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European Municipal Vehicle Markets Expected to Stay Stable for 2014

EUnited Municipal Equipment, the association representing the European manufacturers of mobile machines for municipalities, estimates the industry turnover at around 2 billion Euros for the past year. While the financial situation of the main customer segment, European public authorities, has been very tense over the past years, the industry managed to slightly increase the sales over the past 2 years. For 2014 the sector remains cautiously optimistic and hopes to compensate for the still weak demand in the Southern part of Europe by business in non-established markets outside the EU.

Refuse collection vehicles (RCVs) are the largest product segment by value and represent around half of the sector turnover. The number of vehicles sold in Europe is estimated to be around 6.000 - 7.000 vehicles of which the vast majority is rear-loaders with a single compartment. The UK, France and Germany are by far the largest markets and stand for over 60% of the total demand. Customers in these countries are also the most demanding with regard to the technical specifications. At IFAT 2014 the manufacturers of RCVs will therefore again show numerous innovations around the key topics "work safety", "energy efficiency" and "process efficiency". Especially for the efficient use of energy the RCV manufacturers have optimized their vehicles and lifters in many directions.

The second largest product segment in Europe with a turnover of around 650 million Euros is road sweepers for street cleaning. 2013 around 5.000 - 6.000 sweepers were sold by the European manufacturers – about the same number as in 2012. Compact sweepers accounted for around 70% of the sales with a level almost unchanged compared to 2012. Sales of large truck-chassis mounted sweepers – the remaining 30% of sales – staid slightly below the previous year. For 2014 no big overall changes in demand are expected.

The business with winter maintenance equipment has been more cyclical than the other segments. The influence of cold or warm winter seasons on the demand of the following years for snow-removal and de-icing equipment is considerable. In 2013 around 5.000 salt spreaders and 4.500 snow ploughs were sold by the manufacturers. These are figures close to the previous year. The lack of snow in many parts of Europe during the first part of the winter season 2013/2014 made manufacturers on average expect a slight decrease in equipment demand for 2014. Depending on the first months of 2014 the outlook may however need to be adapted.

European customers have made environmental aspects an important decision factor in their selection process for new equipment. The industry via EUnited Municipal Equipment has

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reacted to this and is developing several test procedures and certificates on key environmental aspects. These tests will allow customers to base their purchasing decisions on comparable information. Following the well-established EUnited PM10 test for sweepers, a EUnited test procedure and certificate on the accuracy of salt spreading has been launched during last IFAT. It will now be extended to allow also the testing of liquid sprayers. Additionally EUnited Municipal Equipment and its members joined forces with customers and other partners to work on a method to determine the energy-efficiency of refuse collection vehicles.

For more information please see www.eu-nited.net or contact the EUnited Municipal Equipment secretariat (carmen.simon@eu-nited.net, phone: +49 (69) 66 03-18 30).

EUnited Municipal Equipment is the European association of the Municipal Equipment Industry. The association represents the leading manufacturers of mobile machines used in municipalities and other public areas. The association has around 40 member companies from 10 European countries and is part of the European umbrella organization EUnited aisbl which gathers different industry sectors of the European engineering industry.