



**Testimony for the Senate Veterans Affairs and Emergency Preparedness
Committee**

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Office of the State Fire Commissioner

Thomas G. Cook, Fire Commissioner

Good morning, Chairman Mastriano, Chair Muth, and members of the Senate Veterans Affairs and Emergency Preparedness Committee, my name is Tom Cook, the State Fire Commissioner. Thank you for the opportunity to speak today regarding the impact of market consolidation on the current state of apparatus manufacturing and supply. Part of our duties in the Office of the State Fire Commissioner is to administer the Low Interest Loan program for fire departments, which, in many cases, use our loans to fund a portion of their apparatus purchases.

The Pennsylvania fire service is in a crisis. The cost of acquiring the apparatus – the engines, ladder trucks and rescue vehicles – that allow our firefighters to do their jobs is unsustainable. The years of consolidations by apparatus manufacturers and price hikes are making the purchase of new fire apparatus impossible for many departments and, for those who *can* afford new vehicles, the waitlist to receive them is routinely several years.

Our office reviews, on average, seven loan applications per month for projects including both new and used apparatus purchases. Because most fire apparatus are built to a specification to fit the needs of the fire department purchasing the apparatus, a comparison of projects is not as straightforward as comparing prices to commercially available passenger vehicles. A review of average project costs by type of apparatus does, however, illustrate an alarming trend.

Our loan program tracks apparatus purchases by major category of vehicle. Aerials have some types of large ladders or tower attached to them, engines carry hose, water, and a pump, and tankers are primarily tasked with hauling water to scenes where no hydrants or other water source is available. Rescues carry specialized equipment for the extrication of entrapped individuals, from automobiles, collapses, or other circumstances.

Over the past three years, we have seen the average cost of a new aerial increase from \$1.1 million to \$1.5 million dollars, or a 36% increase. The cost of a new engine has risen from \$680,405 to \$845,452, which is a 24% increase. The average cost of a tanker truck went from \$431,508 to \$580,701, which is a 35% increase. The increase in the average cost of rescue trucks in our loan program was the most dramatic, rising over the last three years from \$762,519 to \$1,165,681. That's a 53% increase.

It should be noted that our low interest loan program does not provide a loan for the full cost of these projects. For new apparatus, our program only lends up to \$494,942 or 50% of the project cost, whichever is less, for an aerial, \$353,547 or 50% of the project cost, whichever, is less for an engine, tanker, or rescue. The fire department must find a way to fund the balance of the project total.

Many factors may influence the increase in costs in the apparatus industry. Increases in costs of raw materials like metal, increased sophistication of apparatus, and the economic forces of a reduction in the number of independent manufacturers in the industry, which creates less competition, all factor into the increase.

Historically, the fire apparatus industry in the United States was highly fragmented. As recently as the mid-2010s, there were roughly two dozen independent manufacturers competing in the market, many of them family-owned businesses with deep ties to the fire service.

Today, that landscape has changed dramatically.

Over the past 15 years, private equity firms have increasingly pursued a strategy known as a “roll-up,” in which they acquire multiple competitors in a fragmented industry and consolidate them under a single corporate structure. While this strategy can improve efficiency in some sectors, its application in essential service markets—such as fire apparatus manufacturing—raises serious concerns about competition, cost, order/delivery times, and public safety.

It is important to understand that just three companies – REV Group, Oshkosh, and Rosenbauer – now control roughly two-thirds to as much as 80 percent of the U.S. fire apparatus market, according to testimony provided to the United State Senate Committee on Homeland Security and Governmental Affairs by Edward Kelly, General President of the International Association of Firefighters.¹ To illustrate the impact of consolidation on the fire apparatus industry, American Industrial Partners acquired and consolidated multiple manufacturers into what is now REV Group. These types of consolidations reduced the number of manufacturers supplying the fire community. However, the recent market changes go beyond large-scale consolidation. Some of the independent manufacturers have seen investment by private equity groups. For example, FWD Seagrave is currently a portfolio company of ELB Capital Management, LLC. Corporate ownership severed the close ties that many of the family-owned apparatus manufacturers felt with the fire service. This shift to more corporate-focused organizational structure has, in my opinion, made profit a larger component in the business relationship.

While we don’t have any hard data specific to Pennsylvania to share with you regarding apparatus order times, I can say that anecdotally we are seeing longer delivery times on apparatus. It is not unusual for a loan application to be delayed because the manufacturer cannot provide a title for a vehicle or manufacturer’s performance certification letter that is required to execute the loan. The manufacturer often provides these documents closer to the delivery date of the apparatus. The International Association of Firefighters estimates apparatus lead times have increased from one year to 4.5 years.

The cost increases for new fire apparatus have also had a secondary effect of increasing pricing in the used fire apparatus market. When you compare total project costs funded in part by our loan program for used apparatus, it shows an increase in prices. The average cost of used rescue trucks in our program increased from \$248,333 three years ago, to \$509,500, a 105% increase.

¹ [Sounding the Alarm: America’s Fire Apparatus Crisis - Committee on Homeland Security & Governmental Affairs](#)

The average cost of used engines went from \$205,200 to \$333,571 from 2024 to 2025, which is a 63% increase in just one year.

The increased costs of both new and used apparatus are impacting fire departments in the Commonwealth. In both career and volunteer departments, the costs have caused many departments to become even more reliant on grant funding to purchase new apparatus. In the volunteer fire service, traditional fundraising methods: raffles, chicken dinners, and community events no longer raise enough money to make the payment on apparatus. These increased costs are causing more volunteer hours to be diverted to fundraising events, which takes away from hours available for training and response.

Thank you for allowing me to share what we are seeing related to the cost of fire apparatus and the impacts on the fire service in the Commonwealth. I look forward to answering any questions you may have.