Vacuum trucks are equipped with a heavy-duty industrial vacuum unit and are designed to vacuum liquid or particles from a site and transport the load for disposal or re-use. These trucks are used by towns and municipalities for sewer cleaning, factories for industrial waste, environmental services companies for hazardous waste removal and crash cleanups, contractors for septic tank cleaning, oil and gas companies for drilling and fracking water, mining companies for waste handling, and by portable restroom service operators.

This report covers six key types of bodies: hydro excavators, industrial vacuum loaders, portable restroom service units, combination sewer cleaners, coded vacuum tanks, and non-coded vacuum tanks/septic tanks.

Septic/non-coded vacuum trucks make up the largest category in the vacuum truck body segment, and portable toilet service units comprise the second largest category. Taken together, the non-coded units make up almost half of vacuum truck/body production.

The non-coded units are simple products in terms of design, technology and the manufacturing process. Manufacture of these units is regionalized and the segment has numerous small manufacturers serving local markets. These players cater to local end-use customers either directly or through dealers.

Categories which require DOT and ASME certification have higher entry barriers as compared to the non-coded variants, on account of superior technical requirements and higher safety standards required at manufacturing facilities. The more sophisticated vacuum products are sewer cleaners, hydro excavators and vacuum loaders. Because of overlap in manufacturing capabilities of these products, companies in one of these segments offer all or most of the other high-end vacuum body types.

The ten leading fabricators manufactured more than 50% of units in the total vacuum truck/body segment, with the leading player accounting for 15% of the market in units manufactured. Four of the top ten manufacturers exclusively fabricate the more sophisticated vacuum products: sewer cleaners, hydro excavators and vacuum loaders.

Increased oil and gas drilling activity since 2010 resulted in a surge in demand for vacuum trucks, both coded and non-coded, as well as hydro excavators and to some extent, vacuum loaders. However, demand for these vacuum truck bodies has been subdued since mid-2014 due to the downturn in fracking activities, and is currently restricted primarily to replacements. The decline in oil/gas drilling applications has been offset to some extent by the improvement in construction activities and the general economy, resulting in healthy demand for sewer cleaners, septic tanks and portable restroom service units.

The report includes profiles of 57 vacuum truck manufacturers, from small regional companies to units of large publicly-traded corporations.

These and other issues are analyzed in this report, to provide a perspective on the industry structure and dynamics of this highly specialized industry.

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