

Global Bus Market

Industry Study with Forecasts for 2021

Study #3509 | May 2017 | \$6500



Global demand for buses is projected to realize healthy annual increases over the 2011-2016 time frame based on factors such as:

- economic and population growth
- heightened government spending on public transportation to expand transit services, reduce traffic congestion, and improve air quality
- expansion of the global tourism and private transportation industries
- growing demand for buses used to transport students
- a transition from the use of conventional (gasoline and diesel) buses to CNG/LNG, electric, and hybrid models in urban transit systems

Asia/Pacific region to account for over half of all new bus demand

The largest sales gains through 2021 in unit terms will be posted by the Asia/Pacific region. After registering above average advances earlier in the decade, bus demand in the region slowed between 2011 and 2016 due to moderating economic growth and several country-specific factors, such as the military coup in Thailand and the end of a government bus buying program in India. However, the pace of growth is expected to accelerate through 2021. The Asia/Pacific region includes many major tourist destinations, and as the number of foreign visits grows, companies in the tourism industry will purchase new buses. Industrializing nations will invest heavily in their underdeveloped public transportation networks, while public bus operators in mature regional bus markets will upgrade their bus fleets for environmental purposes.

CNG/LNG, electric & hybrid types to take share from conventionals

Sales of electric and hybrid, and CNG/LNG buses will take market share from diesel and gasoline buses due to:

- new and ongoing government programs designed to reduce air pollution and limit the environmental impact of public transportation systems
- the introduction of new, better-performing models (e.g., electric buses with greater ranges and faster charging capabilities)
- low natural gas prices and the expansion of electrical grids worldwide

The motor coach segment will see the largest gains in unit terms through 2021 as private bus operators worldwide shift away from using more basic buses, as motor coaches offer greater comfort, safety, and additional features.

Study coverage

This Freedonia study on the global bus market presents historical production, trade, and demand data plus forecasts for 2021 in unit terms. Bus demand is also broken out by product (motor coach, transit buses, school buses, and other buses) and fuel type (diesel, gasoline, CNG/LNG, and electric and hybrid). In addition, the study evaluates company market share and shows bus sales in unit and dollar terms for major industry competitors, including Anhui Ankai Automobile, Ashok Leyland, Blue Bird, BYD, CNH Industrial, GAZ, Hyundai, Marcopolo, Navistar, Tata Motors, Toyota, Volkswagen, Volvo, Xiamen King Long Motor, and Zhengzhou Yutong Bus.

CENTRAL & SOUTH AMERICA

Brazil: Bus Demand by Product

Through 2021, bus demand in Brazil is projected to climb nearly 10% per annum to 1.2 million units. This growth is driven by rising borrowing costs, making major infrastructure projects more difficult to finance. A large increase in the number of these will be expected in the coming years. Factors that will influence this growth include:

- the addition of new public bus transportation networks
- the expansion of Brazil's large and diverse private transportation network
- an increase in the number of foreign tourist visits

The growing use of motorcycle and light motor vehicles and the popularity of air travel will dampen demand for buses through 2021.

The transit bus segment is forecast to grow at a below average pace between 2016 and 2021. As Brazil's financial situation improves, the government will spend more on programs designed to modernize and expand Brazil's public bus transportation systems. In the country's large cities feature large bus rapid transit systems, these are used intensely, transit buses are replaced regularly. The replacement of the fairly basic transit buses currently in use will be replaced by higher-end buses because of changing consumer preferences.

Demand for motor coaches in Brazil is projected to grow at a below average pace during the 2016-2021 period because of a rise in activity and the growing popularity of private transportation services. More foreign tourists visit Brazil and citizens boost spending on leisure activities.

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Table 8-8 | India: Bus Demand by Product, 2006-2021 (units)

Item	2006	2011	2016	2021	% Compound Annual Growth		
					06-11	11-16	16-21
Bus Demand							
Motor Coaches							
Transit Buses							
Other Buses							
% India							
Asia/Pacific Bus Demand							

Source: The Freedonia Group

Table 4-2 | Global Motor Coach Demand by Region, 2006-2021 (thousand units)

Item	2006	2011	2016	2021	% Compound Annual Growth		
					06-11	11-16	16-21
Global Bus Demand							
% motor coaches							
Global Motor Coach Demand							
North America:							
United States							
Canada & Mexico							
Western Europe							
Asia/Pacific:							
China							
India							
Other Asia/Pacific							
Central & South America							
Eastern Europe							
Africa/Mideast							

Source: The Freedonia Group

Table 7-5 | Germany: Bus Supply & Demand, 2006-2021 (units)

Item	2006	2011	2016	2021	% Compound Annual Growth		
					06-11	11-16	16-21
Buses in Use (000 units)							
demand/000 buses in use							
Bus Demand							
+ net exports & sales from inventory							
Bus Production							
% Germany							
Western Europe Bus Production							

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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May 2017

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Related Studies

Automotive Aftermarket for Brake Parts in North America

Aftermarket demand for automotive brake parts in North America will rise 2.6% annually to \$4.3 billion in 2021. The US will still account for nearly four-fifths of all brake part sales gains in value terms, based on its large and aging light vehicle park, though Mexico will pose the fastest growth. Shoes, pads and linings will hold the biggest gains. This study details the automotive aftermarket for brake parts in North America, with forecasts for 2021 for demand by country, product, and performer. The study also analyzes company market share and lists industry participants.

#3512..... April 2017 \$4900

Automotive Aftermarket for Powertrain Components in North America

North American aftermarket sales of automotive powertrain (engine, transmission, and drivetrain) components is forecast to advance 1.8% per year through 2021. Despite higher rates of expansion in Mexico and Canada, the US will still account for 75% of regional sales advances. Transmissions and related parts will dominate product demand. This study offers historical data plus forecasts for 2021 for demand by product, performer and country in North America. The study details the industry structure, evaluates company market share and lists industry players.

#3505..... March 2017..... \$4900

Global Diesel Engine Market

Global diesel engine sales are forecast to expand 5.8 percent per year through 2020 to \$238 billion. More than half of all new product demand will be in the Asia/Pacific region. Off-highway and other mobile equipment diesel engines will climb well above the global average, bolstering gains in motor vehicle diesel engine demand. This study analyzes the \$180 billion world diesel engine industry, with forecasts for 2020 and 2025 by product and market in 6 world regions, and for 23 countries. The study also evaluates company market share and lists industry players.

#3488..... January 2017 \$6300

World Motorcycles

World demand for motorcycles is forecast to climb 3.8% per year to 113 million units in 2020. Outside of the large Chinese market, motorcycle sales will rise over seven percent per year during the 2015-2020 period. The Asia/Pacific market will account for almost three-fifths of all new motorcycle demand through 2020. This study assesses the 93.9 million unit market worldwide for motorcycles, providing projections for 2020 and 2025 by type, in 6 regions and 24 countries. In addition, the study details industry structure and analyzes company market share.

#3454..... October 2016 \$6600

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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