



BUSINESS PLAN

CEN/TC 245 LEISURE ACCOMMODATION VEHICLES

EXECUTIVE SUMMARY

The scope of CEN/TC 245 concerns the "Standardization in the field of habitation requirements applicable to leisure accommodation vehicles (caravans, motor caravans, caravan holiday homes) with regard to health and safety. Terminology, requirements and test methods. Inspection, procedures and certification. Aspects pertaining to use as road vehicles are not covered".

During the last century, awareness of the safety of users of leisure accommodation vehicles (LAVs) has greatly developed.

In 80's, major European countries had national standards which define requirements on gas, electricity and health for LAVs occupants.

A robust collection of European LAVs standards then become a necessity. An important number of countries was interested to support harmonized normative work within CEN rules.

Safety requirements for habitation purposes was never covered by any European legal act such as directives or regulations. Requirements from national standards were taking into account for developing European LAVs standards

1 BUSINESS ENVIRONMENT OF THE CEN/TC 245

1.1 Description of the Business Environment

For historical reasons, LAVs producers and users are mainly located in Western part of Europe. Europe can have national legislation on the installation of LAVs with significant impact on the business environment.

A very large majority of European manufacturers are supported by national federation. Each national federation is represented by the umbrella organization named ECF (European Caravan Federation) based in Switzerland.

Within the last 20 years, a solid consolidation of OEMs, suppliers was engaged. The quality of the products is significantly improved by support of industrial scale production. CEN/TC 245 experts with the complete support of the LAVs environment achieve some harmonized and secure standards.

For issuing new legal act, European Commission, lately on 2012, referred to a consensual method, approach develop under CEN/TC 245 standards.

1.2 Quantitative Indicators of the Business Environment



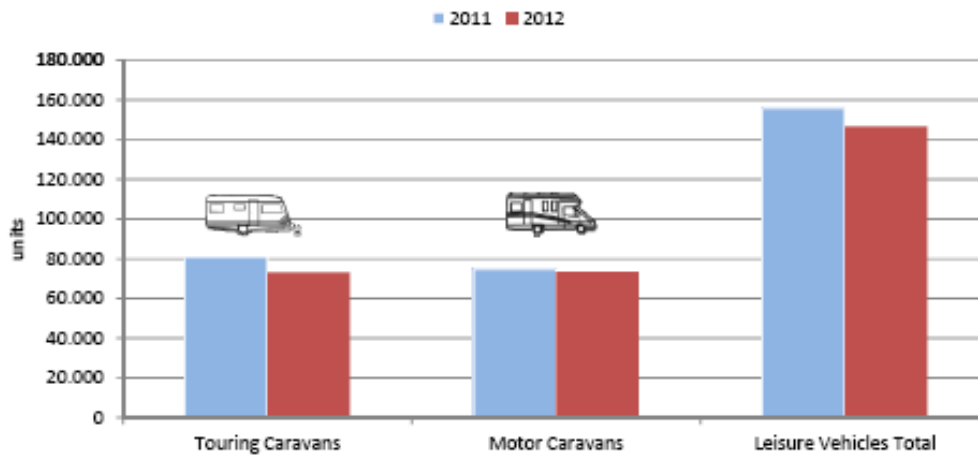
EUROPE: Registrations of new Leisure Vehicles 2012

Country	Touring Caravans			Motor Caravans			Leisure Vehicles Total		
	2011	2012	change %	2011	2012	change %	2011	2012	change %
Austria	781	865	+10,8	848	1.025	+21,2	1.627	1.890	+16,2
Belgium	1.167	1.028	-12,1	2.789	2.647	-5,1	3.956	3.673	-7,2
Denmark	3.090 *	2.680 *	-13,3	150 *	140 *	-8,7	3.240	2.820	-13,0
Finland	1.055	918	-13,0	1.650	1.397	-15,3	2.705	2.315	-14,4
France	10.451	9.063	-13,3	19.307	17.786	-7,9	29.758	26.849	-9,8
Germany	17.324	17.638	+1,8	21.791	24.062	+10,4	39.115	41.700	+6,6
Italy	1.898	1.425	-16,1	7.016	4.715 */**	-32,8	8.714	6.140	-29,5
Netherlands	8.814	7.527	-14,6	1.420	1.295	-8,8	10.234	8.822	-13,8
Norway	3.350	3.169	-5,4	2.445	2.609	+6,7	5.795	5.778	-0,3
Portugal	159	131	-17,6	168	103	-38,7	327	234	-28,4
Slovenia	168	142	-15,5	151	143	-5,3	319	285	-10,7
Spain	2.004	1.432	-28,5	1.774 *	1.377	-22,4	3.778	2.809	-25,6
Sweden	4.207	3.449	-18,0	3.735	3.598	-3,7	7.942	7.047	-11,3
Switzerland	1.761	1.810 *	+2,8	2.658	3.020 *	+13,7	4.417	4.830	+9,4
UK	23.342	20.403	-12,6	7.265 ***	7.734 ***	+6,5	30.607	28.137	-8,1
Others	1.641 *	1.481 *	-9,8	1.831 *	1.821 *	-0,5	3.472	3.302	-4,9
Total	81.012	73.159	-9,7	74.994	73.472	-2,0	156.006	146.631	-6,0

* Estimates

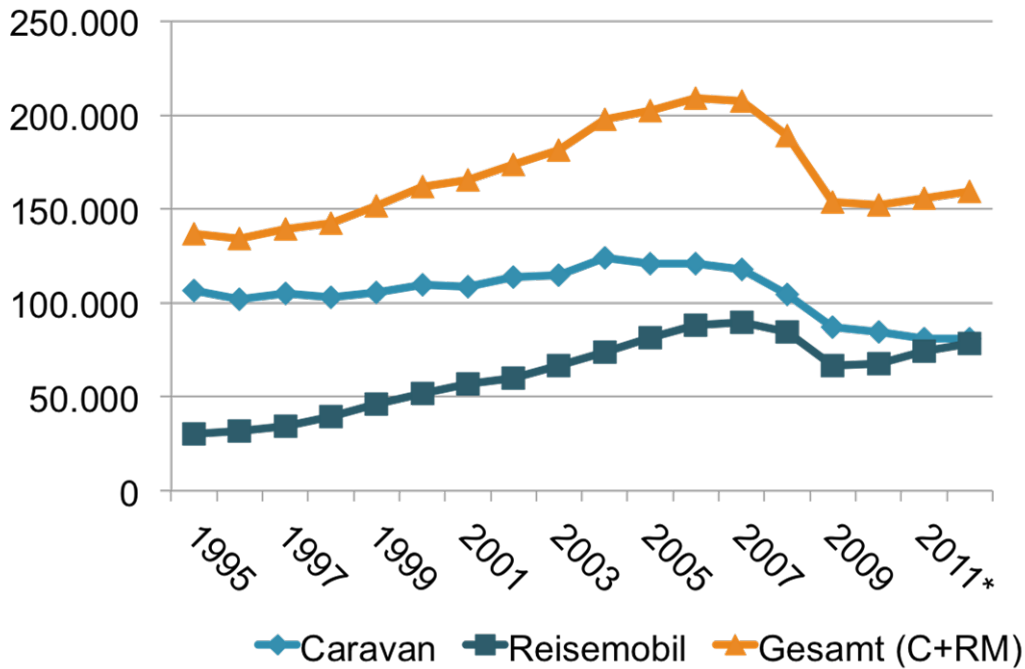
** Figures are provisional

*** Figures have been revised by NCC



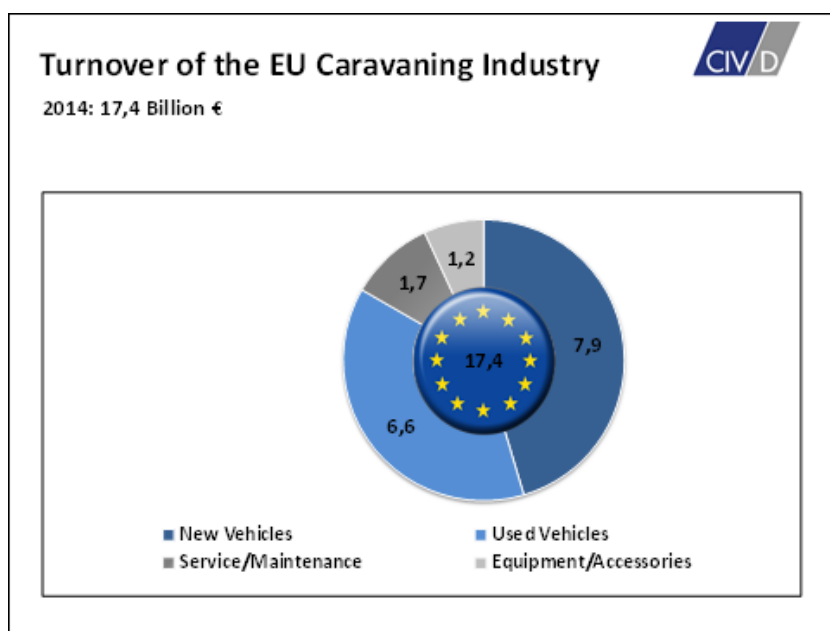
The business impact of the LAVs industry is increasing year by year. LAVs fundamentals contributes to a significant "life style", a liberty and freedom way of spending leisure times.

Attached figure represents the general statistics of road leisure vehicles registered for the 1st time within a European country from 1995 to 2012. The impact of the economic crisis around 2008, 2009 was significant for the 1st registration vehicles. In the meantime, the used road leisure vehicles registration never stop during this period.



Quelle: ECF, Stand: 05.01.2012

The LAVs industry generates business for different partners from the gas, electrical, vehicle industries. The following figure represents the turnover within European countries for 2014.



2 BENEFITS EXPECTED FROM THE WORK OF THE CEN/TC 245

The whole standardization work will be performed with a view to increase the safety of all the European users by setting the minimum safety requirements of the products and by improving the consumer information.

By drafting documents recognized and applicable in all CEN members' countries, giving advice to manufacturers, importers and distributors, the standardization work will minimize the different interpretations in case of market surveillance by the public authorities and create a fair competition environment among worldwide manufacturers who operate on the European market including the EEA countries.

3 PARTICIPATION IN THE CEN/TC 245

All the CEN national members are entitled to nominate delegates to CEN Technical Committees and experts to Working Groups, ensuring a balance of all interested parties. Participation as observers of recognized European or international organizations is also possible under certain conditions. To participate in the activities of this CEN/TC 245, please contact the national standards organization in your country.

4 OBJECTIVES OF THE CEN/TC 245 AND STRATEGIES FOR THEIR ACHIEVEMENT

4.1 Defined objectives of the CEN/TC 245

The interior architectures of LAVs are always upgrading. Development of products for a better usage, efficiency is a leitmotiv. The goals of the CEN/TC 245 is to follow new developments without forcing burdensome barrier in respect of the LAVs safety.

By the revision of existing standards, consumers and users will benefit of the most up to date technical safety requirements.

4.2 Identified strategies to achieve the CEN/TC defined objectives.

A consensus was achieved to manage all technical effort thanks to a working group named CEN/TC 245 WG6 "Technical and habitation requirements for Leisure Accommodation Vehicles". After several years of practice, expertise of the CEN/TC 245 WG6 continue to solve all technical aspects.

4.3 Environmental aspects

End of life, life cycle, circular economy of LAVs are deeply study for the revision, development, amendment of standards.

5 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE CEN/TC 245 WORK PROGRAMME

Seven standards (EN 1647:2012, EN 1648-1:2012, EN 1648-2:2012, EN 721:2004, EN 13878:2003, EN 1645-1:2012 and EN 1646-1:2012) are under revision at preliminary stage following decisions 45/2015, 46/2015, 47/2015, 49/2015, 50/2015, 53/2016 and 54/2016).

For road LAVs (motor caravans, caravans), European & international regulations should not affect habitation requirements which are covered by standards. For caravan holiday homes, standards cover all habitation safety issues

Major producers have interests to export outside European market. Possible harmonization throughout standardization partnership with non-European countries could affect further LAVs standard development.