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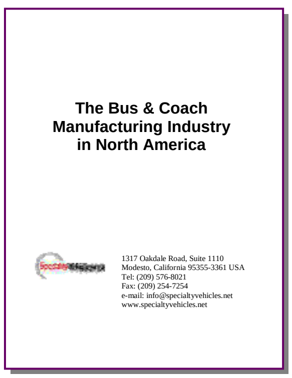
- Key trends & developments
- Demand drivers
- Key external environmental and regulatory influences
- Export data
- Outlook and forecast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- **Cutaway/Van Chassis**
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  - — 40 ft. +
  - — Under-40 ft.
  - — Double-deckers
  - — Other
- **Motor Coaches**
- **School Buses**
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  - — Type B
  - — Type C
  - — Type D
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About This Report

The manufacture of buses in North America is a complex activity by reason of the wide variety of bus types, each with different underlying manufacturers, channels and competitive considerations. As a result, most manufacturing plants, and in turn the industry players, have tended to specialize vertically in a few compatible product lines, as opposed to building the entire gamut of passenger transport vehicles.

The recent rise in fuel prices has spurred demand for public transportation. The equally spectacular and sudden fall in the price of oil has not yet changed the metrics of the increased demand for transportation on the grounds that travelers have learned to save money by shifting away from driving. At the same time, the additional demand for public transit has not been easily met by transit agencies due to funding constraints for vehicle purchases. On the whole, the shifting trends have been of net benefit to bus suppliers, particularly for cutaway, van chassis and rail chassis configurations.

Hybrid systems are starting to be offered for cutaways and motor coaches, but it may be a while before commercial fleets adopt these, due to their significant cost premium. Foreign manufacturers such as DesignLine of New Zealand and Foton of China are specifically targeting the “green market” for their buses, and are not using traditional diesel-powered systems to enter the North American market. Whether hybrid developments continue to progress under the new oil price scenario remains to be seen, in the light of governmental programs for energy self-sufficiency. However, the likelihood is that it will be very difficult to economically justify the cost of hybrid systems versus regular diesel or gasoline power at this prevailing level of low oil prices.

There has been significant consolidation in the past five years, though lately it has appeared to subside. Gillig was recently sold to CC Industries, the parent company of Great Dane, a leading manufacturer of heavy trailers. Corbeil, the leading Canadian school bus manufacturer, was acquired by Collins Bus. Foreign players are also entering the North American bus market. CAIO Induscar, a leading Brazilian transit and motor coach bus manufacturer, Stallion Bus Industries, with Chinese-built buses, and Bus & Coach International (BCI), also with Chinese-built buses, have all entered the body-on-chassis market with products that target the motor coach segment at a lower price point than completely integrated motor coaches. At the same time these new acquisitions are occurring, the acquisition of NABI and Blue Bird by private equity group Cerberus is likely to unwind due to the deep prevailing problems in private equity funded transactions of recent times.

Parts of this overall mature industry have been growing, but companies with single product offerings such as MCI, with heavy dependence on motor coaches, recently went into Chapter 11 bankruptcy protection. Large players in the industry are reaching agreements with smaller suppliers to produce bus bodies under licensing agreements; for example, IC Corporation and ABC are supplied by General Coach for transit and body-on-chassis motor coaches respectively. These licensing agreements will increase in the future to allow for new product designs in competitive commercial markets.

These and other key factors impacting the industry are analyzed in detail in this study. This is the only report of its kind that seeks to quantify and analyze the entire business of bus manufacturing in North America, by each type of bus. The study goes beyond APTA or CTTA statistics to provide an independent appraisal generated from a wide-ranging investigation and analysis from the ground up.

Methodology

- Perusal of all relevant trade publications.
- Financial information searches from national and local sources, including several specialized directories.
- Extensive utilization of Internet research tools.
- Analysis of product literature and technical data from individual manufacturers and from general industry sources.
- Interactive contact(s) with industry participants.

The Bus & Coach Manufacturing Industry in North America

Contents

For each product type, the following analysis is provided:

- *Production Estimates & Competitive Shares in Units & Dollars*
- *Competitive Review*
- *Market Analysis*

ABC/Van Hool
Alexander-Dennis Ltd.
Ameritrans/TMC Group
ARBOC Mobility
BCI Buses
Blue Bird Corp
Boyertown Trolley
Cable Car Classics Inc.
Caio North America
Champion/Thor
Classic Trolley
Coach & Equipment Mfg. Corp.
COBUS Industries LP
Collins/Mid Bus/Corbeil
Commercial Body Builders Ltd.
Daimler Buses North America
Designline
Diamond Coach Corp.
Dupont Trolley Industries
EBUS Inc.
ElDorado/Thor
Federal Coach LLC
Foton America Bus Co Inc
Gillig Corp.
Girardin
Glaval/Forest River
Gomaco Trolley Co.
Goshen/Thor
IC Corp.
Krystal Enterprises
Molly Corp.
Motor Coach Industries Ltd.
New Flyer Industries Ltd.
North American Bus Industries (NABI)
Nova Bus
Optima Bus Corp.
Orion Bus Industries Ltd.
Overland Custom Coach Inc.
Prevost Car Inc.
Setra of North America
Specialty Bus Manufacturing LLC
Specialty Vehicles (SVI, Inc.)
Stallion Bus Industries
Starcraft/Forest River
Startrans Bus/Supreme Corp.
Thomas Built Buses Inc.
Trolley Enterprises
Turtle Top Inc.
Zlimousine

How This Report is Organized

The Bus & Coach Manufacturing Industry in North America
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A. SCOPE & METHODOLOGY defines the coverage of the report and outlines the **methodology**, **assumptions** and **sources** used in compiling the research.

B. The **EXECUTIVE SUMMARY** pulls together the study contents into a brief analysis and overview of industry highlights. It also includes recent trends and developments for the industry as a whole.

C. PRODUCT TYPE defines the different bus types that are reviewed in this report. An assessment is made of the **key drivers** impacting **demand** and finally, the analysis is rounded off through a brief evaluation of the main **applications and customers**. Additional details on leading component manufacturers within the industry are included.

D. MARKET ANALYSIS gives **production estimates** for each manufacturer in **units** and **dollars** by type of bus. All leading players and corporate groups within the North American bus industry are covered. This section addresses the **regional nature** of these products, with locations, production numbers and values for each region.

E. ANALYSIS BY PRODUCT TYPE begins with production estimates for each type of bus in **units** and **dollars**. Dollar estimates include the value of body production, chassis and fully integrated units by each manufacturer. This data is then used to provide a **review of the competition** within each product type. Integrally-made buses are further sub-divided into articulated, under 40-foot, over 40-foot, double-decker and others, and school buses are broken out by Types A, B, C, and D.

F. INDUSTRY STRUCTURE is a **tabulation** that correlates **employment**, **plant size** and **sales** at each company, to arrive at a bird's eye view of the underlying industry structure**. Web addresses of manufacturers** are provided as a convenience to users wishing to access additional information on each company.

G. OUTLOOK & FORECAST has projections for each of the product types through 2013, with additional forecasts on the direction the market will take over that timeframe.

H. COMPANY PROFILES, based on a mix of interviews and/or other information, seek to describe company operations in a way that adds immeasurably to the overall understanding of this industry. All identified players in the United States and Canada are featured as a Profile, with the larger, more important companies carrying a higher degree of detail.

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