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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

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

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

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World Buses

Industry Study with Forecasts for **2016 & 2021**

Study #2933 | November 2012 | \$6100 | 379 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	5
World Economic Outlook	7
Personal Income Trends.....	11
World Demographic Overview	13
Population.....	14
Urban Population	15
World Light Vehicle Overview	17
Light Vehicle Production	18
Light Vehicle Sales.....	20
Energy Prices.....	22
Technology Trends.....	26
Legal & Regulatory Environment.....	28
Pricing Trends.....	32

WORLD SUPPLY & DEMAND

General	35
Regional Overview.....	36
Demand	37
Park	42
Production.....	44
International Trade	47
Demand by Product	48
Motor Coaches.....	51
Transit Buses	53
Other Buses	56
Demand by Fuel Type	60
Bus Rapid Transit Systems	63

NORTH AMERICA

General	66
Bus Supply & Demand	67
Bus Market Outlook	70
United States	72
Canada	78
Mexico	83

WESTERN EUROPE

General	89
Bus Supply & Demand	90
Bus Market Outlook	93
France.....	95
Germany	100
United Kingdom.....	105

Spain	110
Italy	115
Other Western Europe	120
Sweden	126
Belgium	127
All Other	128

ASIA/PACIFIC

General	130
Bus Supply & Demand	131
Bus Market Outlook	134
China	136
India	143
Indonesia	148
Japan.....	153
Thailand	159
South Korea	164
Other Asia/Pacific	170
Australia	176
Taiwan.....	178
All Other	179

OTHER REGIONS

Central & South America	180
Bus Supply & Demand	181
Bus Market Outlook.....	183
Brazil.....	185
Other Central & South America.....	191
Eastern Europe	196
Bus Supply & Demand	198
Bus Market Outlook.....	200
Russia.....	202
Other Eastern Europe.....	208
Poland.....	214
Czech Republic.....	215
All Other.....	216
Africa/Mideast.....	217
Bus Supply & Demand	219
Bus Market Outlook.....	221
Turkey.....	224
Iran.....	229
Nigeria.....	234
Other Africa/Mideast.....	240

INDUSTRY STRUCTURE

General	248
Industry Composition	249
Market Share	251
Research & Product Development.....	255

Manufacturing	257
Marketing & Distribution.....	259
Cooperative Agreements.....	261
Financial Issues & Requirements.....	269
Mergers & Acquisitions.....	269

COMPANY PROFILES

Alexander Dennis	273
Allied Specialty Vehicles.....	276
Anhui Ankai Automobile	277
Ashok Leyland	279
Berkshire Hathaway.....	281
Blue Bird	283
Consorcio G Grupo Dina.....	285
Daewoo Bus	286
Daimler AG.....	288
Dongfeng Motor.....	294
Eicher Motors	295
Fiat Industrial	296
Fiat SpA	298
GAZ OAO	299
General Motors	300
Gillig LLC.....	302
Haci Ömer Sabanci Holding A.....	303
Hyundai Motor.....	305
Irizar S Cooperativa.....	307
Liaoning SG Automotive.....	309
MAN SE	310
Marcopolo SA	313
Minsky Avtomobilny Zavod JSC.....	316
Motor Coach Industries	317
Navistar International.....	318
New Flyer Industries	322
North American Bus Industries	324
Proterra Incorporated	326
Scania AB	328
Solaris Bus & Coach.....	331
Tata Motors.....	333
Thor Industries	335
Toyota Motor.....	337
Van Hool NV.....	341
VDL Groep BV	342
Volvo AB	345
Wright Group.....	349
Xiamen King Long Motor	350
Yangzhou Yaxing Motor Coach	352
Zhengzhou Yutong Bus.....	353
Zhongtong Bus	355
Zonda Group.....	356
Other Companies Mentioned in Study	357

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region .. 11
2 World Per Capita GDP13
3 World Population by Region & Age15
4 World Urban Population by Region17
5 World Light Vehicle Production by Region 20
6 World Light Vehicle Sales by Region22
Cht Average Annual Spot Prices
for Crude Oil, 2001-2011.....24
Cht Average Annual Spot Prices for
Natural Gas, 2001-201125
Cht World Average Bus Prices, 2001-202134

WORLD SUPPLY & DEMAND

1 World Bus Demand by Region39
Cht World Bus Demand by Region, 201140
Cht Change in Bus Demand between
2011 & 2016 by Region40
Cht World Bus Demand: Projected
2011-2016 Annual Rate of Growth41
2 World Buses in Use by Region43
Cht World Buses in Use by Region, 2011.....44
3 World Bus Production by Region46
Cht World Bus Production by Region, 201146
4 World Bus Net Exports.....48
5 World Bus Demand by Product50
Cht World Bus Demand by Product, 201150
Cht Change in Bus Demand by Product,
2006 to 2011 & 2011 to 2016.....51
6 World Motor Coach Demand by Region53
7 World Transit Bus Demand by Region56
8 World Demand for Other Buses
by Product & Region.....59
9 World Bus Demand by Fuel Type.....62
Cht World Bus Demand by Fuel Type, 201163
Cht World Bus Rapid Transit
Systems by Region, 201265

NORTH AMERICA

1 North America: Bus Supply & Demand.....69
Cht North America: Bus Demand
by Country, 201170
2 North America: Buses in Use & Bus
Demand by Product & Fuel Type72
3 United States: Bus Supply & Demand.....76
4 United States: Buses in Use
& Bus Demand by Product78
5 Canada: Bus Supply & Demand81
6 Canada: Buses in Use &
Bus Demand by Product83
7 Mexico: Bus Supply & Demand.....86

8 Mexico: Buses in Use & Bus
Demand by Product88

WESTERN EUROPE

1 Western Europe: Bus Supply & Demand ...92
Cht Western Europe: Bus Demand
by Country, 201193
2 Western Europe: Buses in Use & Bus
Demand by Product & Fuel Type95
3 France: Bus Supply & Demand98
4 France: Buses in Use & Bus
Demand by Product100
5 Germany: Bus Supply & Demand103
6 Germany: Buses in Use & Bus
Demand by Product105
7 United Kingdom: Bus Supply & Demand 108
8 United Kingdom: Buses in Use
& Bus Demand by Product110
9 Spain: Bus Supply & Demand.....113
10 Spain: Buses in Use & Bus
Demand by Product115
11 Italy: Bus Supply & Demand.....118
12 Italy: Buses in Use & Bus
Demand by Product120
13 Other Western Europe: Bus
Supply & Demand.....123
14 Other Western Europe: Buses in Use
& Bus Demand by Product125
15 Other Western Europe: Bus
Supply & Demand by Country126

ASIA/PACIFIC

1 Asia/Pacific: Bus Supply & Demand133
Cht Asia/Pacific: Bus Demand
by Country, 2011134
2 Asia/Pacific: Buses in Use & Bus
Demand by Product & Fuel Type136
3 China: Bus Supply & Demand.....141
4 China: Buses in Use & Bus
Demand by Product143
5 India: Bus Supply & Demand146
6 India: Buses in Use & Bus
Demand by Product148
7 Indonesia: Bus Supply & Demand.....151
8 Indonesia: Buses in Use &
Bus Demand by Product153
9 Japan: Bus Supply & Demand157
10 Japan: Buses in Use & Bus
Demand by Product159
11 Thailand: Bus Supply & Demand162
12 Thailand: Buses in Use &
Bus Demand by Product164
13 South Korea: Bus Supply & Demand.....168
14 South Korea: Buses in Use &
Bus Demand by Product169
15 Other Asia/Pacific: Bus
Supply & Demand.....173

16 Other Asia/Pacific: Buses in Use
& Bus Demand by Product175
17 Other Asia/Pacific: Bus Supply
& Demand by Country176

OTHER REGIONS

1 Central & South America:
Bus Supply & Demand.....183
2 Central & South America: Buses in Use &
Bus Demand by Product & Fuel Type... 185
3 Brazil: Bus Supply & Demand189
4 Brazil: Buses in Use & Bus
Demand by Product191
5 Other Central & South America:
Bus Supply & Demand.....194
6 Other Central & South America: Buses
in Use & Bus Demand by Product.....196
7 Eastern Europe: Bus Supply & Demand.. 199
Cht Eastern Europe: Bus Demand
by Country, 2011200
8 Eastern Europe: Buses in Use & Bus
Demand by Product & Fuel Type202
9 Russia: Bus Supply & Demand.....206
10 Russia: Buses in Use & Bus
Demand by Product208
11 Other Eastern Europe: Bus
Supply & Demand.....211
12 Other Eastern Europe: Buses in Use
& Bus Demand by Product213
13 Other Eastern Europe: Bus Supply
& Bus Demand by Country214
14 Africa/Mideast: Bus Supply & Demand ..220
Cht Africa/Mideast: Bus Demand
by Country, 2011221
15 Africa/Mideast: Buses in Use & Bus
Demand by Product & Fuel Type223
16 Turkey: Bus Supply & Demand227
17 Turkey: Buses in Use & Bus
Demand by Product229
18 Iran: Bus Supply & Demand232
19 Iran: Buses in Use & Bus
Demand by Product234
20 Nigeria: Bus Supply & Demand.....238
21 Nigeria: Buses in Use & Bus
Demand by Product240
22 Other Africa/Mideast: Bus
Supply & Demand.....245
23 Other Africa/Mideast: Buses in Use
& Bus Demand by Product247

INDUSTRY STRUCTURE

1 Bus Sales for Selected
Manufacturers, 2011.....250
Cht World Bus Market Share, 2011252
2 Selected Cooperative Agreements.....264
3 Selected Acquisitions & Divestitures.....271

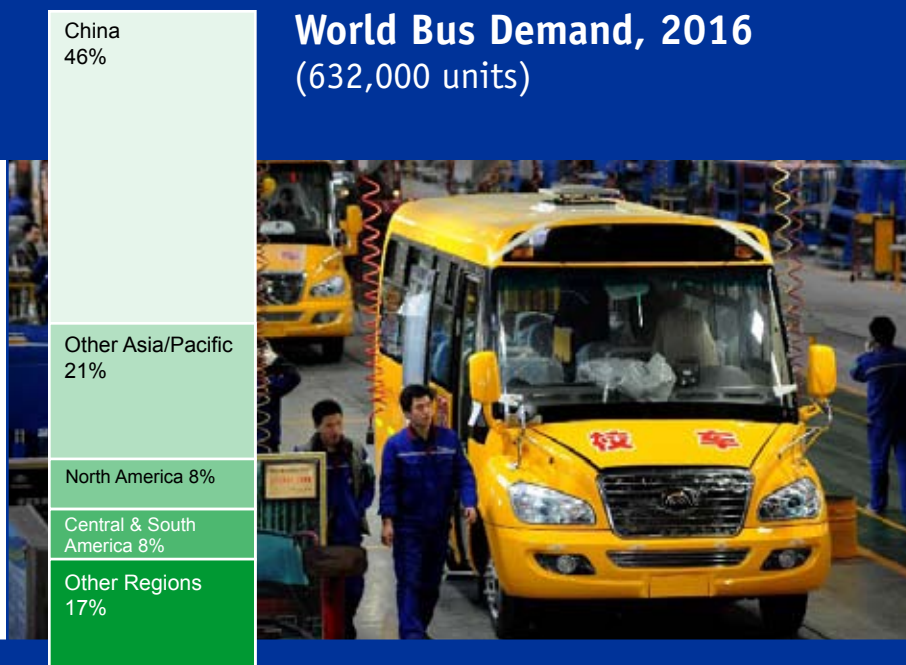
Global gains will be based on skyrocketing demand for Type C school buses, driven largely by market advances in China, where there are safety concerns about current student transport.

World demand to rise 5% annually through 2016

The world market for buses is projected to grow 5.0 percent annually to 632,000 units in 2016, approaching \$64 billion in sales. Much of the gains will be attributable to Type C school buses, demand for which will skyrocket from 26,000 units in 2011 to 70,000 units in 2016. This increase will largely be driven by market advances in China, where sales of Type C buses will expand rapidly from a small existing base because of safety concerns about other types of buses currently used to transport students. Growth in demand for motor coaches, transit buses, and all other buses will, in the aggregate, be much more moderate.

Transit bus sales will rise at the next fastest rate behind Type C school buses, spurred by efforts to reduce traffic congestion and improve air quality as urban populations continue to grow; volatile fuel costs, making bus transportation more attractive to commuters; and the ongoing development of public transportation infrastructures, including bus rapid transit systems, in a number of developing countries. The market for motor coaches, which account for the largest portion of global bus demand, will increase at a somewhat slower pace, fueled by rising per capita incomes and vacation travel spending. Sales of all other buses, which include shuttles and other smaller vehicles based on a medium-duty chassis, will register the slowest gains, supported by a pickup in tourism and travel spending.

World Bus Demand, 2016 (632,000 units)



Asia/Pacific region to offer best growth opportunities

The Asia/Pacific region will register the fastest market advances through 2016, fueled by robust economic growth and the expansion of urban transit systems, particularly in China and India. China alone will account for three-fifths of all new bus demand between 2011 and 2016. The Africa/Mideast region will post the second fastest gains, supported by further development of public transportation infrastructures, most notably in Nigeria, where bus sales will rise 13 percent annually through 2016 from a relatively small current base. The US will also record above average increases, as bus demand rebounds following a

dramatic drop in sales from 2006 to 2011. Product demand in Western Europe and Japan will also recover from recent lows, although the expected rates of growth will not be nearly as strong as in the US. Bus sales in these areas will be stimulated by generally healthy economic conditions and higher tax revenues, providing government agencies with the revenues needed to replace older vehicles and expand current fleets. In Central and South America, on the other hand, demand for buses is expected to decline modestly between 2011 and 2016. This will be due to a drop in bus sales in Brazil from an unusually high level in 2011, when vehicle prebuys in advance of new emissions standards caused demand to surge.

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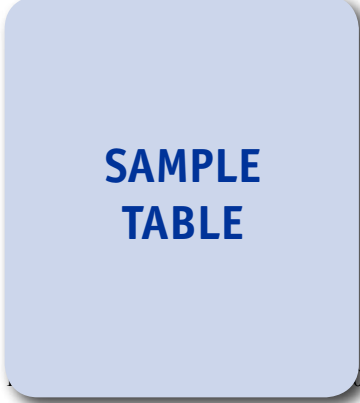
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Sample Text, Table & Chart

TABLE VI-12

THAILAND: BUSES IN USE & BUS DEMAND BY PRODUCT (units)

Item	2001	2006	2011	2016	2021
Urban Population (mil persons)					
buses in use/mil urban capita					
Buses in Use (000 units)					
demand/000 buses in use					
Bus Demand					
Motor Coaches					
Transit Buses					
Other Buses					
% Thailand					
Asia/Pacific Bus Demand					



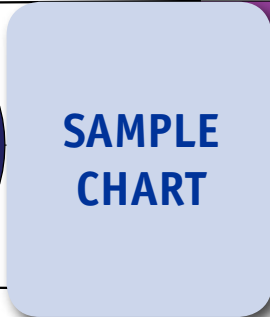
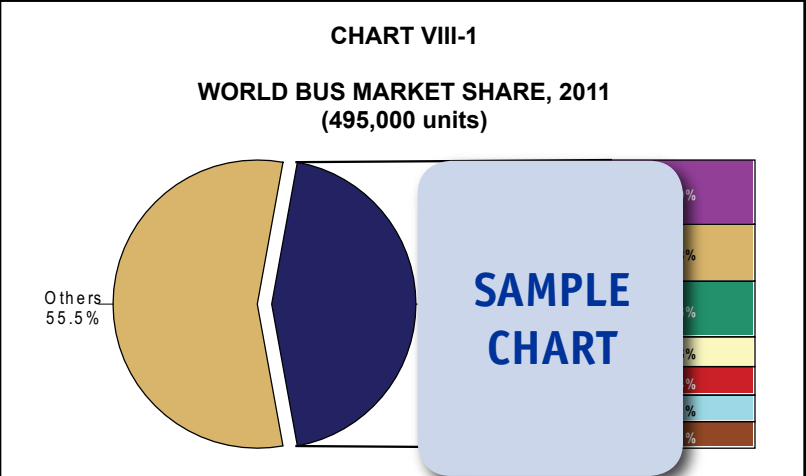
ASIA/PACIFIC

Thailand: Bus Market Outlook



percent a 011 pace of any nation globally. On the other hand, the transportation system will boost the size of the market. However, traffic congestion and air pollution will reduce fuel vehicles will account for an increasing share of the market total. For example, in June 2012 government officials approved the purchase of 3,183 CNG buses for the Bangkok Mass Transit Authority. However, competition from rail transit systems will act as a restraint on bus demand over the longer term. The Thai government has announced plans to build a 745 kilometer high-speed rail line connecting Bangkok and Chiang Mai, with service expected to begin in 2018. Although bus sales will climb at a slower rate than during the 2006-2011 period, growth in the size of Thailand's bus fleet will accelerate as replacement sales account for a declining share of the market total because of the large numbers of newer vehicles that remain in use. The total size of the nation's bus park will rise annually through 2016 to 111,000.

The fastest gains will be recorded by motor coaches, which will rise 7.1 percent per year through 2016, fueled by rising personal income levels and a pickup in travel and tourism expenditures. In September 2012, for example, OA Corporation took delivery of 100 Shanghai Sunlong Bus tourist buses, and in October 2012 the Bangkok Mass Transit Authority announced that it would begin offering a new service from Bangkok to Pakse and Vientiane in Laos as part of its efforts to strengthen transport networks with neighboring nations. Motor coaches will bolster their position as the most commonly used product in Thailand, making up 46 percent of 2016 product sales, followed by transit buses and other buses, many of which are smaller vehicles.



Sample Profile, Table & Forecast

COMPANY PROFILES

Blue Bird Corporation
 402 Blue Bird Boulevard
 Fort Valley, GA 31030
 478-825-2021
<http://www.bl>

Annual Sales:
 Employment:

Key Products:

Blue Bird is a leading manufacturer in the US, and a leading producer of commercial and recreational buses. The Company is owned by Cerberus Capital Management LP (New York, New York), a private investment firm.

The Company's buses include school, transit and shuttle types. Specific buses available from Blue Bird include ALL AMERICAN rear engine buses, which comprise diesel and compressed natural gas powered types; ALL AMERICAN front engine buses; 77 seat BLUE BIRD VISION diesel and propane powered buses; and MICRO BIRD Type A buses, which seat up to 30 passengers. The Company also produces the BLUE BIRD SHELL bus shell, which comprises a bus body with a heavy duty chassis. The shell is typically used by coach and bus converters, which finish the vehicles to their own specifications. Blue Bird's buses utilize components from various suppliers, including diesel engines from Cummins Incorporated (Columbus, Indiana) and transmissions from Allison Transmission Incorporated (Indianapolis, Indiana).

In 2012, Blue Bird introduced several new safety technologies for its buses. Among these, SAFESTOP-HD features a high definition

TABLE VI-11

THAILAND: BUS SUPPLY & DEMAND
(units)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2010\$)					
per capita GDP					
Population (mil persons)					
% urban					
Urban Population (mil persons)					
buses/bil \$ GDP					
buses/mil urban capita					
Bus Demand					
+ net exports & sales from invento					
Bus Production					
% Thailand					
Asia/Pacific Bus Production	208640	249460	359000	434500	78500

**SAMPLE
TABLE**

"Thailand's bus output is projected to rise at a 5.9 percent annual rate through 2016 to 600 units, roughly the same as in the region as a whole. Local producers will benefit from continued growth in domestic sales. However, competition from much larger foreign manufacturers with greater economies of scale will prevent Thai bus production from climbing at a faster pace, and industry output will remain insignificant by global standards. As a result, ..."
 --Section VI, pg. 161

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OTHER STUDIES

World Tractors

World demand for tractors will rise 6.8 percent annually through 2016 to \$122 billion. Gains in the Asia/Pacific region will be more than twice that of any other region, with China alone claiming nearly one-third of the global total. Agricultural tractors will remain the largest segment, followed by tractors for construction and mining applications. This study analyzes the \$88 billion world tractor industry, with forecasts for 2016 and 2021 by market, product, world region and for 23 countries. The study also evaluates company market share and profiles industry participants.
 #2984 February 2013 \$6300

World Motorcycles

The global market for motorcycles, including electrically-powered machines, will grow 7.2 percent annually to 134.5 million units in 2016. China will remain by far the largest national market, followed by India and Indonesia. Sales of e-bikes and e-cycles will grow roughly in line with internal combustion engine (ICE) motorcycle demand. This study analyzes the 95 million unit world motorcycle industry, with forecasts for 2016 and 2021 by type, world region and for 23 countries. The study also evaluates company market share and profiles industry players.
 #2972 January 2013 Price: \$6300

World Robots

Global robot demand will rise 10.5 percent annually through 2016 to \$20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the \$12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.
 #2950 December 2012 \$6100

Automotive Aftermarket in North America

The North American light vehicle aftermarket is projected to rise 3.2 percent annually to \$85.5 billion in 2016. The US will record the slowest gains but will represent four-fifths of the region's total sales growth. Electronics will be the fastest growing product segment. The dominant professional market will outpace the DIY segment. This study analyzes the \$73 billion automotive aftermarket in North America, with forecasts for 2016 and 2021 by country, product and service performer. The study also evaluates company market shares and profiles industry participants.
 #2927 August 2012 \$5100

World Diesel Engines

World demand for diesel engines is projected to grow 6.7 percent per year through 2015 to \$197.5 billion. Growth in the key Asia/Pacific region will be led by China and India, as expanding motor vehicle and off-highway equipment output combines with more fixed investment. Demand in North America and Western Europe will improve. This study analyzes the \$143 billion world diesel engine industry, with forecasts for 2015 and 2020 by application, world region and for 36 countries. The study also evaluates company market share and profiles industry players.
 #2864 April 2012 \$5900

About The Freedonia Group

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