

ATV Symposium

EICMA CHINA – The Motorcycle Show

June 11, 2010



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ATV Symposium

- Purpose
- Overview/Context
- Goals
- Introductions



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Canadian Off-Highway Vehicle Distributors Council



COHV CVHR

Canadian Off-Highway Vehicle Distributors Council
Conseil Canadien des Distributeurs de Véhicules Hors Route



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(Australia)



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All Terrain Vehicle Industry
European Association



Consumers – United States

- ATVs

- Introduced in 1970s; population of 10.2M in 2008
- Sales peaked at 1.15M in 2006; down 59% since^{^*}
- Primary distribution model: manufacturer/distributor/dealer
- Most riding on private land, except in West (66% public)[^]
- 79% recreation; 21% utility[^]
- Significant gov't/industrial use
- Public information & education programs from SVIA/ASI

- UTVs/ROVs

- Introduced in 1980s as strictly utility vehicles; recreational uses began in early 2000s
- Sales: 36,000 in 1990; 270,000 in 2008*#
- Rec/Hunting sales grew from 10% in 2005 to 32% in 2009*#
- Significant gov't/industrial use
- Public information & education programs from ROHVA

[^] Source: Motorcycle Industry Council

* Source: Power Products Marketing

Includes Canada; includes other utility vehicles



Consumers – Canada

- Market Dynamics
 - Estimated annual sales for ATVs/ROVs/UTVs was over 125,000 per year until 2009, which saw a 25 percent decrease
 - Estimated ATVs/ROVs/UTVs currently in-use 1.25 million; estimated number of rider/users 3.4 million
 - 2010 the market has started to rebound – sales estimated at 100,000 units
 - COHV is the sole industry association in Canada
- Vehicle Use
 - Utility use is about 20%; recreational use is 55% ; mixed use 25%
 - Provincial trail systems being developed across Canada (\$57 million)
- Safety Education & Training
 - No mandatory training; rider training and classroom education available for ATV users through various sources



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Consumers – Australia

- Market Dynamics

- Approx 270,000 park: annual sales across all major brands is about 17,000 pa: No regulations or design requirements: Not able to be registered: Private land usage with exceptions: FCAI only Industry Association

- Vehicle Use

- 97% utility; 3% recreational; farm; industry; government; Surf Life saving, Antarctic Research


- Safety Education & Training


- Several SVIA accredited training organisations. Recognised need for all operators to be trained. OH&S requirements.
- Industry initiatives such as DVD with sale.
- Safety Authorities pushing for more accessible training.




ATVEA Achievements


ATVEA Education Package


 Package containing of recommendations for information to be inserted in the “ATV owner’s manuals” and in “instruction guides”.

 ATV Rider Training video.

 How to operate ATVs safely

 Translated in 23 EU national languages

 Disseminated through the dealer network of ATVEA members.

 Expanding “ATV rider instruction course” in cooperation with UK based EASI European ATV Safety Institute to France, Spain, and the Netherlands.



ATVEA Achievements



ATVEA Communication Activities



ATVEA advertising guidelines to be observed by ATVEA members when promoting ATVs in the media, brochures and website. Advertisings must promote the use of appropriate safety equipment, safe riding and proper riding area.



The “ATVEA Code of Conduct for ATV users” is part of ATVEA’s commitments to promote the safe and responsible use of ATVs. It highlights the importance of respect for others, the environment and the legislation on accessibility to terrain.



Released (website + poster + flyer) in 7 European Languages in January 2010 at Brussels Motor show.



Technical & Environmental Issues – United States

- Emissions – EPA; CARB
 - Exhaust and Permeation Tank/Fuel Lines: standards; test procedures; labeling; certification/approval process
 - EPA GHG emissions reporting requirement (beginning 2011)
- Sound – EPA; States; Land Managers
 - Manufactured – ANSI standard (EPA for OHM): 82 dBA (>170cc)/80 dBA (\leq 170 cc), 50 ft. acceleration test
 - In Use Enforcement – 96 dBA, 20” stationary test (SAE J1287)
- Land Access – Forest Service; Bureau of Land Management
 - Some seek to prohibit motorized recreation on public land – claiming damage to ecosystems, wildlife (446M acres; 18% of land)
 - Increase/maintain recreational access; advocate managed access



Technical and Environmental Issues – Canada

- Exhaust Emissions
 - Environment Canada intends to implement emission standards similar to EPA standards in US
 - Self- certification and annual reporting of fleet emissions
- Sound
 - COHV adopted ANSI-SVIA 1-2007 and members voluntarily comply
 - COHV also endorses off-road sound emission standard SAE J1287 (in-use)
- Land Access
 - Focus is on trail systems and development of rider federations;
 - continued lessening of environmental impact through coordinated national approach between industry, rider organizations, NOHVCC and government



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Technical and Environmental Issues – Australia


- Exhaust Emissions
 - Currently no regulations, standards or testing
- Sound
 - Currently no regulations, standards or testing
- Land Access
 - Very limited access to public land; limited ability to register ATV's for use on roads / road side areas;




European Legislation for ATVs

 The need for road homologation is essential in the European Market

 ATVEA's position is that ATVs and Side-by-Sides are primarily designed to go off-road (= off paved road)


 ATVs are designed for unpaved byways, fields, dirt tracks, forests...


 But in the EU, any road/byway/field (paved or unpaved) which is open to the public, is classified as **public road**.


 In order to circulate on **public roads** motorized vehicles are subject to type-approval legislation.




European Legislation for ATVs

 Therefore, around 90% of ATVs in Europe are type-approved (and thus fall under the strict road legislation)

 2 typical types of uses for which ATVs need type approval:

 Utility users may go from one field or forest to another via paved or unpaved “public road”

 Leisure users go via (paved or unpaved) authorised trails which are part of the public road network.



European Legislation for ATVs

Type-approved ATVs



All ATVs used on public area must comply with the Directive relating to the type-approval of two or three-wheel motor vehicles (2002/24/EC) or with any other European or national Type-Approval system.



This Directive defines the characteristics of the mopeds, scooters, motorcycles, tricycles and quadricycles that are allowed to use European public roads




Its goal is to create a European single market for these vehicles and ensuring safety and control emissions of these vehicles in Europe.



European Legislation for ATVs


Type-approved ATVs

 The need for road approval is specific for Europe

 The Current type-approval regulations (2002/24/EC or the Various national type approval systems) defines requirements for


 Safety

 Emissions

 Licence plate

 Driving licence


 Insurance


 With ATVs that do not comply the use is limited to confined private terrains.



European Legislation for ATVs

Type-approved ATVs

 ATVs are not defined and described in the 2002/24/EC directive...

 Manufacturers have to use the “quadricycle” category of the Directive in order to homologate their ATVs at EU level.





Same category!


European Legislation for ATVs


Type-approved ATVs

 Latest developments:

 The European Commission does not seem to be willing to include ATVs in this legislation anymore!!!!

 The Commission seem to be willing to create a dedicated on-road quad category with severe power, exhaust and noise limits and on-road safety features (differential), not suitable for off-road use.


 The Commission will issue its proposal in autumn 2010 before discussions with the European Parliament and Ministers from the EU States.

 Final text adopted at the end of 2011? With implementation 2 years after?





European Legislation for ATVs

Non-homologated ATVs

 ATVs (and Side-by-Sides) that will **NOT** be used on public terrain (Youth ATVs included) fall within the scope of **The Machinery Directive (2006/42/EC)**

 It aims to **protect consumers from unsafe machinery**

 Forms the legal basis for the future European Standard for ATVs

 ATVEA has been involved in the preparatory works for this standard since the beginning in 2007.



Regulation – ATVs - United States

- Standards and Oversight
 - Highly regulated; CPSC is primary regulator
 - Illegal to sell ATV unless it meets mandatory standard (ANSI/SVIA 1-2007), is subject to approved Action Plan and meets all other requirements
 - CPSIA mandatory lead limits
 - Lead Content - Stay of Enforcement until May 2011
- Testing and Certification
 - Manufacturer/Importer must certify compliance with all CPSC requirements
 - Third-party testing of youth models (soon)
- Action Plans
 - Advertising; Dealer Monitoring
 - Training; Age; Hotline; Video; Alerts; Information/Education
 - ASI Participating Company Program



Regulation – ROVs/UTVs - United States

- Standards and Oversight
 - CPSC is primary regulator; significant interest since 2008
 - No mandatory standards, but CPSC issued ANPR for possible mandatory standards
 - ROHVA opposed certain proposed requirements in ANPR
 - ROHVA published first voluntary standard – ANSI/ROHVA 1-2010 – in March 2010
- Safety Programs
 - Not currently mandated
 - ROV Safety Rules; ROHVA E-Course (July 2010)



RECREATIONAL OFF-HIGHWAY
VEHICLE ASSOCIATION



Regulation – ATVs - Canada

- Standards and Oversight
 - Transport Canada regulates vehicle equipment standards
 - Environment Canada regulates vehicle emission standards
 - COHV voluntary industry standard incorporates ANSI-SVIA 1-2007 vehicle equipment standards plus other requirements
 - COHV provides importer support; rider safety materials/programs
- Testing and Certification
 - Self-certification of compliance; self-reporting to Environment Canada
- Advertising/Marketing Guidelines
 - COHV developed industry practices and standards (copy available)
 - COHV focused on safety, environment and image of vehicle and riders



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Regulation – ROVs/UTVs - Canada

- Standards and Oversight
 - Consideration by Transport Canada and Environment Canada are in the very preliminary stages;
 - COHV industry standard likely to incorporate ANSI-ROHVA 1-2010 vehicle equipment standards plus bilingual requirements
 - COHV most likely to harmonize with ROHVA for rider safety materials and education
- Testing and Certification
 - Likely to be self-certification of vehicle equipment standards compliance and self-reporting to Environment Canada
- Advertising/Marketing Guidelines
 - COHV will recommend industry practices and standards



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Regulation – ATVs - Australia

- Standards and Oversight
 - No Australian Standards for ATV's. All FCAI Members vehicles meet ANSI Standards; All FCAI Members have support network for retail customers. Members encourage all users to follow Owners Manual and Safety warning labels on ATV's.
- Testing and Certification
 - Currently no testing regime for use of ATV's, however OH&S legislation covers workplace issues
- Advertising/Marketing Guidelines
 - Industry (FCAI) Code of Practice developed for Retailers



Regulation – ROVs/UTVs - Australia

- Use In Australia
 - Beginning to figure in Manufacturers sales. Very low volumes and not at this time recorded in official FCAI figures.
- Standards and Oversight
 - Same as for ATV's
- Testing and Certification
 - Same as for ATV's
- Advertising/Marketing Guidelines
 - Same as for ATV's



International Industry Collaboration

- Common Interests
- Networking Opportunities
- Forum



Questions



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Thank You

www.iwpvi.org

