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World Buses

Industry Study with Forecasts for **2014 & 2019**

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The new sense of frugality taking hold among consumers in many developed markets, coupled with volatile fuel prices, have made bus travel a more attractive option.

Global demand to rise 4.2% yearly through 2014

Demand for buses worldwide will expand 4.2 percent annually to 496,000 units in 2014, reflecting rebounding demand in North America following the 2009 recession as well as sustained sales in many other markets. Beyond North America and Japan, both of which experienced significant declines in demand in 2009, the global economic crisis has not had as negative an impact in many markets. The new sense of frugality taking hold among consumers in many developed markets, coupled with volatile fuel prices, have made bus travel a more attractive option for its cost effectiveness and fuel efficiency.

Other forces expected to support bus demand include significant government spending on transit infrastructure in the US and Canada, in efforts to stimulate their economies. Additionally, increasing congestion levels in major metropolitan centers worldwide and the establishment of dedicated and sometimes guided "busways" in key cities across Central and South America, Australia, France and the UK are also supporting bus demand. Likewise, the general economic expansions taking place in key emerging markets could require workers to travel further -- usually by bus -- 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. The arrival of new

World Bus Demand, 2009 (404 thousand units)



powertrain technologies will also compel administrators to update their fleets, as high fuel prices make hybrid and alternative fuel options much more cost effective.

China to remain largest, fastest growing market

The bus market in North America is unique in several ways, notably for its use of specially designed school buses. The US also lacks the dynamic passenger train, tram and subway systems so common in Europe and Japan, making bus travel the primary mass transit option in most US cities. New investments in light rail projects in many US states as a result of government stimulus

funding could pose competition for bus sales. However, such spending could also stimulate transit bus sales in multi-mode passenger transportation systems. Western Europe and Japan will experience slower growth in bus demand compared to the United States due to stagnant population increases and aging populations, as well as the prevalence of other mass transit options such as rail.

China remains both the largest market for buses and the largest producer, and will be one of the fastest growing bus markets going forward. The country could become a regional hub for bus production, although virtually all of its bus output so far has been focused on satisfying local demand.

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Sample Text, Table & Chart

OTHER REGIONS

Brazil: Bus Demand by Type -- Demand for buses is forecast to increase significantly, accounting for over 50% of total demand. Brazil is a relatively small population with a bus-based public transportation system that is comparatively skewed towards low-income Brazilians must rely on bus transportation. Brazil's strong expected growth going forward will help drive bus demand, creating jobs and boosting incomes. The country will host both the 2014 soccer World Cup and the 2016 Olympics, which will likely boost demand for buses of all kinds.

Brazil's BRT system in Curitiba is widely acknowledged as one of the pioneering examples of this type of public transportation. While a significant success in the years after it was launched in the late 1970s, the project has been less so in recent years, with declining ridership. This might seem a cautionary example for the many other cities worldwide that are planning their own BRTs. Declining ridership has caused a spiral of ticket price increases, which have driven down ridership even more. In fact, Curitiba is planning to replace the BRT in a major corridor with a light rail/subway system.

By 2007, the system had been expanded to cover 13 areas in the Curitiba metropolitan region. The system charges a flat fare that in effect subsidizes the trips of the mostly poorer workers who live in outlying areas. Nonetheless, bus ridership within the Curitiba municipality continued to decline, as more former passengers have acquired cars. This anomaly is largely the result of Brazil's intense substituting ethanol for gasoline, which has kept overall fuel prices relatively stable compared to the dramatic gains seen in other regions in recent years. Furthermore, surveys have shown that many

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**SAMPLE
TEXT**

TABLE VII-4

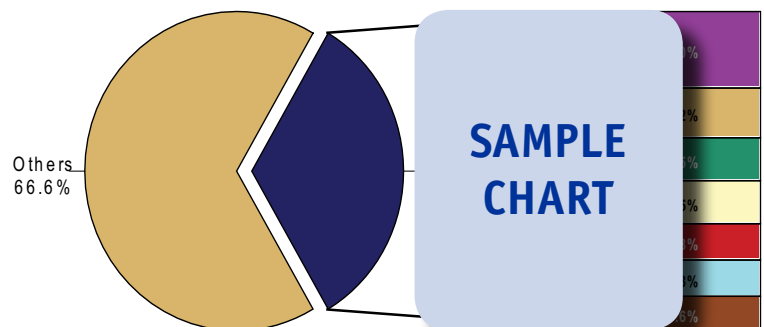
BRAZIL BUS DEMAND BY TYPE
(units)

Item	1999	2004	2009	2014	2019
Population (million persons)					166
buses per million population					177
Bus Demand by Type					100
Motor Coaches					100
Transit Buses					100
Other Buses					100
% Brazil					13
C&S America Bus Demand (units)					100

**SAMPLE
TABLE**

CHART VIII-1

WORLD OEM BUS MARKET SHARE BY COMPANY
(403,700 units, 2009)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

**TABLE VII-3
BRAZIL BUS SUPPLY, DEMAND & PARK**

Item	1999	2004	2009	2014	2019
Population (million persons)	170	180	190	200	210
GDP/capita	1,000	1,200	1,400	1,600	1,800
Gross Domestic Product (bil 2008\$)	150	180	210	240	270
bus park/bil \$ GDP	0.03	0.03	0.03	0.03	0.03
bus sales/bil \$ GDP	0.05	0.05	0.05	0.05	0.05
Urban Population (million persons)	100	105	110	115	120
bus park/mil urban capita	0.06	0.06	0.06	0.06	0.06
bus sales/mil urban capita	0.08	0.08	0.08	0.08	0.08
Bus Park (000 units)	100	100	100	100	100
Bus Sales (units)	100	100	100	100	100
+ net exports/sales from inventory	100	100	100	100	100
Bus Production (units)	150	150	150	150	150

**SAMPLE
PROFILE**

COMPANY PROFILES

Daewoo Bus Corporation

202-1 Ojung-Dong
 Ojung-Gu, Bucheon-City, Gyunggi 421814
 South Korea
 82-32-680-66
<http://www.daewoo.com>

Annual Sales:
 Employment:

Key Products: compressed natural gas buses; and

Daewoo Bus is a global manufacturer of buses and bus chassis for public transportation applications. The Company is owned by Yung An Company (South Korea), a diversified private holding company.

The Company produces luxury, intercity and intracity buses, as well as buses that run on compressed natural gas (CNG). Luxury buses from Daewoo Bus, which are 12-meter-long models that seat up to 46, include the SUPER CRUISER, ROYAL HI-DECKER, CRUISING STAR and ROYAL CRUISER II lines. The Company's intercity buses include 9- and 12-meter-long models that seat from 34 to 46 passengers. Specific models include ROYAL CRUISTAR II, CRUISING ARROW, CRUISER, ROYAL LUXURY II, ROYAL ECONOMIC II and ROYAL STAR buses. Among the Company's intracity buses are ROYAL MIDI and ROYAL CITY, and low floor models. These buses are typically 9, 10, 11 or 12 meters in length, and seat between 45 and 104 passengers. Daewoo Bus produces CNG powered versions of the ROYAL MIDI, ROYAL STAR, ROYAL CITY and ROYAL LUXURY II buses. Bus chassis from the Company include intercity and intracity versions.

"Brazil is the largest regional producer of buses, building 34,500 vehicles in 2009, and will expand to 42,500 vehicles in 2014. ... Brazil is a key exporter of buses to other neighboring countries in the region, and will enjoy a growing trade surplus. Brazil's bus park is expected to grow 2.5 percent per year to 350,000 units in 2014 as a result of increasing bus sales."

--Section VII, pg. 172

OTHER STUDIES

Automotive Coatings, Adhesives & Sealants

US automotive coating, adhesive and sealant demand will rise 9.4% yearly through 2014 as motor vehicle output recovers from the recent downturn. Coatings will remain the dominant segment, with water-based, powder and radiation-curable types leading gains. This study analyzes the \$3.6 billion US automotive coating, adhesive and sealant industry with forecasts for 2014 and 2019 by formulation and substrate, polymer, market and application. It also evaluates company market share and profiles industry competitors.

#2714 November 2010 \$4800

Motorcycles in China

Demand for motorcycles in China will grow 7.6% yearly through 2014. Electric motorcycles will surpass gas types as the largest segment in units. New regulations for electric motorcycles will favor lighter vehicles such as mopeds while discouraging electric scooters and three-wheeled trikes. This study analyzes the 117 billion yuan motorcycle industry in China, with forecasts for 2014 and 2019 by product, market and geographic region. It also evaluates company market share and profiles industry participants.

#2658 September 2010 \$5300

World Automotive Sensors

Global demand for light vehicle OEM automotive sensors will advance 11.8% annually through 2014. North America will be the fastest growing region, far outpacing the Asia/Pacific and other regions based on a rebounding US market and higher per-vehicle sensor revenues. This study analyzes the \$9.1 billion world automotive sensor industry, with forecasts for 2014 and 2019 by product, world region and for 23 countries. It also evaluates company market share and profiles industry participants.

#2640 June 2010 \$5700

World Motorcycles

(including Electric Bicycles & Mopeds)

Global motorcycle demand will grow 7.6% per year through 2013, driven by rising living standards in developing areas that make motorcycles more affordable to use. ICE motorcycles will remain dominant while electric types lead gains. Sales in the Africa/Mideast and Asia/Pacific markets will grow the fastest. This study analyzes the 79.2 million unit world motorcycle industry, with forecasts for 2013 and 2018 by product, world region and for 21 countries. It also evaluates market share and profiles industry players.

#2537 August 2009 \$5700

World Light-Duty Green Vehicles

Global "green" vehicle demand will grow rapidly through 2013, driven by government subsidies, technology breakthroughs and erratic oil prices. North America will remain the largest and fastest growing market. Conventional hybrid-electric vehicles will surpass natural gas types to become the most commonly sold. This study analyzes the 1.8 million unit world green vehicle industry, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates market share and profiles industry players.

#2510 August 2009 \$5700

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