C-06 MASTER CENSUS BRIEF • PROPERTY RESTORATION ECOSYSTEM

2026 Property Restoration Vendor, Equipment OEM & Managed-Repair (TPA) Census

Primary-source verified registry of 42 Chunk 1 restoration software, drying/IAQ OEM, remediation chemical, distribution, and managed-repair TPA vendors audited from 143 raw RIA & R&R Buyer's Guide records under Restoration Intel's Option B ownership transparency policy.

Gate Disposition	Rows	Audit Basis & Key Primary-Source Findings
PUBLISH_INDEPENDENT	**29**	Verified standalone restoration software, OEM, distributor & claims operating vendors
PUBLISH_BADGED (Option B)	**13**	Corporate-parent / subsidiary units badged (Verisk, CoStar/Matterport, RPM/Legend, Therma-Stor/Phoenix, ICP/Benefect & Fiberlock, Sedgwick/EFI, Crawford, CCA/Lionsbridge, Ashtead/Sunbelt, DBK, UCC/HydraMaster)
DEDUPE_CROSS_SOURCE	4	Cross-list RIA vs. R&R duplicates closed pre-publish (Verisk, KnowHow, Xcelerate, Phoenix)
WATCH_ABSORBED	4	Absorbed legacy brands unified into canonical profiles (CodeBlue & MADSKY -> Accuserve; Nexxus -> Alacrity; Restore365 -> Cotality)
PRUNE_DEFUNCT_ASSETS_SOLD	1	Jon-Don permanently closed May 9, 2025; key inventory/accounts/USAClean acquired by Aramsco
WATCH_CHUNK2 & EXCLUDED	92	82 qualifying RIA vendors queued for Chunk 2 + 10 non-vendor associations/agencies excluded

Critical 2025–2026 Industry M&A, Ownership & Directory Corrections Verified Live

• Jon-Don Shutdown (May 9, 2025): Ceased operations permanently after 40+ years; Aramsco acquired key inventory, customer accounts, and USAClean.

• Alacrity Solutions MRP Spin-Off (Jan 20–21, 2026): Divested its Managed Repair Program to BV Investment Partners, rebranded as Altimeter Solutions Group.

• Accuserve Unification (Jan 2023): Unified CodeBlue, MADSKY, and AccuWin under Accuserve; fixed dead/wrong raw CSV MADSKY domain (madsky.com).

• Benefect Ownership Correction: Owned by ICP Group since March 2019 (fixing legacy 'Benefect (RPM)' directory misattribution); sister brand to Fiberlock.

• Lionsbridge Domain Correction: Corrected raw CSV lionsbridge.com (Calgary landscaping) to live CCA Global Partners network lionsbridgecontractorgroup.net.

• 2025–2026 Tech & Claims M&A: CoStar acquired Matterport (~$1.6B, 2025); CompanyCam acquired Beam Finance (Mar 2026); Bertram Capital acquired STARC Systems (Sep 2026); Cornell Capital acquired Hancock Claims (Sep 2026).

Chunk 1 Directory Roster — All 42 Verified Restoration Vendors (By Sector)

Sector	Count	Published Vendors (* = Option B Corporate-Parent Badged)
Estimating, Claims & 3D Capture Software	**10**	Verisk (Xactimate / XactAnalysis)*, Cotality (formerly CoreLogic / Symbility / DASH), Encircle, CompanyCam, HOVER, EagleView, Matterport*, DocuSketch, magicplan, Actionable Insights
Restoration ERP, Field Ops & Telemetry	**8**	Albiware, Xcelerate Restoration Software, KnowHow, JobNimbus, Canam Systems (PSA), Promatic Software Ltd., Breesy AI, Geo-Trac
Drying, IAQ, Containment & Cleaning OEMs	**10**	Legend Brands (Dri-Eaz / ProRestore)*, Phoenix Restoration Equipment*, Abatement Technologies, STARC Systems, Esporta Wash Systems Inc., Morantz Ultrasonics, Rotobrush International, DBK USA, Inc. (Drymatic)*, Aero Tech Manufacturing, HydraMaster*
Remediation Chemicals, Distribution & Rental	**6**	Benefect*, Fiberlock Technologies*, Anabec Solutions, Aramsco, Abatix, Sunbelt Rentals*
Managed-Repair Networks (TPAs) & Claims Partners	**8**	Crawford Contractor Connection*, Alacrity Solutions, Sedgwick Repair Solutions*, Accuserve (incorporating CodeBlue & MADSKY), Lionsbridge Contractor Group*, EFI Global, Inc.*, Hancock Claims Consultants, Wardlaw Claims Service

Contractor & Estimator Procurement Due-Diligence Checklist

1. Verify Active Ownership & Legal Contracting Entity: Confirm parent-company billing and SLA governance on all 13 Option B badged units and post-divestiture entities (Altimeter vs. Alacrity).

2. Mitigate Distributor Concentration Risk: Following Jon-Don's May 2025 exit, maintain active secondary credit accounts (e.g., Abatix ESOP or Inline Distributing) alongside Aramsco.

3. Validate XactAnalysis / Symbility Integration Depth: Confirm live ESX import accuracy and per-claim transaction charges before deploying new 3D sketch or ERP platforms.

4. Cap Single-TPA Revenue Exposure: Review referral fees, workmanship warranty liability, and SLA scorecards across Contractor Connection, Sedgwick, Accuserve, and Lionsbridge.

5. Machine-Readable Access: Every profile ships with a synchronized LF Markdown twin (.md) and dedicated llms.txt registry at restorationintel.com/restoration-vendor-tpa-census-llms.txt.

Methodology & Scope Notice: This census audits commercial restoration technology, equipment OEM, chemical, supply, and managed-repair (TPA) vendors listed in the RIA Vendor Member Marketplace, R&R Buyer's Guide, and RIA TPA Scorecard ecosystems. Restoration contractors/franchisors are tracked separately; no vendor paid for inclusion or placement.