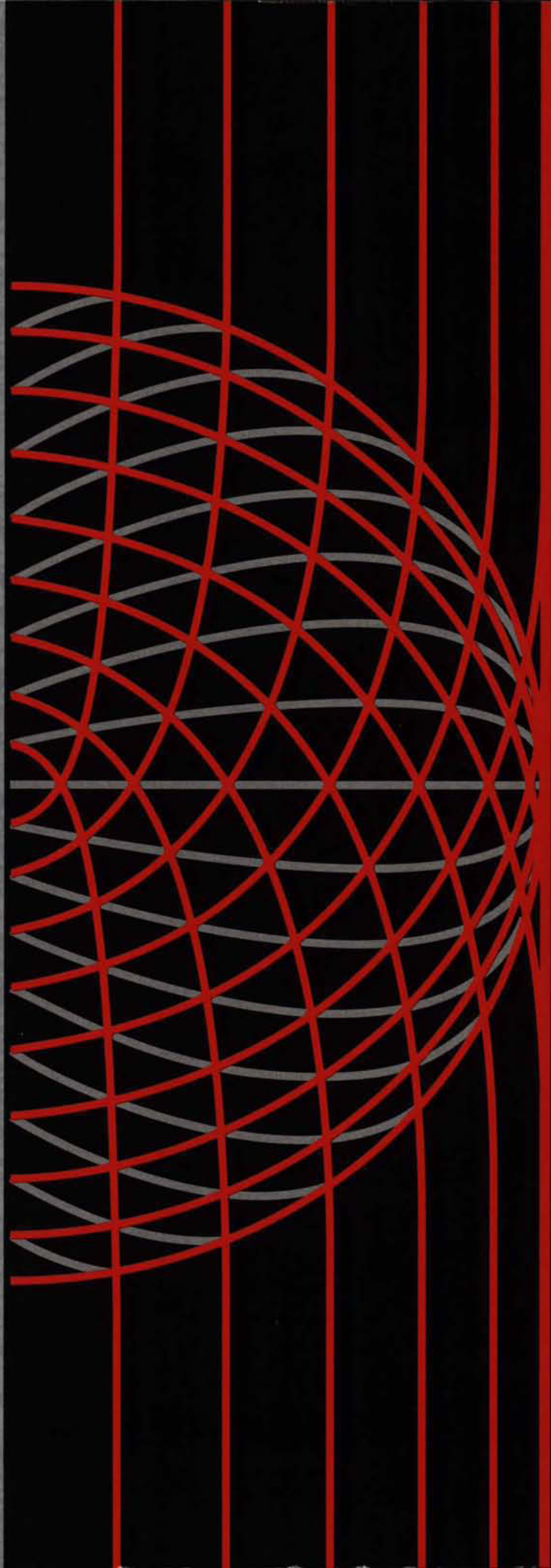


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Urban and intercity Buses

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Canada

1990-1991

URBAN AND INTERCITY BUSES**FOREWORD**

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In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to growth and prosperity. Promoting improved performance by Canadian firms in the global marketplace is a central element of the mandates of Industry, Science and Technology Canada and International Trade Canada. This Industry Profile is one of a series of papers in which Industry, Science and Technology Canada assesses, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological, human resource and other critical factors. Industry, Science and Technology Canada and International Trade Canada assess the most recent changes in access to markets, including the implications of the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the profiles.

Ensuring that Canada remains prosperous over the next decade and into the next century is a challenge that affects us all. These profiles are intended to be informative and to serve as a basis for discussion of industrial prospects, strategic directions and the need for new approaches. This 1990-1991 series represents an updating and revision of the series published in 1988-1989. The Government will continue to update the series on a regular basis.

Michael H. Wilson
Minister of Industry, Science and Technology
and Minister for International Trade

Introduction

The automotive industry in Canada broadly includes the manufacturers both of motor vehicles (passenger cars, trucks, buses and specialty vehicles) and of the parts, tires and tubes that are used as original equipment in the assembly of new motor vehicles as well as for replacement parts and accessories. Most of the industry is rationalized to operate in one market that includes both Canada and the United States.

Automotive activities in 1989 generated slightly over 15 percent of the total shipments of products manufactured in Canada. They accounted for 32.5 percent of all exports of fabricated materials and end products. In 1989, automotive shipments were composed of \$28.1 billion in automobile, truck and bus assembly; \$14.7 billion in parts; \$1.9 billion in specialty vehicles; and about \$1.5 billion¹ in tires and tubes. In the same year, the industry employed 185 200 people.

Of these, 55 500 were involved in assembling automobiles, trucks and buses; 96 500 in parts; 22 700 in specialty vehicles; and about 10 500¹ people worked to manufacture tires and tubes.

This profile deals only with the urban and intercity bus manufacturing industry. In addition to *Urban and Intercity Buses*, industry profiles have been prepared covering

- *Automotive Aftermarket Parts*
- *Automotive Original Equipment Parts*
- *Automotive Tires*
- *Heavy-Duty Trucks*
- *Light Motor Vehicles*
- *Specialty Vehicles*

¹ISTC estimates.



Structure and Performance

Structure

The bus industry consists of manufacturers of two distinct products serving different markets — intercity motor coaches and urban transit buses. Manufacturers of school bus bodies and specialty buses are covered in the *Specialty Vehicles* profile.

In 1989, the bus manufacturing industry employed about 3 200 people and shipped some \$467 million worth of products² (Figure 1). Exports accounted for \$253 million, of which 97 percent went to the United States. Although domestic sources supplied virtually all Canadian bus demand, related imports in 1989 were estimated to be worth about \$105 million, consisting mainly of major components, such as engines, transmissions and axles. These components are sourced primarily in the United States and account for approximately 30 percent of the total cost of producing a bus. Components enter Canada under the conditional duty-free provisions of the Canada-U.S. Automotive Products Trade Agreement (Auto Pact) implemented in 1965. Because the bus industry operates on a rationalized basis in Canada and the United States, it must be examined in a North American context.

There have been practically no exports of finished buses from North America to other countries. The North American bus is generally not suited to conditions in the developing world, as it is too expensive and too difficult to maintain. Most developing countries are capable of manufacturing bus bodies and standard school bus types of vehicles. European intercity coach manufacturers have recently begun to penetrate the U.S. market; however, there have only been a few imports into the Canadian market.

There are five bus manufacturers in Canada: the Quebec-based Prévost Car; the U.S.-owned Motor Coach Industries (MCI), based in Manitoba; Greyhound Canada Inc., based in Quebec; the Dutch-owned New Flyer Industries, based in Manitoba; and Ontario Bus Industries (OBI), with plants in Ontario and New York State. Prévost Car and OBI are closely held Canadian-owned companies.

Because intercity motor coaches and urban transit buses serve different markets, the two subsectors are treated as separate segments of the bus industry.

Intercity Motor Coaches

The Canadian intercity coach subsector consists of MCI's plant in Winnipeg, Manitoba, and Prévost Car, located in Sainte-Claire, Quebec. In 1989, employment was about

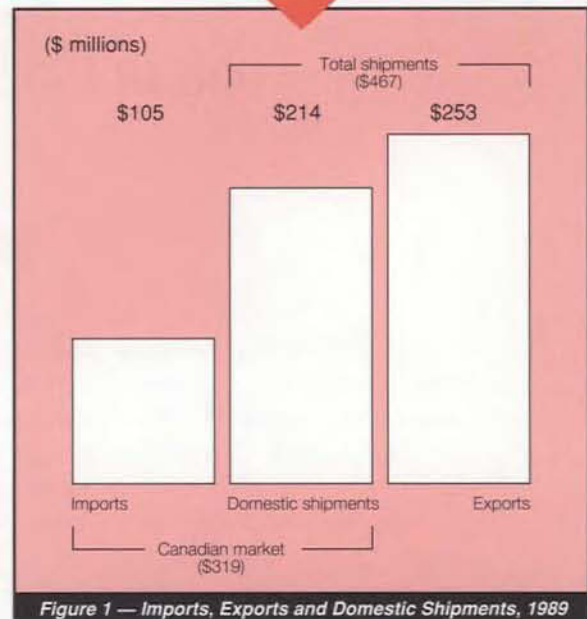


Figure 1 — Imports, Exports and Domestic Shipments, 1989

2 000 people. This subsector in Canada accounts for about half of total bus shipments. Approximately 75 to 85 percent of sales are made to the United States.

MCI and its U.S. affiliate, Transportation Manufacturing Corporation (TMC), both wholly owned subsidiaries of the U.S. Dial Corporation, dominate intercity bus production in North America with two-thirds of the market. In 1987, the Dial Corporation (previously the Greyhound Corporation) purchased General Motors' urban bus manufacturing facilities in Canada and the United States, thereby broadening its product base. This purchase made the company the largest manufacturer of both urban and intercity buses in North America.

The MCI intercity bus plant in Manitoba is part of the company's rationalized North American manufacturing operations. The plant produces coach shells valued at about 40 percent of the completely equipped end product. At full capacity, the Winnipeg plant can produce over 1 000 coach shells yearly (using only one work shift). These are shipped to the United States for final assembly and trim. Some of the completed vehicles are then returned for sale into the Canadian market. The other intercity motor coach producer, Prévost Car, has the capacity to produce 400 coaches annually (using one work shift).

Privately owned carriers are the subsector's principal customers. In addition, publicly funded transit operators purchase some highway coaches for their commuter services.

²Data on the industry are not readily available since, under current SIC codes, buses and parts are combined with automotive statistics. Data used in this analysis are therefore derived from company information and should be taken as indicators, not as precise measurements.



In the past, the majority of TMC and MCI sales were to Greyhound Lines, the largest U.S. carrier and an affiliated company, and to smaller intercity carriers. Trailways, the second major U.S. carrier, purchased its buses from Eagle International, which it owned. The status quo changed in 1987 when TMC's and MCI's owner sold Greyhound Lines to GLI Holdings, a Texas-based investor group, but kept TMC and MCI and its Canadian line operations. Soon afterwards, in 1989, GLI Holdings also purchased Trailways and Eagle International. As a result of these transactions, TMC and MCI no longer had privileged access to a major line operator in the United States.

Prévost Car is not affiliated with any carrier. It sells motorcoaches to independent intercity carriers, charter carriers and special-purpose users.

Intercity bus operators have suffered from the growing popularity of air travel; as airfares fell in response to deregulation, so has bus ridership fallen. Greyhound Lines has sold off much of its intercity bus fleet in the last years.

North American demand for intercity buses has fallen, and manufacturers have seen sales and profits drop. For example, Greyhound Lines, now including Trailways, and Eagle International in 1990 filed for protection from creditors under Chapter XI of the U.S. *Bankruptcy Act*. Only the tour bus market in the United States has grown, but competition has increased with the entry of European producers, who have taken up to 20 percent of this market by offering very luxurious models.

Urban Transit Buses

The Canadian urban transit bus subsector is composed of three major companies: Greyhound Canada Inc. in Saint-Eustache, Quebec, a General Motors facility until 1987, with a production capacity of 1 200 units; OBI in Mississauga, Ontario, 600 units; and New Flyer Industries in Winnipeg, Manitoba, 400 units. Employment in all three plants averaged 1 200 workers in 1989.

Publicly funded transit operators in both Canada and the United States are the subsector's main customers. Canadian companies are capable of supplying a variety of product designs, including those for special purposes such as conveying the physically disabled.

The traditional competitors in the United States have been General Motors (now TMC), Flexible, Gillig, and Neoplan. During the 1980s, there was a dramatic shift in the competitive position of the urban transit bus assembly companies in the North American market. In the early 1980s, GM dominated the market with a more than 50 percent share. Currently, Flexible, Neoplan and TMC each appear to have captured a 25 percent share of the North American market. OBI's market share has

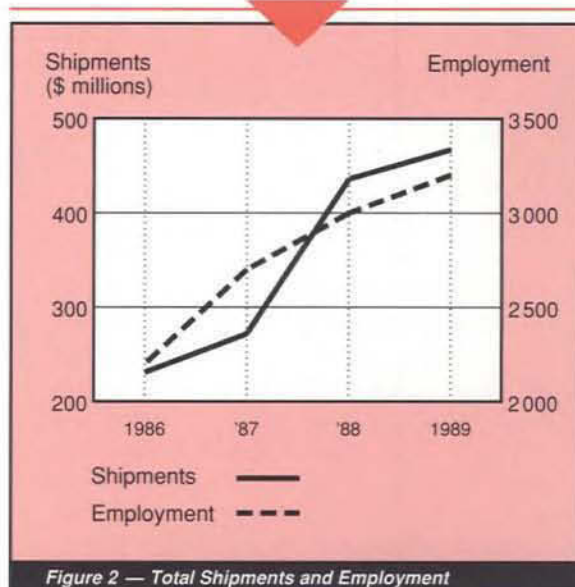


Figure 2 — Total Shipments and Employment

risen to about 15 percent since its inception in 1985. While New Flyer's market share had declined from about 9 percent in the early 1980s, it appears to have recaptured that share by the end of the decade. Since the mid-1980s, nine European producers have entered the market, with most opening U.S. plants to meet the U.S. federal government's "Buy America" requirements (see the "Trade-Related Factors" section). However, the strong competition and a soft market have forced four European companies to close their U.S. plants and exit from the U.S. marketplace.

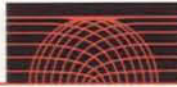
Performance

The Canadian industry's contribution to North American bus production has been significant (Figure 2). After achieving a 34 percent market share in 1982, Canadian production declined to about 26 percent of North American production between 1983 and 1987; then, because of corporate restructuring, the sector was able to regain its 34 percent market share in 1988 and 1989.

The bus industry in North America produced well below its capacity throughout the 1980s. The reasons for this under-use of facilities are different for the two subsectors, but shifts in demand in the U.S. market have had a very direct and dramatic impact on Canadian production in both.

Intercity Motor Coaches

Deregulation of commuter airlines and railroads in the United States has resulted in increased competition among the participants in the intercity coach subsector. Declining demand for coach services and more effective utilization



of existing equipment have reduced the demand for new coaches. Greyhound, the largest carrier in North America, reduced its fleet by 30 percent in 1985. This action released 1 300 units for rebuilding and resale to other companies.

The North American market for intercity coaches averaged 2 200 units per year through the early 1980s, but declined steadily since 1984 to reach about 1 400 units in 1986 and subsequent years. The Canadian market accounts for approximately 200 units annually.

In spite of the overcapacity and weak demand, new entrants continue to exacerbate the pressure on existing producers. Some manufacturers from Europe, such as Neoplan, have entered the U.S. intercity bus market through their U.S. urban bus manufacturing facilities. This influx of producers in the U.S. market is the combined result of weak European demand and a desire to use surplus urban bus manufacturing capacity in the United States, since production lines to manufacture intercity coaches can be added simply and cheaply.

In spite of attempts by European producers to penetrate the U.S. market, MCI and Prevost Car have managed to keep their traditional share of the North American market. In the early 1980s, production capacity utilization in Canada averaged 75 to 80 percent. Despite the downturn in the market since 1985, both companies have remained profitable. In 1989, Canadian plants were producing at approximately 90 percent of capacity.

Urban Transit Buses

The urban transit bus subsector in North America faces a worse overcapacity situation than the intercity bus subsector. Projections for the growth in use of mass transit systems in U.S. cities by commuters seeking to beat rapidly rising gasoline prices and shortages during the 1970s were overly optimistic. As well, cutbacks in U.S. federal funds for transit systems during the 1980s exacerbated this overcapacity situation. North American demand for urban transit buses has steadily declined over the past decade from a 1980 high of more than 5 000 units to a 1989 level of about 3 100 units. The Canadian market demand is about 200 to 250 units annually. However, current North American capacity for manufacturing urban transit buses remains at an estimated 6 000 units.

Since the small Canadian market cannot support three manufacturers, the industry is highly dependent on the U.S. market. Because of the depressed demand south of the border, the urban transit bus subsector in Canada faced declining production in the early 1980s. However, by 1989, urban transit bus production had increased to 1 200 units from a 1986 level of slightly over 600 units as Canadian companies regained market share.

Strengths and Weaknesses

Structural Factors

In this industry, competitiveness is based on the ability to design and produce a product that meets customer requirements for safety, comfort, durability and efficiency. While these factors are critical, it is also necessary for manufacturers to bring their products to the market at a competitive price.

In product development, the Canadian bus industry is competitive within North America and has developed a lead in certain niche areas. Canadian companies have active programs for research and development (R&D) that have allowed them to bring new products to the market successfully at a time of intense competition. These niche areas or new products include low-floor urban transit buses, articulated urban transit buses and intercity motor coaches, vehicles using alternative fuels and buses for the disabled.

The Canadian bus industry, however, could face a challenge from European competitors established in the United States who appear to have a technological lead in the urban bus subsector. In the intercity motor coach subsector, however, it is the North American producers who have a competitive edge. European intercity motor coach technology is geared to producing luxurious but short-lived vehicles for charter operations that are less able to withstand the harsh climatic conditions and long distances characteristic of the North American market. European producers who are not cost effective now are beginning to adapt their buses to North American operating conditions.

Comparative data indicate that Canadian input costs, including wages, parts, materials, etc., are equivalent to those in the United States. Canadian producers, however, contend that labour costs have become relatively higher than those in the United States in recent years.

Process technology is becoming a more decisive factor as new competitors from Europe continue to exert downward pressure on prices. All Canadian plants are investing in manufacturing technology improvements, which will play an important role in reducing manufacturing costs.

Trade-Related Factors

The 1991 Canadian tariff on buses is 6.3 percent for those imported from the United States and 9.2 percent for those from countries having Most Favoured Nation (MFN) status with Canada. In the United States, the tariff for Canadian as well as MFN imports is 3.1 percent. Tariffs in the European Community average 20 percent. Japan has a zero tariff rate for buses. Most developing countries have tariffs on buses.



Under the terms of the Auto Pact, Canada extends conditional duty-free entry to qualified manufacturers of buses and parts from all countries, subject to certain performance-related requirements. The principal requirements include a production facility in Canada and a specified minimum level of Canadian and American value-added. The United States, on the other hand, restricts duty-free access to buses and original equipment parts originating only in Canada and containing at least 50 percent North American value-added. As all Canadian bus manufacturers meet the requirements, their products enter the United States duty-free. The ability to import components and to export buses free of duty considerably enhances the Canadian manufacturers' price competitiveness.

Although tariffs have not been a major factor in trade between Canada and other developed countries, non-tariff barriers, such as procurement policies favouring local firms or specifications listing special requirements, are a significant impediment to Canadian exports. These barriers, together with strong indigenous industrial capacity, have virtually closed European and Japanese markets to Canadian producers. In the United States, government procurement policies, which apply to federally funded purchases (such as purchases by transit authorities, municipalities, etc.) have been a major barrier to Canadian producers, overriding many of the benefits of the Auto Pact. This is especially the case for companies in the urban transit bus subsector.

In 1978, the United States passed the *Surface Transportation Assistance Act* (STAA). To encourage the acquisition of U.S.-made transit vehicles, "Buy America" provisions contained in the legislation require transit authorities who wish to receive U.S. federal government funding to respect certain conditions calling for U.S. final assembly and a statutory level of U.S. content. These provisions can be waived only under certain stringent conditions.

In 1987, amendments to the legislation under the *Surface Transportation and Uniform Relocation Assistance Act* tightened the "Buy America" provisions. These raise progressively the content requirement from 50 to 60 percent and limit the use of the most common waiver to occasions where the purchase of foreign goods results in a 25 percent or better cost savings, up from 10 percent. Companies already meeting "Buy America" requirements, including the major Canadian suppliers, are not subject to the new local content levels until 1992.

In addition to the above, U.S. procurement legislation and practices commonly set aside many procurement contracts for U.S. small businesses (frequently defined as up to 1 500 employees) and for minority-owned companies.

The Canadian federal government, unlike the U.S. federal government, has no non-tariff trade barriers. Some provincial

governments, however, have their own procurement requirements, which are similar to those of some U.S. states.

Under the Canada-U.S. Free Trade Agreement (FTA), bilateral tariffs on buses are to be phased out in 10 equal, annual steps ending in 1998. The Canadian provisions of the Auto Pact remain unchanged, although only those companies now listed in the FTA are able to participate. Companies participating in Canada must continue to meet Auto Pact performance requirements to retain eligibility for duty-free imports from third countries after tariffs are phased out. Canada has also agreed to end the prohibition on the entry from the United States of used or second-hand buses over a five-year period ending in 1993.

Technological Factors

Canadian companies have been active in the development of new bus designs and have a lead in certain niche areas. All companies have active R&D programs and Canadian producers offer a range of products. Those products include a popular coach design 2.6 metres (8.5 feet) in width, which has become the standard intercity coach size, as well as articulated intercity and urban buses. Also available are products for specific segmented market niches, such as buses using alternative fuels and specialized buses for physically disabled people.

The market for entire buses is stable, so the thrust of future technology will be primarily in the parts segment. Most major innovation is taking place in the high-value-added, high-technology components such as engines, transmissions and axles, where Canada lacks domestic suppliers. R&D work in this country centres on new modular bus designs and on the use of advanced materials. The goal of future R&D efforts by the bus producers will be to increase quality and lower production costs. Development is already under way in the integration of product design and manufacturing. Product design is also focusing on new bus designs to incorporate new engines powered by methanol, propane or compressed natural gas. Major new product introductions, however, have been infrequent and, when they have occurred, the innovations have diffused quickly throughout the industry.

Other Factors

The industry has expressed concern about the relatively higher value of the Canadian dollar in recent periods vis-à-vis the American dollar (Figure 3). On the other hand, under certain economic conditions, it is widely recognized that a significantly lower value is likely to be inflationary. The resulting higher domestic costs and prices can erode, over time, the short-term competitive gains of such a lower-valued dollar.



Evolving Environment

The North American bus industry faces intense competition in what has largely become a replacement market. With a Canadian market too small to support it, the survival of the Canadian bus industry will continue to depend on access to the U.S. market. Several pieces of U.S. legislation, however, will have a significant impact on that market.

The *Americans with Disabilities Act* of 1990 is causing concern for manufacturers because it is not known when it will come into effect and exactly how it will be applied. The Act requires wheelchair accessibility for all new intercity motor coaches as well as urban transit buses and bus stations. A three-year study, to be completed in 1993, is under way by the U.S. government to define how the Act will be implemented. The resulting regulations are expected to significantly increase the cost of a new bus.

Regulation of vehicle emissions under the *U.S. Clean Air Act*, to take effect in 1993, could cause a dramatic fall in the demand for new buses as transit operators wait for new diesel engines that meet the required emission levels. These engines are not expected to be developed by manufacturers until 1994. Legislation requiring the use of buses that use alternative fuels will also be in effect by 1993. In Canada, emission legislation governing buses is under consideration.

In early 1990, the U.S. Secretary of Transportation announced a National Transportation Plan that involves all segments of public transit. The plan is needed because of the lapse of the *Surface Transportation Assistance Act* of 1964 on 30 September 1991. The Act provides the basic policy and financial focus for the U.S. federal government's role in urban transportation and mobility. Combined with the National Transportation Plan, the renewal and revision of this Act will affect the role of public transit, and consequently the market, well into the next century. The changes will probably also affect funding priorities and reduce subsidy levels to U.S. transit authorities.

The FTA is not expected to have a major impact on this industry in the short to medium term. The removal by 1993 of the Canadian ban on the importation of used buses could have a competitive impact on the intercity motor coach market in Canada by providing a cheaper alternative for Canadian buyers. In the longer term, as tariffs decline, increased competition in the North American market can be expected.

The Internal Market Program of the European Community, commonly known as EC-92, is expected to affect the U.S. bus market by adding to the already severe competitive environment

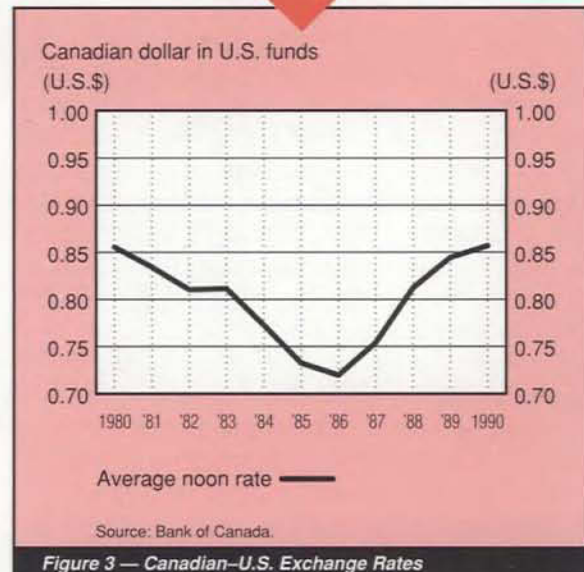


Figure 3 — Canadian-U.S. Exchange Rates

faced by Canadian manufacturers. Most European countries have extensive production overcapacity, which will probably encourage rationalization and a search for new markets.

The current round of multilateral trade negotiations (MTN), the possibility of a Mexico-U.S.-Canada free trade agreement, and the economic reordering of the Eastern European bloc of countries are not expected to have any significant impact on the Canadian bus manufacturers in the near to medium term.

Intercity Motor Coaches

Deregulation of all aspects of transportation will continue to affect the intercity motor coach market. Among the changes deregulation has fostered is a trend towards wider, more comfortable and luxurious vehicles that can compete against other transit modes. North American bus manufacturers face growing competition from U.S.-based European entrants who have traditionally produced luxurious vehicles and who are now adapting them to the requirements of the North American market. The Chapter XI filing of Greyhound Lines and its bus manufacturing subsidiary, Eagle International, in the United States shows how restructuring of the transportation service sector can affect even the largest carriers.

Deregulation has resulted in the entry of new charterers and small carriers. This situation could present additional opportunities to Canadian manufacturers, who are able to respond to these specialized markets.

"Buy America" provisions are not expected to have a major impact on most firms in this subsector, as only a small percentage of sales of intercity motor coaches are for commuter



or transit services. Nevertheless, some Canadian manufacturers will be unable to sell to these U.S. markets because of these requirements.

Urban Transit Buses

The urban transit bus subsector will continue to operate under conditions of overcapacity, which is aggravated by the building of assembly facilities by the European suppliers in the United States. Demand in Canada and the United States is expected to remain constant at about 3 100 units annually in the short term. In the United States, demand is anticipated to be depressed in the short term because of uncertainties about the continuation of federal financial aid to transit authorities and about environmental and other legislation. In both countries, however, the medium-term outlook is brighter. The urban transit bus fleet serving North American cities is aging and, at some point, new buses will have to be bought. Therefore, demand should increase over the medium term to the level of 350 units per year in Canada and 3 500 units per year in the United States. As this will still be below total North American capacity, continued rationalization of the urban transit bus segment is inevitable.

Other changes taking place in the marketplace will have an impact on how Canadian companies do business. Pressure is being put on U.S. transit authorities to encourage private sector involvement by contracting out the provision of urban and commuter bus service. Private companies or individuals would lease the buses from the municipalities and would be responsible for repairs and maintenance. If this occurs, all bus producers would face a multitude of influential new operators, who would have an impact on purchasing decisions.

In this environment of overcapacity and intense competition, niche market strategies and joint-venture arrangements will become increasingly more important.

As the U.S. "Buy America" requirements become more stringent, Canadian manufacturers will be under greater pressure to increase production in U.S. facilities. All three urban transit bus manufacturers have already opened plants in the United States.

Canadian bus manufacturers have proven their ability to compete in the U.S. market against traditional U.S. suppliers. Canadian strengths lie especially in sales to targeted market segments. Aside from these niche markets, it is expected that Canadian producers will continue to face strong competition in the North American market, both from companies already participating and from overseas producers who may wish to set up North American operations. In a situation of severe North American overcapacity, it is expected that the restructuring of the North American industry will continue. While Canadian manufacturers are expected to remain competitive in the U.S. market, state and federal legislation regarding content levels (e.g., "Buy America" provisions) will challenge Canadian producers of urban buses.

For further information concerning the subject matter contained in this profile, contact

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Competitiveness Assessment

The Canadian urban and intercity bus manufacturers are competitive in the North American marketplace. However, the industry in Canada will continue to depend for its survival on exports to the United States, where non-tariff barriers continue to be a major concern.



PRINCIPAL STATISTICS^a

	1986	1987	1988	1989
Establishments	5	5	5	5
Employment	2 200	2 700	3 000	3 200
Shipments ^b (\$ millions)	231	272	436	467
(units)	935	1 435	1 825	2 335

^aData used in these statistics are ISTC estimates derived from company information. Numbers should be taken as indicators, not as absolutes.

Data prior to 1986 are not available.

^bAverage price per unit decreased since 1986 due to steadily reducing bus specifications reflecting decreases in U.S. federal funding levels.

TRADE STATISTICS

	1986	1987	1988	1989
Exports ^a (\$ millions)	107	143	242	253
Domestic shipments (\$ millions)	124	129	194	214
Imports ^b (\$ millions)	129	83	116	105
Canadian market (\$ millions)	253	212	310	319
Exports (% of shipments)	46	53	55	54
Imports (% of Canadian market)	51	39	37	33

^aExports are finished buses and bus shells.

^bSince 1988, imports consist of completed urban and intercity buses intended for the Canadian market and certain powertrain components.

SOURCES OF IMPORTS^a (% of total value)

	1986	1987	1988	1989
United States	97	95	95	95
Hungary	3	5	5	5

^aFrom the United States: Powertrain components and highway motor coaches. From Hungary: Articulated joint assembly and completely knocked down (CKD) kits for urban buses.



DESTINATIONS OF EXPORTS (% of total value)

	1986	1987	1988	1989
United States	100	100	97	97
Sweden	—	—	3	3

REGIONAL DISTRIBUTION (average over the period 1986 to 1989)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	—	40	20	40	—
Employment (% of total)	—	35	15	50	—

MAJOR FIRMS

Name	Country of ownership	Location of major plants
Greyhound Canada Inc.	United States	Saint-Eustache, Quebec (UTB)
Motor Coach Industries Limited	United States	Winnipeg, Manitoba (IMC)
New Flyer Industries Ltd.	Netherlands	Winnipeg, Manitoba (UTB)
Ontario Bus Industries Ltd.	Canada	Mississauga, Ontario (UTB)
Prévost Car Incorporée	Canada	Sainte-Claire, Quebec (IMC)

(IMC) Intercity motor coaches

(UTB) Urban transit buses

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SECTORAL STUDIES AND INITIATIVES

The following study is available from the Canadian Urban Transit Association.

The Transit Supply Sector in Canada

ISTC funded this study in conjunction with the Canadian Urban Transit Association. The report, completed in March 1990, presents a synthesis of the total value of goods and services produced by the transit supply industry.

Printed on paper containing recycled fibres.

