Busworld Turkey breaks new ground

The 7th edition of Busworld Turkey broke with previous practice and moved from Istanbul to the country’s third largest city, Izmir, on the Aegean. It was a very successful event, dominated by domestic manufacturers and suppliers but with plenty to interest international visitors. In fact, there were 115 exhibitors from 18 countries.

Some people in the industry were sceptical about the move from Istanbul. In fact, the net surface area was 10,500 sq m, a little larger than the last Busworld Turkey in Istanbul.

A total of 10,040 visitors came from 107 countries. They and the exhibitors enjoyed the excellent facilities of a brand new exhibition centre.

It was clear from the start that Busworld Turkey would be a great success. Busworld and its local partner, HKF Trade Fairs, were particularly pleased that business was being conducted all over the Fair, including sales of new buses, and many negotiations resulting in new contacts.

The Turkish industry is fascinating. Its manufacturers rely heavily on imports of most mechanical units, including engines, automatic gearboxes and specialised axles. Countering that, Turkey has developed a supply industry that is very strong on components for integral vehicles and bodywork, including doors, seats, entire dashboard assemblies, lighting and air conditioning. All those suppliers were well represented at Busworld Turkey.

Registrations of buses and coaches in the Turkish market have been volatile in the last three years, totalling 8,587 of all sizes in 2015, 10,837 in the following year, and then 10,369 in 2017. However, in the critical segment for larger buses and coaches, they fell from 2,942 in 2015 to 1,859 last year. These numbers are due to several factors, including a failed coup in 2016, and severe turmoil over Turkey’s southern borders in Syria and Iraq.
Public funding for new city buses has been cut — a familiar story in many countries — and the coach industry was hit by a downturn in tourism, although that is showing signs of recovery this year. Fortunately, Turkish manufacturers are very innovative and have responded to market requirements with a number of new models that were launched at Busworld Turkey.

Production in Turkey is another story, reaching 66,934 units in 2017, the highest ever. The country is a major manufacturer of buses and coaches of all sizes, with very strong export activities, and those volumes have continued to expand. Minibuses dominated the figures with 55,036 units, almost all built by Ford.

OSD, the Turkish association for vehicle manufacturers, follows the normal Turkish practise of measuring the value of exports in USD. Last year, they came to USD1,528,803,235! This was the second highest value on record. The actual production numbers should be slightly higher, because OSD only counts production and sales by its members. They do not count exports by Guler, or the many conversions built on imported Mercedes-Benz and Iveco vans and chassis cowl, where there is considerable Turkish content in the bodywork, before being delivered abroad.

Turkey benefits from its unique geographical location, spanning Europe and Asia, but also close to the Middle East and North Africa. It is by far the largest manufacturing country in the region. There is a good supply of skilled workers and an excellent higher education system.

At one time, Turkey was two or three steps behind the European Union in terms of vehicle emission limits, but most of the manufacturers offered models that complied with EU standards. To some extent, this was helped by engine suppliers like Cummins, which now claims to meet around 50% of the Turkish demand for engines in medium and heavy vehicles. Turkey now meets the same emission standards as the EU.

Turkey has a very strong supply industry, particularly for components for integral vehicles and bodywork. They can meet the quality standards of the most demanding multi-national vehicle manufacturers, with an excellent reputation for innovation. Many of their latest products were on display at Busworld Turkey, attracting not only domestic but also international visitors.

Busworld Turkey was unique. It could have been a national exhibition, but it attracted so many other visitors that it was a truly international fair. The event was helped by the excellent new exhibition facilities in Izmir and the general buzz of bus business.
Turkish plans for electric drives

All over the world, there has been a rapid increase in development of electrically powered vehicles and a steady increase in demand and orders for them. In some major cities there is deep concern about air quality and this has not been helped by political demonisation of diesel, including ignorance of the latest very clean emission standards. Buses are a logical candidate for electric drive because they work all day in urban centres and return at night to the same depot where they can be recharged.

China has been the leading exponent of electric buses with several factories and large numbers in service. Over the last five years, battery technology has improved by leaps and bounds so that more energy can be stored in lighter batteries, enabling buses to operate all day on a full electrical charge. BYD has been the leading manufacturer, with a growing presence in many export markets but is by no means alone.

The alternative to all day operation on a full charge is opportunity charging, typically at the end of each route, and taking around five minutes. Buses can then be fitted with fewer batteries, saving weight and enabling more passengers to be carried. However, with the continuing development in battery technology, opportunity charging might be a short-lived phase. Major cities have already ruled out opportunity charging because of the number of gantries that would be required.

Turkish manufacturers have been closely involved in the development of electric buses. Otokar launched the Vectio Electra at Busworld Turkey back in April 2012. It was the first all-electric bus built in Turkey, with a length of just over 9 metres and a range of up to 280 km in ideal conditions. The Electra used high security lithium-iron magnesium phosphate batteries.

This prototype bus was trialled in more than 20 cities but the company decided to suspend development until quite recently. At Busworld Turkey, Otokar said that it is now working on a prototype 12-metre city bus that it hopes to demonstrate later this year.

Temsa was next, launching its MD9 ElectriCity midibus in June 2015. It had a range of 150 km on a full charge, so it needed additional opportunity charging during the day. An interesting feature of this vehicle was that the batteries were mounted as low as possible to assist the centre of gravity.

Coming right up to date, at Busworld Turkey in Izmir, BMC and Güleryüz added to the list of Turkish electric bus builders. BMC launched the 8.5-metre Neocity Ev midibus that had a range of 275 km on highway and 210 km in typical city traffic. It had a 235 kW electric motor, a full low floor layout and a comprehensive interior specification. Full recharging of the batteries took seven hours.

Güleryüz builds the Cobra range that includes midibuses, full size single deck and double deck city buses. The company has successfully developed a niche market for open top sightseeing versions of its double decker.

Two all-electric models were exhibited, namely an 11-metre low floor single deck bus and an all-electric double deck sightseeing bus.

The DDB makes sense because sightseeing buses are often used in historic and congested city centres where there are air quality issues.

At present, bus operators are being cautious about ordering all-electric buses but several European cities have bought relatively small numbers to understand the technology and the maintenance requirements, including recharging infrastructure. The largest numbers of all-electric buses are now in London and the Netherlands.

It has been predicted that many more European tenders for electric buses will be issued by 2020. That is excellent timing for the Turkish manufacturers to have proved their technology and to be ready with a range of models.
Otokar on an export roll

Otokar had a strong presence at Busworld Turkey. The company said that its exports were growing strongly, reaching USD149m in 2017, an increase of 14% on the previous year.

The city bus range is now extensive, right up to articulated versions of the popular full low floor Kent. Otokar almost monopolises the local bus market in Malta having delivered more than 200 units in the last three years. Many of those are Vectio midibuses that are ideally suited to Malta’s narrow and, at times, steep roads.

More recent deliveries were 12-metre Kent buses, bought to serve the busiest routes. The entire fleet in Malta has Euro VI engines, fully automatic gearboxes, air conditioning and CCTV.

Sales in Europe are going very well and steadily increasing. The Navigo midicoach has found a niche, while the larger Vectio range can be offered either as a midicoach or as a low entry bus for local services. The Kent city bus has broken into several markets while the Territo is a multi-purpose coach, available at 12- or 13-metre length. The latter model can carry up to 86 passengers and is popular in the French school bus sector.

Earlier this year, Otokar won a massive order, valued at EUR983m, to deliver 400 buses to Bucharest Municipality. It was said to be the largest single bus order ever secured by a Turkish manufacturer and included a mix of 10-, 12- and 18-metre models with deliveries starting this summer. Otokar will be responsible for all aftersales services for eight years. Little more than one month later Otokar secured another significant order. This came from Greater Amman Municipality which is modernising its bus network. This order called for 40 12-metre Kent and 60 10-metre Vectio midibuses. All will be low floor and will have comprehensive specifications.

At the signing ceremony with Bucharest, Serdar Görgüç, General Manager of Otokar said: “Our vehicle parc continues to grow by the day in Western Europe as well as Central Europe, Middle East and North Africa regions. We carry out important research and development activities to produce the most innovative, well-equipped and environmentally friendly vehicles and contribute to modern cities. Every year we allocate around 4 per cent of our revenues for Research and Development.”

BMC had an impressive display

BMC booked the largest stand area -3,000sq m - at Busworld Turkey and put on an impressive display of vehicles and entertainment. The latter included a variety of top class performers, all attracting visitors to BMC after its two year absence from the market.

There were several vehicles on display. The highlight was the Neocity Ev electric midibus but the company also showed its larger low floor Procity range that can be powered by Euro VI Cummins diesel or CNG engines and the Apron. As the name suggests this vehicle is designed for passenger transfers at airports.

BMC has been totally restructured and has new Qatari and Turkish investors. The main factory is at Pınarbaşı, just to the east of Izmir. The company said that it was completely re-organising the plant and production systems, including the introduction of robots for some processes. It will also invest in a cataphoretic dip anti-corrosion (KTL) treatment system capable of taking structures up to 15-metres long.

Bus production is currently in a smaller facility nearby but will be moved into the main plant to make use of the new equipment and corrosion treatment. All BMC buses have complete integral structures and they will be guaranteed against corrosion for 15 years. The company said that it plans to introduce five new bus models in 2018.

BMC is a very important manufacturer of military vehicles including tanks, heavy armoured vehicles, on tracks or wheels, and lighter armoured support vehicles. The company has bought a new site and has started construction of a factory that will open in 2020 to build military vehicles. It also plans to build metro and light rail vehicles in this plant.
Busworld Russia reports strong bookings

Busworld Russia will be held in the Crocus Exhibition Centre in Moscow from 23 to 25 October.

Recently, the Russian Ministry of Industry and Commerce predicted a 10% growth in the overall automotive industry in 2018. Cars accounted for the highest growth rate. Sales and production of buses are predicted to rise by 0.8% to 12,500 and 13,300 units respectively. Many of these are smaller buses up to around 30 seats capacity, used on a wide variety of applications.

Although the predicted increase is light, there is significant investment in heavier city buses, especially in the Moscow region. Within the last few weeks, Mosgortrans, the Moscow city bus operator, placed two contracts, each valued at RUR6.35bn with LiAZ and KamAZ each to build 100 full size low floor electric city buses, due to be delivered before the end of 2018. Both manufacturers will be responsible for installation and upkeep of 62 fast charging stations and the maintenance of the vehicles for a 15-year life.

These second generation Russian electric buses will have electric portal axles and lithium-titanate batteries which take only 10-20 minutes to recharge, about ten times faster than the previous generation. The batteries are designed for 20,000 cycles of charge and discharge and are able to be recharged at very low temperatures.

At the beginning of June, Mostransavto placed orders with LiAZ for 615 buses. There will be 540 Voyage intercity coaches on Scania chassis, similar to those that were initially built for the Winter Olympic Games in Sochi in 2014. The other 75 vehicles will be LiAZ-5292 low floor city buses designed for routes with intensive passenger traffic. These 12-metre buses will have capacity for 94 passengers.

Although sales are dominated by the very powerful GAZ Group, significant numbers of international manufacturers have booked space at Busworld Russia, including several from China, also Western European bus builders and major component suppliers.

We will bring more information about Busworld Russia in the next edition of the "Busworld Times".

Moscow wants to replace some trolleybuses with full electric wireless buses.

The latest style LiAZ low floor city bus.

A Scania chassis with a GAZ Group interurban body.
Busworld India being held in late augst

Busworld International and its Indian partners, InterAds Ltd, are busy making plans for Busworld India which will be held in the southern city of Bangalore (Bengaluru) from 29 to 31 August.

This eighth edition of Busworld India is being fully supported by the Association of State Road Transport Undertakings and the Bus Operators Confederation of India, the two most influential trade associations in the Indian bus and coach market.

India is a massive market that is normally second in the world after China. Sales and production years for domestic manufacturers run from 1 April to 31 March. In the year 2016/17, sales of buses and coaches above 7.5 tonnes gross reached 47,262, a rise of 7.6% over 2015/16. In the same period, sales of light buses and coaches climbed to 50,864, compared with 48,936 in 2015/16. These are very significant volumes and do not include imports.

There have been tremendous advances in vehicle specifications, driven by safety regulations and more strict emission limits. The construction of bodywork has to meet regulations that are based upon the European Bus Directive, so that has meant the demise of many small traditional bodybuilders who frequently worked in timber.

India has also followed Europe on engine emission limits. The Bharat Standards are based on Euro limits but their imposition has followed several years behind Europe. The Supreme Court decided in March last year to ban the sales of all new commercial vehicles that had engines meeting BSIII. That caused a sudden slump in sales, bus BSIV became the standard from that time.

The Government has now proposed that BSIV vehicles cannot be sold after June or September 2020, depending on type. That will be a major challenge for Indian manufacturers and fuel companies, ensuring that European standards of diesel fuel are available all across the sub-continent.

Both the Central Government and some of the State Governments are taking measures to combat congestion and pollution. That has lead to the limited introduction of hybrid buses and even to some that are totally electric. For instance, Bangalore has trialled BYD electric buses since 2014 and decided to invest in 150 in November 2016.

In recent years, a new market segment has appeared, for smaller buses designed specifically for school transport. They have a number of safety features, internally and externally.

The intercity coach market has also grown rapidly, due in part to major investment in long distance highways. This business is dominated by European style coaches, built by MAN, Mercedes-Benz, Scania and Volvo, plus some local manufacturers who offer competitive standards.

Traditionally, exhibitors tend to commit fairly late in the day to taking space at Busworld India, but we will bring you more information on the next edition of the “Busworld Times”.

Isuzu fills a midibus gap

Anadolu Isuzu is one of the best known builders of midibuses and midicoaches in Turkey. Traditionally, they had compact Isuzu engines mounted vertically above the front axle. These simple vehicles remain available and are widely sold in Turkey and export markets.

More recently, Isuzu has introduced a range of low entry midibuses and a full size low floor city bus. As domestic customers started to feel constrained on capital spending, Isuzu combined its knowledge of low floors and medium vehicles to introduce the Novociti Life.

This is an 8-metre low floor midibus with an FPT NEF4 4.5-litre engine mounted vertically in line at the rear. It has the same styling as the larger low floor buses and its “big bus” specification includes full air suspension, disc brakes and an Allison fully automatic gearbox with the option of a ZF manual unit. The first significant order, for 80 units, came from the city of Bingol, in central eastern Turkey.

Isuzu reported that the low floor and highly attractive operating costs appealed to customers in Turkey and the company’s international markets. Low floors help passengers to get on and off more quickly and that enables faster journey times and greater productivity.