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CHANGES IN CONTRACTING ACTIVITY BETWEEN 2024 & 2025 AMONG FEDERAL PUBLIC LAND AGENCIES

BERNHARD KLUGER, PROSPECT PARTNERS, LLC &
ANDREA DELGADO HAWK EYE STRATEGIES, LLC

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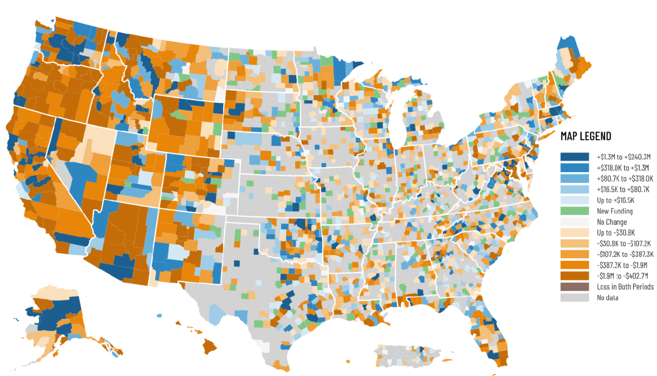
Executive Summary

Federal agencies contract with small businesses, large firms, nonprofits, research institutions, Tribes, and state and local governments to advance their missions, performing work that can include infrastructure and equipment inspection and maintenance, wildfire risk reduction, fire suppression, and the scientific research that informs land management decisions. Shifts in those contracts can immediately impact local economies, with long term consequences for nationwide planning decisions, public safety, and the enjoyment of public spaces.

Figure 1: Net Change in New Funding of Vendors by Federal Public Land Agencies Between 2024 and 2025 (County Level Impact)

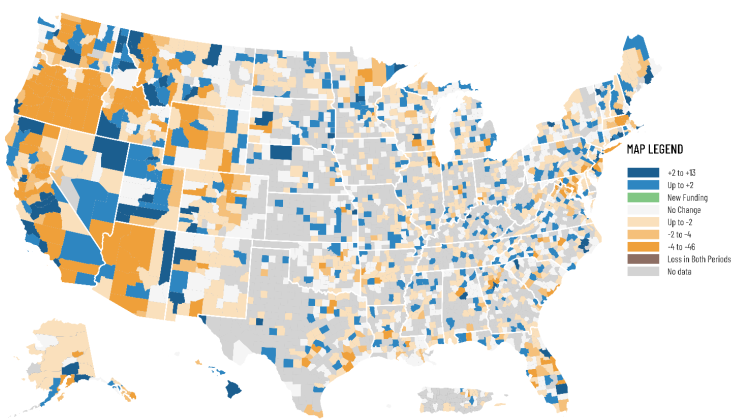


Between 2024 and 2025, federal public land agencies[1] reported a drop in contract spending of 14.3% ($1.3B), shedding 14.4% (1,969 vendors), according to our analysis of recently released federal data. In that same period, the number of small business vendors receiving new federal

[1] USDA Forest Service, National Park Service, U.S. Geological Survey, Bureau of Land Management, U.S. Fish and Wildlife Service, Bureau of Reclamation, Bureau of Indian Affairs, Bureau of Safety and Environmental Enforcement, Office of Inspector General (DOI), and Office of Surface Mining Reclamation and Enforcement.

business fell by 15.5% (1,751 vendors), from 11,280 to 9,529, a slightly higher rate than the overall vendor decline. Cuts were geographically widespread, with business communities in 874 counties nationwide and 204 counties in Western states experiencing a net decline in new federal contracting dollars.[2] Western state vendors, who represent the largest segment of federal public land agency contracting, were hardest hit, with a 19.6% ($1.0B) decline in contract spending. [3] Nearly one in five (102 counties) saw net spending with local vendors fall to zero in 2025.

Figure 2: Net Change in the Number of Vendors Receiving New Funding from Federal Public Land Agencies Between 2024 and 2025 (County Level Impact)



Contracting is one of the ways in which federal agencies advance their missions and fulfill Congressional mandates. Understanding federal contracting behavior is therefore critical to understanding agency priorities and performance. For this reason, Prospect Partners and Hawk Eye Strategies conducted an analysis of recent shifts in contracting across federal agencies and bureaus responsible for the management of public lands. Using recently available public data on federal contracting, our analysis intends to provide visibility into agency stewardship of taxpayer dollars and support fact-based dialogue, inquiry, and oversight from the public, NGOs and elected officials into the implications of contracting changes for critical infrastructure within public lands, water supply, outdoor recreation, and wildland fire management.

Key Findings

Across the ten federal public land agencies, bureaus, and offices whose data we reviewed, new spending fell in 2025 with few exceptions. Declines were consistent across geographies and industries, as well, with sharp drops in the number of small businesses finding work in the federal marketplace:

[2] The two primary metrics used throughout this analysis are variation between 2024 and 2025 in (a) net federal funding obligations and (b) the count of vendors receiving net positive or net negative obligations. Our analysis departs from the conventional fiscal year start date of October 1 to capture the abrupt changes in spending upon the turnover in Presidential and agency leadership. Instead, we have defined 2024 as the period February 1, 2024 through January 31 and 2025 as the period February 1, 2025 through January 31, 2026).

[3] Arizona, California, Colorado, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming

- Contract spending fell by $1.3B (14.3%), from $9.1B in 2024 to $7.8B in 2025. The number of vendors receiving new funding fell by 1,969 (-14.4%), from 13,707 to 11,738.
- The number small business vendors fell by 1,751 (-15.5%), from 11,280 to 9,529, a slightly higher rate than the overall vendor decline of 14.4%
- Among rural counties, one in five (102 counties) saw net spending with local vendors fall to zero in 2025, exceeding the national rate of 14.1% of counties.
- Western states, which account for more than half of all contracting across the 10 agencies and bureaus, saw a proportionally steeper decline of $1.0B (-19.6%), from $5.1B to $4.1B.
- Scientific studies and technical analysis posted the largest proportional drop (-36.1%), followed by architecture, engineering, and professional services (-35.2%), and information technology (-29.1%).
- Major infrastructure projects drove most of the largest statewide gains and declines, with individual projects driving new funding in Georgia (+$232M) [4] and Minnesota (+$167M)[5] and driving drops in Texas (-$441.3M) and New Mexico (-$262.3M).
- Aviation & transportation was the only category of contracted goods and services to record an increase, rising 14.9%, though the number of vendors in the category fell by 22.4%, which may signal a trend toward contract consolidation.

Western Perspectives

Our analysis identified two prominent patterns in the federal contracting ecosystem between 2024 and 2025 that are of specific interest to Western states:

- **Western states were hit harder than the nation overall.** Spending in the eleven Western states declined by 19.6% compared to the national average of 14.3%. Oregon (-$356M), New Mexico (-$262M), and Colorado (-$189M) recorded the largest Western-state declines. Montana (+$81M) was the only Western state with a substantial increase, driven by a single project: a Bureau of Reclamation investment to restore the Sisk Dam in California's Central Valley region. [6] Four Western counties were in the top 10 for growth in 2025, with a net gain of $0.5B, while six Western counties were in the bottom 10, with a net drop of $0.6B.
- **Cuts may disrupt critical supply chains based in Western states.** Widespread cuts had an outsized impact on local firms. Firms throughout the West involved in aviation, equipment maintenance, and hazardous fuels mitigation, among other specialized activities, experienced a decline in or complete loss of contract spending. At the top of the list, vendors in Oregon, a significant industry cluster for forestry and wildland fire

[4] Kiewit Construction (GA) for NPS reconstruction of recreational trails in VA following Hurricane Helene, https://www.fs.usda.gov/r8/gwj/projects/archive/67511.

[5] Ames Federal Contracting Group (MN) for BOR Hyram Dam repair in Hyram Dan in UT, https://www.usbr.gov/uc/progact/hyrum/index.html

[6] NW Construction (MT) for BOR reconstruction of the Sisk Dam in California's central valley. https://www.usbr.gov/projects/index.php?id=57.

management, experienced steep declines in the number of vendors affected: 290 out of 1,283 received no new funding in 2025, for a total drop of $355.5M.

Figure 1: Change in Federal Public Land Agency Contract Spending with Vendors in Western States in 2025

	2024		2025		Change		% Change	
State	**$M**	**#**	**$M**	**#**	**$M**	**#**	**$M**	**#**
AZ	$241.3	533	$173.7	437	-$67.5	-96	-28.0%	-18.0%
CA	$948.9	1,762	$951.8	1,568	$3.0	-194	0.3%	-11.0%
CO	$601.5	669	$412.1	559	-$189.4	-110	-31.5%	-16.4%
ID	$327.5	617	$333.3	557	$5.8	-60	1.8%	-9.7%
MT	$495.8	644	$576.8	583	$81.0	-61	16.3%	-9.5%
NM	$380.8	303	$118.5	255	-$262.3	-48	-68.9%	-15.8%
NV	$142.2	215	$99.1	206	-$43.0	-9	-30.3%	-4.2%
OR	$1,155.6	1,283	$800.1	993	-$355.5	-290	-30.8%	-22.6%
UT	$241.0	330	$233.0	338	-$7.9	8	-3.3%	2.4%
WA	$473.5	721	$314.1	627	-$159.4	-94	-33.7%	-13.0%
WY	$83.5	194	$80.3	152	-$3.2	-42	-3.8%	-21.6%
Total	**$5,091.5**	**7,271**	**$4,092.9**	**6,275**	**-$998.6**	**-996**	**-19.6%**	**-13.7%**

Source: USASpending.gov. Federal contract obligations for public land agencies of the U.S. Department of the Interior and the U.S. Department of Agriculture, February 2024 to January 2025 and February 2025 to January 2026. Data accessed May 20, 2026.

Conclusions:

Our analysis of contracting data for 2024 and 2025 suggests two notable shifts in federal public land agency procurement. The first is a shift of wildland fire and aviation contracting dollars away from small business in parallel with an increase in contracting dollars with a small number of companies engaged in large-scale air-based fire suppression. The second shift is a potential realignment of the nation's largest water infrastructure investments, including what may be a pause in long-term rural water supply initiatives and towards wastewater systems replacement at high profile national forests and parks.

Our analysis does not establish the reasons for these shifts, which could reflect changing agency priorities, the natural ebb and flow of spending for multi-year projects, completion of prior phases of work, or other factors. Our analysis did consider the impact of impoundment, reprogramming, and rescission of funds related to the Inflation Reduction Act (IRA), which provided one-time supplemental funding that flowed through normal agency contracting. Although significant, IRA accounts for only one quarter to one third of declines in spend and vendor counts. No matter the source of these declines, their impact is profound.

Given the potential implications on local economies, taxpayer cost, and public safety, and the delivery of public services, these shifts warrant transparency. Questions that concerned citizens or oversight bodies can consider asking include but are not limited to:

- Do these spending patterns reflect formal changes in agency priorities, and if so, when and how were they decided?
- What is the status of the projects and commitments associated with the reduced spending, including those tied to existing federal obligations?
- How are agencies measuring the operational and service-delivery effects of these shifts?

WESTERN STATE PERSPECTIVE

A Closer Look into Federal Public Land Agency Spending with Vendors Based in Western States

Vendors in Western States Receive a Majority of Public Land Agency Contract Spending
Across the federal government, agencies contract with businesses, governments, Tribes, and nonprofit organizations to provide a wide range of services and goods. Vendors headquartered in Western States accounted for a majority (55.9%) of public land agency contract spending in 2024. The largest public land agencies each spent between 20% and 65% of their contracting dollars with firms headquartered in the Western states. Western-headquartered firms in 2025 had the largest shares of contract spending at Bureau of Reclamation and the USDA Forest Service contracted, at 64.9% ($0.6B) and 60.1% ($2.2B) respectively.

Impact of Spending Cuts on Vendors in Western States
In 2025, overall spending with vendors in Western states fell from approximately $5.1B to $4.1B, a drop of $1.0B (-19.6%), outpacing the national average of -14.3%. The number of vendors with registered addresses in Western states receiving new funding fell year-on-year from 7,271 to 6,275, with 996 vendors (-13.7%) receiving no new funding in 2025.

Federally reported data show that the decline in federal spending extended to eight of the eleven Western states. Vendors in Oregon posted the largest absolute Western-state decline at $356 million (-30.8%), shedding more vendors than any other state, with a drop of 290 (-22.6%).[8] New Mexico fell by $262 million (-68.9%), much of which reflects the Navajo-Gallup project delay noted above. Colorado declined by $189 million (-31.5%), Washington by $159 million (-33.7%), Nevada by $43 million (-30.3%), and Arizona by $68 million (-28.0%). California and Idaho were essentially unchanged, with net year-on-year increases of $3M and $5M, respectively.

Montana was the lone Western state with a substantial spending gain of $81 million (up 16.3%), largely accounted for by $250M in 2025 for a single project, the Sisk Dam in California's Central Valley. In nearly all Western states, including Montana, vendor counts declined even as dollar figures held relatively steady.

NATIONAL PERSPECTIVE

NATIONWIDE CHANGES IN FEDERAL PUBLIC LAND AGENCY CONTRACTING BETWEEN 2024 AND 2025

Nationwide, the top five areas of spending in 2024 were wildfire suppression ($2.43B, 26.6%); construction, facilities, and maintenance ($1.87B, 20.5%); technology services and software ($0.72B, 7.9%); architecture, engineering, and professional services ($0.89B, 9.8%); and water infrastructure and reclamation ($1.04B, 11.4%). These five categories accounted for more than three quarters of all public land agency contract spending in 2024, consistent with the agencies' mission objectives and general operating needs. Spending in smaller categories, such as scientific studies, surveys, and technical analysis ($284.8M) or housekeeping, grounds, and facilities services ($192.3M), was at the lower end of total spending.

Spending Dropped for Most Goods and Services that Public Land Agencies Use

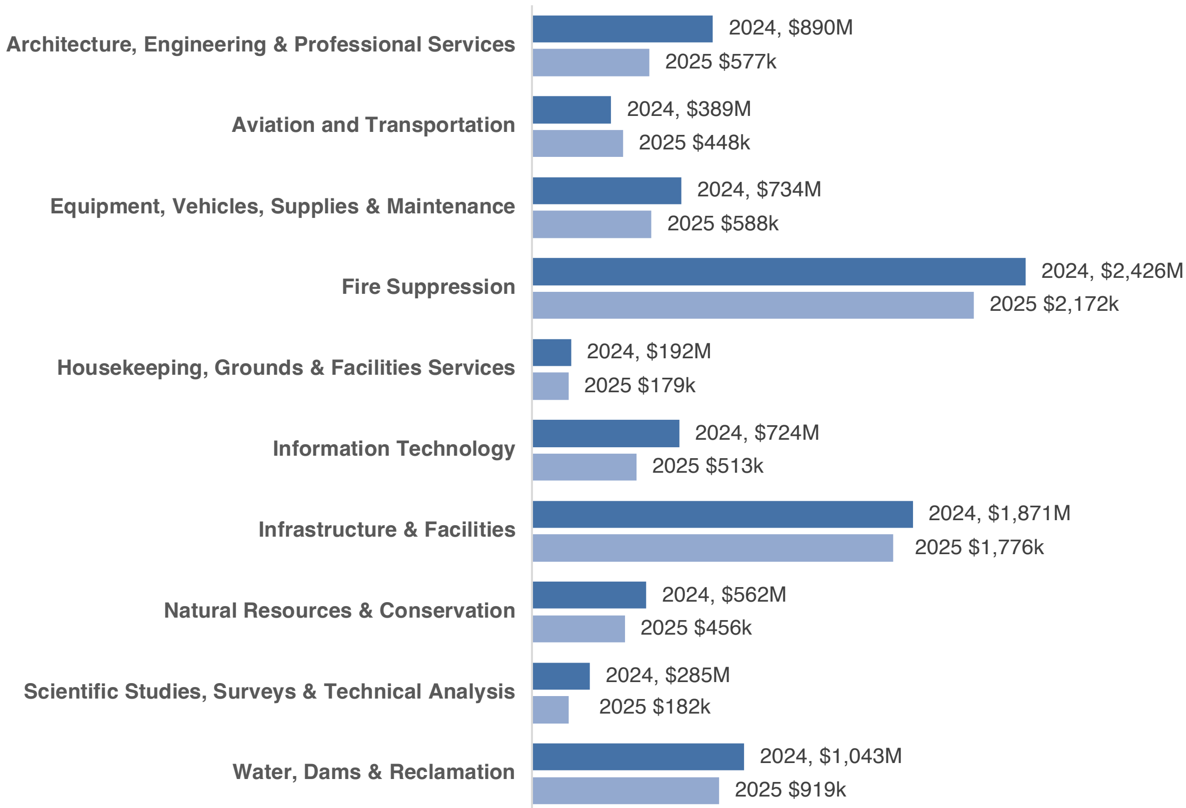
Aviation and transportation was the sole category of goods and services with net growth in 2025, with spending rising by $58 million (+14.9%). Even in aviation & transportation, however, the number of vendors fell by 90 (-22.4%),

Among the largest declines in 2025:

- Scientific studies and technical analysis: down $103 million (-36.1%); 301 fewer vendors held new contracts.
- Architecture, engineering, and professional services: down $313 million (-35.2%); 446 fewer vendors held new contracts.
- Information technology: down $211 million (-29.1%).
- Equipment and vehicles: down $147 million (-20.0%); 518 fewer vendors held new contracts.
- Fire suppression: down $255 million (-10.5%).

Absolute declines in other categories, such as housekeeping, grounds, and facilities services, were smaller than those listed above, but fund work that intersects routinely with day-to-day operations at public sites. An assessment of such cuts on mission delivery is a matter for further examination by the public, advocates, and elected officials.

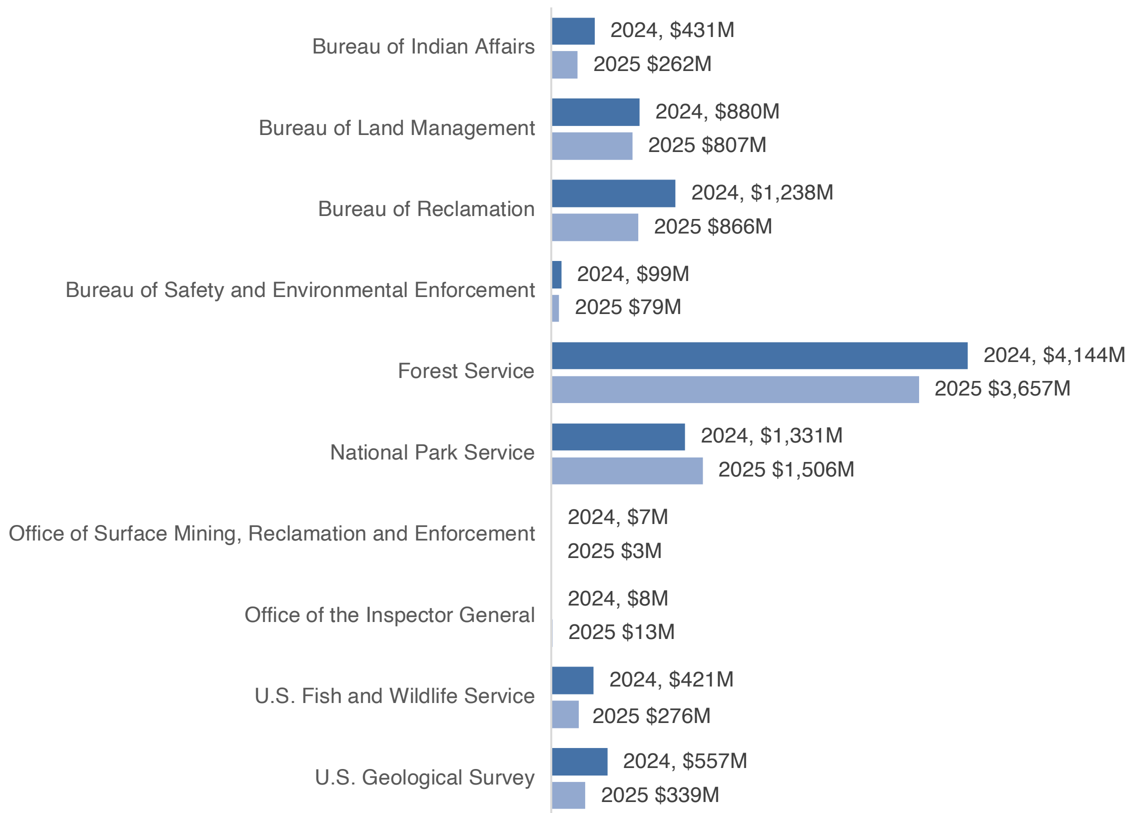
Figure 3: Contract Spending by Federal Public Land Agencies for Products and Services in 2024 and 2025 for all US States and Territories



National Changes by Agency

Nine of the ten agencies in this study recorded spending declines in 2025. The Forest Service, which accounts for more than 40% of all public land agency contracting, recorded a $486 million reduction (-11.7%) with 1,282 fewer vendors holding contracts with the agency than in the previous year, the largest absolute change of any agency. The U.S. Geological Survey fell by $218 million (-39.1%), and the Bureau of Indian Affairs by $169 million (-39.2%). The U.S. Fish and Wildlife Service declined by $146 million (-34.5%), and the Bureau of Reclamation by $372 million (-30.1%).

Figure 4: Contract Spending by Federal Public Land Agencies in 2024 and 2025 for all US States and Territories



The National Park Service was the only large agency to record a spending increase, rising by $175 million (+13.2%), driven in significant part by two funding obligations with a single engineering firm: $240.6M for infrastructure reconstruction in western Virginia following Hurricane Helene, and $217.2M for wastewater treatment infrastructure at Yosemite National Park in California. NPS [9] had 312 fewer contracted vendors than in the prior year (-10.9%). The Bureau of Land Management recorded a modest spending decline of $73 million (-8.2%), but was the only agency where vendor counts increased, adding 44 vendors (+2.5%).

Figure 5: Top 10/Bottom 10 States by Change in Net $ Funding Obligations for Contracted Goods and Services in 2025

	2024		2025		Change		% Change	
10 Biggest Gains	$M	#	$M	#	$M	#	$M	#
GA	$155.2	265	$387.6	219	$232.4	-46	149.7%	-17.4%
MN	$44.4	230	$211.4	205	$167.0	-25	376.3%	-10.9%
MD	$198.8	322	$328.1	269	$129.3	-53	65.1%	-16.5%
MO	$352.7	155	$458.4	133	$105.7	-22	30.0%	-14.2%
MT	$495.8	644	$576.8	583	$81.0	-61	16.3%	-9.5%
MA	$66.0	172	$102.1	149	$36.1	-23	54.8%	-13.4%
GU	$3.1	16	$19.8	14	$16.7	-2	533.7%	-12.5%
PR	$9.6	66	$18.3	46	$8.7	-20	90.1%	-30.3%
KY	$25.9	67	$33.9	61	$7.9	-6	30.6%	-9.0%
ID	$327.5	617	$333.3	557	$5.8	-60	1.8%	-9.7%

	2024		2025		Change		% Change	
10 Biggest Drops	$M	#	$M	#	$M	#	$M	#
TX	$626.2	481	$184.9	383	-$441.3	-98	-70.5%	-20.4%
OR	$1,155.6	1,283	$800.1	993	-$355.5	-290	-30.8%	-22.6%
NM	$380.8	303	$118.5	255	-$262.3	-48	-68.9%	-15.8%
CO	$601.5	669	$412.1	559	-$189.4	-110	-31.5%	-16.4%
WA	$473.5	721	$314.1	627	-$159.4	-94	-33.7%	-13.0%
HI	$122.5	74	$12.6	74	-$109.9	0	-89.7%	0.0%
AZ	$241.3	533	$173.7	437	-$67.5	-96	-28.0%	-18.0%
SD	$83.7	136	$38.7	126	-$45.0	-10	-53.8%	-7.4%
NV	$142.2	215	$99.1	206	-$43.0	-9	-30.3%	-4.2%
MI	$105.6	187	$63.3	166	-$42.4	-21	-40.1%	-11.2%

To What Extent Do IRA Rescissions Account for Declines?

A portion of the 2025 decline reflects impoundment and rescission of one-time Inflation Reduction Act (IRA) funding rather than a reduction in the agencies' base contracting. IRA-associated obligations fell from roughly $453 million in 2024 to about $42 million in 2025, a year-over-year decline on the order of a quarter to a third of the total drop in PLA contracting. IRA-associated work was concentrated in the Forest Service wildland management and Bureau of Reclamation large-scale water infrastructure projects. With respect to the number of vendors lost in 2025, IRA rescissions account for a meaningful proportion, but not the majority, of the decline. At most about 521 vendors had any IRA-associated activity in 2024, falling to roughly 235 in 2025, a small share of the overall vendor loss.A fuller accounting, including the basis for these estimates, appears in the Appendix.

Are We Observing a Cut or a Shift in Funding Between States?

USASpending.gov recorded a reduction in contract spend in 36 of 56 states and territories; 49 of 56 saw vendor counts fall. Texas recorded the largest absolute dollar slide nationally, falling by $441 million (-70.5%). A portion of this decline reflects a possible in spending (at the time of publication) on a single project: approximately $120 million in authorized funding for continuation of the Navajo-Gallup Water Supply Project, a multi-decade Bureau of Reclamation initiative delivering drinking water to Tribal communities in New Mexico and Arizona. Oregon fell by $356 million (-30.8%), New Mexico by $262 million (-68.9%), Colorado by $189 million (-31.5%), and Washington by $159 million (-33.7%). Hawaii saw a near-total reduction of $110 million (-89.7%).

Figure 6: Top 10 Counties by Net $ Funding Obligations for Contracted Goods and Services in 2024 and 2025

Top 10 Counties in 2024	State	Net Funding $ Obligated
Dallas	TX	410,727,580
Fairfax	VA	372,010,773
Bernalillo	**NM**	**333,228,165**
St. Louis	MO	320,142,021
El Paso	**CO**	**213,726,385**
Jackson	**OR**	205,287,777
Spokane	**WA**	**178,941,860**
Anchorage	AK	175,402,122
Gallatin	MT	171,521,906
Marion	**OR**	**163,636,973**

Top 10 Counties In 2025	State	Net Funding $ Obligated
Gallatin	**MT**	**327,198,074**
St. Louis	MO	295,643,136
Fairfax	VA	288,672,650
Fayette	GA	240,583,073
Solano	**CA**	**236,569,702**
Anchorage	AK	198,743,238
Dakota	MN	179,870,553
Baltimore[7]	**MD**	**156,823,221**
Marion	**OR**	**151,585,772**
Jackson	**OR**	**134,279,668**

Note: Western states in bold.

Several states recorded significant net increases in new obligations for the contracting of goods and services. Net obligations to vendors based in Georgia rose by $232 million (+149.7%), driven largely by Hurricane Helene disaster recovery contracting, including a $241 million Forest Service design-build award to Kiewit Infrastructure South for reconstruction of recreational and facility infrastructure in the Pisgah National Forest. Spending with Minnesota-based contractors increased by $167 million, driven by a $73.3 million Bureau of Reclamation contract obligation for work in Utah. Missouri gained $106 million (+30.0%) and Maryland $129 million (+65.1%).[8] Montana, a

[7] Maryland's $129 million increase is driven primarily by a single large vendor whose federal contracting records list a Maryland address. Available information indicates this company's principal operations and state-of-incorporation are in Oregon. Because we report data as recorded in the federal contracting system without alteration, Maryland reflects the reported figure.

[8] ibid

Western state, gained $81 million (+16.3%), driven by Bureau of Reclamation work on the Sisk Dam rehabilitation project in California's San Joaquin Valley.

Figure 7: Top 10/Bottom 10 Counties by Net $ Change in Funding Obligations for Contracted Goods and Service in 2025

10 Biggest Gains	State	Net Change	10 Biggest Drops	State	Net Change
Fayette	GA	240,256,826	Dallas	TX	-402,675,682
Solano	**CA**	**223,354,615**	**Bernalillo**	**NM**	**-237,180,844**
Dakota	MN	171,529,398	Honolulu	HI	-93,435,871
Gallatin	**MT**	**155,676,168**	**El Paso**	**CO**	**-89,874,820**
Baltimore	MD	149,243,279	Fairfax	VA	-83,338,123
St. Louis	MO	103,389,078	**Spokane**	**WA**	**-79,474,639**
Ada	**ID**	**53,167,012**	**Jackson**	**OR**	**-71,008,109**
Warren	VA	51,778,237	**Los Angeles**	**CA**	**-65,414,212**
Middlesex	MA	39,832,177	**Multnomah**	**OR**	**-61,660,059**
Riverside	**CA**	**32,662,009**	El Paso	TX	-52,225,824

Note: Western states in bold.

NATIONAL IMPACT ON SMALL BUSINESS

Small Businesses Continue to Represent the Majority of Contracting Awards and Dollars, but Faced Sharper Declines

Across the federal government, federal contracts with businesses, governments, and nonprofit organizations provided a wide range of services and goods in 2024 and 2025. Among the recipients of contract spending in 2024, most vendors were small businesses (82.2% of vendors, 78.2% of dollars) and large businesses (10.1% of vendors, 17.4% of dollars), followed by government entities (4.4%), nonprofit organizations (2.2%), and educational institutions (0.4%). Together, these 13,707 vendors received $9.1B in contract obligations.

Figure 8: Change in Federal Public Land Agency Contract Spending with Small Business Vendors in Western States in 2025

	2024		2025		Change		% Change	
State	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
AZ	$195.4	431	$146.3	355	-$49.1	-76	-25.1%	-17.6%
CA	$799.4	1,524	$619.6	1,327	-$179.8	-197	-22.5%	-12.9%
CO	$490.9	548	$334.6	450	-$156.3	-98	-31.8%	-17.9%
ID	$315.1	537	$261.6	476	-$53.4	-61	-17.0%	-11.4%
MT	$487.8	564	$569.8	522	$82.0	-42	16.8%	-7.4%
NM	$183.1	248	$90.5	205	-$92.6	-43	-50.6%	-17.3%
NV	$137.0	183	$91.1	173	-$45.9	-10	-33.5%	-5.5%
OR	$1,097.2	1,140	$748.2	872	-$349.1	-268	-31.8%	-23.5%
UT	$220.6	248	$217.5	257	-$3.1	9	-1.4%	3.6%
WA	$438.3	598	$283.3	509	-$155.0	-89	-35.4%	-14.9%
WY	$81.9	163	$77.3	128	-$4.6	-35	-5.7%	-21.5%
Total	**$4,446.7**	**6,184**	**$3,439.7**	**5,274**	**-$1,006.9**	**-910**	**-22.6%**	**-14.7%**

Small Business Cut More Deeply Than Other Vendors by Spending Cuts

Small businesses are the backbone of the public land agency vendor community, representing more than 80% of all vendors and receiving approximately 78% of federal public land agency contracting dollars in 2024. In 2025, the number of small business vendors fell by 1,751 (-15.5%), from 11,280 to 9,529, a slightly higher rate than the overall vendor decline of 14.4%.

The impact at the county level was particularly concentrated. Of 1,872 counties with contracting activity reported in 2024, 874 counties (46.7%) saw a decline in the number of small businesses receiving new business in 2025. In 263 (14.1%) counties, the number of small business vendors receiving new business in 2025 dropped to zero. An additional 213 counties lost at least half of their small business vendors, bringing to 476 the number of counties that lost 50% or more of their small business vendor base. In 711 counties, more than one in three nationwide, small businesses lost at least 25% of their vendor count.

Rural Counties: Steep Declines from a Smaller Baseline

The pattern is especially pronounced in rural counties. Of 553 rural counties with any contracting in 2024, nearly one in five (102 counties) saw net spending with local vendors fall to zero in 2025, a higher rate than the national rate of 14.1%. These shifts in contracting warrant inquiry from small business advocates and county leaders concerned about rural economic development, including identifying which counties and contract categories drove the changes and whether federal agencies are meeting small business contracting goals and other statutory obligations.

A NOTE ON APPROACH AND METHODOLOGY

Prospect Partners, LLC and Hawk Eye Strategies, LLC, consultancies based in Washington, DC, and Colorado, analyzed contracting data from USASpending.gov for 10 federal public land management agencies, comparing two consecutive 12-month periods: February 1, 2024 through January 31, 2025 ("2024") and February 1, 2025 through January 31, 2026 ("2025"). The analysis covers contracting activity for ten agencies within the U.S. Department of the Interior and one within the U.S. Department of Agriculture. The agencies are the USDA Forest Service, National Park Service, U.S. Geological Survey, Bureau of Land Management, U.S. Fish and Wildlife Service, Bureau of Reclamation, Bureau of Indian Affairs, Bureau of Safety and Environmental Enforcement, Office of Inspector General (DOI), and Office of Surface Mining Reclamation and Enforcement.

Funding obligations: Our analysis is intended show where the most significant changes in contract spending occurred in 2025 as a first step toward identifying both root causes and impacts. For this reason, our analysis is based on federal agency data on fund obligations, obtained through USASpending.gov. A funds obligation is the federal equivalent of a commercial purchase order, through which the buyer commits to a certain level of spending against the delivery of a well-defined package of goods and services. A drop in obligations between two years is therefore likely to suggest at least four possibilities, all of which are relevant to federal service delivery: the cessation of work due to the completion of a project; a temporary pause in work; a shift of work to a different vendor; or an advance obligation, with the vendor drawing down on previously committed funds until they are expended.

Adjusted calendar year: Throughout the document, the authors have used an adjusted calendar year, beginning on February 1 and ending January 31. We have chosen this unorthodox approach in response to the overarching question driving our research: How have federal agencies changed their practices in the first twelve months of the current Presidential administration? The fiscal calendar would be unsuitable as it would confuse the sharp increase in spending observed in the final year of the Biden administration and the sharp declines in first year of the Trump administration. These changes in spending were a reflection changes in policy that the incoming administration communicated widely and consistently. Blurring the distinction through the use of fiscal year would provide no benefit. Once we made the decision to move away from fiscal year, the one-month shift was an uncomplicated adjustment to our models and provided an additional level of confidence to the reader who had an interest in marking the immediate impact of the change in leadership. Further adjustment, however, to an adjusted calendar based on Presidential inauguration risked signaling a level of precision that is beyond that of the underlying data and federal payment processes.

Geographic data: Locations of spending with vendors and contractors reflect the reported headquarters address of each organization, **not** the location where the contracted work was performed. A construction company headquartered in Georgia that performs work in Oregon will appear in Georgia in our analysis. Readers should interpret geographic data in this report as a measure of where contracting dollars flow in terms of company revenue, not field activity.

Vendor counts: Vendor counts in tables cannot be summed directly due to the presence of vendors across multiple row values (e.g., Product and Service Groups, Agencies). Vendor counts may vary by a small margin (under 0.5%) across tables. This reflects two factors: minor differences in how vendors are counted (by transaction versus by aggregated recipient) and unavoidable changes to vendor UEIs that occur over the lifetime of an award as companies update their SAM.gov registrations.

Data source: USASpending.gov contracting data (downloaded February 10, March 7-8, and May 8, 2026). Analysis periods based on action obligation date: Period 1 = February 1, 2024 - January 31, 2025. Period 2 = February 1, 2025 - January 31, 2026. Vendor counts represent distinct Unique Entity Identifiers (UEIs) per period per group. Small Business status is based on the contracting officer's determination for any 2024 or 2025 action. Rural classification: A county is classified as rural if the reported FIPS county code does not appear in the U.S. Census Bureau county-to-CBSA delineation file.

APPENDIX A:

NOTE ON RESCISSION OF INFLATION REDUCTION ACT FUNDING AND OVERALL DECLINES IN CONTRACT PENDING AND VENDOR POPULATION BETWEEN 2024 AND PRESENT DAY

This appendix examines the extent to which changes in spending between 2024 and present day may be attributed to the enactment and termination of the Inflation Reduction Act of 2022 (IRA, P.L. 117-169). As overall public land agency (PLA) contracting fell between 2024 and 2025, how much of that change was driven by the wind-down of one-time IRA funding rather than by changes in the agencies' base funding?

Our analysis suggested that IRA-associated contracting constituted a meaningful share of PLA contracting, peaking at roughly 6% of total obligations in 2023 accounting for about 3% across the IRA's lifespan, but does not account for the majority of the nationwide decline in contract spending or vendor participation. Its rise and fall nonetheless form a distinct arc, and its decline between 2024 and 2025 represents a meaningful minority of the overall dollar decline, approximately between one quarter to one third, though a much smaller share of the decline in the number of vendors.

Table A1. IRA Associated Contract Obligations as a Share of Total Contract Obligations

Adjusted Calendar Year[9]	Total PLA Net Obligations	Est. Max IRA Obligations	Est. Min IRA Obligations	Non-IRA Obligations	IRA Share (Max)
2021[10]	$790.3M	$1.3M	$0.0M	$789.0M	0.2%
2022	$7,307.9M	$50.9M	$18.8M	$7,257.0M	0.7%
2023	$8,213.2M	$518.1M	$314.4M	$7,695.2M	6.3%
2024	$9,138.2M	$453.2M	$368.2M	$8,685.1M	5.0%
2025	$7,835.6M	$41.7M	$32.5M	$7,794.0M	0.5%
2026 YTD[11]	$1,536.0M	$3.0M	$2.4M	$1,533.0M	0.2%
Total	**$34,821.2M**	**$1,068.1M**	**$736.2M**	**$33,753.1M**	**3.1%**

Overall IRA Contracting Trend:

Even with maximum or "ceiling" totals, IRA related contract spending was negligible through 2022, surging to an estimated $518 million at their 2023 peak (accounting for 6.3% of all PLA contracting), remained substantial in 2024 at $453 million, then fell sharply to $42 million in 2025, a decline of roughly $411 million year over year. Data on the partial 2026 year through April 2026

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[9] The adjusted calendar year, a concept developed for this report, runs from February 1 through January 31.

[10] 2021 data reflects only the portion of that acquisition year from the first observed IRA transaction (October 20, 2021). Although this date proceeds the enactment of the IRA, we have identified multiple transactions aligned with IRA that are most likely to have been originally authorized through the Infrastructure Investment and Jobs Act and subsequently reauthorized by Congress as IRA.

[11] Year to Date (YTD) 2026 totals are based on data obtained on June 4, 2026. Although USASpending is updated as often as each business day, agencies have up to 90 days to fully upload their financial data to the system after which the USASpending staff validates and processes the data.

shows the wind-down essentially complete, with only a few million dollars of new IRA-associated activity recorded.

IRA wind-down accounts for a meaningful proportion of overall dollar declines among public land agencies between 2024 and 2025, on the order of a quarter to a third, but are not the principal cause. The larger share of the decline occurred in base, non-IRA contracting.

Table A2. IRA Associated and Total Vendor Counts

Acquisition Year	Total PLA Vendors	Est. Max # IRA Vendors	Est. Min # IRA Vendors
2021	6,429	6	3
2022	15,342	47	31
2023	15,711	353	292
2024	15,252	521	436
2025	13,585	235	183
2026 YTD	8,154	71	61

Note: Annual vendor counts are based on USASpending.gov Unique Entity Identifiers (UEIs) active in the given year. Vendor counts do not sum across years because a vendor active in multiple years is counted in each.

IRA vendor counts occupy a smaller share of agency totals than IRA dollar totals.
At their 2024 peak, at most 521 vendors had any IRA-associated activity, a maximum or "ceiling" of 3.4% of the roughly 15,252 PLA vendors that year. Between 2024 and 2025 the number of IRA-associated vendors fell by 286 (from 521 to 235). Against the much larger decline in total PLA vendors over the same period, IRA wind-down explains only a small fraction of the overall vendor loss. IRA contributed proportionally more to the decline in dollars than to the decline in the number of firms, which is consistent with reports that IRA contract spending was concentrating in a relatively small number of larger awards compared to contract spending overall

Agency Variation
The proportion of IRA spending as a portion of total spending varied by agency. USDA Forest Service alone accounted for roughly $652 million of the estimated $1.07 billion IRA maximum or "ceiling". This reflects the large IRA investment in wildfire and forest-management. The Bureau of Reclamation accounted for a further $272 million. Notably, BOR's floor and ceiling are identical because those transactions carried no competing statute in their program-activity records. The single largest IRA-associated recipient over the period is CDM Constructors Inc., a New Mexico based firm with $265 million in net IRA funded obligations for construction of water-supply facilities, work connected to the Bureau of Reclamation water program discussed elsewhere in this report.

Table A3. IRA-Associated Obligations by Agency (Full Period)

Agency	Est. Max IRA $	Est. Min IRA $	Max Vendors	Min Vendors
Forest Service	$651.9M	$339.1M	379	311
Bureau of Reclamation	$272.2M	$272.2M	25	25
Bureau of Land Management	$60.4M	$49.4M	117	104

National Park Service	$45.3M	$42.6M	89	85
U.S. Fish and Wildlife Service	$37.3M	$32.2M	99	93
Bureau of Indian Affairs	$1.4M	$1.0M	3	2
Bur. Safety & Enviro. Enforcement	-$0.4M	-$0.4M	1	1
Total	$1,068.1M	$736.2M	NA	NA

Note: Full period (2021 acquisition year through partial 2026). Vendor counts are distinct UEIs and are not summed across agencies. Three in-scope agencies recorded no IRA-associated contracting: U.S. Geological Survey, Office of Surface Mining Reclamation and Enforcement, and Office of Inspector General. Source: USASpending.gov contract transactions.

How We Identified IRA-Associated Contracting

USASpending records information on the funding source for each contract transaction. However this data is inconsistently reported across agencies, offices, and funding streams. The single largest reporting challenge is the structure of USASpending, which allows a single transaction to be associated with multiple funding streams. For example, the construction of a road or implementation of a new software system might include funding contributions that span multiple funding years, Congressional authorization, and programs. Tracking each dollar's source would add expensive and time-consuming accounting that would discourage cost-saving collaboration.

Within the existing data structure, fortunately, while it is not possible to measure exactly how much a particular funding stream contributes to a purchase of goods or services, it is possible to reliably measure whether this has occurred. Our goal, therefore, was to determine the minimum and maximum possible range of IRA spending on projects where IRA is an identified source.
We classified a transaction as IRA-associated through the USASpending program-activity field and the exact language "INFLATION REDUCTION ACT." This approach ensured reproducibility by an independent reviewer applying that single rule to the same source data.

With this decision rule, we were able to determine a maximum value ("ceiling") and minimum value ("floor") for IRA contributions to any goods or services purchases.

Table A4. Largest IRA-Associated Recipients (Full Period)

Rank	Recipient	State	Net IRA Obligations	IRA Transactions	Related Product/Service Codes
1	**CDM Constructors Inc.**	NM	$264.8M	31	Y1NE – Construction of Water Supply Facilities
2	**Sierra Tahoe Environmental Mgmt., LLC**	CA	$85.8M	8	F099 – Natural Resources/Conservation – Other
3	**Burnbot Inc.**	CA	$32.2M	6	F099 – Natural Resources/Conservation – Other
4	**Creative Systems and Consulting LLC**	VA	$21.5M	15	7A20 – IT App Development Software; D399 – IT/Telecom – Other
5	**Guidehouse Digital LLC**	VA	$20.5M	10	DF01 – IT/Telecom – IT Management Support Services

6	**Techtrend, Inc.**	VA	$19.7M	5	DF01 – IT/Telecom – IT Management Support Services
7	**J. W. Bamford, Inc.**	CA	$19.0M	15	F099 – Natural Resources/Conservation – Other
8	**Accenture Federal Services LLC**	VA	$17.4M	8	DF01 – IT/Telecom – IT Management Support Services
9	**TWC Corp**	OR	$14.3M	12	F099 – Natural Resources/Conservation – Other
10	**Johnson-Frank & Associates, Inc.**	CA	$14.0M	4	R404 – Professional: Land Surveys – Cadastral

Note: Ranked by net IRA-associated obligations (estimated-maximum basis) over the full period. State reflects the vendor's registered headquarters address, not place of performance, consistent with the rest of this report. Product/service codes are those attached to the recipient's IRA-associated transactions. Source: USASpending.gov contract transactions.

Anomalies in Transaction Dates:

A small number of transactions (61, totaling about $27 million) report IRA as their funding source have action dates before the IRA was signed into law on August 16, 2022. USASpending program-activity tagging may reflect later funding reclassification as some IIJA activites were retroactively reauthorized through IRA. We account for these transactions as they are reported through USASpending and make no causal claim or adjustment, consistent with our practice of reporting source data without alteration.

Appendix B: Tables and Charts

Table 1a: Contracting by Federal Public Land Agencies by State of Vendor Registration
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, Western States

	2024		2025		Change		% Change	
State	**$M**	**#**	**$M**	**#**	**$M**	**#**	**$M**	**#**
AZ	$241.3	533	$173.7	437	-$67.5	-96	-28.0%	-18.0%
CA	$948.9	1,762	$951.8	1,568	$3.0	-194	0.3%	-11.0%
CO	$601.5	669	$412.1	559	-$189.4	-110	-31.5%	-16.4%
ID	$327.5	617	$333.3	557	$5.8	-60	1.8%	-9.7%
MT	$495.8	644	$576.8	583	$81.0	-61	16.3%	-9.5%
NM	$380.8	303	$118.5	255	-$262.3	-48	-68.9%	-15.8%
NV	$142.2	215	$99.1	206	-$43.0	-9	-30.3%	-4.2%
OR	$1,155.6	1,283	$800.1	993	-$355.5	-290	-30.8%	-22.6%
UT	$241.0	330	$233.0	338	-$7.9	8	-3.3%	2.4%
WA	$473.5	721	$314.1	627	-$159.4	-94	-33.7%	-13.0%
WY	$83.5	194	$80.3	152	-$3.2	-42	-3.8%	-21.6%
All Western States	**$5,091.5**	**7,258**	**$4,092.9**	**6,258**	**-$998.6**	**-1,000**	**-19.6%**	**-13.8%**

Chart 1a: Contracting by Federal Public Land Agencies by State of Vendor Registration.
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, Western States

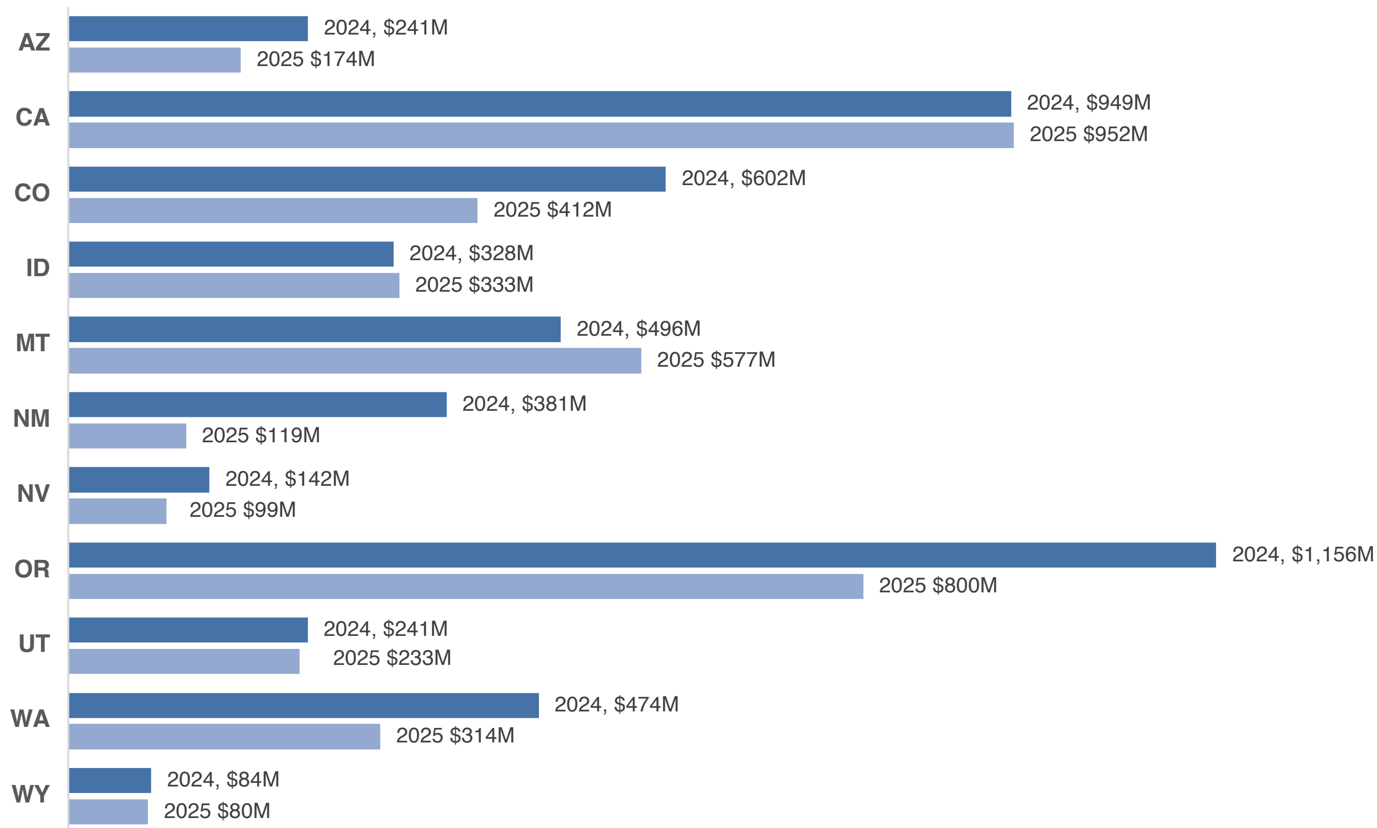

Table 1b: Contracting by Federal Public Land Agencies by State of Vendor Registration
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, Western States

	2024		2025		Change		% Change	
State	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
AZ	$195.4	431	$146.3	355	-$49.1	-76	-25.1%	-17.6%
CA	$799.4	1,524	$619.6	1,327	-$179.8	-197	-22.5%	-12.9%
CO	$490.9	548	$334.6	450	-$156.3	-98	-31.8%	-17.9%
ID	$315.1	537	$261.6	476	-$53.4	-61	-17.0%	-11.4%
MT	$487.8	564	$569.8	522	$82.0	-42	16.8%	-7.4%
NM	$183.1	248	$90.5	205	-$92.6	-43	-50.6%	-17.3%
NV	$137.0	183	$91.1	173	-$45.9	-10	-33.5%	-5.5%
OR	$1,097.2	1,140	$748.2	872	-$349.1	-268	-31.8%	-23.5%
UT	$220.6	248	$217.5	257	-$3.1	9	-1.4%	3.6%
WA	$438.3	598	$283.3	509	-$155.0	-89	-35.4%	-14.9%
WY	$81.9	163	$77.3	128	-$4.6	-35	-5.7%	-21.5%
Total	$4,446.7	6,184	$3,439.7	5,274	-$1,006.9	-910	-22.6%	-14.7%

Chart 1b: Contracting by Federal Public Land Agencies by State of Vendor Registration.
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, Western States

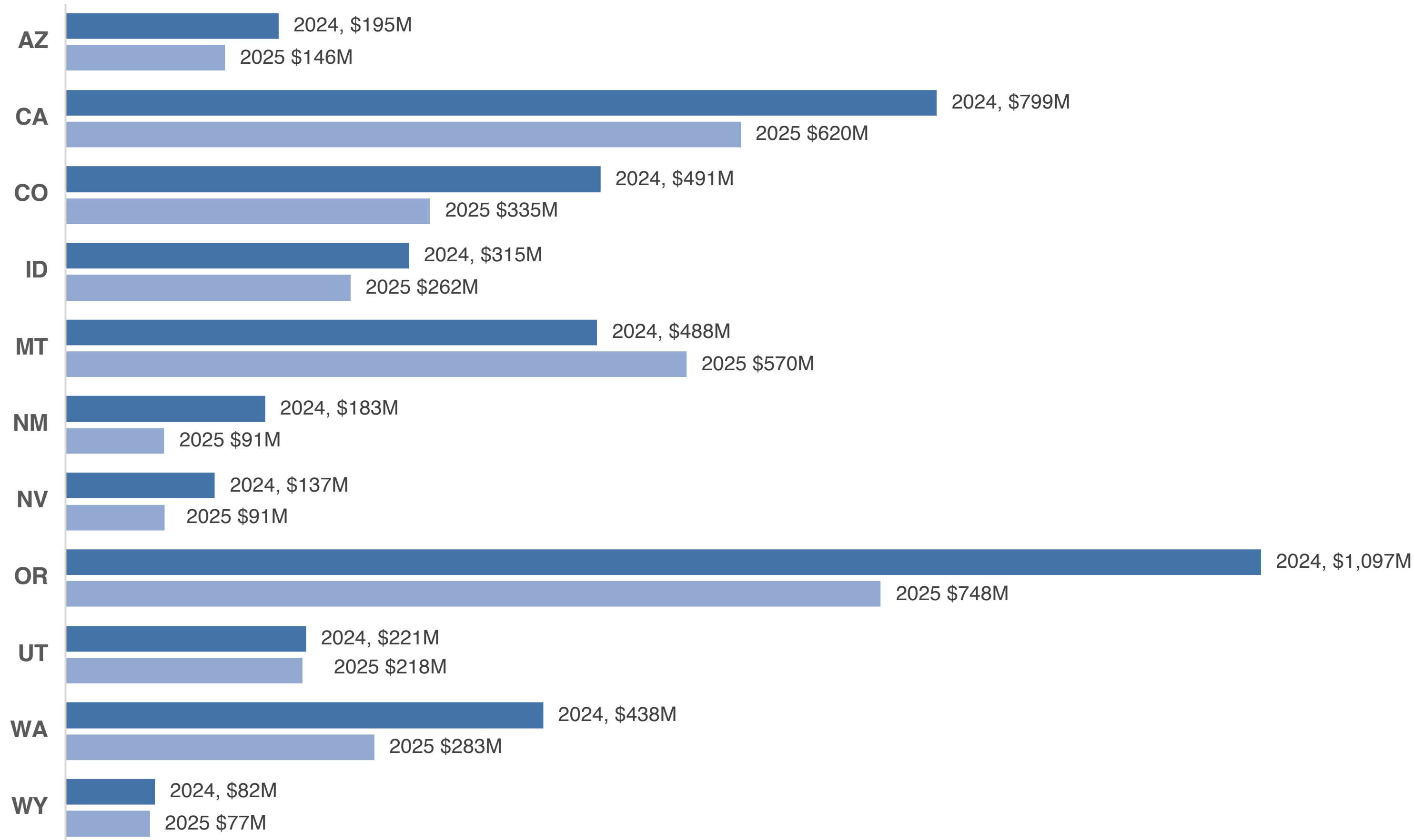

Table 2a: Contracting by Federal Public Land Agencies by Federal Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, All States and Territories

	2024		2025		Change		% Change	
Federal Agency	$M	#	$M	#	$M	#	$M	#
Bureau of Indian Affairs	$431.1	613	$261.9	565	-$169.2	-48	-39.2%	-7.8%
Bureau of Land Management	$879.7	1,793	$807.1	1,837	-$72.6	44	-8.2%	2.5%
Bureau of Reclamation	$1,238.0	1,173	$866.0	1,061	-$372.0	-112	-30.1%	-9.5%
Bureau of Safety and Environmental Enforcement	$99.4	126	$79.3	106	-$20.1	-20	-20.2%	-15.9%
Forest Service	$4,143.6	6,389	$3,657.2	5,107	-$486.4	-1,282	-11.7%	-20.1%
National Park Service	$1,330.9	2,870	$1,505.9	2,558	$175.1	-312	13.2%	-10.9%
Office of Surface Mining, Reclamation and Enforcement	$7.2	63	$3.4	51	-$3.8	-12	-52.4%	-19.0%
Office of the Inspector General	$7.6	55	$13.2	38	$5.6	-17	72.9%	-30.9%
U.S. Fish and Wildlife Service	$421.4	2,081	$275.9	1,686	-$145.5	-395	-34.5%	-19.0%
U.S. Geological Survey	$557.2	1,497	$339.1	1,215	-$218.1	-282	-39.1%	-18.8%
All Public Land Agencies	**$9,116.1**	**13,707**	**$7,809.0**	**11,738**	**-$1,307.1**	**-1,969**	**-14.3%**	**-14.4%**

Note: Vendor counts are distinct firms. The individual rows do not sum to the All-Agencies vendor figure, because a firm active in more than one agency is counted in each row but only once in the all-agencies total.

Table 2b: Contracting by Federal Public Land Agencies by Federal Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, All States and Territories

	2024		2025		Change		% Change	
Federal Agency	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
Bureau of Indian Affairs	$374.4	367	$200.6	337	-$173.8	-30	-46.4%	-8.2%
Bureau of Land Management	$731.8	1,423	$688.6	1,419	-$43.2	-4	-5.9%	-0.3%
Bureau of Reclamation	$475.1	842	$564.5	758	$89.4	-84	18.8%	-10.0%
Bureau of Safety and Environmental Enforcement	$78.2	80	$67.0	70	-$11.2	-10	-14.4%	-12.5%
Forest Service	$3,948.1	5,717	$3,263.5	4,544	-$684.6	-1,173	-17.3%	-20.5%
National Park Service	$958.8	2,394	$938.5	2,158	-$20.4	-236	-2.1%	-9.9%
Office of Surface Mining, Reclamation and Enforcement	$5.8	46	$2.3	33	-$3.4	-13	-59.8%	-28.3%
Office of the Inspector General	$1.9	40	$1.1	25	-$0.8	-15	-40.7%	-37.5%
U.S. Fish and Wildlife Service	$370.0	1,650	$236.3	1,325	-$133.7	-325	-36.1%	-19.7%
U.S. Geological Survey	$187.9	1,118	$131.8	887	-$56.1	-231	-29.8%	-20.7%
All Public Land Agencies	**$7,132.1**	**11,276**	**$6094.3**	**9,525**	**-$1,037.8**	**-1,751**	**-14.6%**	**-15.5%**

Note: Vendor totals do not sum due to duplication of vendors across rows.

Table 2c: Contracting by Federal Public Land Agencies by Federal Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, Western States

	2024		2025		Change		% Change	
Federal Agency	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
Bureau of Indian Affairs	$270.3	287	$129.7	268	-$140.6	-19	-52.0%	-6.6%
Bureau of Land Management	$456.0	1,160	$392.7	1,181	-$63.3	21	-13.9%	1.8%
Bureau of Reclamation	$668.3	716	$562.4	635	-$105.8	-81	-15.8%	-11.3%
Bureau of Safety and Environmental Enforcement	$12.7	20	$7.4	15	-$5.3	-5	-41.6%	-25.0%
Forest Service	$2,941.7	4,260	$2,196.9	3,508	-$744.8	-752	-25.3%	-17.7%
National Park Service	$488.2	913	$659.3	836	$171.1	-77	35.0%	-8.4%
Office of Surface Mining, Reclamation and Enforcement	$4.4	22	$0.1	15	-$4.2	-7	-97.3%	-31.8%
Office of the Inspector General	$0.6	8	$0.3	4	-$0.3	-4	-49.6%	-50.0%
U.S. Fish and Wildlife Service	$143.3	646	$68.2	487	-$75.1	-159	-52.4%	-24.6%
U.S. Geological Survey	$105.9	544	$75.8	422	-$30.1	-122	-28.4%	-22.4%
All Public Land Agencies	**$5,091.5**	**7,258**	**$4,092.9**	**6,258**	**-$998.6**	**-1000**	**-19.6%**	**-13.8%**

Table 2d: Contracting by Federal Public Land Agencies by Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, Western States

	2024		2025		Change		% Change	
Federal Agency	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
Bureau of Indian Affairs	$257.4	174	$107.2	162	-$150.3	-12	-58.4%	-6.9%
Bureau of Land Management	$411.6	914	$357.6	913	-$54.0	-1	-13.1%	-0.1%
Bureau of Reclamation	$367.2	512	$453.4	447	$86.1	-65	23.5%	-12.7%
Bureau of Safety and Environmental Enforcement	$5.5	14	$2.4	13	-$3.2	-1	-57.2%	-7.1%
Forest Service	$2,865.3	3,897	$2,126.0	3,199	-$739.3	-698	-25.8%	-17.9%
National Park Service	$351.8	766	$302.9	719	-$49.0	-47	-13.9%	-6.1%
Office of Surface Mining, Reclamation and Enforcement	$3.8	17	-$0.3	11	-$4.1	-6	-100.0%	-35.3%
Office of the Inspector General	$0.4	5	$0.1	2	-$0.3	-3	-81.7%	-60.0%
U.S. Fish and Wildlife Service	$131.2	525	$59.2	396	-$72.0	-129	-54.9%	-24.6%
U.S. Geological Survey	$52.4	440	$31.5	334	-$20.9	-106	-39.9%	-24.1%
All Public Land Agencies	**$4,446.7**	**6,169**	**$3,439.7**	**5,256**	**-$1,006.9**	**-913**	**-22.6%**	**-14.8%**

Chart 2a: Contracting by Federal Public Land Agencies by Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, All US States and Territories

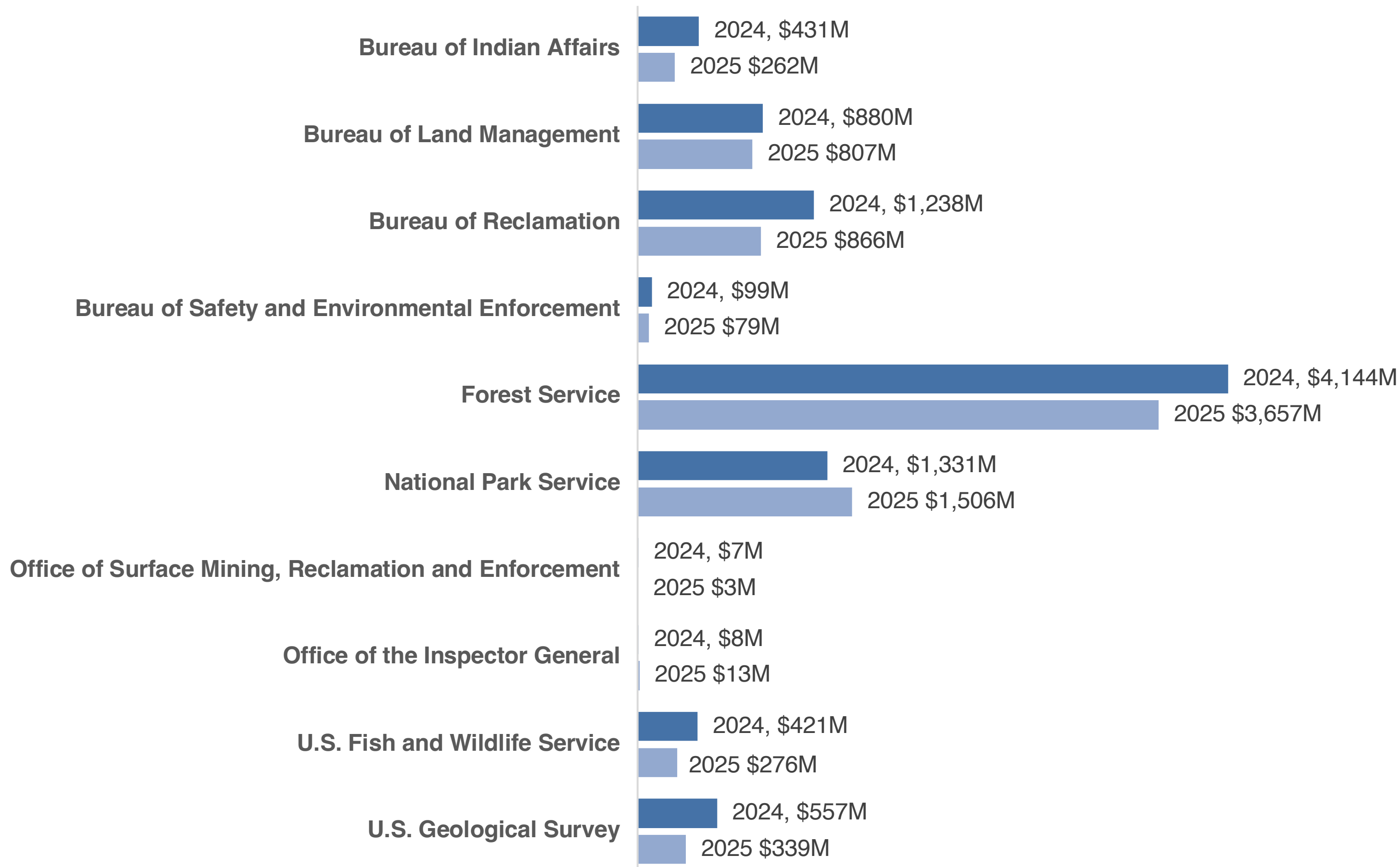

Chart 2b: Contracting by Federal Public Land Agencies by Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, All US States and Territories

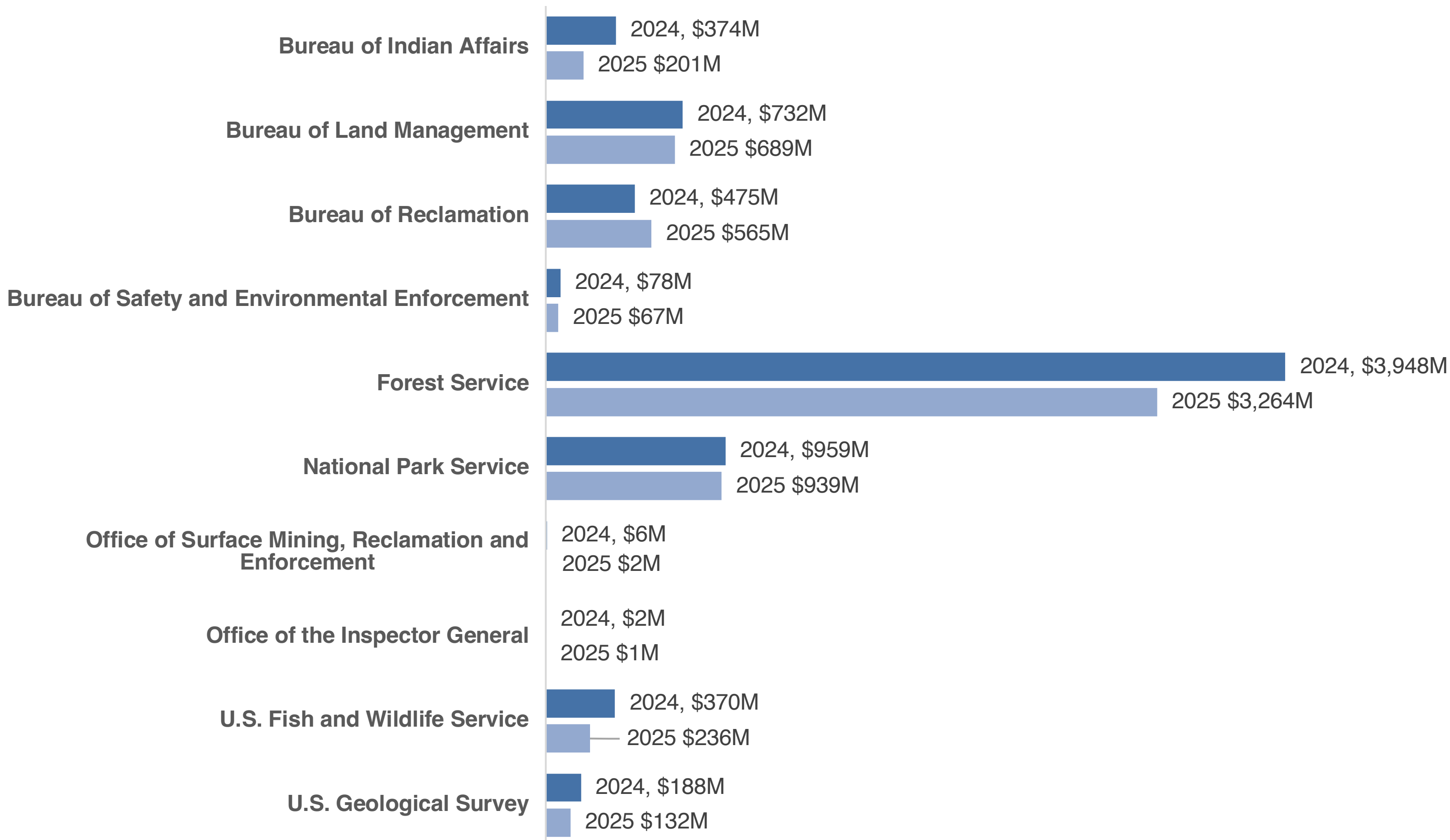

Chart 2c: Contracting by Federal Public Land Agencies by Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, Western States

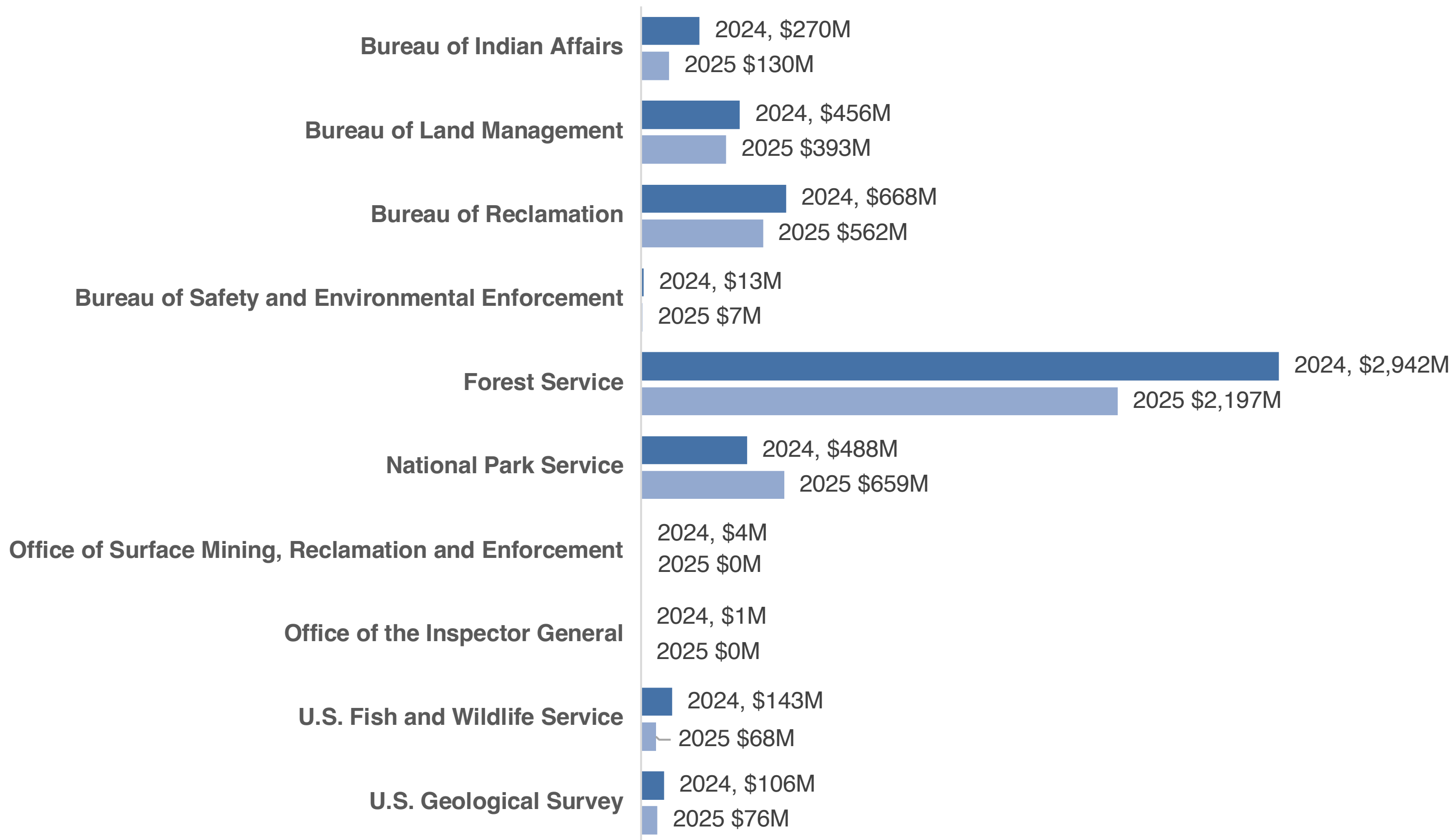

Chart 2d: Contracting by Federal Public Land Agencies by Agency
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, Western States

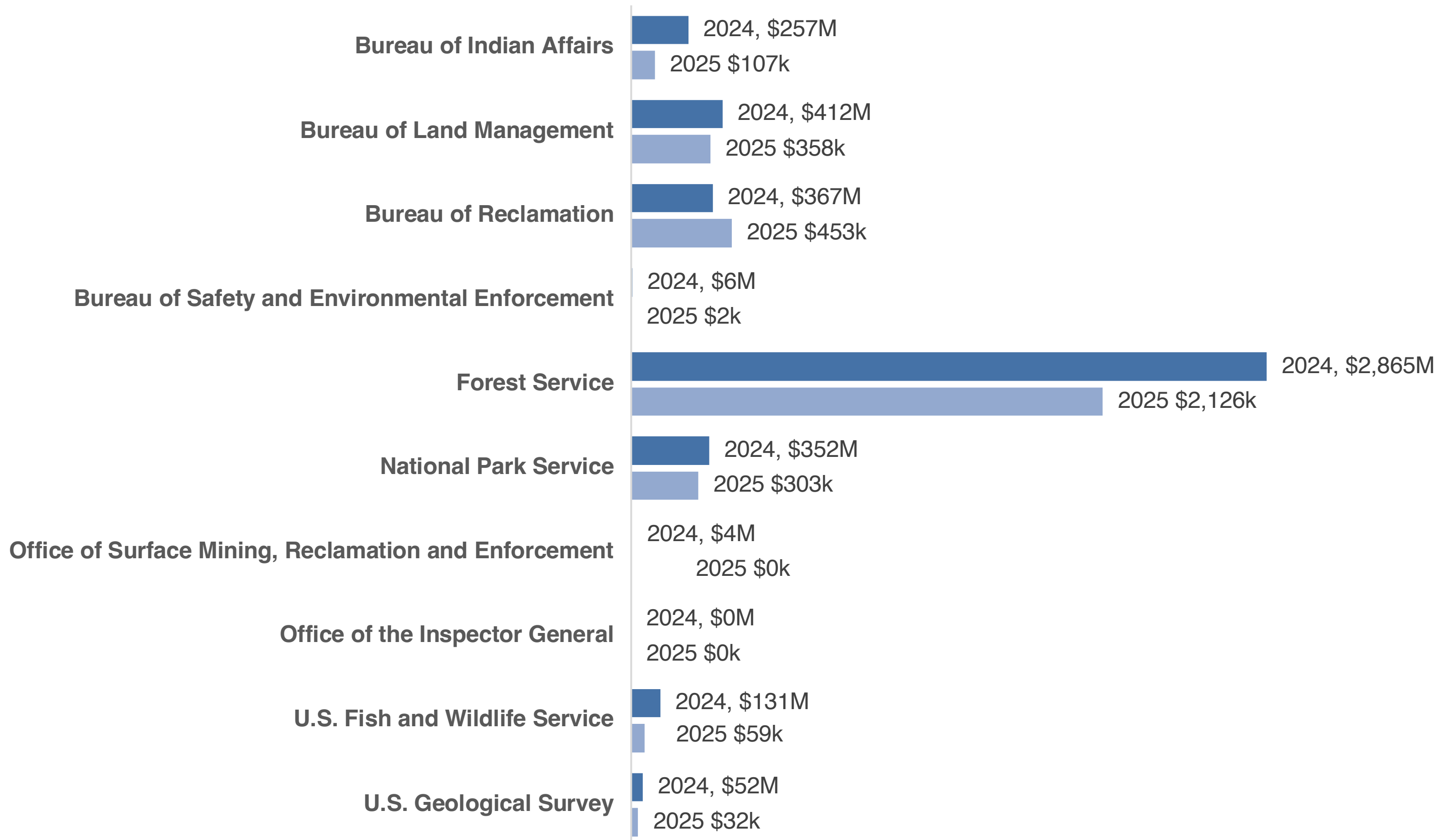

Table 3a: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, All States and Territories

	2024		2025		Change		% Change	
Product and Service Group	**$M**	**#**	**$M**	**#**	**$M**	**#**	**$M**	**#**
Architecture, Engineering & Professional Services	$889.8	1,966	$577.0	1,520	-$312.8	-446	-35.2%	-22.7%
Aviation and Transportation	$389.3	401	$447.5	311	$58.2	-90	15.0%	-22.4%
Equipment, Vehicles, Supplies & Maintenance	$734.2	3,580	$587.6	3,062	-$146.6	-518	-20.0%	-14.5%
Fire Suppression	$2,426.3	2,143	$2,171.8	1,996	-$254.5	-147	-10.5%	-6.9%
Housekeeping, Grounds & Facilities Services	$192.3	2,010	$179.2	1,763	-$13.1	-247	-6.8%	-12.3%
Information Technology	$723.7	853	$513.1	762	-$210.6	-91	-29.1%	-10.7%
Infrastructure & Facilities	$1,871.4	1,647	$1,775.6	1,373	-$95.9	-274	-5.1%	-16.6%
Natural Resources & Conservation	$561.6	1,465	$456.0	1,236	-$105.6	-229	-18.8%	-15.6%
Scientific Studies, Surveys & Technical Analysis	$284.8	1,714	$181.9	1,413	-$102.8	-301	-36.1%	-17.6%
Water, Dams & Reclamation	$1,042.7	419	$919.3	397	-$123.4	-22	-11.8%	-5.3%
All Product and Service Groups	**$9,116.1**	**13,707**	**$7,809.0**	**11,738**	**-$1,307.1**	**-1,969**	**-14.3%**	**-14.4%**

Table 3b: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, All States and Territories

	2024		2025		Change		% Change	
Product and Service Group	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
Architecture, Engineering & Professional Services	$506.2	1,444	$329.0	1,077	-$177.2	-367	-35.0%	-25.4%
Aviation and Transportation	$364.0	336	$422.4	258	$58.5	-78	16.1%	-23.2%
Equipment, Vehicles, Supplies & Maintenance	$605.3	2,987	$472.8	2,516	-$132.5	-471	-21.9%	-15.8%
Fire Suppression	$2,369.2	2,090	$2,113.8	1,947	-$255.3	-143	-10.8%	-6.8%
Housekeeping, Grounds & Facilities Services	$110.5	1,410	$113.1	1,231	$2.5	-179	2.3%	-12.7%
Information Technology	$508.7	601	$338.8	526	-$169.9	-75	-33.4%	-12.5%
Infrastructure & Facilities	$1,594.4	1,539	$1,317.0	1,256	-$277.5	-283	-17.4%	-18.4%
Natural Resources & Conservation	$514.0	1,276	$424.8	1,066	-$89.2	-210	-17.3%	-16.5%
Scientific Studies, Surveys & Technical Analysis	$232.3	1,320	$138.1	1,071	-$94.2	-249	-40.5%	-18.9%
Water, Dams & Reclamation	$327.5	358	$424.4	347	$96.9	-11	29.6%	-3.1%
All Product and Service Groups	**$7,132.1**	**11,276**	**$6094.3**	**9,525**	**-$1,037.8**	**-1,751**	**-14.6%**	**-15.5%**

Table 3c: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, Western States

	2024		2025		Change		% Change	
Product and Service Group	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
Architecture, Engineering & Professional Services	$343.6	828	$237.0	656	-$106.6	-172	-31.0%	-20.8%
Aviation and Transportation	$276.6	217	$275.7	157	-$0.9	-60	-0.3%	-27.6%
Equipment, Vehicles, Supplies & Maintenance	$402.3	1,694	$293.1	1,462	-$109.2	-232	-27.1%	-13.7%
Fire Suppression	$1,797.2	2,002	$1,397.2	1,837	-$399.9	-165	-22.3%	-8.2%
Housekeeping, Grounds & Facilities Services	$99.1	1,073	$78.0	956	-$21.1	-117	-21.3%	-10.9%
Information Technology	$148.7	281	$84.7	245	-$64.1	-36	-43.1%	-12.8%
Infrastructure & Facilities	$1,013.7	761	$705.2	585	-$308.5	-176	-30.4%	-23.1%
Natural Resources & Conservation	$416.3	815	$315.8	691	-$100.5	-124	-24.1%	-15.2%
Scientific Studies, Surveys & Technical Analysis	$105.7	731	$63.9	601	-$41.8	-130	-39.5%	-17.8%
Water, Dams & Reclamation	$488.4	228	$642.4	223	$154.0	-5	31.5%	-2.2%
All Product and Service Groups	**$5,091.5**	**7,258**	**$4,092.9**	**6,258**	**-$998.6**	**-1000**	**-19.6%**	**-13.8%**

Table 3d: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, Western States

	2024		2025		Change		% Change	
Product and Service Group	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**	**$M**	**SB #**
Architecture, Engineering & Professional Services	$229.9	599	$154.7	451	-$75.1	-148	-32.7%	-24.7%
Aviation and Transportation	$267.8	182	$271.3	137	$3.4	-45	1.3%	-24.7%
Equipment, Vehicles, Supplies & Maintenance	$372.0	1,473	$261.4	1,266	-$110.7	-207	-29.7%	-14.1%
Fire Suppression	$1,757.2	1,969	$1,355.1	1,808	-$402.0	-161	-22.9%	-8.2%
Housekeeping, Grounds & Facilities Services	$43.8	687	$40.0	601	-$3.9	-86	-8.8%	-12.5%
Information Technology	$137.0	204	$73.0	171	-$64.0	-33	-46.7%	-16.2%
Infrastructure & Facilities	$915.3	726	$612.9	550	-$302.4	-176	-33.0%	-24.2%
Natural Resources & Conservation	$381.9	705	$291.8	589	-$90.1	-116	-23.6%	-16.5%
Scientific Studies, Surveys & Technical Analysis	$86.8	615	$51.3	487	-$35.5	-128	-41.0%	-20.8%
Water, Dams & Reclamation	$254.9	203	$328.3	200	$73.4	-3	28.8%	-1.5%
All Product and Service Groups	**$4,446.7**	**6,169**	**$3,439.7**	**5,256**	**-$1,006.9**	**-913**	**-22.6%**	**-14.8%**

Chart 3a: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, All US States and Territories

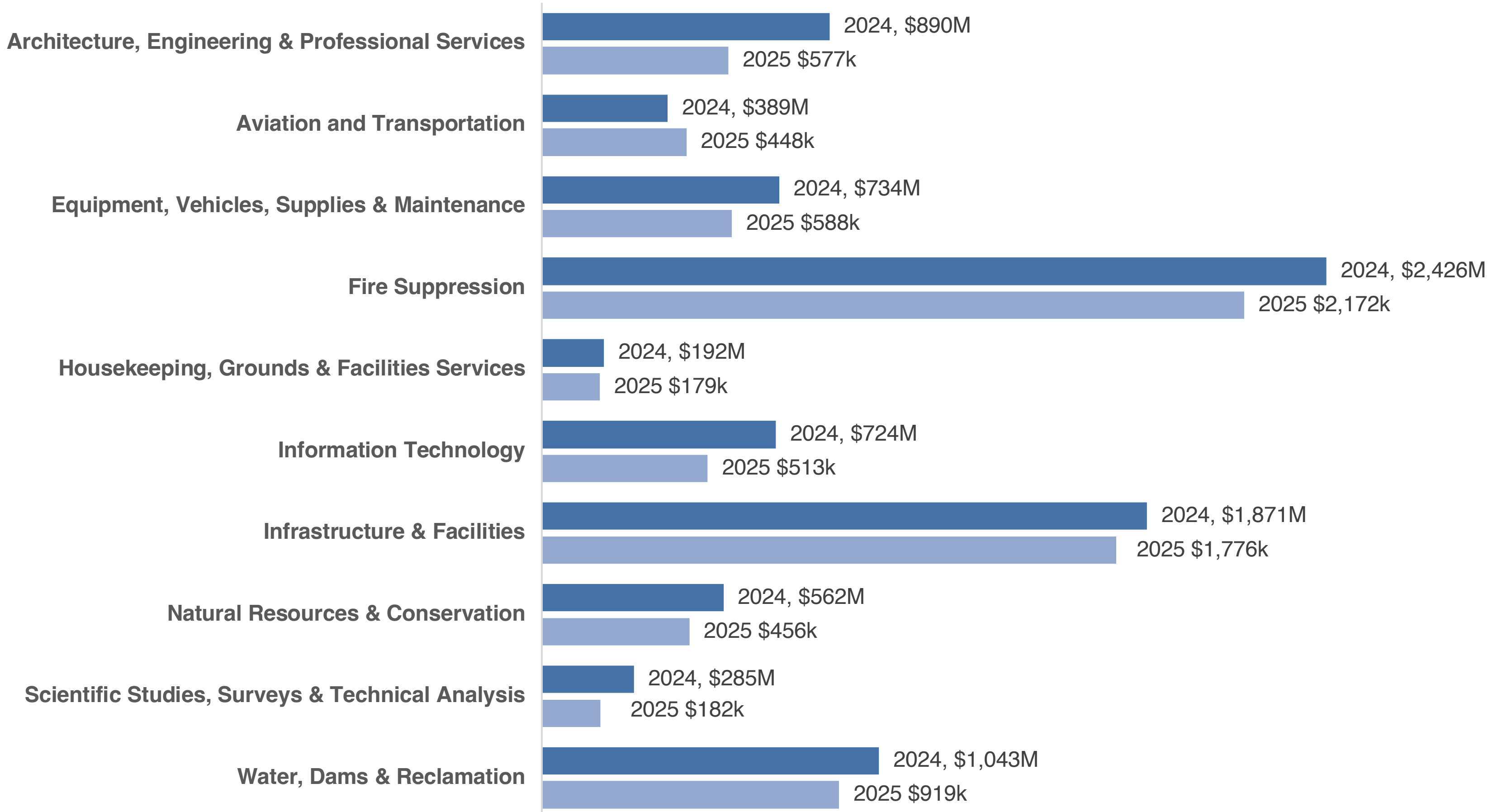

Chart 3b: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, All US States and Territories

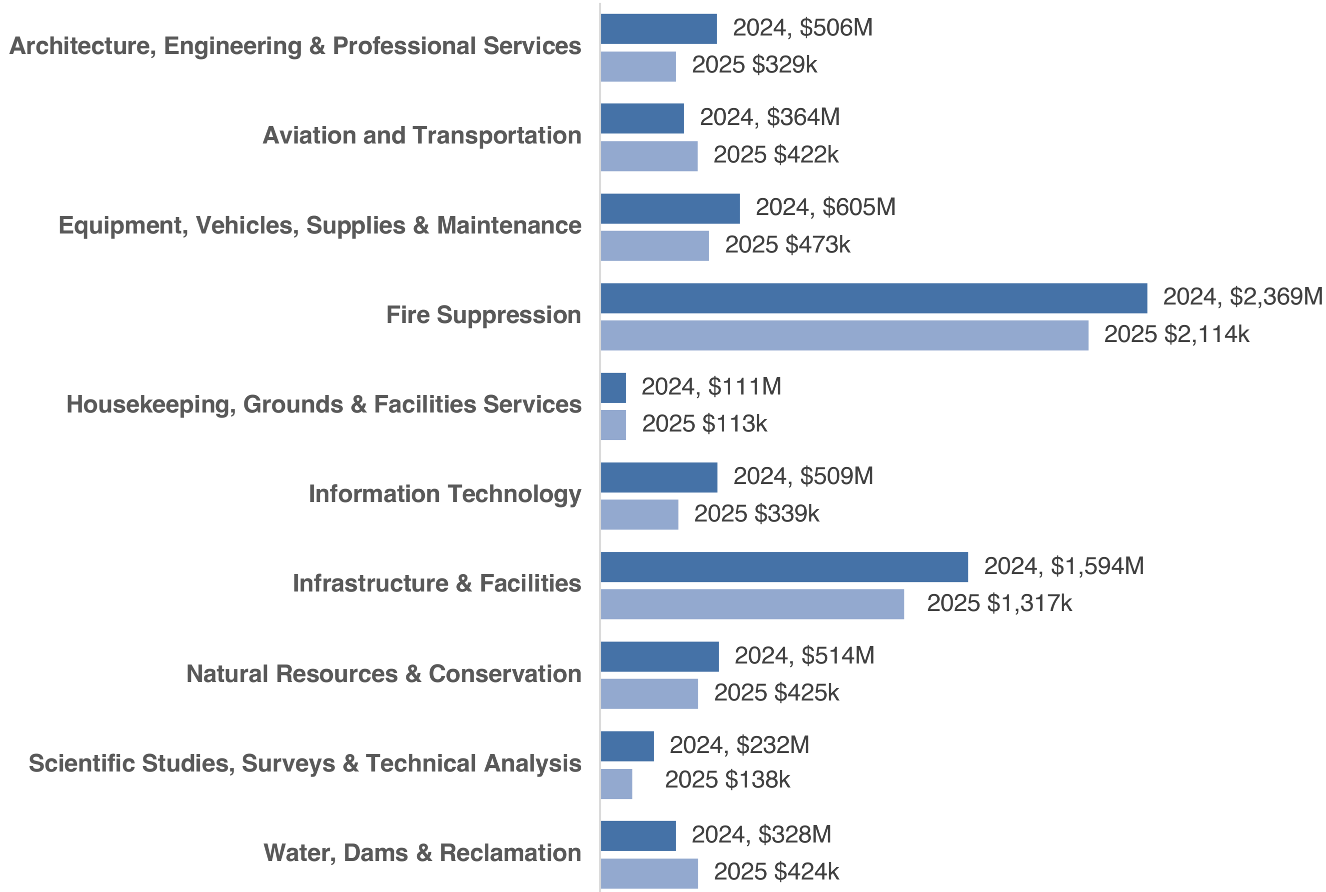

Chart 3c: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
All Vendors, Western States

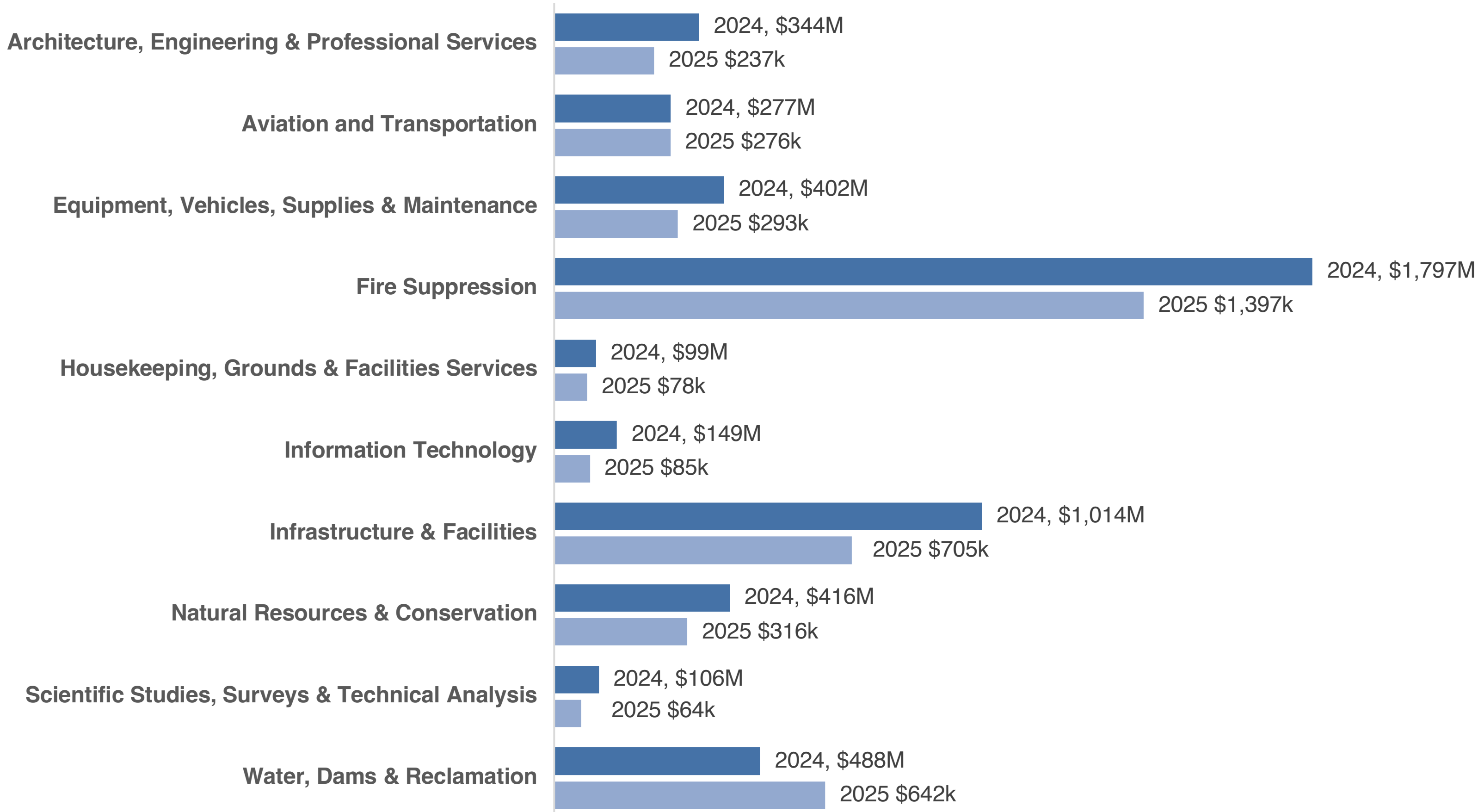

Chart 3d: Contracting by Federal Public Land Agencies by Product and Service Group
Contracting Period: February 2024 to January 2025, February 2025 to January 2026
Small Business (SB) Vendors, Western States

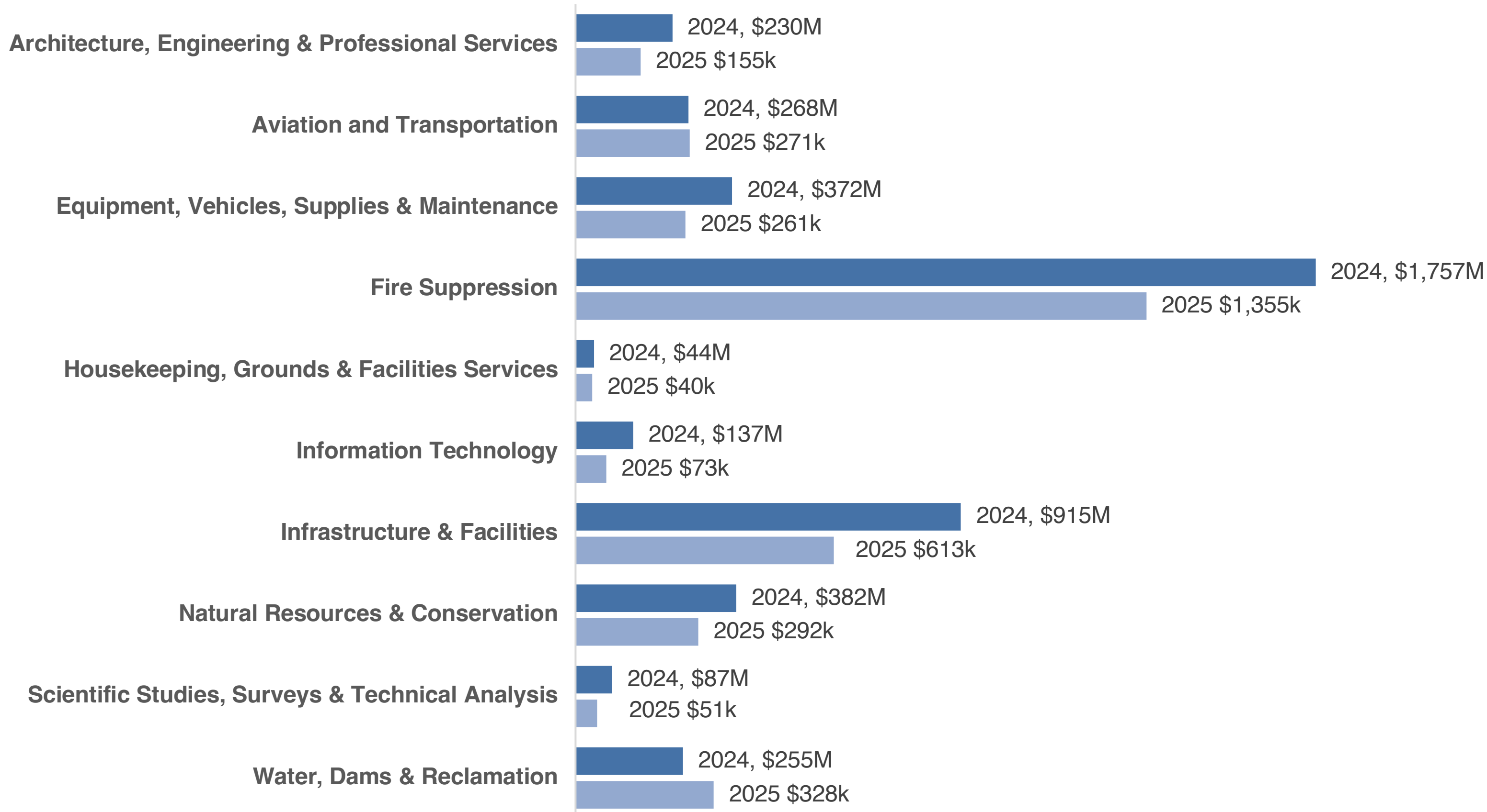

Table 4: Contracting by Federal Public Land Agencies
Top 10 Counties by Net Funds Obligated: Most Spending, Biggest Gains, Biggest Drops
Contracting Periods: February 2024 to January 2025, February 2025 to January 2026

Top 10 Counties: Highest Spending	State	2024
Dallas	TX	$410,727,580
Fairfax	VA	$372,010,773
Bernalillo	NM	$333,228,165
St. Louis	MO	$320,142,021
El Paso	CO	$213,726,385
Jackson	OR	$205,287,777
Spokane	WA	$178,941,860
Anchorage	AK	$175,402,122
Gallatin	MT	$171,521,906
Marion	OR	$163,636,973

Top 10 Counties: Highest Spending	State	2025
Gallatin	MT	$327,198,074
St. Louis	MO	$295,643,136
Fairfax	VA	$288,672,650
Fayette	GA	$240,583,073
Solano	CA	$236,569,702
Anchorage	AK	$198,743,238
Dakota	MN	$179,870,553
Baltimore	MD	$156,823,221
Marion	OR	$151,585,772
Jackson	OR	$134,279,668

10 Biggest Gains	State	2024-2025
Fayette	GA	$240,256,826
Solano	CA	$223,354,615
Dakota	MN	$171,529,398
Gallatin	MT	$155,676,168
Baltimore	MD	$149,243,279
St. Louis -City)	MO	$103,389,078
Ada	ID	$53,167,012
Warren	VA	$51,778,237
Middlesex	MA	$39,832,177
Riverside	CA	$32,662,009

10 Biggest Drops	State	2024-2025
Dallas	TX	-$402,675,682
Bernalillo	NM	-$237,180,844
Honolulu	HI	-$93,435,871
El Paso	CO	-$89,874,820
Fairfax	VA	-$83,338,123
Spokane	WA	-$79,474,639
Jackson	OR	-$71,008,109
Los Angeles	CA	-$65,414,212
Multnomah	OR	-$61,660,059
El Paso	TX	-$52,225,824

Table 5: Contracting by Federal Public Land Agencies
Top 10 Contractors by Net Funds Obligated
Contracting Periods: February 2024 to January 2025, February 2025 to January 2026

Recipient	2024 ($M)
Perimeter Solutions LP	$281.7
Jacobs Project Management Co	$262.6
CDM Constructors Inc	$188.0
Tepa EC, LLC	$176.1
Aero-Flite, Inc.	$133.2
Oscar Renda Contracting Inc	$131.9
Helicopter Express LLC	$105.2
NW Construction, Inc	$95.8
Hensel Phelps Construction Co	$87.6
Neptune Aviation Services, Inc	$78.7
Total	**$1,540.7**

Recipient	2025 ($M)
Perimeter Solutions LP	$359.6
NW Construction, Inc	$240.6
Kiewit Infrastructure West Co	$228.7
Jacobs Project Management Co	$217.2
Kiewit Infrastructure South Co	$173.9
Tepa EC, LLC	$152.3
Bridger Air Tanker LLC	$108.5
Aero-Flite, Inc.	$94.3
Helicopter Express LLC	$77.2
Ames Federal Contracting Group LLC	$73.3
Total	**$1,725.6**

Table 6: Contracting to Western-Headquartered Vendors in 2025
February 2025 to January 2026
All Vendors

Agency	2025 All US States and Territories $M	2025 Western States $M	2025 Western State Share of Federal Market
Forest Service	$3,657	$2,197	60.1%
National Park Service	$1,506	$659	43.8%
Bureau of Reclamation	$866	$562	64.9%
Bureau of Land Management	$807	$393	48.7%
Bureau of Indian Affairs[12]	$262	$130	49.5%
U.S. Geological Survey	$339	$76	22.4%
U.S. Fish & Wildlife Service	$276	$68	24.7%
Bureau pf Safety & Environmental Enforcement	$79	$7	9.4%
Office of Surface Mining, Reclamation and Enforcement	$3	$0	3.5%
Office of Inspector General	$13	$0	2.1%

Western State Share is the proportion of 2025 contracting attributed to vendors with registered addresses in one of the 10 Western states. These figures do not represent place-of-performance.

[12] USASpending.gov reports spending by Bureau of Indian Education (BIE) and Bureau of Indian Affairs (BIA) as a single agency. Our analysis removed approximately one third of BIA spending directly attributable to BIE. However, it is likely that significant BIE funding continues to be included in our BIA statistics.

Table 7: Federal Public Land Contracting by State of Vendor Registration in 2025
February 2025 to January 2026
All Vendors, All US States and Territories

	2024		2025		Change		% Change	
State	**$M**	**#**	**$M**	**#**	**$M**	**#**	**$M**	**#**
OR	$1,155.6	1,283	$800.1	993	-$355.5	-290	-30.8%	-22.6%
CA	$948.9	1,762	$951.8	1,568	$3.0	-194	0.3%	-11.0%
TX	$626.2	481	$184.9	383	-$441.3	-98	-70.5%	-20.4%
VA	$604.6	576	$577.1	493	-$27.5	-83	-4.6%	-14.4%
CO	$601.5	669	$412.1	559	-$189.4	-110	-31.5%	-16.4%
MT	$495.8	644	$576.8	583	$81.0	-61	16.3%	-9.5%
WA	$473.5	721	$314.1	627	-$159.4	-94	-33.7%	-13.0%
NM	$380.8	303	$118.5	255	-$262.3	-48	-68.9%	-15.8%
MO	$352.7	155	$458.4	133	$105.7	-22	30.0%	-14.2%
ID	$327.5	617	$333.3	557	$5.8	-60	1.8%	-9.7%
AK	$258.3	374	$246.7	322	-$11.6	-52	-4.5%	-13.9%
AZ	$241.3	533	$173.7	437	-$67.5	-96	-28.0%	-18.0%
UT	$241.0	330	$233.0	338	-$7.9	8	-3.3%	2.4%
FL	$220.9	424	$185.7	371	-$35.3	-53	-16.0%	-12.5%
MD	$198.8	322	$328.1	269	$129.3	-53	65.1%	-16.5%
GA	$155.2	265	$387.6	219	$232.4	-46	149.7%	-17.4%
NV	$142.2	215	$99.1	206	-$43.0	-9	-30.3%	-4.2%
HI	$122.5	74	$12.6	74	-$109.9	0	-89.7%	0.0%
MI	$105.6	187	$63.3	166	-$42.4	-21	-40.1%	-11.2%
NC	$103.4	224	$97.1	191	-$6.3	-33	-6.1%	-14.7%
PA	$87.5	228	$55.7	196	-$31.8	-32	-36.3%	-14.0%
SD	$83.7	136	$38.7	126	-$45.0	-10	-53.8%	-7.4%
WY	$83.5	194	$80.3	152	-$3.2	-42	-3.8%	-21.6%
OH	$80.2	157	$67.4	130	-$12.7	-27	-15.9%	-17.2%
LA	$77.2	149	$58.6	117	-$18.6	-32	-24.1%	-21.5%

	2024		2025		Change		% Change	
State	**$M**	**#**	**$M**	**#**	**$M**	**#**	**$M**	**#**
OK	$76.0	177	$69.9	137	-$6.1	-40	-8.0%	-22.6%
NJ	$73.9	129	$44.7	120	-$29.2	-9	-39.5%	-7.0%
WI	$70.1	213	$39.0	165	-$31.1	-48	-44.3%	-22.5%
IL	$69.1	191	$32.0	151	-$37.1	-40	-53.7%	-20.9%
MA	$66.0	172	$102.1	149	$36.1	-23	54.8%	-13.4%
DC	$53.8	88	$54.5	78	$0.7	-10	1.3%	-11.4%
MS	$50.8	105	$45.3	88	-$5.5	-17	-10.7%	-16.2%
IA	$47.2	58	$9.3	46	-$37.9	-12	-80.3%	-20.7%
MN	$44.4	230	$211.4	205	$167.0	-25	376.3%	-10.9%
DE	$44.3	20	$12.5	17	-$31.8	-3	-71.8%	-15.0%
NY	$40.5	217	$27.1	183	-$13.4	-34	-33.1%	-15.7%
SC	$40.1	89	$14.0	73	-$26.1	-16	-65.0%	-18.0%
AL	$38.2	111	$43.4	92	$5.2	-19	13.7%	-17.1%
NE	$33.1	88	$26.9	86	-$6.3	-2	-18.9%	-2.3%
TN	$31.0	103	$22.5	82	-$8.5	-21	-27.5%	-20.4%
KY	$25.9	67	$33.9	61	$7.9	-6	30.6%	-9.0%
KS	$24.2	59	$25.0	62	$0.8	3	3.1%	5.1%
AR	$24.0	109	$28.7	76	$4.6	-33	19.2%	-30.3%
ME	$21.6	40	$18.5	40	-$3.1	0	-14.4%	0.0%
IN	$16.4	94	$10.7	71	-$5.8	-23	-35.0%	-24.5%
ND	$13.4	83	$17.7	71	$4.3	-12	32.2%	-14.5%
CT	$9.9	60	$6.9	57	-$2.9	-3	-29.8%	-5.0%
PR	$9.6	66	$18.3	46	$8.7	-20	90.1%	-30.3%
WV	$6.9	62	$11.1	53	$4.2	-9	61.0%	-14.5%
NH	$6.7	39	$2.6	35	-$4.2	-4	-61.9%	-10.3%
RI	$4.0	13	$2.3	10	-$1.7	-3	-42.0%	-23.1%
GU	$3.1	16	$19.8	14	$16.7	-2	533.7%	-12.5%
VT	$2.2	24	$2.9	31	$0.7	7	33.2%	29.2%
VI	$1.2	17	$0.7	20	-$0.5	3	-40.4%	17.6%

	2024		2025		Change		% Change	
State	**$M**	**#**	**$M**	**#**	**$M**	**#**	**$M**	**#**
MP	$0.2	4	$0.4	4	$0.3	0	185.9%	0.0%
AS	$0.1	2	$0.1	1	$0.1	-1	116.4%	-50.0%
Total	**9116.1**	**13769**	**7809**	**11789**	**-1307.1**	**-1980**	**-14.3%**	**-14.4%**

Table 8: Top 50 Vendors by Net Obligations in 2024
February 2025 to January 2026
All Vendors, All US States and Territories

Recipient ID (UEI)	Recipient Name	State	Business Type	2024	2025	Change	Pct Change
QGUQWSU5AHB4	PERIMETER SOLUTIONS LP	MO	Small Business	$281.7	$359.6	$77.9	27.6%
WEBHVDKSC4T5	JACOBS PROJECT MANAGEMENT CO.	TX	Business	$262.6	$0.5	-$262.0	-99.8%
LLB7TD5CJZN4	CDM CONSTRUCTORS INC	NM	Business	$188.0	$25.6	-$162.4	-86.4%
EZMNZ2HYHFB7	TEPA EC, LLC	CO	Small Business	$176.1	$108.5	-$67.6	-38.4%
QLPVYV6GY874	AERO-FLITE, INC.	WA	Small Business	$133.2	$73.3	-$59.9	-45.0%
G1L8ZF4SL2Z9	OSCAR RENDA CONTRACTING INC	TX	Business	$131.9	$0.1	-$131.8	-99.9%
RH1LCNXGVHL7	HELICOPTER EXPRESS LLC	GA	Small Business	$105.2	$94.3	-$10.8	-10.3%
SNSLU2QXJ7Z5	NW CONSTRUCTION, INC	MT	Small Business	$95.8	$228.7	$132.9	138.8%
LA5LXK1PHJB5	HENSEL PHELPS CONSTRUCTION CO	HI	Business	$87.6	$0.4	-$87.2	-99.6%
XL62ZMCVAJQ7	NEPTUNE AVIATION SERVICES, INC.	MT	Small Business	$78.7	$39.6	-$39.1	-49.7%
EJM2SPWE2JP3	10 TANKER AIR CARRIER, LLC	NM	Small Business	$71.6	$20.9	-$50.7	-70.9%
LUP6L35Y7D36	AERO AIR, LLC	OR	Small Business	$68.2	$52.2	-$16.0	-23.4%
J8MRKB47KE59	BRIDGER AIR TANKER LLC	MT	Small Business	$58.7	$77.2	$18.5	31.6%
HYBLSJAMM2F4	KBR WYLE SERVICES, LLC	MD	Business	$58.4	$32.1	-$26.3	-45.0%
HMYJQTNC54D5	TECHNOLOGIES INTERNATIONAL INC	TX	Small Business	$56.2	$4.6	-$51.6	-91.9%
QX19NKSJWGS5	COULSON AVIATION (USA), INC.	OR	Small Business	$54.4	$44.9	-$9.5	-17.5%
C47BNA8GM833	ACCENTURE FEDERAL SERVICES LLC	VA	Business	$53.9	$50.3	-$3.6	-6.8%
MT9AATHS7ZB5	TUTOR PERINI CORPORATION	CA	Business	$49.3	$0.6	-$48.7	-98.9%
CN4KSKX2UQY5	COUNTERTRADE PRODUCTS, INC.	CO	Small Business	$44.6	$19.5	-$25.1	-56.2%
PD4TKBLMUUN5	BRINK BROTHERS INC.	OR	Small Business	$43.3	$18.3	-$25.0	-57.8%
LD8UDJB9JLU1	WOOLPERT, INC.	OH	Business	$38.1	$17.0	-$21.1	-55.3%
DJQ8NMQL3NL5	CROMAN CORP	OR	Small Business	$37.4	$21.8	-$15.7	-41.8%
YNNQLGD3ET25	ATHERTON CONSTRUCTION LLC	NV	Small Business	$37.4	$7.0	-$30.4	-81.2%
EMJEL3XM6A87	NV5 GEOSPATIAL, INC.	FL	Business	$36.1	$26.1	-$10.1	-27.9%
MN1JM9GARHC5	BILLINGS FLYING SERVICE LLC	MT	Small Business	$34.4	$26.2	-$8.2	-23.8%

Recipient ID (UEI)	Recipient Name	State	Business Type	2024	2025	Change	Pct Change
H1VHLSRLB3Y7	HELICOPTER TRANSPORT SERVICES, LLC	DE	Small Business	$33.1	-$0.8	-$33.9	-100.0%
XNWZFJBMRR86	GLOBAL ENGINEERING SERVICES INC	UT	Small Business	$32.2	$2.4	-$29.9	-92.7%
PRAAAKNBMW99	ROTAK LLC	AK	Small Business	$30.4	$50.0	$19.6	64.3%
VPTGBJSKFVS2	BRISTOW LLC	LA	Small Business	$30.4	$21.2	-$9.2	-30.3%
W77RJMD7DUE3	PRECISION, LLC	OR	Small Business	$29.1	$44.7	$15.6	53.5%
SHPGR1MM5MK8	HELIMAX AVIATION INC	MI	Small Business	$29.1	$15.0	-$14.0	-48.3%
GRGVD98552T5	J. I. GARCIA CONSTRUCTION, INC.	CA	Small Business	$29.1	$14.3	-$14.7	-50.7%
RMVJU76MCN81	THALLE CONSTRUCTION CO INC	NC	Business	$28.7	$0.1	-$28.6	-99.6%
RU57CLM9FHK8	COASTAL CONSTRUCTION GROUP, LLC	MI	Business	$27.9	$16.5	-$11.5	-41.0%
XKTEX8Q1R7K5	SILLER HELICOPTERS, LLC	CA	Small Business	$26.8	$43.0	$16.1	60.1%
NFGMJQ662UL6	IRONWOOD COMMERCIAL BUILDERS INC	CA	Small Business	$24.5	$6.5	-$18.1	-73.7%
VKBQML5FNT93	PAULSEN CONSTRUCTION, LLC	UT	Small Business	$24.4	$21.1	-$3.2	-13.2%
P3DJNPYU6KY3	DYNAMO TECHNOLOGIES, LLC	VA	Small Business	$24.1	$15.3	-$8.8	-36.6%
DBA2MN1QFBH6	R.C.S. CONSTRUCTION, INC.	SD	Business	$23.7	$2.9	-$20.8	-87.6%
K3WDSCEDY1V5	DEWBERRY ENGINEERS INC.	VA	Business	$23.6	$20.2	-$3.4	-14.2%
X699HTJAFFQ9	FIBER BUSINESS SOLUTIONS GROUP INC	PA	Small Business	$23.2	$4.6	-$18.5	-80.0%
KHCKQ1ZWE6P4	GARCO CONSTRUCTION, INC.	WA	Business	$23.0	$15.3	-$7.7	-33.6%
HJP8JPSEC2G4	NUAXIS LLC	VA	Small Business	$21.8	$6.3	-$15.6	-71.3%
JLMKCTQD5YD8	JRCRUZ CORP.	NJ	Business	$21.5	$0.0	-$21.5	-100.0%
MHTUN9NJJQK3	ALLIANCE STEEL CONSTRUCTION, INC.	WI	Small Business	$21.1	$0.5	-$20.6	-97.8%
X9C9L6JMHGV3	HARTMAN-WALSH PAINTING COMPANY	MO	Small Business	$20.8	$22.6	$1.8	8.7%
HL1PNEQMHCK6	GRAYBACK FORESTRY, INC.	OR	Small Business	$20.7	$24.7	$4.0	19.2%
J9EKLNMZXFM6	PACIFIC GAS AND ELECTRIC COMPANY	CA	Business	$20.5	$3.2	-$17.4	-84.5%
DELENYZCZKA4	NATIONAL NATIVE AMERICAN CONSTRUCTION, INC.	ID	Small Business	$20.5	$2.4	-$18.1	-88.1%
G7P7GKJQZLK6	SOUTHERN CONTRACTING, LLC	MS	Business	$19.9	$0.2	-$19.7	-99.1%