

Special Service & Homeland Security Vehicle Manufacturing in North America

Size, segmentation, trends, growth, channels, competitive shares and structure underlying the manufacture of different types of special service vehicles in North America

The only report of its kind on the market and manufacture of selected Special Service Vehicles, including Homeland Security uses

This study brings together into one place, a comprehensive understanding of varied applications for Special Service Vehicles, for the following applications:

Analysis

- Unit & value estimates by product type/segment
- Fabrications vs. conversions
- Competitive shares and industry structure
- Leading demand drivers
- Industry developments, changes and trends
- Key external/ environmental influences



- **Mobile Command Centers**
- **SWAT Vehicles, Cash-in-Transit Vehicles, Prisoner Transport Vehicles and Armored Vehicles, plus an overview of Mine Resistant Ambush Protected (MRAP) Vehicles**
- **Hazmat Vehicles, Decontamination Vehicles & Bomb/Explosive Ordnance Disposal Vehicles**

Manufacturers' Directory

- Listings of virtually all manufacturers in the United States and Canada, with:
 - Contact details
 - Unit and dollar production estimates
 - Estimated product mix by type/segment
 - Facilities and employees
 - Brief company highlights

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Specialized Analysis by Industry Specialists

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Special Service & Homeland Security Vehicle Manufacturing in North America

ABOUT THIS REPORT

This report addresses the manufacture of vehicles used in Special Service applications in North America, many of which have recently been designated for Homeland Security use.

The increased focus on homeland security post-9/11 has significantly increased opportunities for companies manufacturing all types of vehicles; many departments and communities are now willing to invest in what was once considered a luxury. Grants from the U.S. Department of Homeland Security, for partial or full financing of these vehicles, have played a major role in boosting demand.

Municipal markets for fire, emergency and special service vehicles in North America are expected to remain brisk in the near future, though not at the torrid pace following 9/11. Export markets have also begun to open up. China is becoming an important export destination, as it looks to strengthen its emergency response capabilities prior to hosting the Beijing Olympics in 2008. Countries in the Middle East have also been importing emergency vehicles, including fire apparatus, from North American manufacturers.

There are over one hundred manufacturers of these types of vehicles in the US and Canada. A distinguishing characteristic of manufacturers in this segment is their ability to manufacture vehicles for a large range of applications, from small search/rescue vehicles to large and complex command centers/SWAT vehicles and emergency responders, as well as vehicles catering to applications outside the special service segment.

Vehicles in this segment are highly customized, particularly for products such as high-end mobile command centers. These can range in price from \$200,000 to \$1,500,000, and no two such products are identical. There is a very high degree of interaction between the manufacturer and the customer throughout the design and production process, with the manufacturer often incorporating changes as the vehicle assembly progresses.

High-end products costing upwards of \$400,000 are manufactured by only a handful of players. However, barriers to entry for simpler products, such as light-duty rescue trucks and small command centers, are low. There are numerous small manufacturers that primarily manufacture other types of truck bodies, but also produce a few Special Service Vehicles as part of their product mix.

There has been significant convergence of emergency vehicle applications in recent years, leading to manufacture of more multi-purpose vehicles. Increasingly, emergency calls to police and fire departments are related to health emergencies, resulting in a growing overlap between ambulances, emergency responders and rescue vehicles. Another major change post-9/11 is the way agencies respond to emergencies, with increased co-operation, interaction and cohesiveness between police, fire, hospitals and health departments, as well as county emergency management agencies taking a regional approach, sharing resources and equipment with neighboring counties.

These and other aspects of the industry are highlighted in this pioneering report by SpecialtyVehicles.net ("SVN"). The key objective of this report is to present a picture of the competitive landscape and rigorously document "who is who" in the business of manufacturing vehicles used for Special Service applications.

Through a "bottoms-up" approach, a database has been developed that breaks out estimated market sizes by company and applications. The report is a first-ever attempt to cohesively put this industry into a structured format for enabling M&A moves, market size identification, sales planning, and competitive share analysis.

This is the only report of its kind on this subject, prepared by a publishing/consulting firm whose principals have 25+ years of industry knowledge and experience.

METHODOLOGY

Primary

- Extensive interviews and interactive contact with senior industry executives in marketing, product management, technical and other functional areas.
- Industry trade associations and government agencies.
- Trade show visits.

Secondary

- Perusal of all relevant trade publications.
- Financial information searches from national and local sources, including several specialized directories.
- Extensive utilization of Internet research tools.
- Analysis of product literature and technical data from individual manufacturers and from general industry sources.

· Experience · Integrity · Skills · in Researching Global OE Vehicular, Body, Engine, Equipment, Trailer, Component & Related Industries

- SVN reports contain hard factual information, which **cannot be found anywhere else.**
- We present our reports in **properly organized analytical, tabular, and graphic frameworks.** Just organizing this vast information requires a dedicated team.
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SVN is a consultancy firm dedicated to providing proprietary business analysis and databases to the global OE vehicular, body, engine, equipment, trailer, component and related industries. The company's principals have over 25 years of market research and business consulting experience in these segments.

SVN has developed unique expertise and skills in developing information that requires a pioneering effort in research and analysis. Our reports are used throughout the specialized vehicular industries for sales and market planning, strategy development, acquisitions, investment presentations, financing submissions and numerous other uses.

Please visit www.specialtyvehicles.net for detailed credentials and testimonials on our work. **References gladly provided.**

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CONTENTS

PREFACE

Part I: Mobile Command Centers

I.A. SCOPE & METHODOLOGY

I.B. EXECUTIVE SUMMARY

Background

Industry Structure

- I.B.1 Production Estimates & Shares by Vehicle Type
- I.B.2 Product Application Matrix
- I.B.3 Key Findings
- I.B.4 Market Review
- I.B.5 Competitive Review

I.C. PRODUCT ANALYSIS

I.D. MANUFACTURERS' DIRECTORY

Part II: SWAT Vehicles, Cash-in-Transit Vehicles, Prisoner Transport Vehicles, Armored Vehicles, MRAP Vehicles

II.A. SCOPE & METHODOLOGY

II.B EXECUTIVE SUMMARY

Background

Industry Structure

- II.B.1 Production Estimates & Shares by Vehicle Type
- II.B.2 Product Application Matrix
- II.B.3 Key Findings
- II.B.4 Market Review
- II.B.5 Competitive Review

II.C. PRODUCT ANALYSIS

- II.C.1 SWAT Vehicles
- II.C.2 Cash-in-Transit Vehicles
- II.C.3 Prisoner Transport Vehicles
- II.C.4 Armored Passenger Vehicles, Personnel Carriers, Pursuit Vehicles, Riot Control Trucks
- II.C.5 MRAP Vehicles
 - II.C.5.1 Overview
 - II.C.5.2 Product Review
 - II.C.5.3 Competitive & Market Review

II.D. MANUFACTURERS' DIRECTORY

Part III: Hazmat Vehicles, Decontamination Vehicles & Bomb/Explosive Ordnance Disposal Vehicles

III.A. SCOPE & METHODOLOGY

III.B. EXECUTIVE SUMMARY

Background

Industry Structure

- III.B.1 Production Estimates & Shares by Vehicle Type
- III.B.2 Product Application Matrix
- III.B.3 Key Findings
- III.B.4 Market Review
- III.B.5 Competitive Review

III.C. PRODUCT ANALYSIS

- III.C.1 Hazmat Vehicles
- III.C.2 Decontamination Vehicles
- III.C.3 Bomb/Explosive Ordnance Disposal Vehicles

III.D. MANUFACTURERS' DIRECTORY

HOW THIS REPORT IS ORGANIZED

Special Service & Homeland Security Vehicle Manufacturing in North America

Size, segmentation, trends, growth, channels, competitive shares and structure underlying the manufacture of different types of special service vehicles in North America

THIS REPORT IS AVAILABLE AS A COMPLETE STUDY

OR

BY INDIVIDUAL SECTION:

- I. Mobile Command Centers
- II. SWAT, Cash-in-Transit, Prisoner Transport, Armored, & MRAP Vehicles
- III. Hazmat, Decontamination & Bomb/Explosive Ordnance Disposal Vehicles

FOR EACH SEGMENT:

- A. SCOPE & METHODOLOGY defines the coverage of each section and outlines the methodology, assumptions and sources used in compiling the research.
- B. EXECUTIVE SUMMARY gives a brief overview of products and applications, including:
 - a quantification of **Production Estimates and Shares** in **units and dollars**. These numbers are further divided into fabricated versus converted units, and in turn broken out by vehicle size.
 - A **Product Application Matrix** displays each company's product mix.
 - **Key Findings** are summarized.
 - **Market Review** addresses factors impacting market changes.
 - The data is then used to provide a **Competitive Review** that briefly describes the product offerings and distinguishing characteristics of the Top 10 players in each segment of the industry.

- C. PRODUCT ANALYSIS defines the role of each type of vehicle and describes standard configurations, including chassis and pricing ranges.

This section includes **Market Analysis, Recent Developments and Trends** and **Key Drivers** that directly impact demand as well as external factors, such as economic, technological and environmental influences bearing on demand.

- D. MANUFACTURERS' DIRECTORY gives details on companies participating in each segment. Information includes unit production, revenues, plant sizes, employee numbers, product mix percentages, executive names, Web addresses, contact e-mail addresses and significant facts about the company.

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Sample of Contents

Product Application Matrix

Hazmat, Decontamination, Bomb/EOD Disposal Vehicles
Product Application Matrix

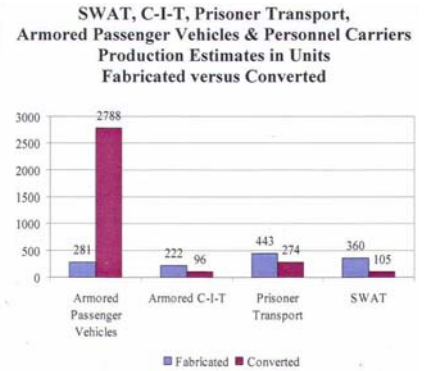
Company	Hazmat	Decontamination	Bomb/EOD Disposal
Advanced Containment Systems			
AeroClave			
Allen Vanguard Corporation			
Ameri-Can Engineering			
Braun Northwest Inc.			
Brown Cargo Van			
Bush Specialty Vehicles			
Clegg Industries, Inc.			
Crash Rescue Equipment Services			
Custom Trailerwerks, Inc.			
E One			
Emergency Management Equipment			
Emergency Vehicles Inc.			
E-N-G Mobile Systems, Inc.			
Farber Specialty Vehicles			
Ferrara Fire Apparatus Inc.			
FSI North America			
Global Ground Support LLC			
Hackney Emergency Vehicles			
ICS Technologies, Inc.			
LDV, Inc.			
Life Safety Systems, Inc.			
Loyalty Mobile Innovations, Inc.			

Production Estimates & Shares by Vehicle Type

Mobile Command Centers
Production Estimates & Shares in Units & Dollars by Vehicle Type

Vehicle Type	Units #	Prod'n % Share	Est. Sales Value (\$ Mil)	Sales % Share	Average Price (\$)
Fabrication					
Light Duty	34	4.0%	2.27	1.7%	94,348
Medium Duty	233	27.6%	41.11	30.1%	235,566
Heavy Duty	60	7.1%	15.99	11.7%	342,214
Integrally Made	29	3.4%	11.76	8.6%	405,679
Integrally Made Trailers	38	4.5%	2.93	2.1%	77,140
Total Fabrication	394	46.6%	74.06	54.2%	
Conversion					
Sedans/SUVs	48	5.7%	2.39	1.8%	81,573
Vans - Step Vans	214	25.3%	29.96	22.0%	235,016
Vans (Sprinter, Ford E350 type)	31	3.7%	4.53	3.3%	170,463
Motor Coaches (Bus Bodies)	65	7.7%	9.63	7.1%	254,083
Trailers	93	11.0%	15.90	11.7%	221,017
Total Conversion	451	53.4%	62.42	45.7%	
Total	845	100.0%	136.48	100.0%	

Production Estimates in Units Fabricated versus Converted



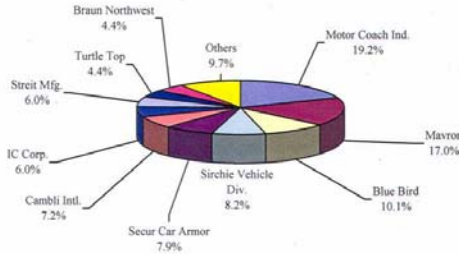
Production by Vehicle Type

Cash-in-Transit Vehicles
Production by Vehicle Type
Rank Order by Units

Rank	Company	FABRICATION				CONVERSION		Total
		Light Duty	Class 3-5	Class 6	Heavy Duty	Vans-Step Vans	Vans (Ford 350, Sprinter Type)	
1	Griffin Inc.		38	85	43			166
2	Centigon		32					88
3	Monroe Truck equipment		29	82				111
4	Streit Manufacturing		8		3		5	42
5	Armored Solutions, Inc.	14	37					51
6	CSI Armoring							43
7	Transeo Global							41
8	Cambli International			13				37
9	Supreme Armored						37	37
10	PDIC		3	13				16
11	Alpine Armoring, Inc.							16
12	Armortek International		8	9				17
13	Labock Technologies			20				20
14	Armet Armored Vehicles	12						12
15	Lasco International Group							2
16	Inkas Armored Vehicle Corporation	1						1
Total		35	146	220	42	42	232	719

Top 10 Manufacturers

Prisoner Transport Vehicles
Production Estimates & Shares in Units
Top 10 Manufacturers



Manufacturers Directory

Hazmat, Decontamination, Bomb/EOD Vehicles
Manufacturers' Directory

Company & Address	Contact details	Key Parameters	Product	Prod'n %	Units #	Profile
Advanced Containment Systems 2130 Cambridge Road Houston, TX 77057 USA www.acont.com	Ph: 281-481-0110 Toll Free: 800-417-2173 Fax: 281-481-0107	Box (H Model) Emp. Size Plant Size (sq. ft.)	Decontamination Bomb/EOD Personnel carrier & others	25%	200	Decontamination units range from 18 ft. to 40 ft. in length with 100 units worldwide.
Ameri-Can PO Box 100 Wayne, PA, 15178-0100 USA www.american.com	Ph: 412-341-1100 Toll Free: 800-341-1100 Fax: 412-341-1100	Box (H Model) Emp. Size Plant Size (sq. ft.)	Decontamination Bomb/EOD Personnel carrier & others	100%	4	Decontamination units range from 18 ft. to 40 ft. in length with 100 units worldwide.
Allen Vanguard Corporation 10715 Cambridge Road Houston, Texas 77057 USA www.allenvanguard.com	Ph: 281-547-1100	Box (H Model) Emp. Size Plant Size (sq. ft.)	Bomb/EOD	5%	21	Created in 1994 with the merger of U.S. based P&H (EOD) & Company and the Canadian company Vanguard Equipment Systems.

COMPANIES INCLUDED IN MANUFACTURERS' DIRECTORIES (COMPLETE REPORT)

- | | | | |
|----------------------------------|--------------------------------|----------------------------------|-------------------------------------|
| Advanced Containment Systems | Dodgen Mobile Technologies | La Boit | Protection Development Int'l Corp. |
| AeroClave | E One | Labock Technologies | Protection Devices, Inc. |
| Allen Vanguard Corp. | Emergency Management Equip | Lasco International Group | Quality Vans |
| Alpine Armoring, Inc. | Emergency Vehicles Inc. | LDV, Inc. | Rescue Vehicles of Iowa |
| American Custom Coach | E-N-G Mobile Systems, Inc. | Lenco | Scaletta Moloney Armoring |
| Ameri-Can Engineering | Farber Specialty Vehicles | Life Safety Systems, Inc. | Secur Car Armor Corp. |
| Armet Armored Vehicles | FastLane Emergency Vehicles | Loyalty Mobile Innovations, Inc. | Shook Mobile Technology |
| Armor Mobile Systems | Ferrara Fire Apparatus Inc. | Matthews Specialty Vehicles | Sirchie Vehicles Division |
| Armored Solutions, Inc. | First Choice Armor & Equipment | Mattman Specialty Vehicles | Specialty Vehicle Solutions |
| Armortek International | Fort Garry Industries Ltd. | MBF Industries | SPEVCO |
| Bickford Broadcast Vehicles | Frontline Communication | MDT Armor | Square One Armoring Services |
| Blue Bird Corp. | FSI North America | Mobile Concepts by Scotty | Streit Manufacturing |
| Braun Northwest Inc. | Gerling and Associates | Mobile Conversions, Inc. | Supreme Armored |
| Brown Cargo Van | Global Ground Support LLC | Mobile Specialty Vehicles | Surrey Mobile Command Center |
| Burlington RV Specialty Vehicles | Great Lakes Coach | Modco Inc. | Texas Armoring Corp. |
| Bus Depot | Greenwood Emergency Vehicles | Monroe Truck Equipment | Thomas Built Buses |
| Bush Specialty Vehicles | Griffin Inc. | Motor Coach Industries | Trailerlogic LLC |
| Calutech Mobile Solutions | Hackney Emergency Vehicles | MTS Manufacturing | Transeo Global |
| Cambli International | High Protection Company | Nabco | Tri-Star Fire Apparatus |
| Centigon | IC Corp. | Nomad Technologies | Turtle Top |
| Clegg Industries, Inc. | ICS Technologies, Inc. | Nor E First Response, Inc. | TVI Corp. |
| Commercial Body Builders | Inkas Armored Vehicle Corp. | OBS, Inc. | U.S. Coach Co. |
| Crash Rescue Equipment Svc | International Armoring Corp. | Odyssey Automotive Specialty | Universal Specialty Vehicles |
| CSI Armoring | Kentucky Trailer Technologies | Pierce Manufacturing | Van-Mor, Inc. |
| Custom Trailerwerks, Inc. | Kingsley Coach, Inc. | PK Vans | Winnebago Comm'l/Specialty Vehicles |
| CVR Industries USA, Inc. | L&S Custom Coaches | Premium Armoring | Wolf Coach |

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