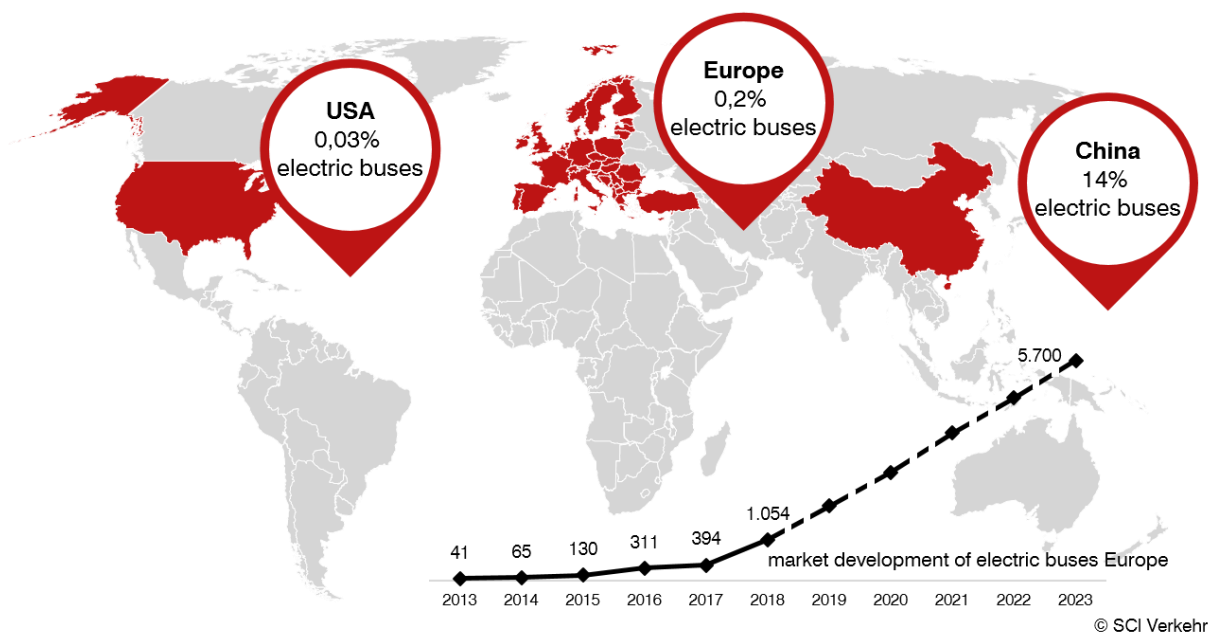


## Europe hesitates to procure electric buses - China shows what is possible

New study on the global bus market

[20.11.2019] Only 0.2% of all buses in Europe are electrified. At 0.4%, Germany is even above the European average, but China shows what is possible: here the share of electric buses is already 14%. Political efforts to promote electric mobility in local public transport are picking up noticeably worldwide. As a result, a great uncertainty can be observed in many markets when it comes to the procurement of new buses - the decision in favour of electric buses still seems to be difficult for many operators. Worldwide sales of diesel buses are also still growing. China, on the other hand, is already focusing on the next technology in electromobility and is increasingly investing in the development of hydrogen fuel cells along the lines of the Japanese model. These are the findings of SCI Verkehr in its latest study "Buses - Global Market Trends".

Share of electric buses in 2018 and developments in Europe until 2023 [%, units]



SCI Verkehr expects the European market for electric buses to grow by 40% by 2023. As in China, political support in Europe is the key driver for the growing implementation of the technology. China has been much more successful than Europe in the last five years. Electric buses already account for 14% of the entire bus fleet here. Shenzhen is the first city in the world where all buses are powered exclusively by battery. Thanks to an intensive subsidy policy, China successfully achieved its electrification targets in 2018 and is already devoting itself to the next propulsion technology: hydrogen fuel cells. SCI Verkehr initially expects further market growth at a high level in China, although a technological change is foreseeable. In Europe, the share of electric buses has remained low so far. Only 0.2% of all buses on

European roads are electrically powered. Operators seem uncertain regarding the purchase of new buses - the acquisition of electric buses is still the exception in 2018.

In the medium term, however, it can also be assumed that the use of electric in the current core markets North America and Europe will increase. SCI Verkehr expects that by 2023, electric vehicles will account for approximately 12% of all orders. In addition to further developments in China, the USA and Europe, SCI Verkehr expects future growth impulses mainly from India and South and Central America. Chile, in particular, emerged as a pioneer in the South American electric bus market in 2018. In general, it can be assumed that further regional markets will follow in the coming years. The most important drivers will be the increasing pollution caused by exhaust gases and the growing sensitivity of politics and the general public to environmental issues. Subsidies are, however, crucial for successful nationwide implementation.

Diesel buses<sup>1</sup> will also continue to develop positively worldwide by an average of 1.5% per year during the forecast period of 2018 to 2023.

SCI Verkehr, a consulting company specialized in the railway industry analyzed the current size, structure and players in the global markets for electric locomotives and drew up forecasts for the next 5 years.

As of now, the MultiClient study „[Buses - Global Market Trends 2019](#)“ is available (in English) from SCI Verkehr GmbH ([www.sci.de](http://www.sci.de)). Also get informed regarding our latest offer in form of the [data annex in excel format](#) which is available since 2017 for all of our published studies.

*Stay up to date on current news and articles concerning the railway industry by following our accounts on these social networks:*



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<sup>1</sup> The buses considered in the study include both city buses and coaches.