

Clean Bus Market in India: Hybrid, Electric, Gas-Based

Segment Overview, Outlook and Market Opportunities

Key Takeaways

- ❖ The last few months have seen a lot of activity in the clean bus market.
- ❖ Cities such as Mumbai, Hyderabad, Navi Mumbai and Pune have tested the waters with the deployment of electric and hybrid buses.
- ❖ High cost of clean buses continues to be a deterrent for deployment; Financial capacity of STUs also an area of concern.
- ❖ That said, the per km-based gross cost model will be preferred since the STUs are not in a position to bear the cost of ownership.
- ❖ Development of charging infrastructure is an area that needs attention. The power sector has to gear up for the new demand in terms of charging infrastructure as well as adequate supply of power.
- ❖ On the policy side, consistency is required. The government is working towards introduction of a dedicated policy on e-mobility which is expected to facilitate greater deployment of clean vehicles.

Industry Perspective

- ❖ Battery-operated electric buses as the most suitable and feasible for the Indian scenario
- ❖ Non-fiscal incentives in the form of tax waivers and GST reductions will act as long term incentives for both STUs and manufacturers.
- ❖ Claims of aggressive bidding have been made following the recent round of bidding for 11 cities under FAME.
- ❖ Experts believe that aggressive bidding has been done to prevent the Chinese manufacturers from flooding the market.

Segment Outlook

- ❖ As per industry estimates, close to about 150,000 buses are available for refurbishment/replacement. This number is indicative of the current maximum potential for the deployment of clean buses.
- ❖ Besides, the government estimates, the additional bus requirement for urban areas to be about 318,000 units and that for inter-city travel to be about 327,000 in the next three to four years
- ❖ Smart city projects will also offer substantial opportunity for deployment of clean buses.

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