



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

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World Buses

Industry Study with Forecasts for **2012 & 2017**

Study #2366 | July 2008 | \$5600 | 278 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends.....	5
Macroeconomic Outlook	8
World Demographic Outlook.....	11
Personal Income & Expenditure Trends	14
World Light Vehicle Overview	16
World Light Vehicle Sales	17
Environmental & Regulatory Factors.....	20
Pricing Trends	23

WORLD OVERVIEW

Global Bus Demand	25
Demand by Region	26
Bus Demand Dynamics	30
Demand by Product Type	32
Transit Buses.....	34
Motor Coaches.....	35
Other Bus Demand	37
Production by Region	38
Bus Park by Region	41
Alternate Fuel Bus Demand.....	43
Busways & Bus Rapid Transit Systems.....	46
Foreign Trade in Buses	48

NORTH AMERICA

General	50
Bus Demand by Type.....	53
United States	56
Canada	63
Mexico	68

WESTERN EUROPE

General	73
Bus Demand by Type.....	75
France.....	78
Germany	82

United Kingdom.....	87
Italy	92
Spain	97
Belgium	102
Sweden	105
Other Western Europe	110

ASIA/PACIFIC

General	114
Bus Demand by Type.....	117
China	120
India	127
Japan.....	131
Indonesia	136
South Korea	140
Australia.....	145
Taiwan	148
Other Asia/Pacific	152

OTHER REGIONS

General	156
Bus Demand by Type.....	159
Latin America.....	161
Brazil.....	166
Other Latin America	170
Eastern Europe	174
Russia	178
Other Eastern Europe.....	183
Africa/Mideast.....	187

INDUSTRY STRUCTURE

General	193
Industry Composition & Market Share....	195
Research & Product Development.....	199
Manufacturing	200
Marketing	203
Distribution	204
Financial Issues & Requirements.....	205
Mergers, Acquisitions & Industry Restructuring	206
Cooperative Agreements.....	208

COMPANY PROFILES

Alexander Dennis	216
Allison Transmission	218
Anhui Ankai Automobile	219
Ashok Leyland	220
Blue Bird	221
Consorcio G Grupo Dina.....	222
Daimler AG.....	224
Fiat SpA	228
GAZ OAO	230
General Motors	231
Haci Omer Sabanci	233
Hyundai Motor.....	235
Liaoning Shuguang Automotive	237
MAN AG.....	238
Marcopolo SA	241
Millennium Transit Services	243
Minsky Avtomobilny Zavod	244
Mondragon Corporacion Cooperativa.....	245
Motor Coach Industries	247
Navistar International.....	248
New Flyer Industries	250
North American Bus Industries	251
Optare Holdings.....	252
Scania AB	254
Solaris Bus & Coach.....	256
Tata Motors Limited.....	258
Thor Industries	259
Toyota Motor.....	261
Van Hool	263
VDL Groep.....	264
Volgren Australia	266
Volvo AB	267
Wright Group.....	270
Xiamen King Long Motor	271
ngzhou Yaxing Motor Coach	272
ZF Friedrichshafen	273
Zhengzhou Yutong Bus.....	275
Zhongtong Bus	276
Other Companies Mentioned in Study	277

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table3

MARKET ENVIRONMENT

1 World Gross Domestic Product
 by Region 10
 2 World Population by Region..... 13
 3 World Urban Population by Region.... 14
 4 Per Capita GDP by Region..... 16
 5 World Light Vehicle Production..... 17
 6 World Light Vehicle Sales 19

WORLD OVERVIEW

1 World Bus Demand by Region..... 29
 Cht World Bus Demand by Region, 2007 .. 30
 Cht Population Correlation to
 Bus Demand, 2007 31
 2 World Bus Demand by Type 33
 Cht World Bus Demand by Type, 2007 33
 3 Transit Bus Demand by Region 35
 4 Motor Coach Demand by Region 37
 5 Other Bus Demand by Region..... 38
 6 World Bus Production by Region..... 41
 7 World Bus Park by Region..... 43
 8 World Bus Demand by Fuel Type 46
 9 World Bus Balance of Trade..... 49

NORTH AMERICA

1 North America Bus Supply,
 Park & Demand 52
 2 North America Bus Demand by Type .. 56
 3 United States Bus Supply,
 Park & Demand 59
 4 United States Bus Demand by Type ... 62
 5 Canada Bus Supply, Park & Demand... 65
 6 Canada Bus Demand by Type..... 67
 7 Mexico Bus Supply, Park & Demand ... 70
 8 Mexico Bus Demand by Type 72

WESTERN EUROPE

1 Western Europe Bus Supply,
 Park & Demand 75

2 Western Europe Bus Demand by Type. 78
 3 France Bus Supply, Park & Demand.... 80
 4 France Bus Demand by Type..... 82
 5 Germany Bus Supply, Park & Demand. 84
 6 Germany Bus Demand by Type..... 86
 7 United Kingdom Bus Supply,
 Park & Demand 89
 8 United Kingdom Bus
 Demand by Type 92
 9 Italy Bus Supply, Park & Demand 94
 10 Italy Bus Demand by Type 97
 11 Spain Supply, Park & Demand..... 99
 12 Spain Bus Demand by Type 101
 13 Belgium Bus Supply,
 Park & Demand 103
 14 Belgium Bus Demand by Type 105
 15 Sweden Bus Supply,
 Park & Demand 107
 16 Sweden Bus Demand by Type 109
 17 Other Western Europe Bus
 Supply, Park & Demand 112
 18 Other Western Europe Bus
 Demand by Type 113

ASIA/PACIFIC

1 Asia/Pacific Bus Supply,
 Park & Demand 117
 2 Asia/Pacific Bus Demand by Type.... 120
 3 China Bus Supply, Park & Demand... 124
 4 China Bus Demand by Type 126
 5 India Bus Supply, Park & Demand ... 128
 6 India Bus Demand by Type 131
 7 Japan Bus Supply, Park & Demand .. 133
 8 Japan Bus Demand by Type 136
 9 Indonesia Bus Supply,
 Park & Demand 138
 10 Indonesia Bus Demand by Type 140
 11 South Korea Bus Supply,
 Park & Demand 142
 12 South Korea Bus Demand by Type ... 144
 13 Australia Bus Supply,
 Park & Demand 146
 14 Australia Bus Demand by Type..... 148
 15 Taiwan Bus Supply, Park & Demand . 150
 16 Taiwan Bus Demand by Type 152

17 Other Asia/Pacific Bus
 Supply, Park & Demand 154
 18 Other Asia/Pacific Bus
 Demand by Type 155

OTHER REGIONS

1 Other Regions Bus Supply,
 Park & Demand 159
 2 Other Regions Bus
 Demand by Type 160
 3 Latin America Supply,
 Park & Demand 163
 4 Latin America Bus Demand by Type. 166
 5 Brazil Supply, Park & Demand..... 168
 6 Brazil Bus Demand by Type..... 170
 7 Other Latin America
 Supply, Park & Demand 172
 8 Other Latin America Bus
 Demand by Type 174
 9 Eastern Europe Supply,
 Park & Demand 176
 10 Eastern Europe Bus
 Demand by Type 178
 11 Russia Supply, Park & Demand..... 181
 12 Russia Bus Demand by Type 182
 13 Other Eastern Europe
 Supply, Park & Demand 185
 14 Other Eastern Europe Bus
 Demand by Type 187
 15 Africa/Mideast Supply,
 Park & Demand 190
 16 Africa/Mideast Bus
 Demand by Type 192

INDUSTRY STRUCTURE

1 Sales of Selected Bus
 Producers, 2007 195
 Cht World OEM Bus Market Share
 by Company, 2007..... 196
 2 Selected Acquisitions
 & Divestitures 208
 3 Selected Cooperative Agreements ... 210

Dramatic rises in fuel prices have helped the global bus market achieve a new footing, as commuters in even light vehicle-saturated markets such as the US increasingly choose mass transit.

Global demand to rise 5% annually through 2012

Worldwide demand for buses will advance 5.0 percent annually to more than 400,000 vehicles in 2012 on the strength of high worldwide fuel prices. Buses represent one of the most cost-effective methods of transporting passengers, and with ridership rising as much as 30 percent a year in some bus transit systems, demand will also increase as transit authorities, motor coach lines and other bus operators place orders to augment their current fleets. Higher fuel prices should also stoke demand as bus operators seek more efficient vehicles, which invariably means the purchase of new products.

Government subsidies to benefit bus demand

Other forces expected to support bus demand included increasing traffic congestion levels in major metropolitan centers worldwide, the establishment of dedicated bus rapid transit systems (BRTs) and "busways" in key cities in Latin America and Asia, and the general economic expansions taking place in emerging markets that require workers to travel further to reach jobs. Bus travel is becoming more of a necessity for urban travelers worldwide as governments enforce limits on the use of personal vehicles (both cars and motorcycles) to reduce pollution and congestion levels.

World Bus Demand, 2007 (324,000 units)



China to account for much of the world's new demand

Worldwide, China is both the largest market for and producer of buses, as well as the nation most responsible for supporting expected bus demand. It will account for 41 percent of new demand between 2007 and 2012 and 47 percent of new production. The country is rapidly becoming a regional hub for bus production although most of its bus output so far has been focused on satisfying local demand. Currently, Chinese bus manufacturers lack the global brand strength or distribution networks of leading producers in Western countries, but the cost advantages of Chinese buses, while shrinking, could buoy exports.

The bus market in North America tends to be atypical among developed nations in a number of ways. The United States and Canada, for example, have thriving markets for specially designed school buses, which are not common in Europe or Japan. The US also lacks the dynamic passenger train, tram and subway (metro) systems so common in Europe and Japan, making bus travel the primary mass transit option in most US cities. Furthermore, the large distances between cities and states provides a strong stimulus for sales of motor coaches, which are purpose-designed to move passengers long distances in comfort.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Bus Demand by Type

Demand for buses in India will increase 5.1 percent annually to 31,400 vehicles in 2012, accounting for 1.2 percent of the total. Overall growth will be driven by rising income levels and its growing population. India's overall economic prosperity and usual bus sales, other factors also contributing to the growth enabler is the increasing demand on meeting India's future transportation needs.

In March 2006, the Indian government indicated increased investment for India's public transportation system, with plans being made to address the burgeoning mobility needs of India's major cities. The government plans to spend over \$11 billion on urban and transportation infrastructure over the next seven years. It appears that a significant portion of investment will be focused on buses, since the costs to develop and maintain new levels of light rail infrastructure would likely be too expensive. In fact, the country is mulling the creation of bus rapid transit systems modeled on those already being operated in Latin America and other parts of the Asia/Pacific region, including Indonesia and Taiwan. BRTs are planned or under construction in Bangalore, Delhi and Pune, with the potential to add Ahmedabad and Hyderabad. As these BRTs come onstream, they will boost demand for transit buses. Transit-type buses in India range from very old vehicles used in smaller towns and villages to newer models used in major cities such as New Delhi and Mumbai.

In June 2008, a report by Dare, a CyberMedia (India) publication for entrepreneurs, indicated that to make the public transport system efficient and reliable, India would need 76,000 additional buses, to be paid for primarily by the private sector. This demand will be for both city and longer distance buses.

**SAMPLE
TEXT**

TABLE VI-5

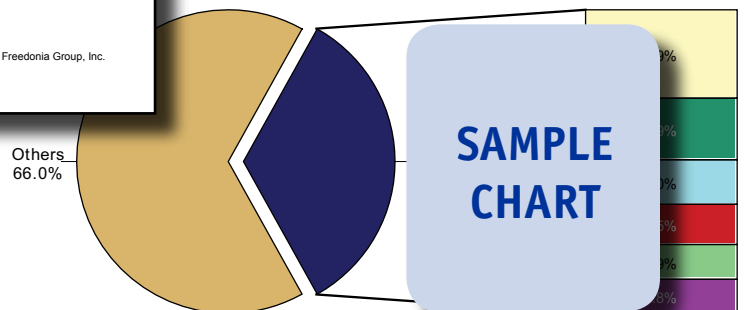
INDIA BUS SUPPLY, PARK & DEMAND

Item	1997	2002	2007	2012	2017
Population (million persons)	1,000	1,100	1,200	1,300	1,385
GDP/capita	100	150	200	250	300
Gross Domestic Product (bil 2006\$)	100	150	200	250	300
bus park/bil \$ GDP	0.001	0.001	0.001	0.001	0.001
bus sales/bil \$ GDP	0.001	0.001	0.001	0.001	0.001
Urban Population (million persons)	200	250	300	350	400
bus park/mil urban capita	0.005	0.005	0.005	0.005	0.005
bus sales/mil urban capita	0.005	0.005	0.005	0.005	0.005
Bus Park (000 units)	100	150	200	250	300
Bus Sales (units)	100	150	200	250	300
+ net exports & sales from inventory	0	0	0	0	0
Bus Production (units)	17,820	23,700	32,120	42,200	52,790

**SAMPLE
TABLE**

CHART VIII-1

OEM BUS MARKET SHARE BY COMPANY, 2007
(324,000 units)

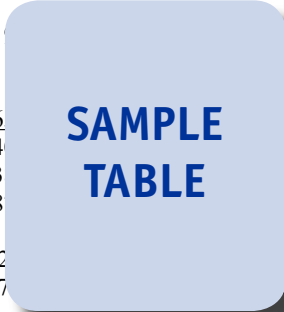


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-6
INDIA BUS DEMAND BY TYPE
(units)

Item	1997	2002	2007	2012	2017
Population (million persons)					105
buses per million population					11
Bus Demand by Type	16				10
Motor Coaches	4				10
Transit Buses	3				10
Other Buses	8				10
% India	2				4
A/P Bus Demand (000 units)	7				7



COMPANY PROFILES

GAZ OAO
 88 Lenina Prospect
 Nizhny Novgorod 603004
 Russia
 7-831-29...
 http://w...

SAMPLE PROFILE

Sales: \$...
 Geograp...
 wealth c...
 Countri...
 Employ...

Key Products: intracity, intercity, school, special purpose, trolley and touring buses

GAZ manufactures light commercial vehicles, trucks, buses, cars, diesel engines, powertrain components and road construction equipment. The Company is active through five segments: Vehicles, Buses, Diesel Engines and Fuel Injection Equipment, Trucks, and Road Construction Vehicles.

The Company is active in the world buses industry through the Buses segment, which had 2006 sales of \$591 million. The segment, which is Russia's largest bus manufacturer according to GAZ, produces intracity, intercity, school, special purpose, trolley and touring buses in various sizes and configurations. In Russia, buses are produced at the Company's Pavlovo, Likino, Kurgan, Golitsino and Kanash plants.

The Pavlovo plant, which does business as PAZ, is a leading producer of small buses under the PAZ brand name. The facility's product line, which comprises over 30 different models, includes PAZ-3237

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"Production of buses in India will increase 5.6 percent per year to 42,200 vehicles in 2012. Bus production is expected to be supported by both local demand and continued exports to surrounding countries. India's plentiful low-cost labor supply and increasingly sophisticated supply base makes the country an ideal export base for buses. Companies building buses in India include Tata. India's bus park should expand ..."
 --Section VI, pg. 128

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OTHER STUDIES

Motorcycles in China

Demand for motorcycles in China will grow 13.9% annually through 2011. Gains will be spurred by a meteoric rise in electric motorcycles, which are much less costly than gas types, are less regulated and are a popular upgrade from bicycles for urban consumers. The Northeast will see the fastest regional demand growth. This study analyzes the 23.2 million unit motorcycle industry in China, with forecasts for 2011 and 2016 by type, market and region. It also evaluates market share and profiles participating companies.

#2320 05/2008..... \$5100

Automotive Diagnostic Products

US automotive diagnostic product demand will grow 5.8% yearly, driven mainly by more electronic/electrical systems in cars, a shift toward technician-owned handheld devices and the rising influence of software over hardware. Equipment will remain dominant while software updates grow the fastest. This study analyzes the \$975 million US automotive diagnostic product industry, with forecasts for 2011 and 2016 by type and service performer. It also evaluates company market share and profiles major players.

#2290 01/2008..... \$4400

Automotive Aftermarket in China

The aftermarket for light vehicle components and parts in China will grow 17.9% annually through 2011. Gains will be driven by the dramatic increase in the light vehicle park and increasing aftermarket spending per vehicle. Mechanical products will remain the largest segment while electronics grow the fastest. This study analyzes the ¥33.7 billion automotive aftermarket in China, with forecasts for 2011 and 2016 by product and service performer. It also evaluates market share and profiles major players.

#2262 12/2007..... \$4900

World Motorcycles

Global motorcycle demand will grow 6% yearly through 2011. Gains will be led by developing markets based on rising incomes and the introduction of higher quality machines with newer technologies. In developed markets, fuel prices and car restrictions will make motorcycles more attractive as transportation. This study analyzes the 44.3 million unit world motorcycle industry, with forecasts for 2011 and 2016 by type, world region and for 18 countries. It also details market share and profiles major players.

#2251 11/2007..... \$5400

Recreational Boating

US recreational boating demand will grow 5.3% yearly through 2011. Powerboats will drive the boat category, led by outboard and sterndrive types. Propulsion systems will be the fastest growing segments. The South offers the best prospects based on its warmer climate and favorable demographics. This study analyzes the \$15.7 billion US recreational boating industry, with forecasts for 2011 and 2016 by material, product and region. It also evaluates company market share and profiles leading competitors.

#2249 09/2007..... \$4500

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