U.S. Transit Bus Industry: A Value Chain Analysis

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What does it take to compete?

- Nations
- Industries
- Firms
What is a Value Chain?
Geography of a Value Chain

Emerging players

Global leaders

Product designers

Subcontract manufacturers

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Global Competitiveness

Low-Carbon Competitiveness
Manufacturing Climate Solutions

12 Studies

LED Lighting
Solar power
Wind power
Hybrid Trucks

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12th in the Series: Public Transit Buses
Five firms dominate the North American bus industry

- New Flyer: 38%
- Gillig: 27%
- Orion: 18%
- Nova: 9%
- NABI: 6%
- Other: 2%
...but the value chain goes way beyond those five firms.
5 Key Findings

1. Jobs
2. Relevance
3. Demand
4. Technology
5. Synergies
1. Jobs are spread throughout eastern U.S.

25,000-33,000 jobs

many overlap with the heavy truck industry
2. Bus manufacture contribute relevant skills and competencies to U.S. motor vehicle industry
3. To add jobs, main factor needed is predictable investment
4. U.S. leadership in “green” buses can lead the way for innovation in other motor vehicles

- Hybrid electric
- All-Electric
- Compressed natural gas
- Hydrogen fuel cell
- Commercial and military
5. Advances in bus technology offer key synergies in the clean energy economy
Thank you for your attention!

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