

BUSES MEAN BUSINESS

THE ECONOMIC IMPACT OF US HEAVY-DUTY
TRANSIT BUS MANUFACTURING



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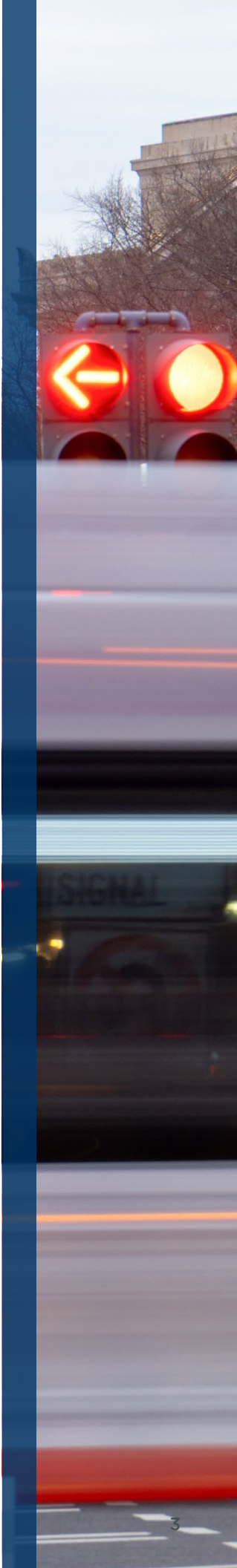
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SEPTEMBER 2026



EXECUTIVE SUMMARY

Public transit agencies in the United States operate a fleet of approximately 65,300 heavy-duty transit buses. For purposes of this report, heavy-duty transit buses include standard transit buses, articulated buses, commuter coaches used in public transit service, double-decker buses, and other transit buses 30 feet or longer that are operated by public transit agencies. Nearly two-thirds of vehicles in service are standard 40-foot transit buses, with articulated buses, commuter coaches, and other vehicle types accounting for the remainder of the fleet. Transit buses accounted for approximately 3.8 billion passenger trips in 2025, or more than 10 million on an average day, representing roughly half of all public transit trips in the United States. With an expected service life of approximately 12 years, transit buses require ongoing fleet renewal and investment in new vehicles. More than half of the US transit bus fleet already exceeds or will reach this benchmark within five years. Supporting this demand is a domestic manufacturing industry and supply chain that produces buses for transit agencies across the country.

This report estimates the economic impact of the US transit bus manufacturing industry in 2025. The analysis captures economic activity within transit bus manufacturers themselves (direct impacts), activity supported through domestic supply chains (indirect impacts), and activity generated when workers spend their earnings throughout the broader economy (induced impacts). Transit bus manufacturing occupies a distinctive position within the transportation equipment sector: unlike higher-volume vehicle industries, transit buses are typically purchased through specialized public procurements that emphasize reliability, accessibility, regulatory compliance, long-term service support, and agency-specific vehicle specifications. Combined with longstanding Buy America requirements and other domestic procurement policies, these characteristics have helped cultivate a substantial US manufacturing and supplier base whose economic contributions extend far beyond final vehicle assembly.



Total contribution to US GDP in 2025.



Over 10 million

Transit bus passenger trips daily, representing 49% of all US public transit trips.





34,100

**US jobs supported, including
13,000 manufacturing jobs.**



54%

**of the transit bus fleet already
exceeds or will reach the FTA's
12-year useful-life benchmark
within 5 years.**

The analysis finds that the transit bus manufacturing industry supported approximately 34,100 jobs, \$5.1 billion in GDP, and \$1.1 billion in federal, state, and local tax revenue in 2025. While transit bus manufacturers themselves directly employed approximately 4,700 workers, the industry's total employment footprint was substantially larger because of its extensive supplier network and the broader effects of worker spending. As a result, each job at a transit bus manufacturer supported an additional 6.3 jobs elsewhere in the economy. Similarly, every dollar of GDP generated directly by transit bus manufacturers supported an additional \$5.30 in GDP through supply-chain and household-spending effects.

Manufacturing accounted for approximately 13,000 supported jobs and \$2.2 billion in GDP, representing 38% of total employment impacts and 43% of total GDP impacts. Additional impacts were concentrated in trade and transportation, business services, and finance and real estate, highlighting the broad network of suppliers involved in producing and delivering modern transit buses. Reflecting this extensive supplier network, economic impacts were supported in all 50 states. States with transit bus assembly facilities, including Alabama, California, Minnesota, and New York, accounted for some of the industry's largest economic impacts, while significant impacts were also generated in Illinois, Indiana, Michigan, Pennsylvania, and Texas.

The report also highlights several trends shaping the transit bus manufacturing industry. Transit bus deliveries have increased in recent years as agencies continue to modernize their fleets, though delivery volumes remain below pre-pandemic levels. Approximately 4,700 transit buses were delivered in the United States and Canada in 2025, compared with more than 6,300 deliveries in 2019. At the same time, the composition of new deliveries is evolving: battery-electric buses account for approximately 4% of buses currently in service but represented about 20% of transit bus deliveries in 2023-2024.



SECTION 1

INTRODUCTION

Heavy-duty transit buses are among the most familiar pieces of public transportation infrastructure in the United States. They provide fixed-route public transportation service in communities of every size, from major metropolitan systems operating thousands of vehicles to small agencies serving rural areas and regional population centers.

For purposes of this report, heavy-duty transit buses include standard transit buses, articulated buses, commuter coaches used in public transit service, double-decker buses, and other transit buses 30 feet or longer that are operated by public transit agencies. Unlike school buses, intercity motorcoaches, or demand-response vehicles, heavy-duty transit buses are designed for frequent passenger stops, intensive daily use, accessibility, and operation in dense urban environments. As a result, they constitute a distinct class of vehicles with specialized design, manufacturing, and maintenance requirements.

Less visible is the manufacturing industry that supplies these vehicles. Heavy-duty transit bus manufacturing occupies a distinctive position within the broader transportation equipment sector. Transit agencies typically purchase vehicles through highly specified procurement processes that emphasize reliability, accessibility, long-term service support, and regulatory compliance. Combined with longstanding federal procurement policies, including Buy America requirements applicable to federally funded transit investments, these characteristics have helped cultivate a substantial domestic manufacturing and supplier base. As a result, transit bus production supports an extensive network of manufacturers, suppliers, transportation providers, and service firms distributed across the United States.

This report estimates the economic impact of the US heavy-duty transit bus manufacturing industry in 2025. The analysis quantifies the economic activity of transit bus manufacturers themselves—that is, the original equipment manufacturers (OEMs) that assemble heavy-duty transit buses (direct impact); the economic activity supported in the industry's substantial domestic supply chain (indirect impact); and the economic activity generated through worker spending across the broader economy (induced impact). Box 1 provides a brief introduction to economic impact analysis and the concepts used throughout the report.

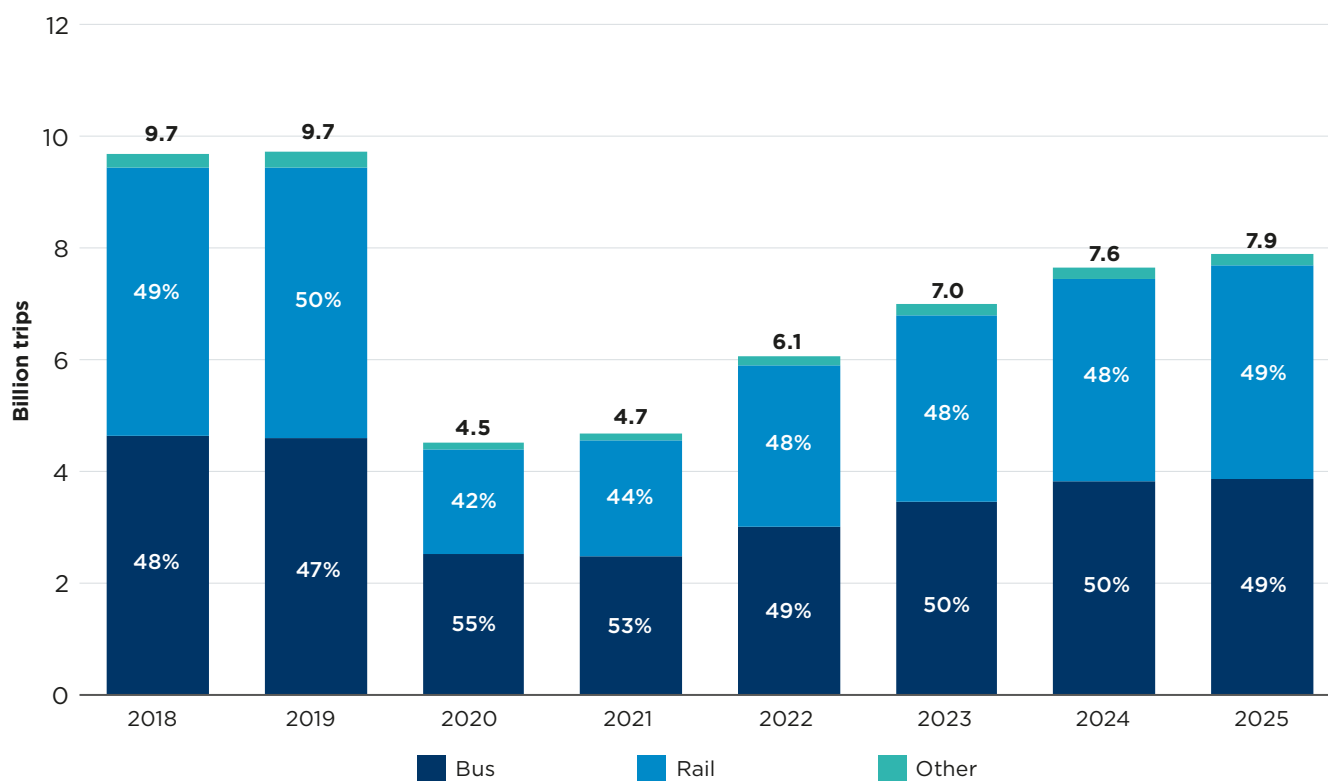


The broader economic benefits of public transportation investment extend well beyond the manufacture of transit vehicles, which is the focus of this report. Recent research prepared for the American Public Transportation Association (APTA) found that a \$1 billion sustained increase in public transportation investment can generate long-term economic value equivalent to approximately \$5 billion and support approximately 41,400 jobs.¹ These benefits include improved mobility, enhanced economic productivity, reduced transportation costs, and economic activity associated with the construction, operation, and maintenance of public transportation systems, in addition to the economic impacts generated through the manufacture of transit vehicles and their supporting supply chains. The present report focuses on a narrower perspective, specifically the manufacture of heavy-duty transit buses and the domestic manufacturing

and supplier ecosystem that supports their production. Accordingly, the analysis does not include economic activity associated with transit operations or investments in facilities, depots, charging and fueling infrastructure, and other capital projects that support transit service.

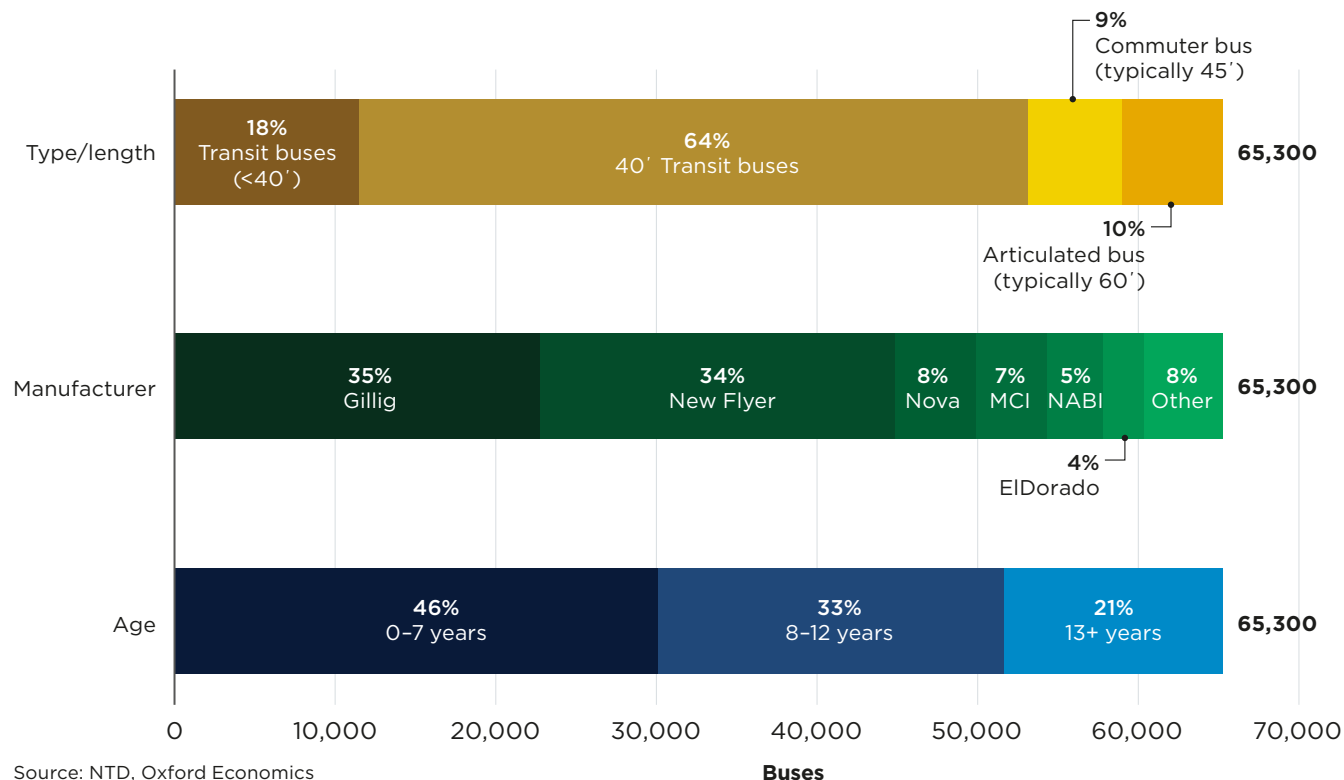
Transit buses accounted for approximately 3.8 billion unlinked passenger trips in 2025, representing nearly half of all public transit trips nationwide (Figure 1). This was roughly equivalent to the combined ridership of all rail modes and translates to more than 10 million passenger trips on an average day. Although total transit bus ridership remains below the 4.6 billion annual trips recorded prior to the pandemic, the recovery has been substantial, with ridership increasing by more than 50% from the 2020 low of 2.5 billion trips.

Figure 1. US transit unlinked passenger trips by modality, 2018–2025



¹ American Public Transportation Association (APTA), *Economic Impact of Public Transportation Investment*. Prepared by EBP, February 2026.

Figure 2. Transit bus stock at US transit agencies, 2024



To provide additional context for the transit bus manufacturing industry examined in this study, Figure 2 summarizes the characteristics of the US transit bus fleet using data reported by transit agencies to the Federal Transit Administration's National Transit Database (NTD).² In 2024 US transit agencies operated approximately 65,300 heavy-duty transit buses. Standard transit buses accounted for 82% of the fleet, with 40-foot transit buses alone representing nearly two-thirds of all transit buses in service. Commuter coaches, which are typically 45-foot vehicles used in longer-distance and express service, accounted for 9% of the fleet, while articulated buses, typically 60 feet long, accounted for 10%.

The fleet also reflects the structure and evolution of the heavy-duty transit bus manufacturing

industry, which is the focus of this report. Buses produced by the top two manufacturers, Gillig and New Flyer (NFI Group), accounted for nearly 70% of vehicles in service in 2024. The remaining fleet includes substantial numbers of vehicles produced by manufacturers such as Nova Bus, Motor Coach Industries (MCI, part of NFI), North American Bus Industries (NABI), and ElDorado National. Several of these brands are no longer major participants in the US heavy-duty transit bus market. Nova Bus announced its exit from US transit bus production in 2023,³ while NABI became part of New Flyer following its acquisition in 2013.⁴ As a result, in 2025, the reference year for this report, US transit bus production was substantially more concentrated than the existing fleet, with Gillig and New Flyer accounting for most heavy-duty transit bus deliveries.

2 National Transit Database (NTD) [Revenue Vehicle Inventory, 2024](#), Federal Transit Administration. Analysis includes revenue vehicles of at least 30 feet classified as Bus, Articulated Bus, Double Decker Bus, and Over-the-road Bus.

3 AB Volvo, ["Nova Bus ends bus production in the US,"](#) June 21, 2023.

4 New Flyer Industries Inc., ["New Flyer Announces Acquisition of North American Bus Industries, Inc.,"](#) June 21, 2013.

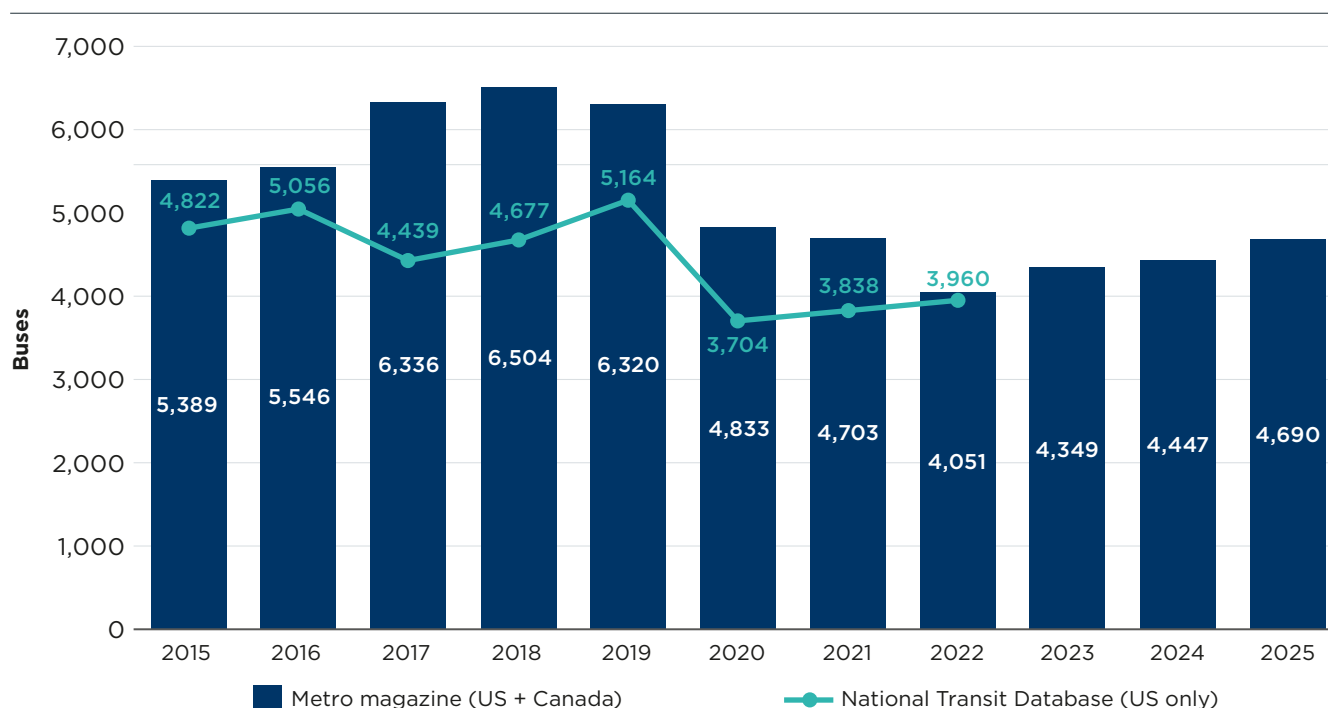
At the same time, the transit bus manufacturing industry is entering a period of renewed competition. ElDorado National resumed transit bus production in 2025 under new ownership following a period of suspended operations, and has returned to active participation in the heavy-duty transit bus market, winning new orders and fulfilling customer deliveries.⁵ Solaris, a European transit bus manufacturer, has also begun to establish a presence in the US market through a growing number of transit agency procurements.⁶ BYD, a major Chinese bus and electric vehicle manufacturer, continues to produce transit buses in the United States, though federal restrictions passed in 2019 have limited its participation in federally funded transit bus procurements.⁷

As of 2024, the transit bus fleet had an average age of approximately eight years. Federal Transit Administration guidance assigns a minimum useful

life of 12 years or 500,000 miles to large heavy-duty transit buses.⁸ As shown in Figure 2, approximately 13,700 transit buses, representing 21% of the national fleet, were older than 12 years. An additional 21,500 buses were between eight and 12 years old and will reach the FTA's useful-life benchmark within the next five years. Together, these 35,200 buses accounted for more than 54% of all heavy-duty transit buses reported to the National Transit Database. This age profile underscores the ongoing need for fleet renewal and modernization, helping sustain demand for new transit buses and the domestic manufacturing industry that produces them.

The scale of this replacement cycle can be seen in recent transit bus deliveries and fleet additions (Figure 3). Publicly available industry and fleet data indicate that annual transit bus deliveries exceeded 6,000 vehicles in the years immediately preceding the Covid-19 pandemic before falling sharply in

Figure 3. Estimated annual transit bus production, 2015–2025



Source: NTD, Oxford Economics

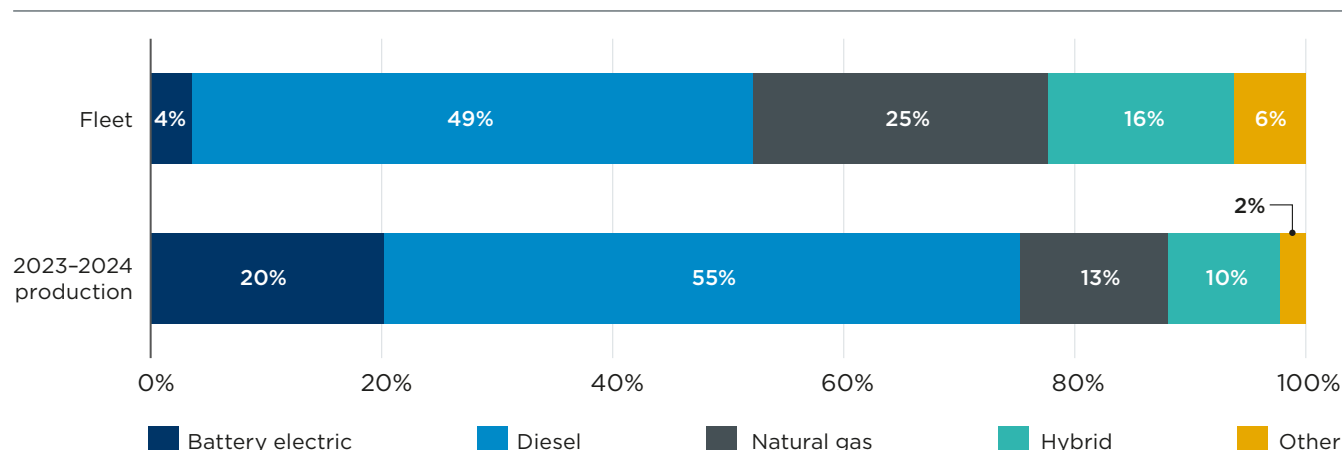
5 Metro Magazine, “ENC to Restart Transit Bus Production, Deliveries Under New Ownership,” April 2025.

6 Solaris Bus & Coach, “Solaris Enters the U.S. Market: First Contract for Zero-Emission Buses,” January 31, 2025.

7 BYD’s US transit bus operations, now marketed under the RIDE brand, [continue to manufacture transit buses](#) in Lancaster, California. Federal restrictions stem principally from [Section 7613 of the National Defense Authorization Act for Fiscal Year 2020](#) (NDAA 2020), which limits the use of FTA funds for rolling stock procured from manufacturers with certain foreign ownership or control relationships.

8 Federal Transit Administration (FTA), [Minimum Asset Useful Life Standards for FTA Grants](#).

Figure 4. Transit bus propulsion technologies, fleet and 2023-2024 production



Source: APTA, Oxford Economics

2020. Both industry delivery statistics and fleet-based estimates suggest that the market remained below pre-pandemic levels through 2022 but has recovered gradually in recent years. According to Metro Magazine, approximately 4,700 transit buses were delivered in the US and Canada in 2025, up from pandemic-era lows but still well below the 6,300 deliveries recorded in 2019.⁹ NTD data on the model years of buses operating in US transit fleets corroborate this broader pattern of a sharp pandemic-era decline followed by a slow and still incomplete recovery.¹⁰

While the existing fleet is still dominated by conventional propulsion technologies, vehicle deliveries in 2023-2024 suggest that the technology mix of the industry is changing (Figure 4).¹¹ Battery-electric buses accounted for approximately 20% of transit buses delivered in 2023-2024, compared with only 4% of all buses currently in service. Diesel buses remained the largest category of 2023-2024 deliveries, accounting for roughly half of vehicles delivered, while natural gas and hybrid buses represented smaller shares than in the installed fleet.

These trends are unfolding within a distinctive manufacturing environment. Compared with passenger automobiles and light-duty trucks, transit buses are produced in much smaller volumes and purchased primarily through specialized public procurements. Together with domestic procurement requirements, these characteristics have helped sustain a domestic manufacturing base and supplier network that supports transit bus production across the United States.

This report quantifies the economic impact of that manufacturing ecosystem in 2025, focusing specifically on the domestic manufacture of heavy-duty transit buses and the US supply chains that support vehicle production. The following sections estimate the economic impacts supported by transit bus manufacturers and the broader economic activity generated through supplier purchases and worker spending. Box 1 provides additional information on the economic impact concepts used throughout this report.

9 Metro Magazine estimates are based on annual surveys of participating transit bus suppliers and represent US and Canadian transit bus deliveries. The survey includes buses under 30 feet, although these represent only about 2-7% of the total. METRO Magazine: “COVID-19 Impacts 2020 Transit Bus Deliveries by 24%,” June 14, 2021. “With COVID Still In Play, Transit Bus Deliveries Down for 3rd Straight Year,” May 2, 2023. “Transit Bus Deliveries Stabilize in 2024, but Market Still Trails Pre-Pandemic Levels,” May 23, 2025. “Recovery and Risk Define the Transit Bus Market in 2025,” April 20, 2026. Pre-2019 data were provided directly for this report.

10 NTD estimates represent the maximum number of buses in transit agencies fleets with the given production year in subsequent years of NTD data through 2024 (see footnote 2 for more on NTD data). For example, the 2021 value represents the maximum number of buses produced in 2021 across the 2021, 2022, 2023, and 2024 NTD datasets.

11 APTA [Public Transportation Vehicle Database](#) (2025). Recent deliveries are defined as active transit buses delivered in 2023-2024. Analysis is limited to buses 30 feet and longer.

COMPONENTS OF ECONOMIC IMPACT ANALYSIS

The input-output model follows the flow of spending through the economy. The model captures and quantifies the impact of the economic activity of the transit bus manufacturing industry on supply chains, consumer spending, economic leakages, and taxes paid to federal, state, and local governments.

The economic impacts of the transit bus manufacturing industry are measured through three channels:

- **Direct Impact:** Economic activity in the transit bus manufacturing industry itself.
- **Indirect Impact:** Economic activity in the full supply chain of the transit bus manufacturing industry.
- **Induced Impact:** Economic activity resulting from direct and indirect workers spending their wages in the broader economy.
- **Total Impact:** the sum of direct impact, indirect impact, and induced impact.

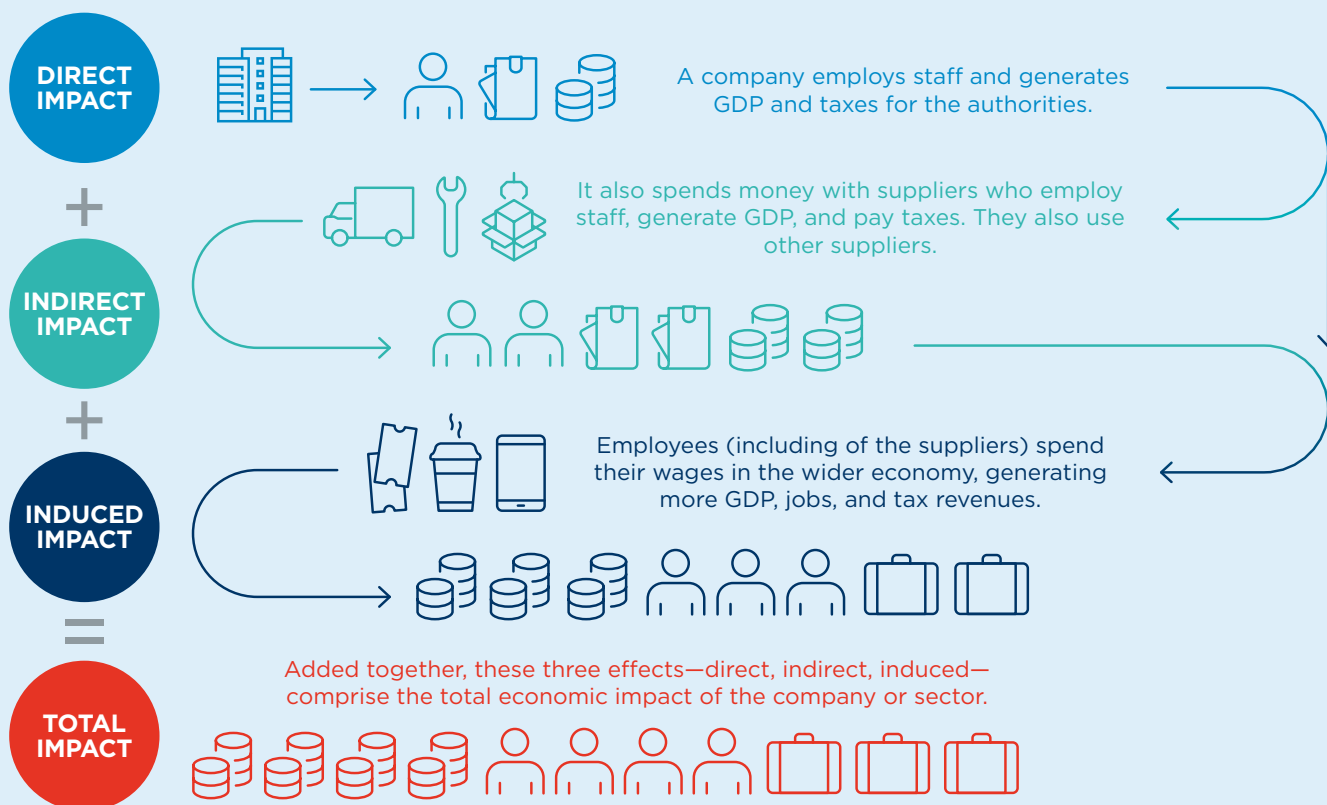
The model captures the inter-industry relationships, consumer spending, and ripple effects that result from the economic activity of the transit bus manufacturing industry.

The economic impact is measured in terms of:

- **Employment:** Total jobs, measured on a headcount basis, including both wage and salary workers and the self-employed.
- **GDP:** Value-added economic activity (contribution to gross domestic product).
- **Taxes:** Total taxes at federal, state, and local levels generated by the full economic impact.

All monetary impacts in this report are presented in 2025 US dollars.

Figure 5. The channels of economic impact





SECTION 2 ECONOMIC IMPACTS



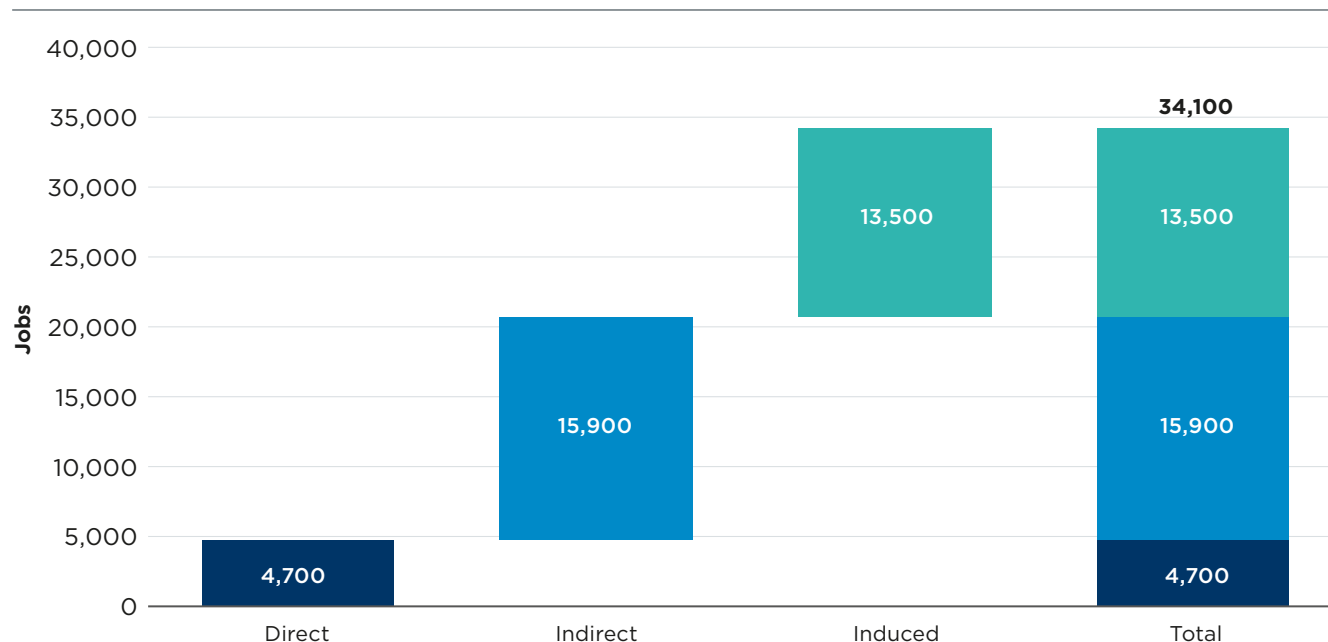
This section presents the estimated economic footprint of the US transit bus manufacturing industry in 2025. The analysis includes economic activity within transit bus manufacturers themselves (direct impacts), activity supported through domestic supply chains (indirect impacts), and activity generated when workers spend their earnings throughout the economy (induced impacts). Applying the framework described in Box 1, the analysis finds that the transit bus manufacturing industry supported substantial employment, GDP, and tax revenues across the United States in 2025.

2.1 EMPLOYMENT IMPACT

The transit bus manufacturing industry supported approximately 34,100 jobs across the US economy in 2025 (Figure 6). These impacts extended well beyond vehicle assembly facilities, reflecting the industry's purchases from domestic suppliers and the spending of wages earned throughout the supply chain. Of the total, approximately 4,700 jobs were directly employed by transit bus manufacturers, while an additional 15,900 jobs were supported through supplier purchases and 13,500 jobs were supported through wage-funded household spending. Together, these indirect and induced effects accounted for approximately 86% of the industry's total employment impact.

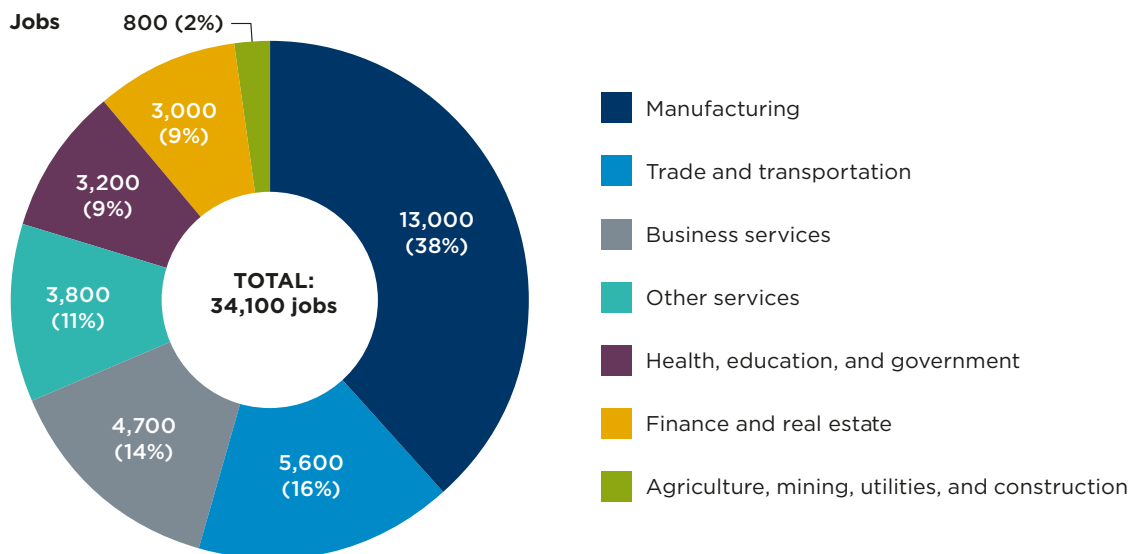
In 2025, the transit bus manufacturing industry had a job multiplier of 7.3. This means that each job at a transit bus manufacturer supported 6.3 additional jobs elsewhere in the national economy through supply-chain purchases and wage-supported household spending. The scale of this multiplier reflects the industry's extensive domestic supplier network, which includes manufacturers of vehicle systems and components, fabricated metals, electronics, seating, glass, and other specialized inputs, as well as transportation, logistics, and business service providers that support vehicle production.

Figure 6. Employment impact of the transit bus manufacturing industry by channel



Source: Oxford Economics

Figure 7. Employment impact of the transit bus manufacturing industry by impacted industry



Source: Oxford Economics

Note: Totals may not sum due to rounding.

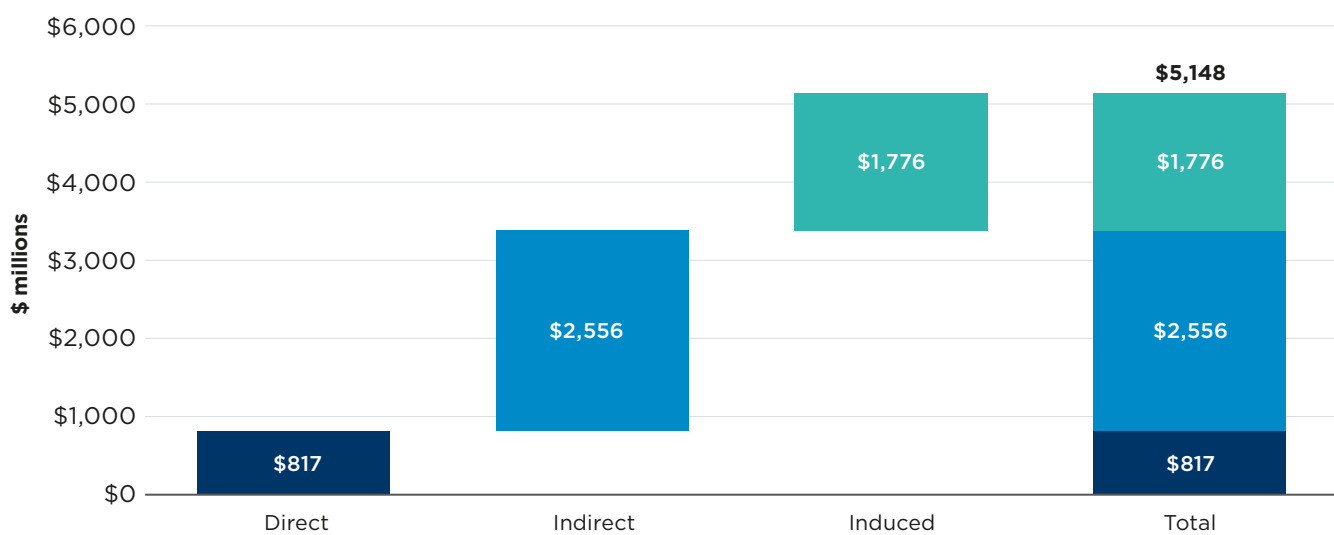
The distribution of these jobs across the economy reflects the broad definition of economic impact used in this study, which includes direct, indirect, and induced effects. The transit bus manufacturing industry supported approximately 13,000 US manufacturing jobs in 2025, making manufacturing the largest impacted sector and accounting for 38% of all jobs supported by the industry (Figure 7). While the direct impacts of transit bus manufacturing are entirely concentrated in manufacturing, indirect and induced impacts are distributed across a wider range of industries throughout the economy. Although manufactured components account for the majority of industry purchases, producing and delivering those components also relies on extensive networks of transportation providers, business services firms, utilities, wholesalers, and other supporting industries. Reflecting this, trade and transportation represented the next-largest employment category, accounting for roughly 16% of total jobs. These results demonstrate that the economic impacts of transit bus manufacturing extend well beyond vehicle assembly plants, supporting employment across a diverse set of industries throughout the US economy.

2.2 GDP IMPACT

The transit bus manufacturing industry supported approximately \$5.1 billion in US GDP in 2025 (Figure 8). These impacts extended well beyond transit bus manufacturers themselves, reflecting the industry's purchases from domestic suppliers and spending by workers throughout the economy. Of the total, \$817 million represented value added generated directly by transit bus manufacturers. An additional \$2.6 billion was supported through purchases from domestic suppliers, while a further \$1.8 billion was generated through household spending by workers whose incomes depended directly or indirectly on transit bus manufacturing activity. As a result, approximately 84% of the industry's total GDP impact occurred outside transit bus manufacturers themselves.

Just as the employment multiplier summarizes how the industry's jobs impact spreads through the economy, the GDP multiplier provides a similar measure of its broader value-added impact. In 2025, the transit bus manufacturing industry had a GDP multiplier of 6.3, meaning that every dollar of value-added economic activity generated directly by transit bus manufacturers supported an additional \$5.30 in GDP elsewhere in the economy through supplier purchases and household spending.

Figure 8. GDP impact of the transit bus manufacturing industry

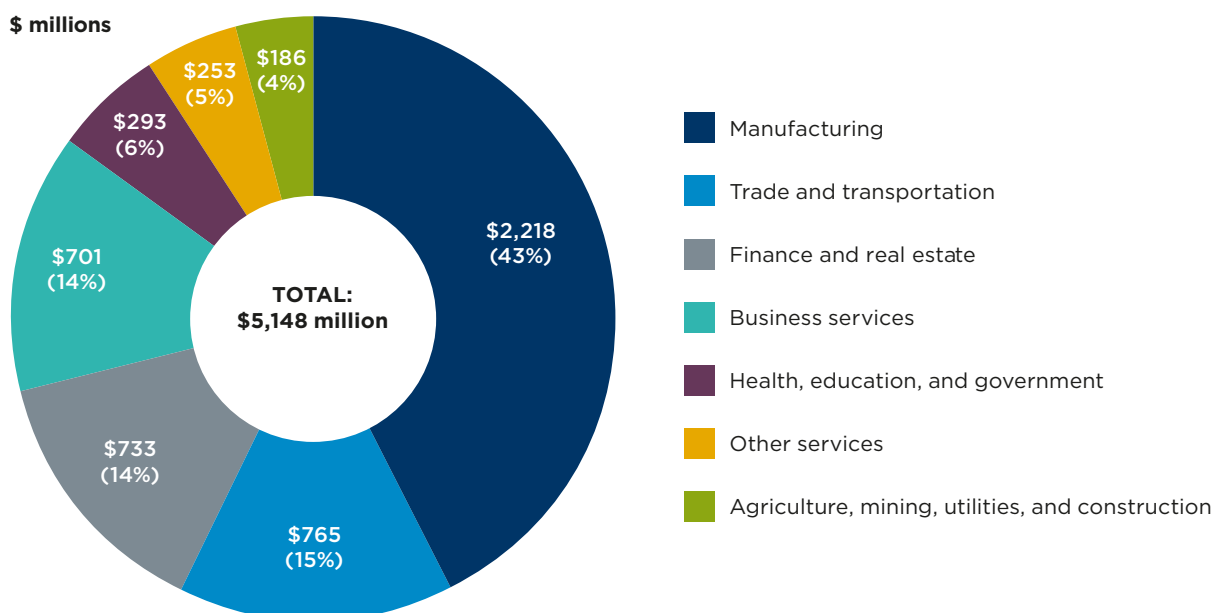


Source: Oxford Economics

The distribution of these GDP impacts across industries reflects the broad range of economic activity required to manufacture transit buses and support their supply chains. Although manufactured components account for most industry purchases, the production and distribution of those components also relies on transportation, finance, business services, utilities, and other supporting industries. Manufacturing accounted for approximately \$2.2

billion in GDP, making it the largest impacted sector and representing 43% of total GDP supported by the transit bus manufacturing industry (Figure 9). Trade and transportation ranked second at 15%, followed by finance and real estate and business services, each at 14%. Together, these impacts reflect the broad domestic supplier network that supports transit bus production, encompassing manufacturers, logistics providers, and a wide range of service industries.

Figure 9. GDP impact of the transit bus manufacturing industry



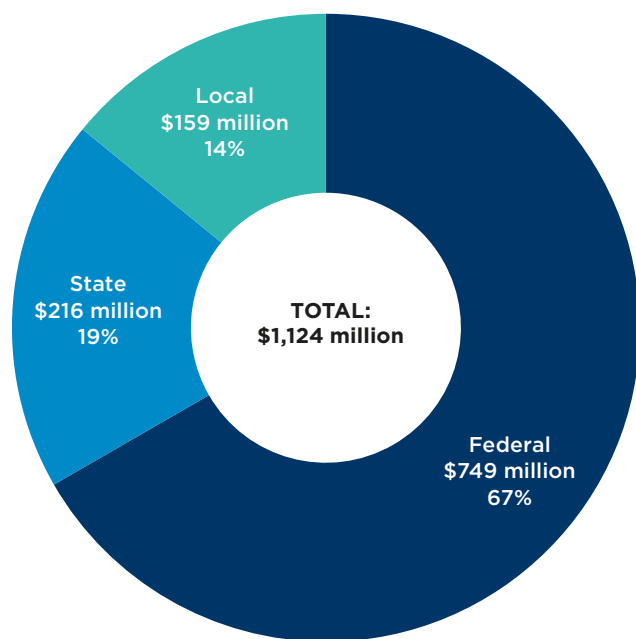
Source: Oxford Economics

Note: Totals may not sum due to rounding.

2.3 TAX IMPACT

In addition to supporting employment and GDP, the transit bus manufacturing industry generated substantial tax revenues for federal, state, and local governments. Across all three channels of impact, the industry supported approximately \$1.1 billion in tax revenue in 2025 (Figure 10). This total included \$749 million in federal taxes, \$216 million in state taxes, and \$159 million in local taxes. These revenues reflect both the scale of payroll and business activity supported by the industry and the breadth of its domestic supply chain. Federal taxes accounted for approximately two-thirds of the total tax impact, while state and local governments collectively received \$375 million in additional revenue through economic activity supported by transit bus manufacturing.

Figure 10. Tax impact of transit bus manufacturing industry



Source: Oxford Economics

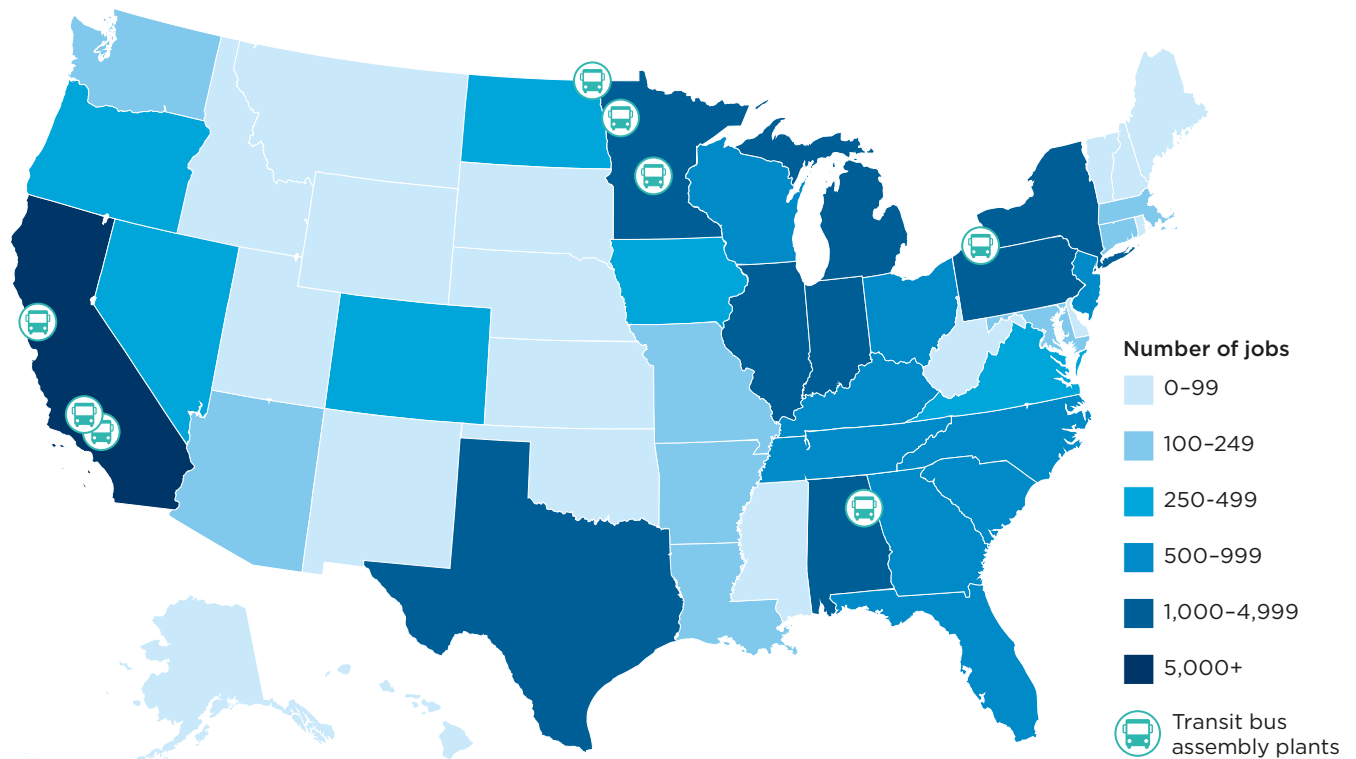
2.4 REGIONAL IMPACTS

The preceding sections examined the national employment, GDP, and tax impacts supported by the transit bus manufacturing industry. These impacts are distributed across all 50 states through a combination of manufacturing activity, supplier relationships, and household spending. While transit bus manufacturing is concentrated in a relatively small number of locations, the industry's economic footprint extends nationwide through its supply chain and the induced effects of worker spending.

Figure 11 shows the geographic distribution of employment impacts across the United States. Major transit bus assembly plants are located in Anniston, Alabama; Livermore, Lancaster, and Riverside, California; St. Cloud and Crookston, Minnesota; Las Vegas, Nevada; Jamestown, New York; and Pembina, North Dakota.

The largest employment impacts were concentrated in states with major manufacturing operations and supplier networks, particularly California, as well as Alabama, Illinois, Indiana, Michigan, Minnesota, New York, Pennsylvania, and Texas. However, employment impacts were supported in every state through purchases of goods and services and the spending of labor income generated throughout the transit bus manufacturing supply chain.

Figure 11. Employment impact of the transit bus manufacturing industry by state



Source: Oxford Economics





SECTION 3

CONCLUSION

The transit bus manufacturing industry plays a critical role in supporting public transportation systems across the United States. Public transit agencies operate a fleet of approximately 65,300 heavy-duty transit buses, creating ongoing investment in vehicle replacement, fleet modernization, and service expansion. Supporting this demand is a domestic manufacturing industry and supplier network that produces complex transportation equipment for transit systems throughout the country. Although conventional diesel, natural gas, and hybrid vehicles continue to comprise most buses currently in service, transit bus deliveries in 2023–2024 indicate an ongoing shift toward battery-electric technologies.

This report finds that the industry's economic footprint extends well beyond the firms that assemble transit buses. In 2025, transit bus manufacturing supported approximately 34,100 jobs, \$5.1 billion in US GDP, and \$1.1 billion in federal, state, and local tax revenue. Much of this impact was generated through an extensive domestic supply chain spanning manufacturers of components and materials, transportation and logistics providers, business services firms, and many other industries that contribute to transit bus production. Supported in part by longstanding domestic procurement requirements, including Buy America provisions, this supplier network extends the industry's economic footprint far beyond vehicle assembly activities. Manufacturing alone accounted for approximately 13,000 jobs and \$2.2 billion in GDP supported by the industry, while additional impacts were generated throughout a wide range of supplier and service industries across the US economy.

The industry's impacts were distributed across all 50 states, although they were concentrated in states with major manufacturing facilities and supplier networks. Economic activity associated with transit bus manufacturing therefore extends far beyond the locations where buses are assembled, reflecting the industry's extensive domestic supply chain and the broad range of businesses involved in vehicle production. Together, these findings underscore the importance of transit bus manufacturing as both a transportation industry and a source of domestic economic activity. As transit agencies continue to replace aging vehicles and modernize their fleets, the industry's domestic manufacturing base and supplier network will remain an important source of jobs, income, and economic activity throughout the United States.

APPENDIX

METHODOLOGY

This report estimates the economic footprint of the US transit bus manufacturing industry in 2025 using a combination of company information, public data sources, and economic impact modeling.

The analysis focuses on the manufacture of heavy-duty transit buses used in public transportation service, including standard transit buses, articulated buses, commuter coaches, and other transit bus vehicle classes typically operated by public transit agencies. School buses, most intercity motorcoaches, and other bus types outside this definition are excluded from the analysis.

The economic impact analysis is based primarily on information provided by three major manufacturers of heavy-duty transit buses in the United States, including the nation's two largest producers. These data included employment, labor compensation, and procurement spending associated with US transit bus manufacturing operations broken out by US state. To estimate industry-wide impacts, Oxford Economics scaled these data to reflect the participating manufacturers' estimated share of total 2025 transit bus production. Market shares were estimated using information from the APTA 2025 Public Transportation Vehicle Database, corroborated by these manufacturers' unit output compared to estimated industry output as shown in Figure 2.

Economic impacts were estimated using IMPLAN, a widely used input-output modeling framework that traces how industry spending flows through the economy. The economic impact framework applied in this report is described in Box 1. Estimates were developed for employment, GDP (value added), and tax revenue at the national and state levels. Direct employment and employee compensation, as well as intermediate input (procurement) spending were estimated based on the scaled company inputs described above; direct capital income and taxes on production and imports were modeled by the IMPLAN system based on industry data for the heavy-duty truck manufacturing industry.

National impacts were estimated using a US national input-output model. State-level impacts were estimated using a multiregional input-output (MRIO) framework that captures trade and supply-chain relationships between states. This approach allows economic activity generated by transit bus manufacturing in one state to support suppliers, workers, and economic activity located elsewhere in the country.

All monetary impacts are reported in 2025 US dollars. This study estimates the economic activity supported by transit bus manufacturing and its supply chain and should not be interpreted as a measure of the broader economic benefits associated with public transportation investment, transit system operations, or improved transportation performance.



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