

Specialty Vehicle Market by Type (Fire, Garbage, Vacuum, Fuel Carrying Tankers, Street Sweepers, Ambulance & Recreational Vehicles), Application, Propulsion (ICE & EV), Battery Chemistry, End-use Industry and Region - Global Forecast to 2030

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Abstracts

The specialty vehicle market is estimated to grow from USD 82.30 billion in 2024 to USD 99.80 billion by 2030, at a CAGR of 3.3%.

Population growth and rapid urbanization have pumped up the demand for specialty vehicles, mainly emergency response vehicles and waste management vehicles. The high-rise buildings and massive industrial complexes have created a necessity for fire trucks and ambulances to address the complex emergency scenarios. As these vehicles have undergone a tremendous technological revolution with the integration of AI and robotics, which reduces human intervention, many are looking to replace the traditional fleets with the technologically advanced ones. Also, flexible work schedules and increased disposable income boost the recreational vehicle market. So, these factors combined act as drivers for the specialty vehicle market.

“The ICE specialty vehicles are estimated to be the largest market during the forecast period.”

Specialty vehicles powered by internal combustion engines (ICE) are the most prevalent type in various sectors, including emergency response, waste management, and recreational activities. These specialty vehicles, such as ambulances, fire trucks, waste management vehicles, vacuum trucks, and recreational vehicles, are typically based on commercial vehicle chassis that are further upgraded and customized to meet specific operational requirements. As these vehicles are heavier, most specialty vehicles run

majorly on diesel or CNGs, providing robust performance, high power output, and reliability in diverse conditions. For instance, ambulances and fire trucks with diesel engines can provide substantial power outputs, ranging from a minimum of 200 HP to as high as 700 HP, depending on the type and customization. Other specialized vehicles, such as aircraft rescue and firefighting (ARFF) trucks, can have even higher power outputs, reaching up to 1,500 HP, to effectively manage airport emergency response operations.

In addition to emergency response vehicles, waste management vehicles like garbage, vacuum, and street sweeper trucks powered by ICE engines are widely used for their ability to handle heavy loads and operate continuously for extended periods. Recreational vehicles (RVs) also utilize ICE engines to provide reliable power for long-distance travel and various off-road adventures. In addition, the initial investment for ICE-based specialty vehicles is less than for electric specialty vehicles. For example, an ambulance with ICE propulsion costs USD 130,000 – USD 300,000, whereas the same ambulance with electric costs USD 240,000 – USD 380,000. During the push towards more sustainable options, such as electric or hybrid propulsion for zero emissions and reduced environmental impact, ICE-powered specialty vehicles would continue to hold the leading position by 2030 at a global level.

'Vacuum Trucks are the fastest-growing vehicle types over the forecast period.'

Vacuum trucks are critical in industrial, commercial, and residential applications as these vehicles help maintain sanitation and hygiene. Vacuum trucks have been in great demand in Asia, one of the fastest-growing markets for specialty vehicles due to various rapid urbanization laws passed by governments and rules and regulations about waste management & sanitation. For instance, India passed an act called The Employment of Manual Scavengers and Construction of Dry Latrines (Prohibition) Act 1993. Under this act, the Indian government abolished manual scavenging. Then this act was further expanded in 2013.

Similarly, the UK also has the Health and Safety at Work Act 1974. Similar to South Africa's approach, this Act focuses on safe working conditions, including for those in sanitation roles. It ensures that workers are not subjected to unsafe practices like manual scavenging.

Modern vacuum trucks utilize advanced vacuum technology to achieve high levels of efficiency. High-capacity fans are used to improve the vacuum capacity. The tank has evolved to accommodate larger volumes of waste while ensuring durability and ease of

maintenance. Also, corrosion-resistant coatings and reinforced materials help extend the tank's lifespan and improve its functionality. Various other innovative technologies are used in the vacuum trucks, including GPS tracking, real-time data monitoring, and automated controls. These features enhance operational efficiency, optimize routes, and provide valuable insights into truck performance.

The stringent laws, abolishment of manual scavenging, technological developments, rapid urbanization and development, and expansion of municipal services will demand vacuum trucks and other waste management vehicles.

'Asia Pacific is set to register the fastest growth rate in the global specialty vehicle market.'

Asia Pacific region mainly comprises countries like India, China, Australia, Singapore, South Korea, Japan, and others. China and India contribute more than one-third of the world's population. The significant issues these countries face are the continuous population growth and rapid urbanization. Countries in the Asia Pacific region have a very high population density in urban areas. For instance, Tokyo, Jakarta, Mumbai, Delhi, and Beijing have high population rates and have seen rapid industrial and infrastructural developments to support these infrastructural developments, there needs to be a robust network of emergency vehicles such as fire trucks and ambulances to address the critical emergence issues and to handle the pollution caused the cities to require waste management vehicles to dispose of the waste generated and to maintain sanitation and hygiene. Countries like China, India, and Australia are also looking to replace the existing fleet of specialty vehicles with electric ones. According to IEA statistics, China leads the world in electric heavy-duty vehicle sales, with >50,000 electric trucks sold in 2022. China is focusing on greening its public sector vehicles, including sanitation vehicles and fire trucks. As most of these specialty vehicles are built on these truck chassis, rising electric truck sales in China will help adopt new energy vehicles in garbage trucks, vacuum trucks, street sweepers, and fire trucks. Various Indian municipalities are testing electric garbage trucks and street sweepers as part of a larger green initiative. Further, according to EMS, in 2021, Australia will invest in electric ambulances and fire and rescue fleets, focusing on zero-emission options for public safety vehicles. Thus, growing urbanization and population and a surge in the requirement for effective waste management vehicles will drive the sales of specialty vehicles, mainly waste management equipment.

The break-up of the profile of primary participants in the specialty vehicles market:

By Companies: OEMs - 70%, Dealers - 30%

By Designation: Director level - 50%, Managers - 40%, Others- 10%,

By Region: North America - 40%, Europe – 35%, and APAC - 20%, rest of the World – 5%

Global players dominate the specialty vehicles market, comprising several regional players. The major players in the specialty vehicles market include Mercedes-Benz AG (Germany), AB Volvo (Sweden), Rosenbauer International AG (Germany), Oshkosh Corporation (US), Morita Holdings Corporation (Japan), Federal Signal Corporation (US), REV Group (US), and IVECO Group (Italy).

Research Coverage:

By type (garbage trucks, vacuum trucks, Street sweepers, recreational vehicles, ambulances, fuel-carrying tankers, and fire trucks); By Application (medical and healthcare, Public safety and services, Waste management, and Leisure); By propulsion (ICE and Electric); By End-Use (Emergency response vehicles, Utilities and municipalities and others (recreational)); By Battery Chemistry (Lithium Iron Phosphate (LFP), NMC, and others); By Region (Asia Pacific, Europe, and North America, and Rest of the World).

The report's scope covers detailed information regarding the major factors influencing the growth of the specialty vehicles market. A thorough analysis of the key industry players has provided insights into their business overview, products, key strategies, contracts, partnerships, agreements, new product launches, recession impact, and recent specialty vehicle market developments.

Key Benefits of Buying the Report:

The report will help market leaders and new entrants with information on the closest approximations of the specialty vehicle market's global revenue, ME subsegments, technology analysis, eco-system, pricing analysis, trade analysis, key buying criteria, and investment & fundings. It will also help stakeholders like OEMs, chassis suppliers, and specialty vehicle component providers understand the competitive landscape and gain insights to position their businesses better and plan suitable go-to-market strategies. Also, the report helps OEMs identify the most prominent municipal corporations based on their population forecast and possible demand for specialty

vehicles like garbage trucks, vacuum trucks, fire trucks, street sweepers, and ambulances. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of critical drivers (Rise in Population and urbanization, increasing economic zones and Special Economic zones, Rising development of e-commerce transportation, mobile clinics, and airport terminals expansions), restraints (Expansive R&D and production costs for specialized components), opportunities (electric and Hybrid vehicles propel the market, Growing development of autonomous vehicles and use of Artificial intelligence (AI) in specialty vehicles for assistance in decision-making and effective fleet management), and challenges (Varied customization needs for various industry application) influencing the growth of the specialty vehicle market.

Product Development/Innovation: Detailed insights on upcoming technologies and new products launched in the specialty vehicle market.

Market Development: Comprehensive market information – the report analyses the authentication and brand protection market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the specialty vehicle market.

Competitive Assessment: In-depth assessment of the market shares, growth strategies, and service offerings of leading players in the specialty vehicle market, such as Mercedes-Benz AG (Germany), AB Volvo (Sweden), Rosenbauer International AG (Germany), Oshkosh Corporation (US), Morita Holdings Corporation (Japan), Federal Signal Corporation (US), REV Group (US), and IVECO Group (Italy).

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