Connected Infrastructure for Electric Buses

3rd Edition

Connected Infrastructure for Electric Buses is the third consecutive report from Berg Insight analysing the latest developments on the intelligent transportation system and charging station market for public transport in Europe and North America. This strategic research report from Berg Insight provides you with 250 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.

Berg Insight™

The market for ITS solutions and charging stations for electric buses in Europe and North America to reach € 2.0 billion by 2029

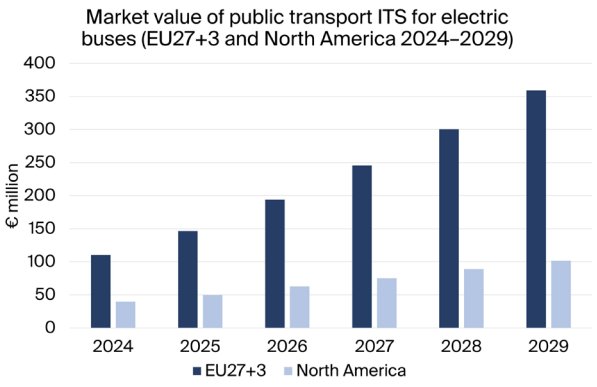
The number of battery-electric buses has grown significantly in the last years. Berg Insight estimates that the number of electric buses in Europe and North America increased from about 1,000 in 2016 to around 31,000 in 2024. The growing fleets of electric buses have created new challenges for public transport operators and agencies. Limited driving range and the need to integrate charging stations have expanded the demand for intelligent transport systems (ITS) that bring together all the necessary infrastructure, including electric buses, charging stations and depots. The term ITS refers to information and communications technology applied to transport infrastructure and vehicles. Berg Insight's definition of ITS for public transport for the purpose of this report includes systems for communication between dispatchers and vehicle operators, automatic vehicle locator systems and automated dispatching systems. Other associated back-office IT systems are also part of the definition, including depot management, driver monitoring, scheduling and planning tools for vehicles and personnel, vehicle maintenance and charging station management software.

Berg Insight is of the opinion that the market for ITS solutions for electric buses is in a growth phase which will last for several years to come. Mega-challenges such as urbanisation, climate change and traffic congestion continue to encourage investments in electric buses and ITS, contributing to a positive outlook for the market. The increased energy prices following Russia's invasion of Ukraine and the supply chain issues following the COVID-19 pandemic have had limited adverse effect on the electrification of public transport. The total market value of public transport ITS for electric buses in Europe is forecasted to grow at a compound annual growth rate (CAGR) of 27 percent from € 110.4 million in 2024 to reach € 359.1 million by 2029. Vehicle and driver monitoring software as well as vehicle gateways are together estimated to account for € 30.7 million of the market value in 2024, while the corresponding number for charging station management software is € 21.5 million. In North America, the total market value of ITS solutions for electric buses is forecasted to grow slower at a CAGR of 21 percent from € 39.7 million in 2024 to reach € 101.6 million in 2029. The US administration has reduced its support for the transition to electric transportation which is expected to affect growth in the US in the coming years. Vehicle and driver monitoring software and vehicle gateways are estimated to account for € 10.5 million of the market value in 2024, while the corresponding number for charging station management software is € 7.9 million.

Some ITS players offer complete turnkey solutions including functionality for most of the ITS applications for electric buses utilised by public transport operators, but many vendors on the market are also specialised ITS players focusing on a few subsystems. Major international ITS players such as INIT, IVU, Trapeze and Clever Devices can provide complete turnkey solutions. IVU has customers mainly in Europe, while Clever Devices, INIT and Trapeze have stronger presence in North America. EQUANS is also a major global player and its CAD/AVL systems have been installed on electric buses both in Europe and North America. ViriCiti has been one of the leading telematics providers for electric buses, before it was acquired by ChargePoint in August 2021. The company now offers hardware and software for the management of buses and charging stations under the ChargePoint brand, which additionally has a comprehensive portfolio of charging hardware and software. Other important providers serving public transport companies with different types of solutions for electric buses include the Scandinavian companies Consat Telematics, FARA and Saga Tenix. The Canadian company GIRO is an important player in the scheduling and planning segment, while PSI Transcom is a prominent provider of depot and charging management software in Europe.

Most of the bus OEMs on the market offer conventional telematics solutions, but the strategies in the area of electric bus specific solutions vary between the players. The European market for electric buses is served by a variety of manufacturers. The Chinese company Yutong reached the highest number of registrations in 2024, followed by Mercedes-Benz, Wrightbus, Iveco Bus, BYD, Solaris and Traton Group. In North America, New Flyer holds a dominant position and other notable players include Gillig, Phoenix Motor, BYD and Nova Bus.

Charging stations play a significant role in the electrification of bus fleets. Berg Insight estimates that the charging station market value for buses in Europe and North America is estimated to have reached over € 500 million in 2024. Growing at a CAGR of 24 percent, the total market value is expected to reach € 1.5 billion in 2029. A group of vendors have emerged as leaders on the market for bus chargers. Examples of major charging station providers in the market for bus charging include ABB E-mobility, BTC Power, Camber, Efacec, Ekoenergetyka, IES Synergy, Kempower, SBRS (Shell Group) and Siemens (together with Heliox).



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New data on electric bus fleets in Europe and North America.

Comprehensive description of the electric bus ITS value chain and key applications.

Profiles of 23 aftermarket ITS solution and 16 EV charging hardware vendors.

Summary of 23 OEM propositions from electric bus brands.

Case studies of 12 electric bus initiatives.

In-depth analysis of market trends and key developments.

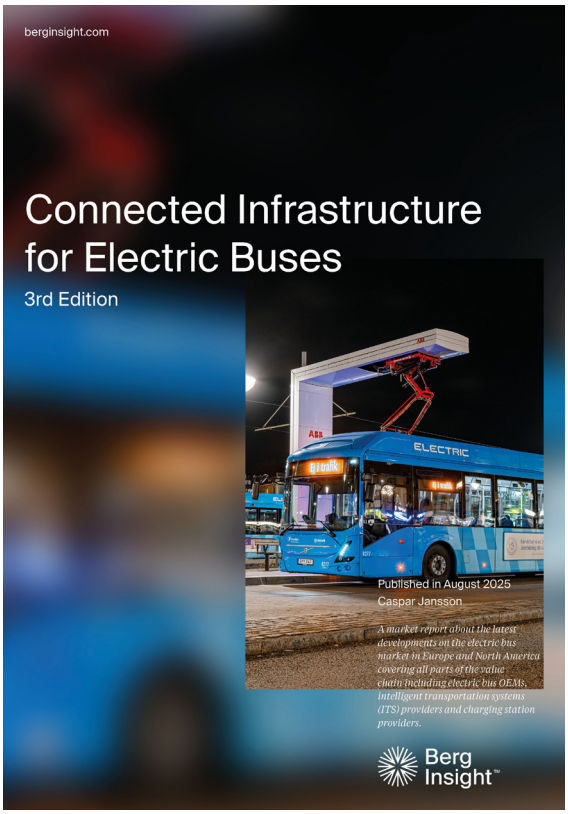
Updated market forecasts lasting until 2029.

This report answers the following questions

- What is the current state and size of the electric bus market?
- Which are the leading providers of public transport ITS solutions for electric buses?
- What offerings are available from vehicle OEMs?
- What equipment and service offerings are available from EV charging station vendors?
- What are the key drivers behind the adoption of electric buses?
- How are the regulatory developments in the EU and NA affecting the electric bus industry?
- How will the electric bus and public transport ITS industry evolve in the future?

About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 80 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



TRANSPORT & LOGISTICS

Connected Infrastructure for Electric Buses

This strategic research report from Berg Insight covers the latest trends and developments on the intelligent transportation system and charging station market for electric buses in public transport. The total market value of public transport ITS for electric buses in Europe and North America is forecasted to grow from € 150.1 million in 2024 to reach € 460.7 million by 2029. Berg Insight at the same time estimates that the charging station market value for electric buses to grow from € 507.3 million in 2024 to € 1.50 billion in 2029. Get up to date with the latest information about vendors, products and markets.

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Who should read this report?

Connected Infrastructure for Electric Buses is the foremost source of information about this market. Whether you are an ITS and telematics vendor, vehicle manufacturer, EV charging station vendor, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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Caspar Jansson is an IoT Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2021 and his areas of expertise include public transport ITS, automotive telematics, insurance telematics and EV charging technology.

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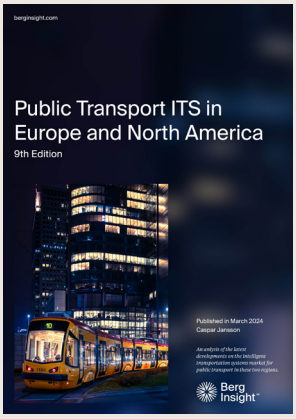

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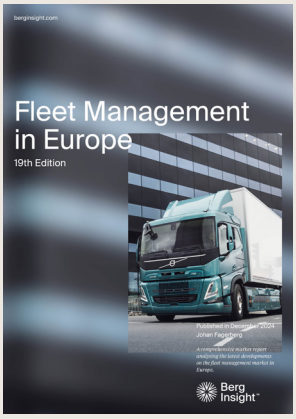

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