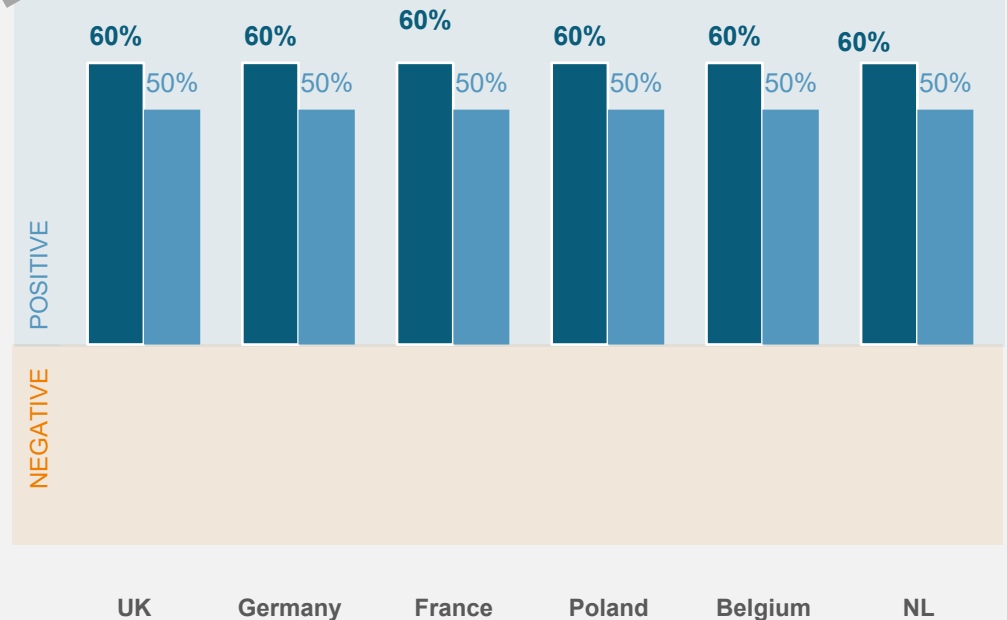
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Turnover balance of investors Q4 2025 and Q1 2026

Balance of companies that **see/expect** an increase minus decrease in turnover for Q4 2025/Q1 2026 compared to the turnover for Q4 2024/Q1 2025





Training needs:

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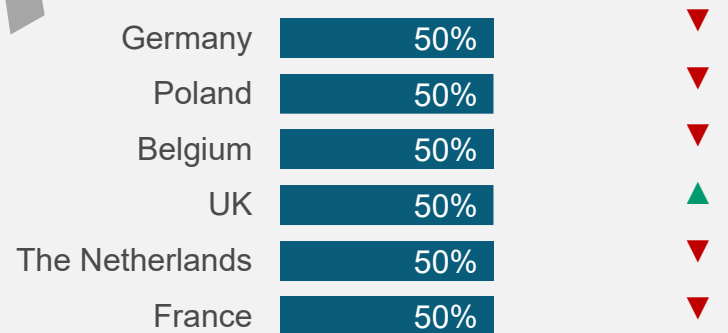
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The effect of manufacturer-provided training on installers

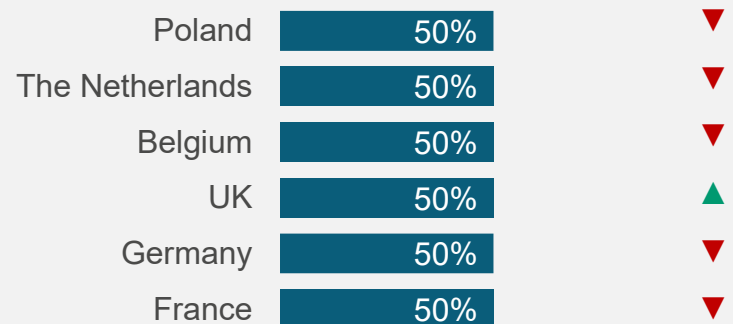
% of installers who either switch entirely or purchase more frequently from the manufacturer organizing the training

Δ 2023



Labour shortage in the HVAC/plumbing/sanitary installation sector

Δ 2023



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Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	125	125	100	126	100	100
Heating installations	50%	50%	50%	50%	50%	50%
Hot & cold-water installations	50%	50%	50%	50%	50%	50%
Installation of sanitary ware	50%	50%	50%	50%	50%	50%
Heat pumps	50%	50%	50%	50%	50%	50%
Ventilation	50%	50%	50%	50%	50%	50%
Air conditioning and cooling	50%	50%	50%	50%	50%	50%

Other installation activities

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	125	125	100	126	100	100
Electrical installation	50%	50%	50%	50%	50%	50%
Solar cells, solar collectors	50%	50%	50%	50%	50%	50%
Home automation installation	50%	50%	50%	50%	50%	50%





Installers' profile:

Core HVAC activities

Which of the following installation activities does your company perform?

Per company size

1-4 FTE 5-14 FTE 15+ FTE

Activity	50%	33%	33%	33%
Hot & cold water installation	50%	33%	33%	33%
Heating installations	50%	33%	33%	33%
Installation of sanitary ware	50%	33%	33%	33%
Heat pumps	50%	33%	33%	33%
Wastewater pumps and water supply installations	50%	33%	33%	33%
Ventilation	50%	33%	33%	33%
Air conditioning and cooling	50%	33%	33%	33%

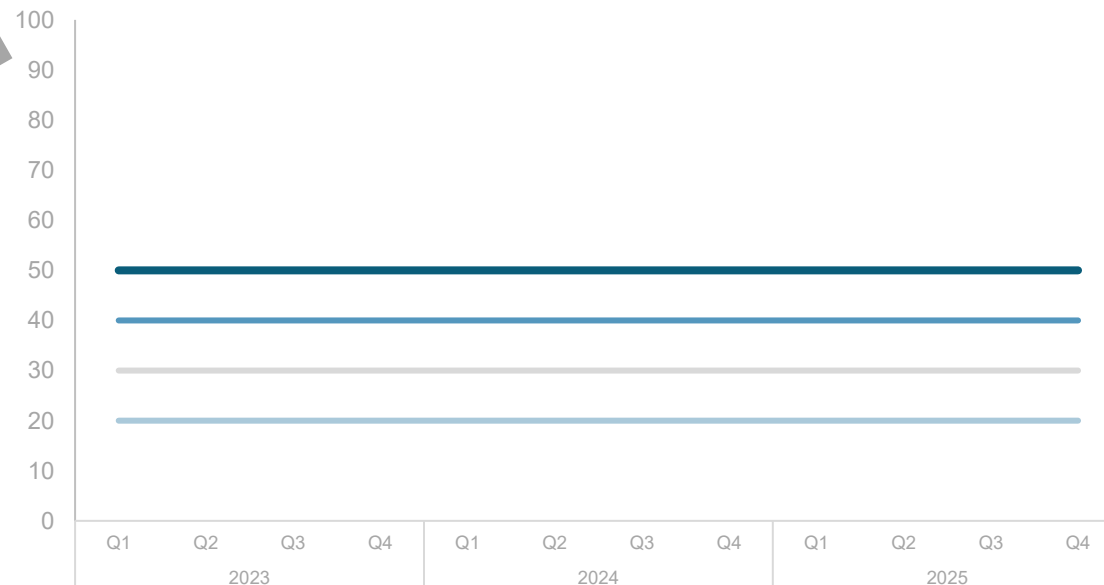
Other installation activities

Electrical installation	50%	33%	33%	33%
Solar cell solar collectors	50%	33%	33%	33%
Home automation installation	50%	33%	33%	33%

Installation activities trend development:

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(% installers) Heat pumps | Electrical installation | Solar cells, solar collectors | Home automation



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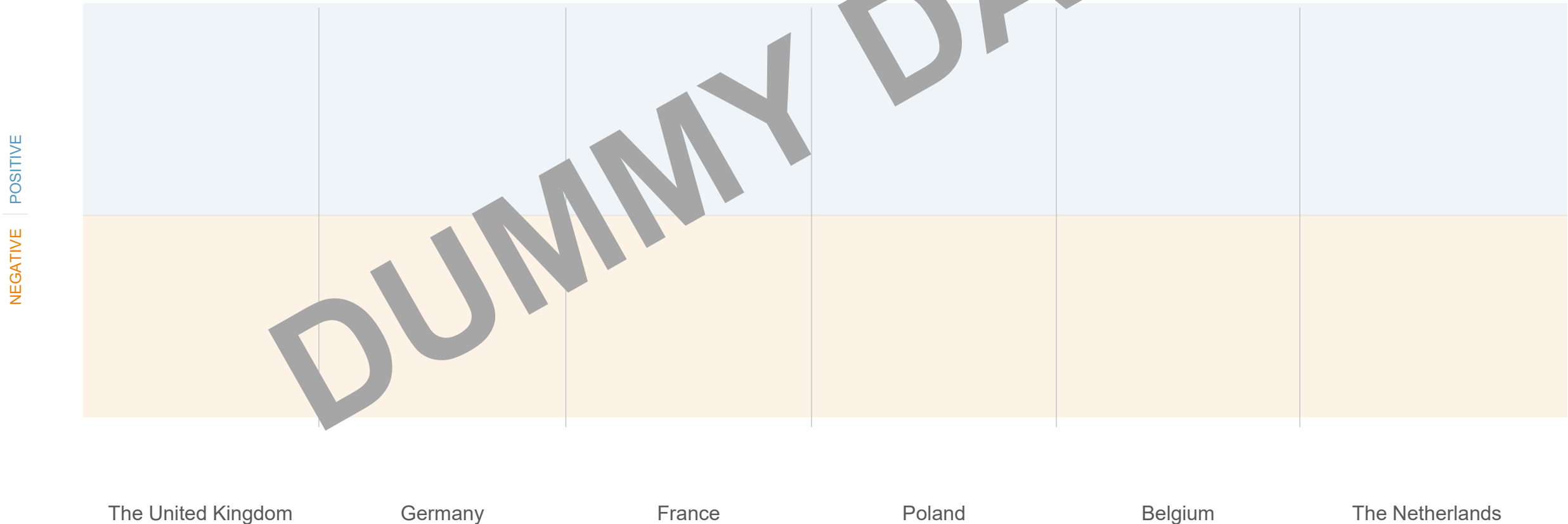
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Turnover outlook last quarters and expectations for Q1 2026

Q: If you compare your turnover of Q4-25 to Q4-24, how did your turnover develop? | What are your expectations for the development in Q1-26?

TURNOVER BALANCE = (% INCREASE minus % DECREASE)

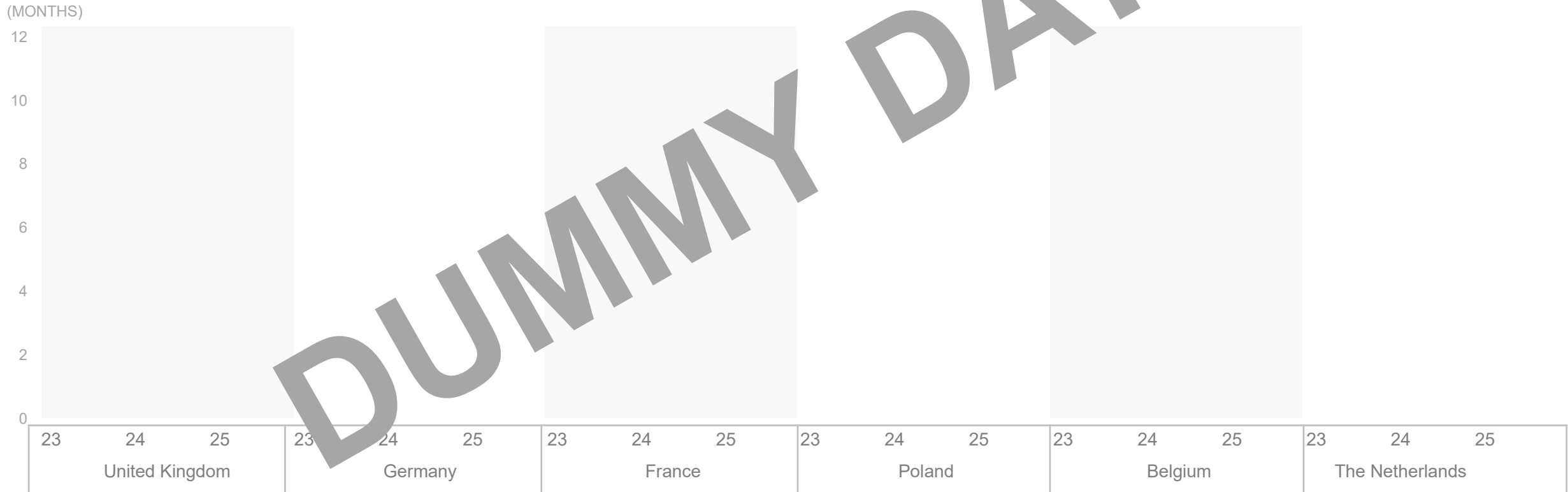
COMPARISON SAME QUARTER LAST YEAR



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Order book portfolio

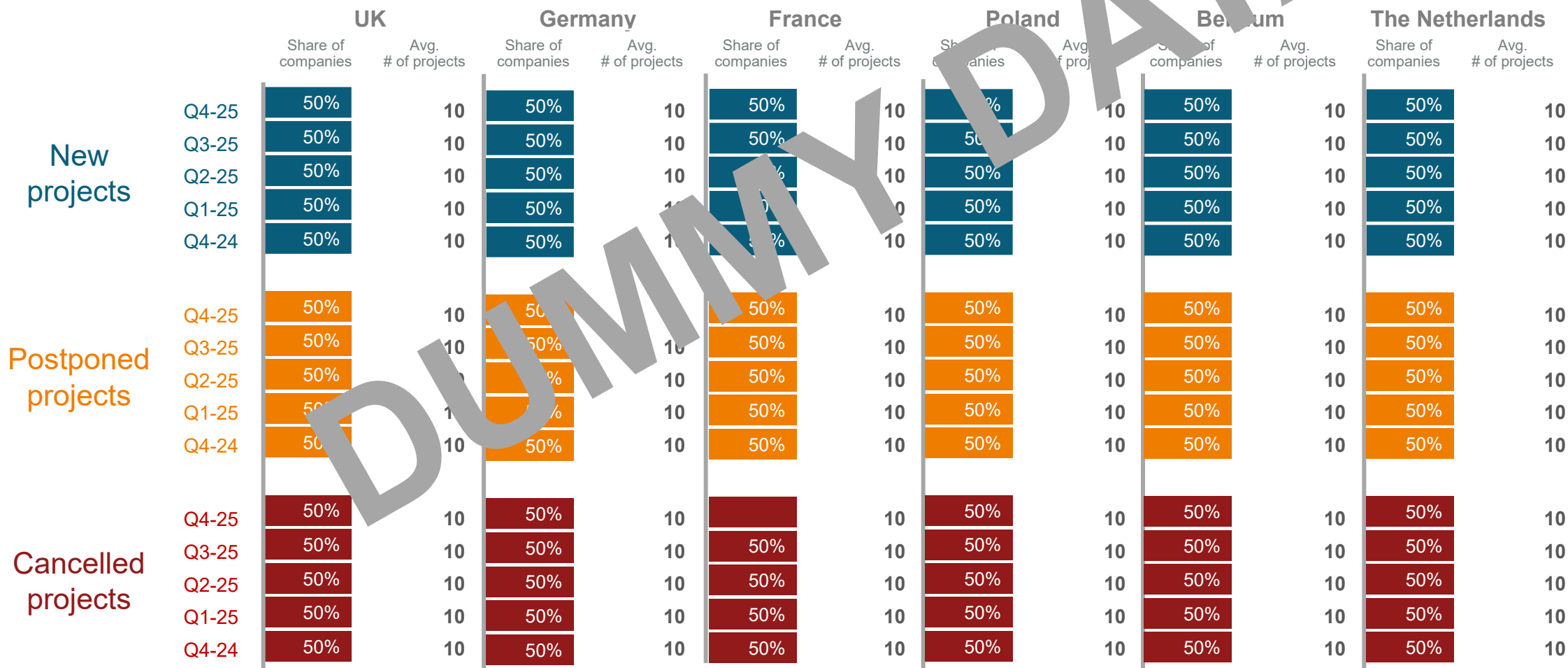
Q: How big is your current order book portfolio? For how many months will you be able to keep your current staff working?



In most countries, a stable high share of installers has new projects from quarter to quarter. The Netherlands has the highest average number of new projects. Compared to Q3, France saw an increase in the share of installers who had cancelled projects, while in Poland and Belgium this share decreased.

Number of projects in Q4 2025

Q: How many new projects has your company scored/ been commissioned in Q4 2025? How many projects have been postponed in Q4 2025? In Q4 2025, how many projects have not started and cancelled?



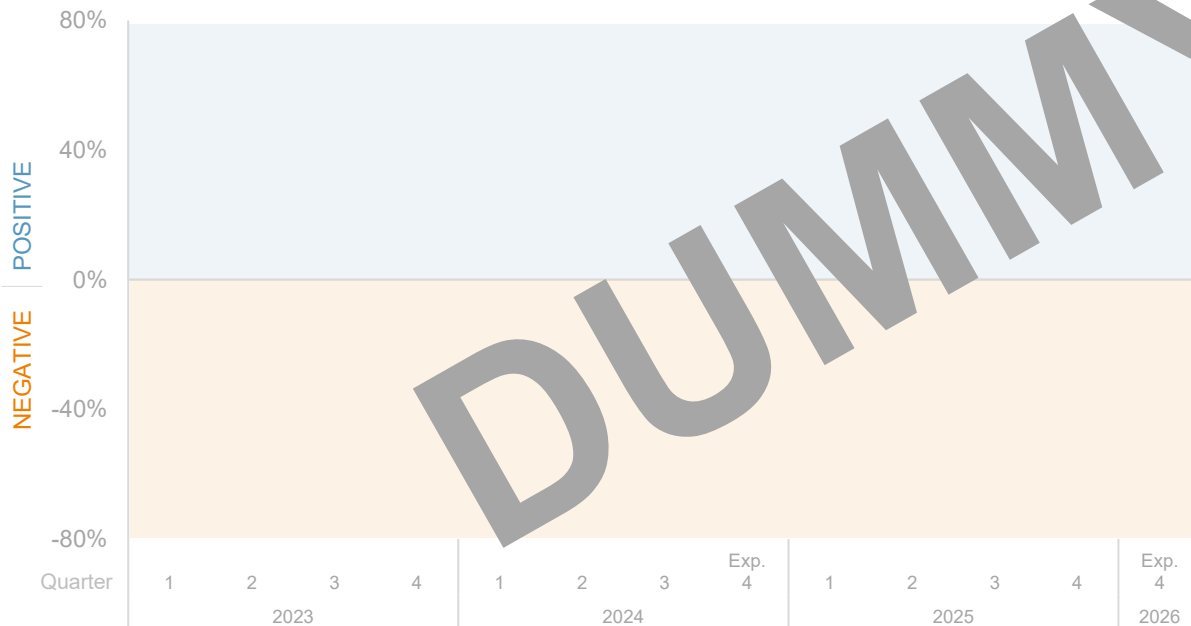
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Turnover outlook

Q: If you compare your turnover of Q4-25 to Q4-24, how did your turnover develop? | What are your expectations for the development in Q1-26?

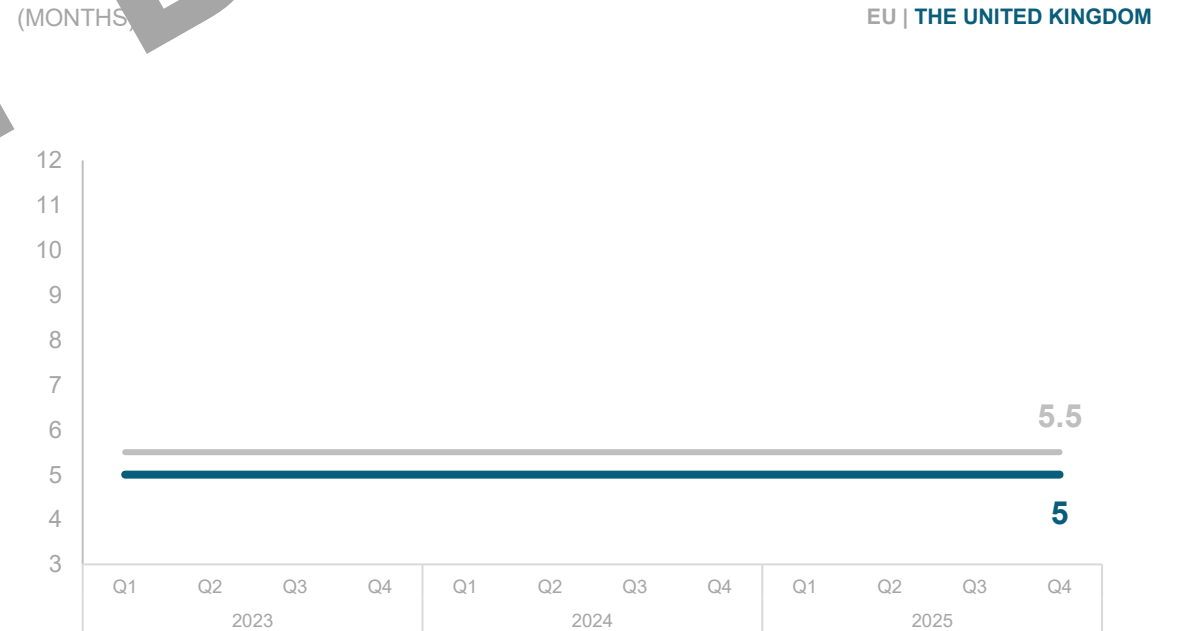
TURNOVER BALANCE = (% INCREASE minus % DECREASE)

■ COMPARISON SAME QUARTER LAST YEAR



Order book portfolio

Q: How big is your current order book portfolio (MONTHS)



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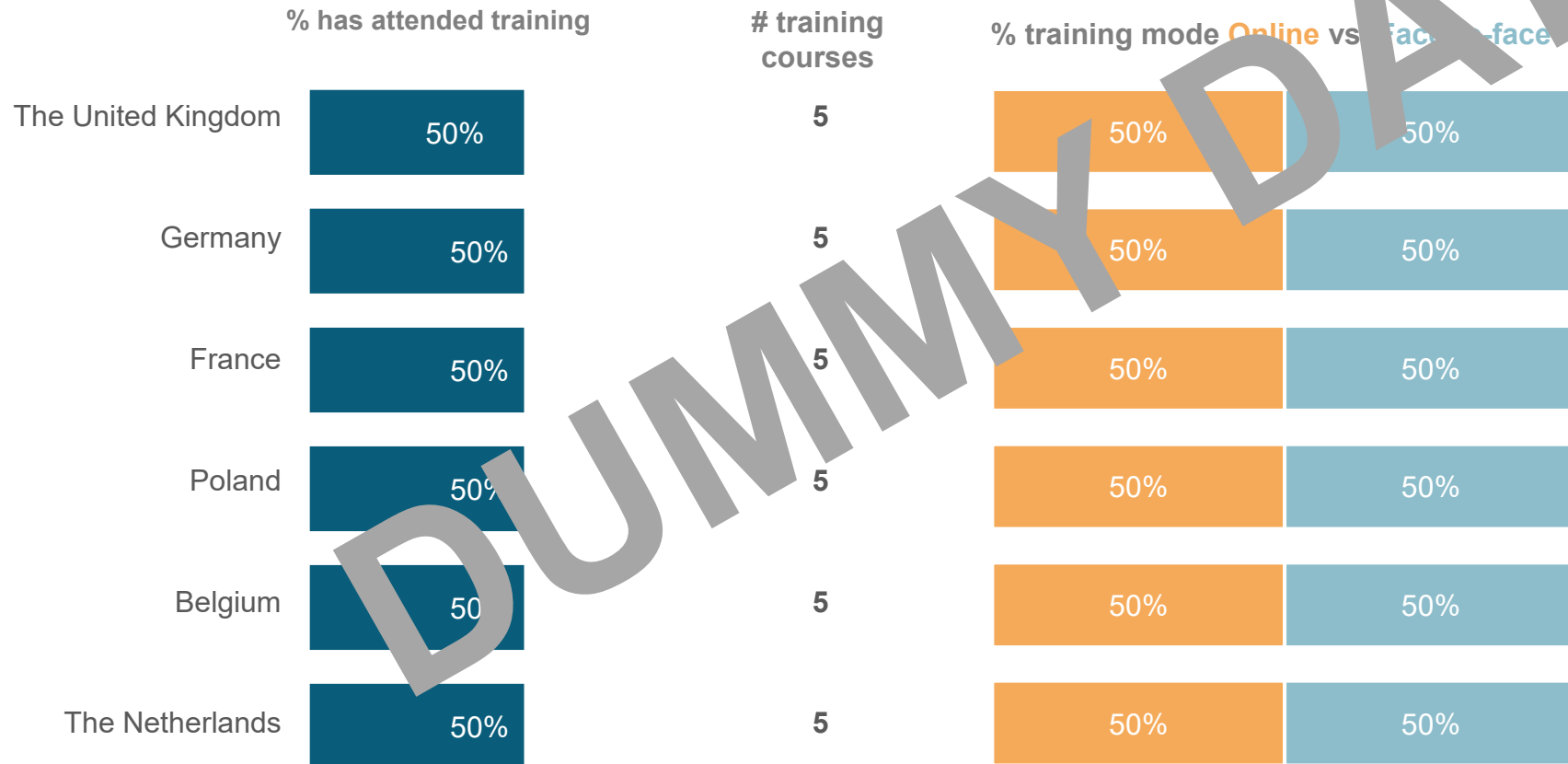
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Key facts about trainings in 2025

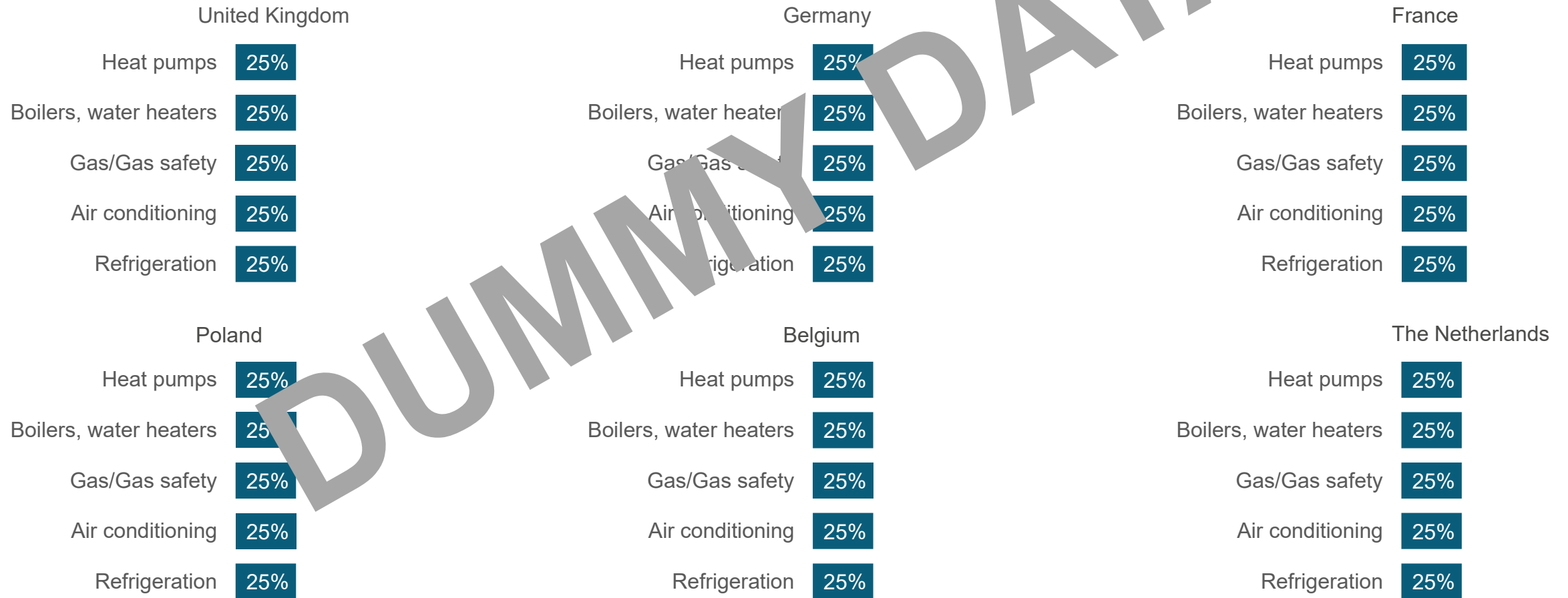
Q. How many training courses in total did you or your employees attend during 2025?/What share of the trainings you or your employees attended during the 2025 was ...?



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Plumbing and HVAC product categories installers typically seek/ attend training – Top 5

Q. For which plumbing and HVAC product categories does your company typically seek/ attend trainings?



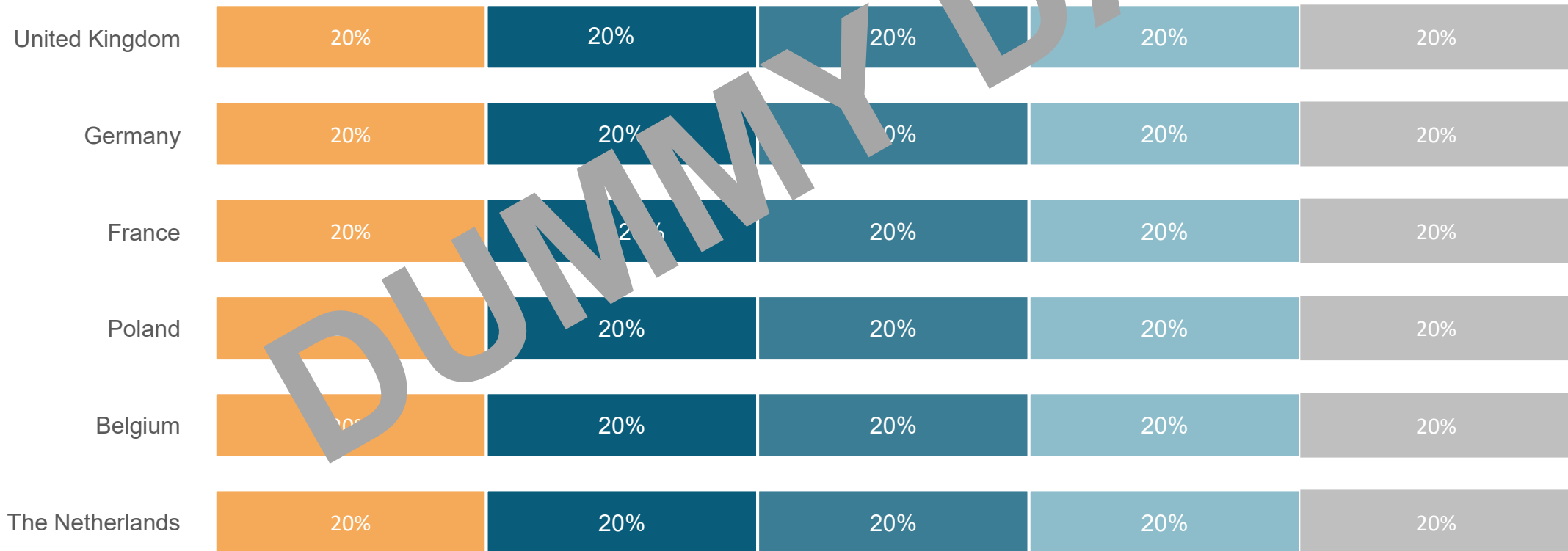
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Preferences and expected changes regarding training methods

Q. Looking ahead, what format do you and your employees prefer for future trainings?

Preferred methods of training

Online | Balanced mix of both | Depends on topic | Face to face | Don't know



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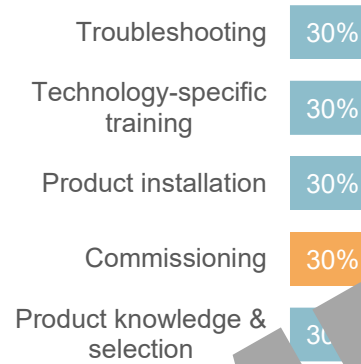
Best topics for trainings – Top 5

Q. Which training topics would be most beneficial for you or your employees to increase knowledge/expertise? Please choose up to 5 answers.

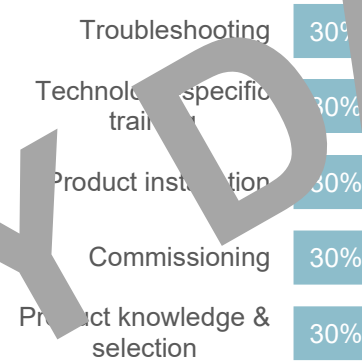
Bar colours legend:

- Training mainly preferred online
- Training mainly preferred face-to-face
- No preference in the training method

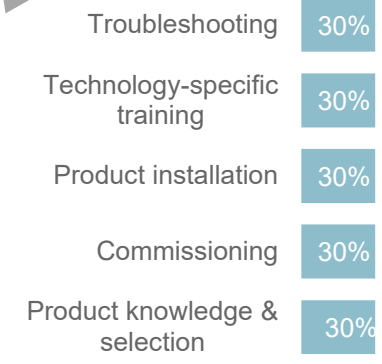
United Kingdom



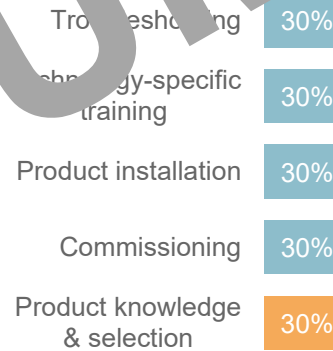
Germany



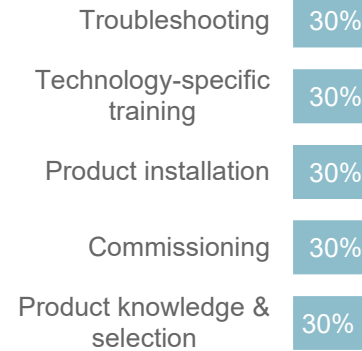
France



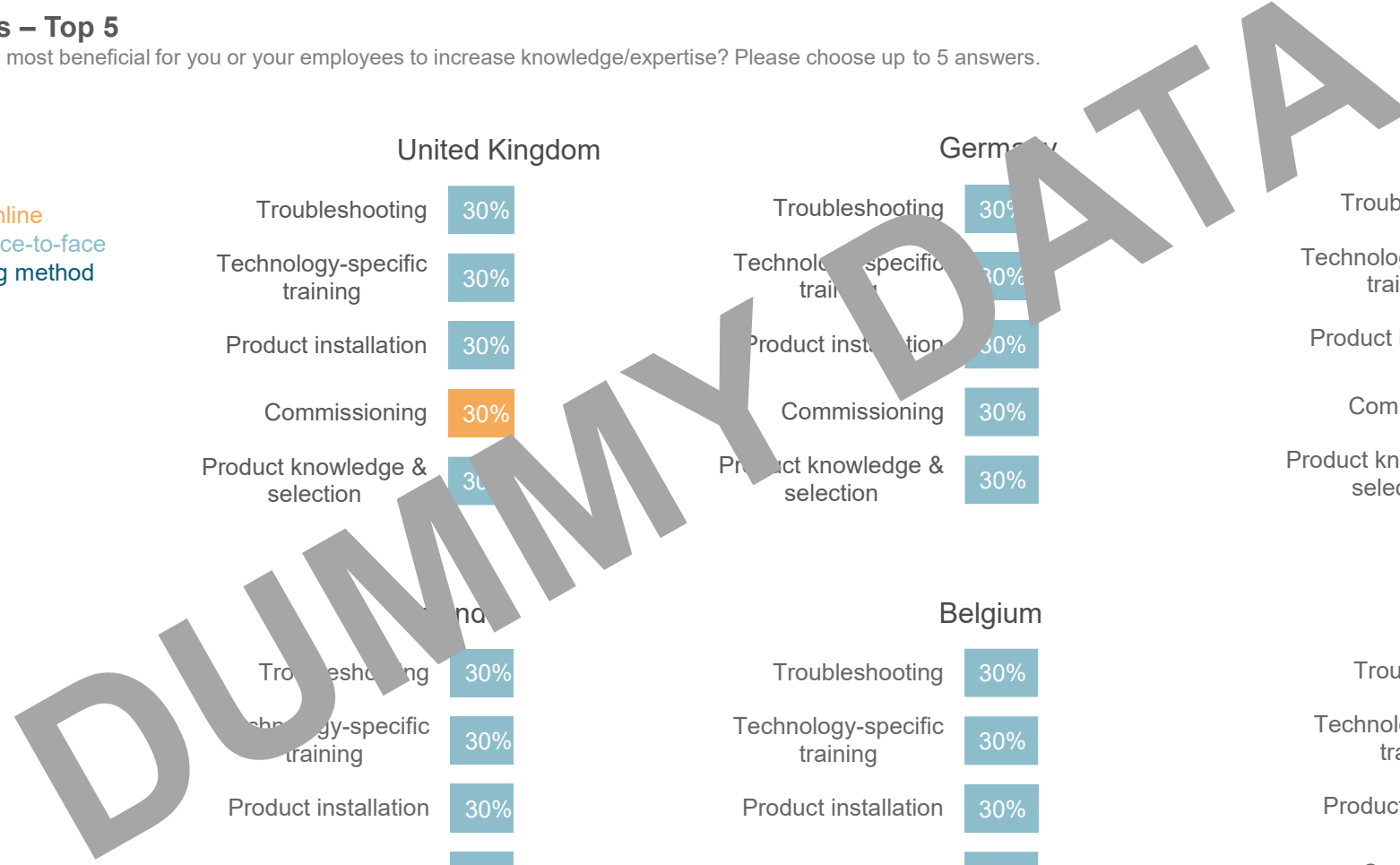
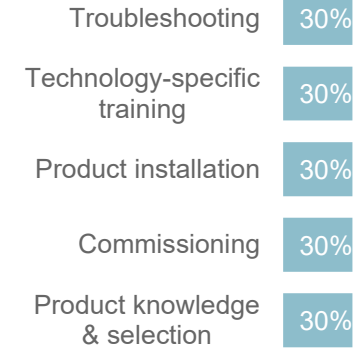
India



Belgium



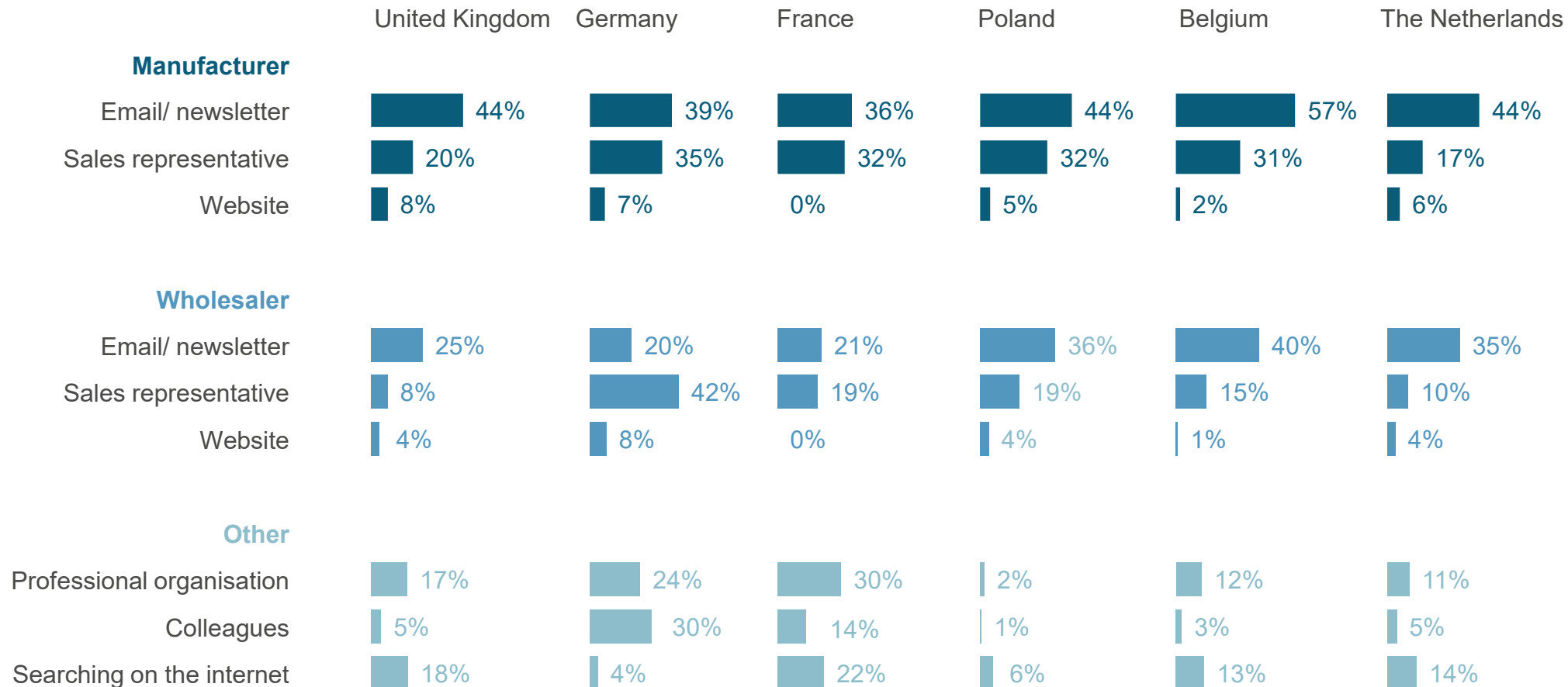
The Netherlands



Manufacturers continue to play a very important role in informing installers about training, with emails/newsletters still the preferred channel. Sales representatives (especially wholesalers' representatives) are somewhat more important in Germany than in other markets.

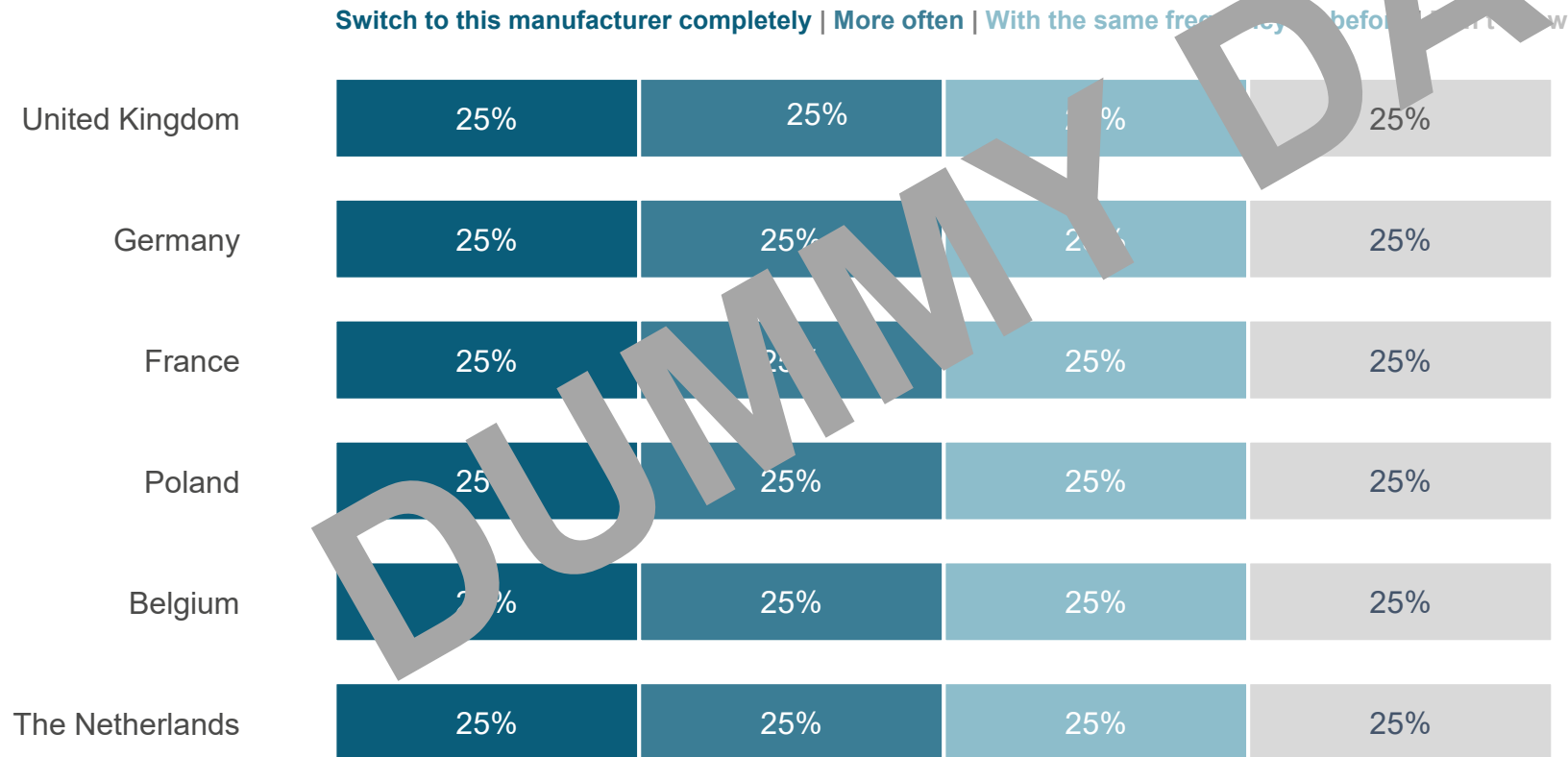
Ways of getting information about trainings

Q. How do you typically receive information about training opportunities?



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Change of interest in installing manufacturers' products after attending a manufacturer-provided special training
 Q. If you attend specialised training provided by a manufacturer, do you typically use/install their products afterwards...



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Timings for trainings in general

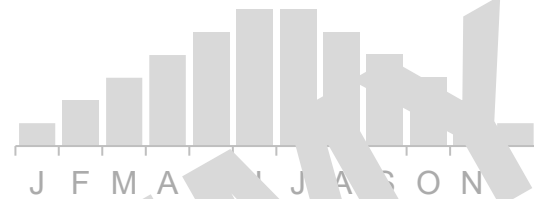
Q. When is the best time of year for training? Please specify the months that are most suitable for you .

Best | Worst month for training

United Kingdom



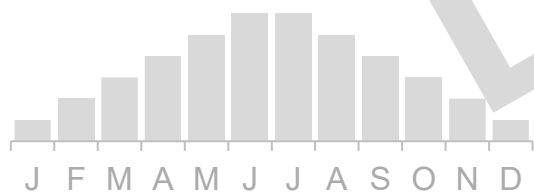
Germany



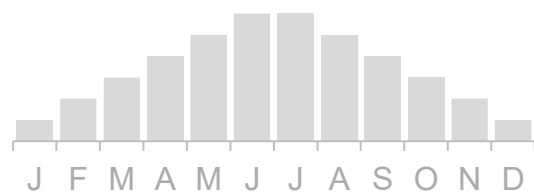
France



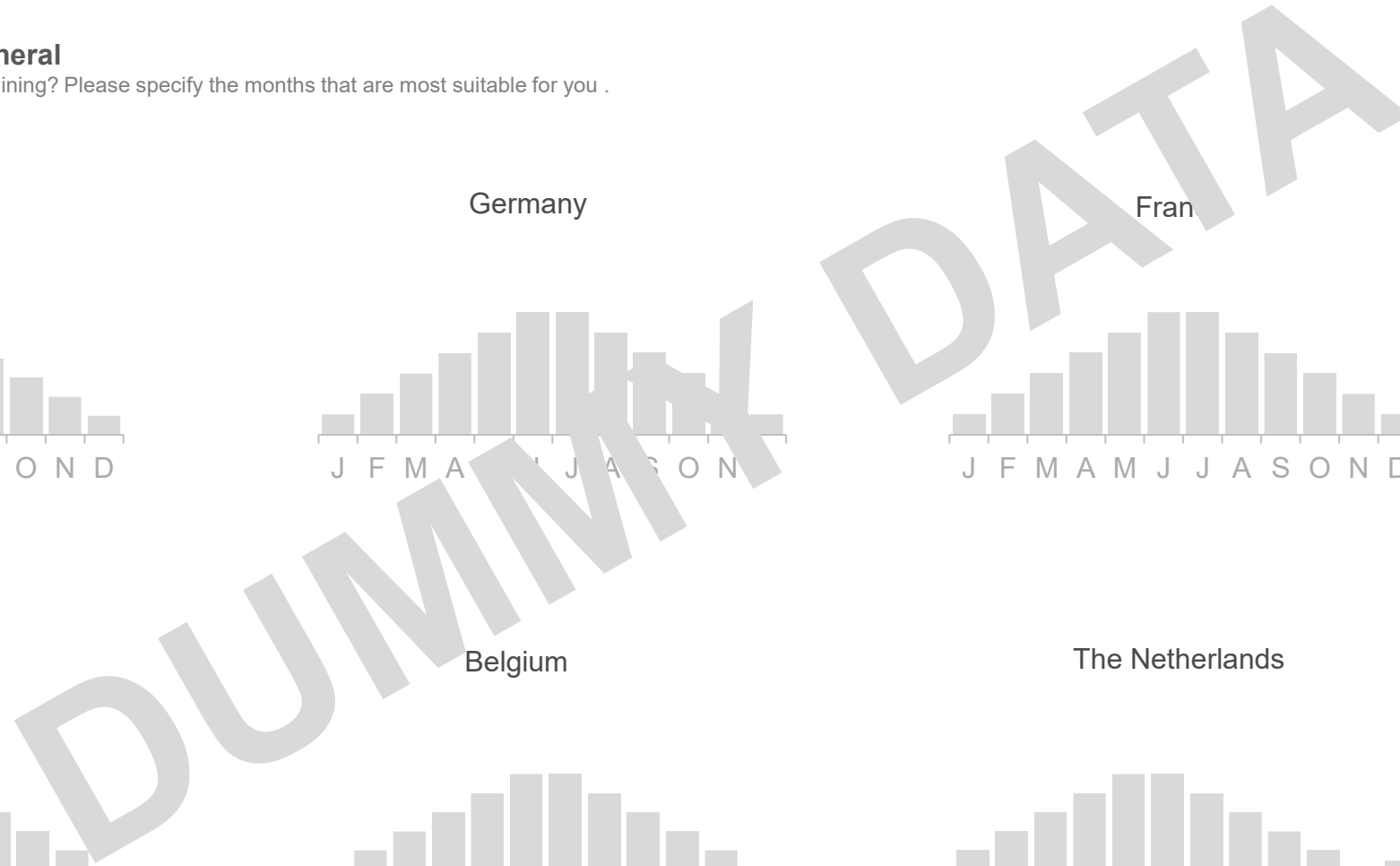
Poland



Belgium



The Netherlands

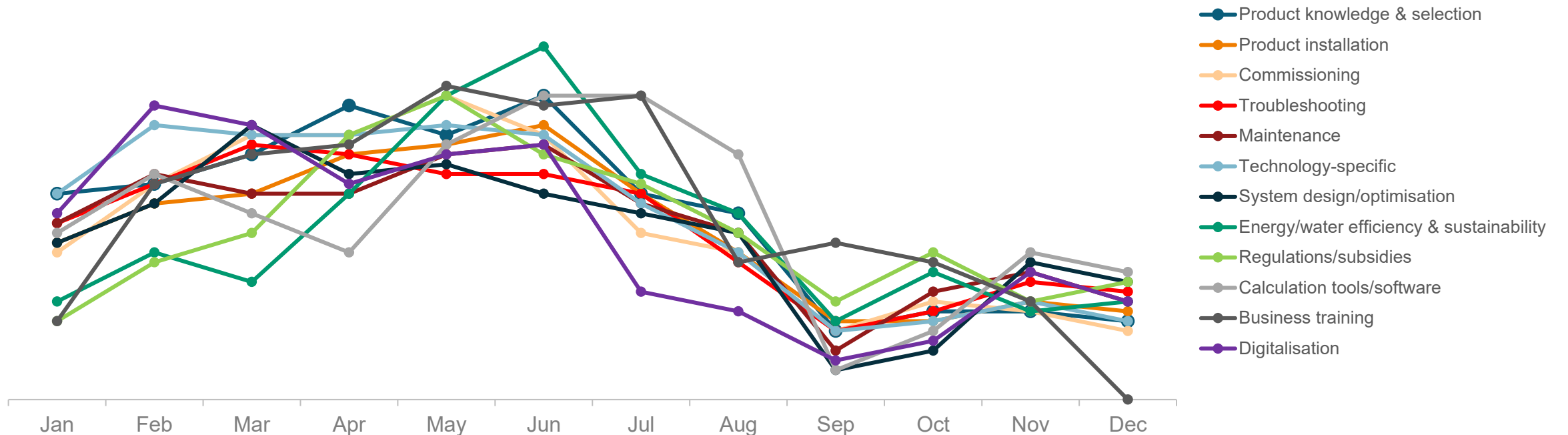


While overall training time preferences follow a similar pattern across topics, installers who prefer specific topics, per indication, find certain months more suitable for training. For example, installers interested in efficiency and sustainability training more frequently mention June, while those preferring business training mention September more than others, but December not at all.

Timings for trainings per topic - Total Europe

Q. Which training topics would be most beneficial for you or your employees to increase knowledge/expertise? Please choose up to 5 answers. | When is the best time of year for training? Please specify the months that are most suitable for you.

NOTE: the preferred month to consider a specific training topic was not directly investigated, so the analysis provided below provides only an indicative direction when installers who prefer a specific training topic would prefer to have training in general.

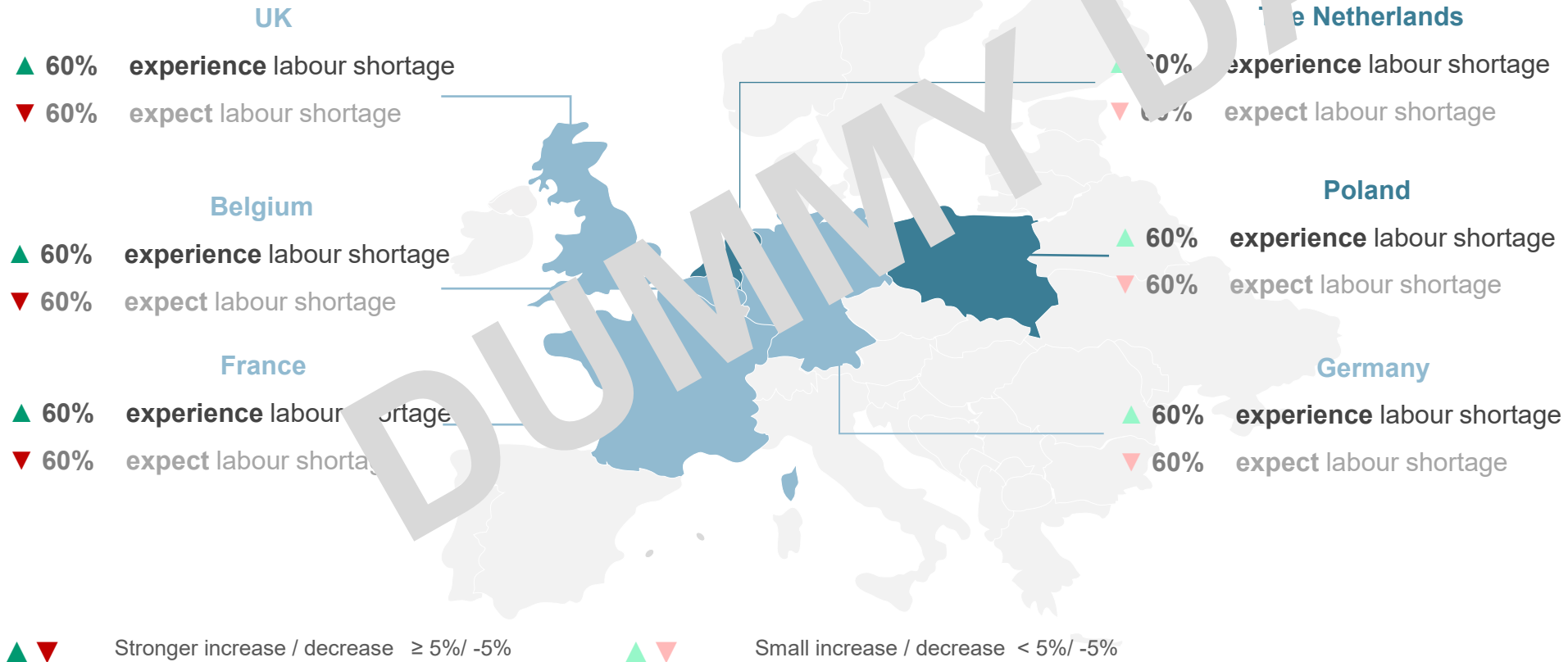


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Labour shortage in the HVAC/plumbing/sanitary installation sector

% of installers experiencing labour shortage

% of installers expecting to experience labour shortage in the coming 5 years



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Addressing labour shortages: expected future strategies of HVAC installers and plumbers – Top 5

Q. How do you expect HVAC installers and plumbers will address the labour shortage in the coming years?



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Attended training in 2025

Q. How many training courses in total did you or your employees attend during 2025?

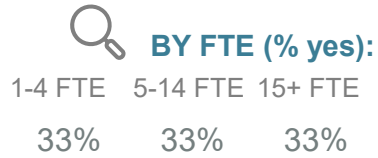
Yes | No | Don't know



Base: n=125, all

Training courses attended in 2025:

10 Courses
attended



For **biggers the company**, the most training courses were attended.

Base: n=83, if attended trainings

Attending training in HVAC product categories - Top 10

Q. For which plumbing and HVAC product categories does your company normally seek/ attend training?

		By FTE		
		1-4 FTE	5-14 FTE	15+ FTE
Gas/gas safety	30%	33%	33%	33%
Heat pumps	30%	33%	33%	33%
Air conditioning	30%	33%	33%	33%
Boilers, water heaters	30%	33%	33%	33%
Health and safety	30%	33%	33%	33%
Ventilation	30%	33%	33%	33%
Plumbing tools	30%	33%	33%	33%
Regulations	30%	33%	33%	33%
Pumps for heating/water circulation (circulators)	30%	33%	33%	33%
Electrical installations	30%	33%	33%	33%

Base: n=125, all

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Share face-to-face versus online trainings in 2025

Q. What share of the training you/your employees attended in 2025 was...?



Base: n=83, if attended trainings

Training organisers

Q. Were the face-to-face/online training you/your employees attended during the last year mainly organised by...



Base: n=87, if attended face-to-face trainings



Base: n=60, if attended an online training

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Number of trainings in 2025 versus 2024

Q. Has the number of training courses increased, decreased or stayed the same in 2025 compared to 2024?

Increased | Remained the same | Decreased | Don't know



Base: n=125, all

Share of online training in 2025 versus 2024

Q. Compared to 2024, has the share of online/digital training that you or your employees attended during 2025...?

Increased
(substantially, slightly)

Remained the same
(slightly, substantially)



Base: n=60, if attended an online training

Plans for attending training in 2026

Q. Will you or your employees attend any professional training in 2026?

Yes | No | Don't know



Base: n=125, all

BY FTE (% yes):

FTE Category	% Yes
1-4 FTE	33%
5-14 FTE	33%
15+ FTE	33%

The leading reason for not attending training in 2026:

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Preferred ways of training – Online vs. face-to-face

Q. Looking ahead, what format do you and your employees prefer for future trainings?

Online | **Balanced mix of both** | Depends on topic | Face to face



Base: n=56, those who had online and face-to-face training

Most preferred ways of training in general

Q. What are your preferred methods of training in general?

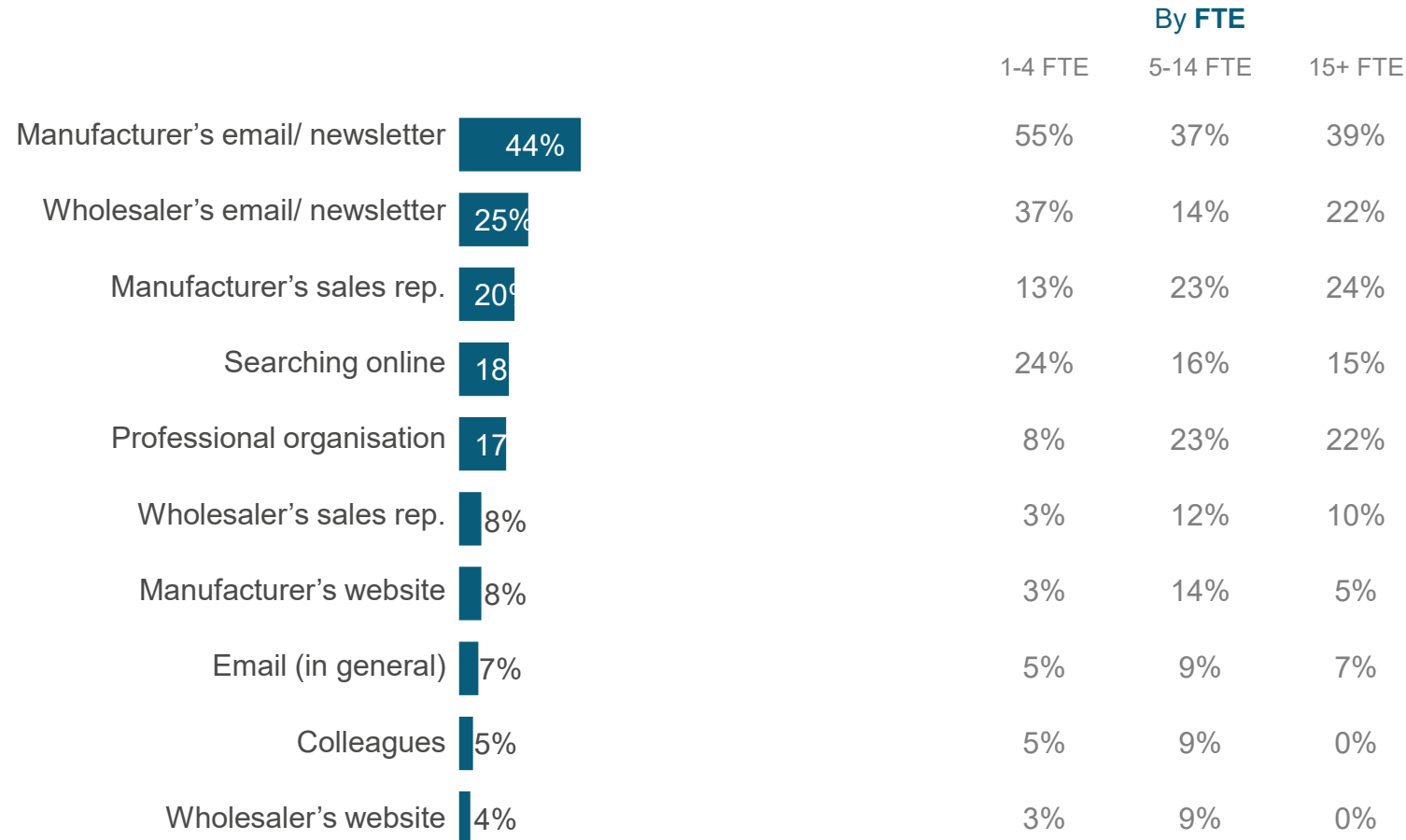
		By FTE		
		1-4 FTE	5-14 FTE	15+ FTE
Manufacturer				
Face-to-face on-site training by the manufacturer	50%	33%	33%	33%
Face-to-face training at manufacturers' premises	50%	33%	33%	33%
Face-to-face training at your premises	50%	33%	33%	33%
Online training/ webinars by the manufacturer	50%	33%	33%	33%
Wholesaler				
Training by one manufacturer at the wholesalers	50%	33%	33%	33%
Training at wholesalers by multiple manufacturers	50%	33%	33%	33%
Online training/ webinars by the wholesaler	50%	33%	33%	33%
Other				
Mix of online/digital and face-to-face training	50%	33%	33%	33%
Tutorials/on demand training	50%	33%	33%	33%
On-site training via mobile devices	50%	33%	33%	33%
Training during exhibitions/fairs	50%	33%	33%	33%

Base: n=62, random selection

Email communication from manufacturers has become the leading information channel for UK installers. Reliance on direct sales representatives has decreased, while online searching and professional organisations maintain steady importance as supplementary information sources.

Ways of getting information about the training –Top 10

Q. How do you typically receive information about training opportunities?

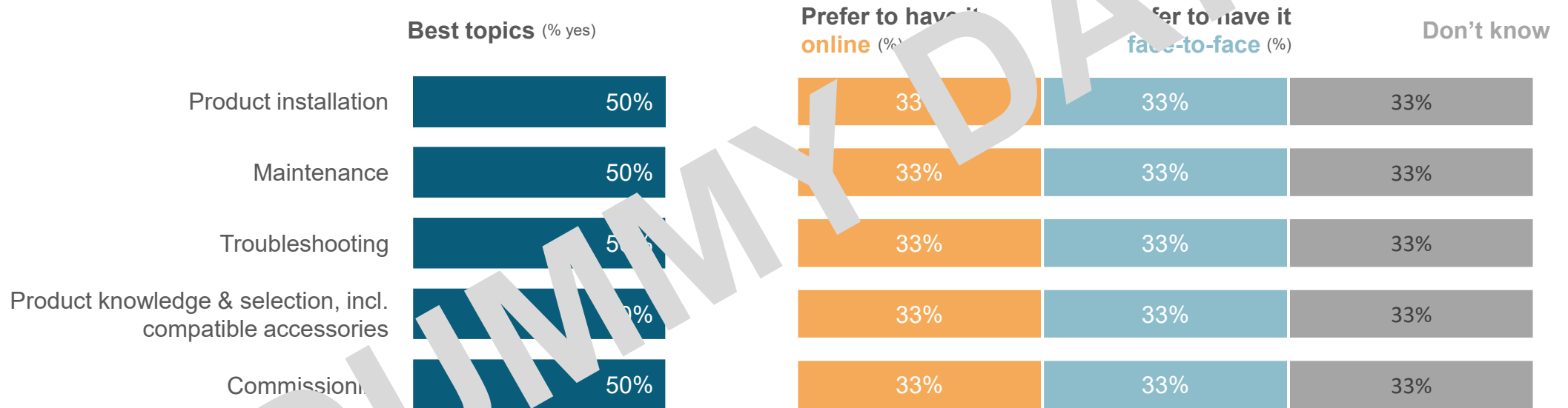


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Best topics for training – Top 5

Q. Which training topics would be most beneficial for you or your employees to increase knowledge/expertise? Please choose up to 5 answers

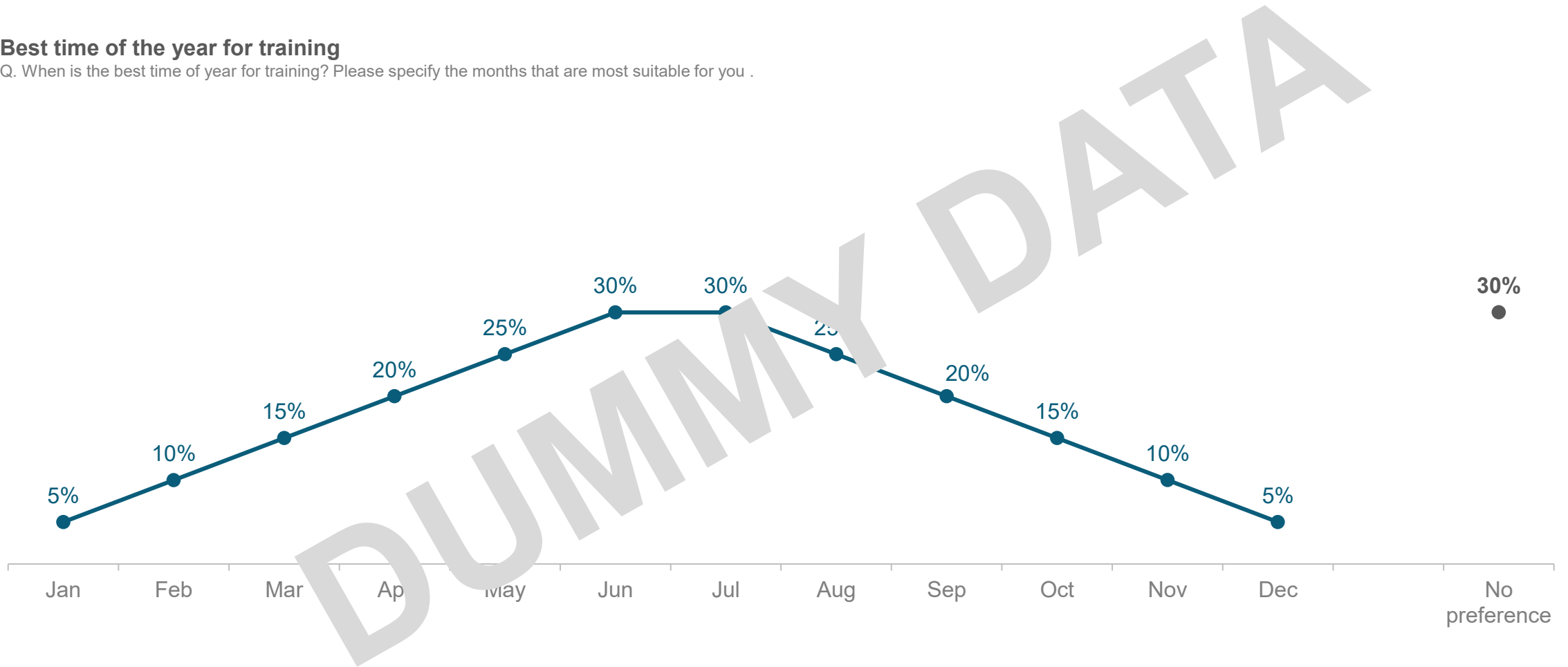
Q. For each of the following topics please specify if your company would prefer to have online/ digital or face-to-face training?



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Best time of the year for training

Q. When is the best time of year for training? Please specify the months that are most suitable for you .

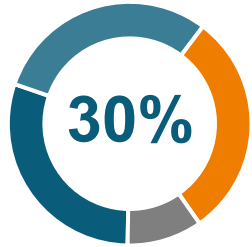


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Paid training

Q. Would you be willing to pay for training?

Yes | Depends on the topic | No | Don't know



By FTE (% Yes)

1-4 FTE	5-14 FTE	15+ FTE
33%	33%	33%

Trainings topics installers would pay for

Q. For which training topics would you be willing to pay?

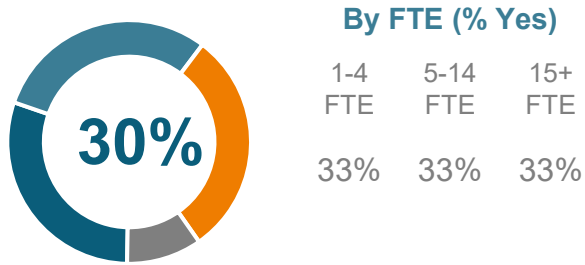
	By FTE		
	1-4 FTE	5-14 FTE	15+ FTE
Technical training	33%	33%	33%
Regulation and sustainability training	33%	33%	33%
Business and soft-skill training	33%	33%	33%
None	33%	33%	33%
Don't know	33%	33%	33%

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Interest in becoming a certified manufacturer's installer

Q. If a manufacturer organises training, would you be interested in becoming a certified installer as part of a comprehensive modular training program?

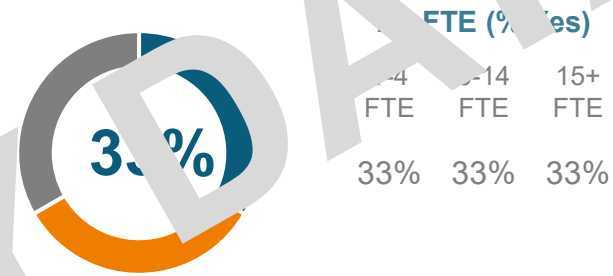
Yes | Depends on the topic | No | Don't know



Willingness to invest 2 training days to get certification

Q. Would you be willing to invest 2 days of training per employee for a certification program?

Yes | No | Don't know



Change of interest in installing manufacturers products

Q. If you attend specialised training provided by a manufacturer, would you typically purchase their products afterwards...

Switch to this manufacturer completely | More often | With the same frequency as before | Don't know

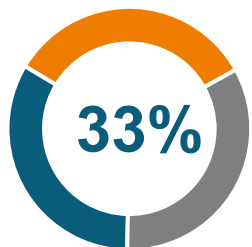


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Experience of labour shortage

Q. Does your company experience a shortage of labour (professional HVAC installers or plumbers) in your own work practice? Q. Do you expect a labour shortage in your operations in the next five years?

Yes | No | Don't know



33% of UK installation companies expect **labour shortage in the coming five years.**

By FTE (% Yes)

1-4 FTE	5-14 FTE	15+ FTE
33%	33%	33%

Base: n=125, all

Expectations of the labour shortage influence training needed

Q. How do you think the labour shortage will impact the future training needs? Will the number of training courses your company requires...

Increase | Remain the same | Decrease | Don't know



Base: n=69, if experiencing/expecting labour shortage

Dealing with the labour shortage - Top 5

Q. How do you expect HVAC installers and plumbers will address the labour shortage in the coming years?

	By FTE		
	1-4 FTE	5-14 FTE	15+ FTE
Hire non-qualified installers and training them in-house	40%	33%	33%
Increase prices	40%	33%	33%
Attracting youth/apprenticeships	40%	33%	33%
More training needed by school system	40%	33%	33%
Hire installers from other countries	40%	33%	33%
Co-operate with self-employed / independent installers (subcontract)	40%	33%	33%

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About European Mechanical Installation Monitor

Key takeaways

Profile of the Mechanical installer

Business development

Theme topic – Training needs

Cross-country summary

United Kingdom

Germany

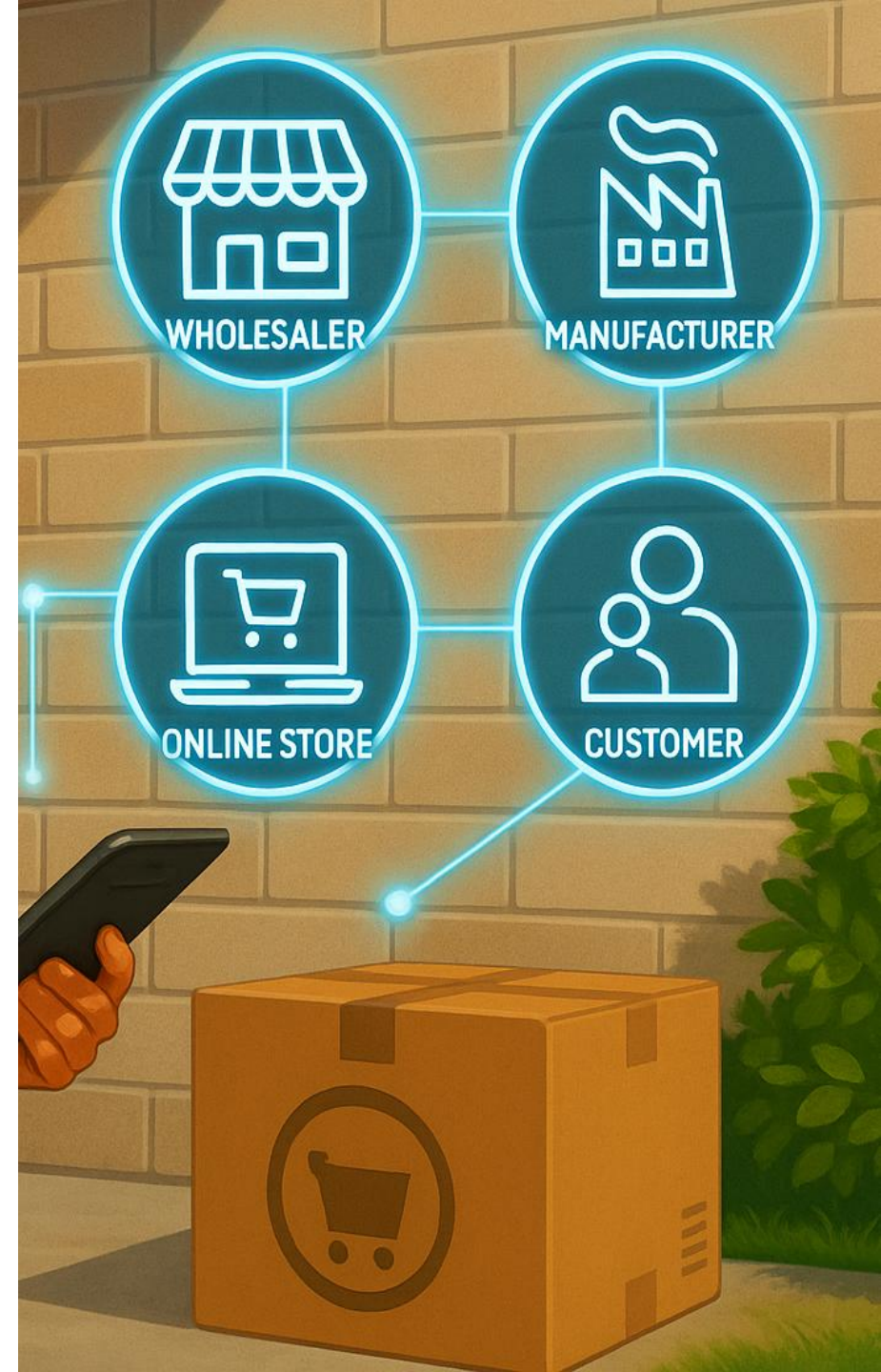
France

Poland

Belgium

The Netherlands

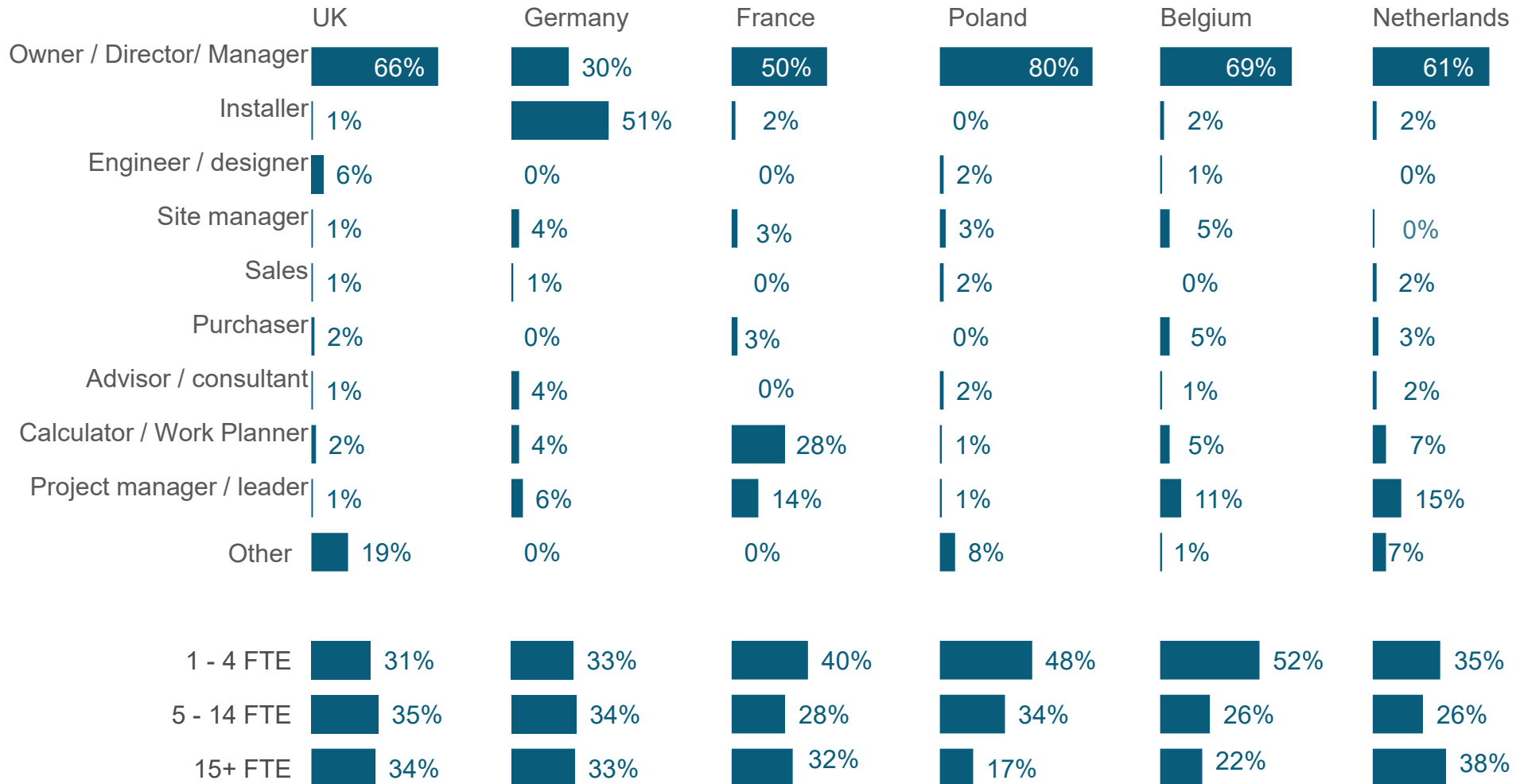
Appendix



Respondents' background characteristics

Job title of the interviewed respondents and the company size

Q. What is your position within the company? | Q. Yourself included, how many full-time employees does your company have in total, in all branches?



An aerial photograph of a city skyline, likely New York City, featuring a river, a cable-stayed bridge, and numerous skyscrapers. The foreground is dominated by a dense forest of trees with autumn foliage in shades of green, yellow, and orange. The sky is blue with scattered white clouds.

USP Marketing Consultancy

Corporate Presentation

About USP Marketing Consultancy

Trusted insights for over 30 years

With over 30 years of international experience, USP is a leading market research and consultancy agency specializing in the construction, installation, DIY, and real estate sectors. Each year, we operate in more than 30 countries, conducting ongoing research to uncover trends, track market developments, and provide actionable fact-based advice that drive strategic decision-making.

We go beyond delivering data. As a trusted specialist and strategic partner, we inspire, advise, and drive growth. Our deep market knowledge, combined with tailor-made solutions, empowers clients to thrive in the ever-changing construction, installation, DIY, and real estate markets, laying a solid foundation for sustainable, long-term success.

At USP, your growth is our mission – we deliver the insights you can truly build on.

Head office



The Netherlands – Rotterdam

Branche office



Croatia – Zagreb

Subsidiary



Germany – Düsseldorf



Tailor-Made Research

Insights designed for your business

USP conducts tailor-made research, combining deep sector expertise with proven methods to deliver insights that drive strategic decisions and growth.



Sector Expertise

Deep knowledge of construction, installation, DIY, and real estate sectors.



Tailored Approach

Research fully aligned with your objectives, markets, and target groups.



International Reach

Experience in conducting research in 30+ countries worldwide.



Full-Spectrum Research

B2B, B2C, qualitative and quantitative research matched to your needs.



Actionable Outcomes








Fact-based, sector-driven advice that drives growth.

Research Portfolio

Our full spectrum of research

From market entry to customer loyalty, powered by over 30 years of sector expertise, we deliver the full spectrum of market research.

We help businesses explore new markets, strengthen their brands, understand customer needs, optimize pricing, and map the customer journey to drive growth.

Research Type	Business Need	USP Advantage
 Market Exploration	Want to understand your market and opportunities?	USP reveals opportunities with deep market and sector knowledge.
 Branding	Looking to strengthen your brand positioning?	USP benchmarks brand health sector-wide for sharper comparison.
 Customer Satisfaction	Curious what really drives satisfaction and loyalty?	USP identifies drivers and benchmarks results industry-wide.
 Pricing	Unsure which price point fits your market best?	USP defines competitive prices with fact-based sector expertise.
 Market Size	Need clarity on the real size and growth of your market?	USP delivers accurate sizing using proven models and sector knowledge.
 Concept testing	Want to know if your new concept will succeed?	USP validates concepts with the right professionals and end-users.
 Customer Journey	Ready to improve your customer journey?	USP maps key touchpoints and translates them into concrete improvements.

Client Testimonials

How clients value our tailor-made research



Gordon Murray-Smith
Market intelligence and insights Manager

USP is a trusted supplier of BMI as they understand our business, are professionals, and are pleasant to communicate with.



Suzanna Lammerts van Bueren
Director Business Development Northern Europe

USP thinks along and was able to, besides delivering the insights, brainstorm about the business opportunities.



Joost Maarse
Global Lead Circular Economy

Delivered as promised and great regular communication towards us as a client.



Katerine Bruun Nielsen
Group insights Manager

USP always works very structurally and professionally, and we always feel in good hands.



PAUL O'dweyer
Global Consumer Market Development Manager

Good relationship between the project team, strong knowledge of the insights, presented and communicated very clearly.



Olga Kolos
Electrician Program Director, Global

We work with USP regularly, they are flexible and provide us with good results.

European Market Monitors

Continuous insights for your business

USP conducts ongoing market monitors, combining sector expertise with reliable data to deliver insights that keep you ahead.



International Scope

Consistent monitoring across key European markets.



Decision-Maker Focus

Insights from architects, contractors, installers and end-users.



Reliable Tracking

Year-on-year data providing robust and comparable insights.



Economic and Thematic Trends

Tracking market trends, economic developments and key sector themes.



Fact-based Guidance

Clear insights to guide your decisions.



Available Market Monitors

Tracking trends that keep you ahead

USP's ongoing research monitors provide direct, in-depth access to your most important target groups across Europe's construction, installation, and home improvement sectors.

These reports track long-term trends as well as rotating themes such as sustainability, digitalization, and innovation, delivering actionable insights to anticipate change and seize opportunities.



HVAC Installers

Mechanical Installation Monitor



Electrical Installers

Electrical Installation Monitor



Consumers (DIY)

Home Improvement Monitor



Handymen

Handyman Insights Monitor



Architects

Architectural Barometer



Painters

Painter Insights Monitor



Contractors

Contractor Monitor



Client Testimonials

How clients value our market monitors



Justyna Gudowska-Pohling
AC EMEA Customer Insights Manager

USP delivered the company good, useful business recommendations and insights, which have accelerated business growth.



Daniel Angelovski
Group Insights Manager

The specialized insights in the Home Improvement Monitor are a great source of input for our industry analysis.



Hardy Jaeschke
Senior Manager Market Research

The USP reports help us better understand different B2B target groups, better assess their business situations, and enrich our range of knowledge enormously.



Caroline Roque
EMEA Consumer and Market Insights Manager

The USP team has very strong expertise in the construction and home improvement markets. We are using their detailed home improvement monitor reports very extensively.



Catrin Klein
Head of Customer & Market Insights

The Contractor monitor reports that we receive from USP provide insights that are fact-based and highly relevant. The reports are easy to assimilate with our internal audience and set foundation for deeper discussions.



Miryam Salvador
Global Channel Director

Their specialized insights into construction and installation markets enable us to make informed go-to-market decisions based on factual data. Their customer-centric approach helps us put customer needs at the centre of our decisions.



Industry Leaders We Work With

Driving growth with our expertise

Construction

Installation & Home Improvement



USP Marketing Consultancy

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