



The First Busworld Turkey And Turkey's Increasing Impact on Bus Production

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The Diamond is the top-of-the-line tour and charter coach model from Temsa. It comes in two lengths with the longer version approximately 45 feet long. Temsa's Diamond has the same features you might find on American and Canadian tour and charter coaches including air ride suspension and a ZF AS Tronic transmission.

The first Busworld Turkey show took place on February 8-10, 2007 in Istanbul. For a first show, it was a substantial success. Some of our readers may ask why NATIONAL BUS TRADER went all of the way to Turkey to attend this show. We can provide you with three reasons.

First, Temsa recently introduced their Turkish-built bus to the U.S. market at the recent UMA Motorcoach Expo in New Orleans in January. This is the first Turkish-built bus to be offered on the U.S. market. As a result, it has generated substantial interest and questions from NATIONAL BUS TRADER readers.

Second, more buses are already being built in Turkey than in any other European country. Moreover, in the near future, Turkey is expected to produce half of the buses sold in Europe. Hence, Turkey is rapidly becoming a major world-class bus production center and has become increasingly important in worldwide bus production.

Third, the Busworld management has acknowledged the importance of Turkey in the world bus industry by creating Busworld Turkey. In the world bus industry, being honored with a Busworld show is the ultimate stamp of approval.

For those readers who do not know, the Busworld show in Kortrijk, Belgium is considered the largest bus show in the world. It is held every other year in October and draws more exhibitors and attendees than any other bus show. It involves seven or eight halls plus extra space in between. There is no host hotel and any events are held in the Halls of Kortrijk. Some people travel substantial distances from hotels. For example, your editor has stayed as far away as Gent and Brussels.

The Kortrijk show in Belgium has been so successful that in recent years it has spread to other countries where bus production and sales are important. New Busworld show locations include Lagos in Africa, Mumbai in India, and Shanghai in China. Most of these shows are scheduled every two years. However, the management at Busworld has indicated that bus development in China is moving so fast that Busworld Asia in China may be the only location that warrants an annual show. Future expansion includes possible plans for shows in Mexico and South America. The only worldwide locations not covered by a Busworld show are the United States and Canada and Australia-New Zealand.

Istanbul has been the traditional crossroads of the area. For decades, Istanbul was the end of the line for the most famous train

in the world – The Orient Express. It originated in London but passengers crossed the English Channel on a ferry boat. In France, they joined another set of cars that went through Paris and then crossed Europe to reach Istanbul. You could cross the Bosphorus, the traditional dividing line between Europe and Asia, and board the Taurus Express which continued east. However, because of mountains and other terrain, there never was a continuous rail line across Southern Asia to compare with the Trans-Siberian line that connected Berlin and Moscow with China and the Pacific Ocean.

In earlier years, a ferry boat was required to cross the Bosphorus. Today, two different bridges cross the Bosphorus and a third one is being planned. In addition, a rail tunnel under the Bosphorus is also under construction. This means that Turkey has the rare distinction of being located in both Europe and Asia.

Like most European countries, Turkey had a number of wagon and body builders in the early years. In the 1960s, the government encouraged the development of a local automotive industry which prompted some major bus building operations. Some people have suggested that the first Busworld Turkey coincides with the 40th anniversary of major bus building activities in Turkey.

Several different factors have combined to make Turkey a major bus building center. The most obvious is that the Turkish work



Much of the local transportation in the major cities of Turkey is provided by ubiquitous minibuses and midibuses that follow regular routes on frequent headways. While they are small enough to dart in and out of traffic, some of the local authorities are pushing for larger midibuses to reduce congestion. This minibus terminal in Adana, Turkey is located adjacent to a beautiful public park.

force offers an impressive level of quality for production costs that is difficult to find elsewhere. With four decades of major bus building history, several major bus component suppliers have built factories and warehouses in Turkey and are able to provide just-in-time deliveries. Temsa has refined this concept into having supplier staff on site and partnering with both painting and seat suppliers. Worth mentioning also is that

modern Turkey is concerned about commerce. As a result, English has become the second language of Turkey. At most airports and even on many road signs, you will see English following the Turkish wording.

In recent years, two major developments have had a major favorable impact on Turkish bus production. With the collapse of the old Soviet system and the emergence of new independent republics, Turkey was in an excellent position to supply buses to several countries in Central Asia located to the east of Turkey. The second is that while Turkey is not a member of the European Union, it entered into a customs agreement with the EU which abolished tariffs on both sides. This made it easier for Turkish bus factories to supply buses to European bus operators. By 2007, Turkey was producing more buses than any country in Europe and approaching the point of being able to claim building 50 percent of the buses sold in Europe.

While Turkey has a great deal in common with European countries, it is different in several respects. Passenger railroad service is typically frequent and convenient in most Western European countries. However, similar passenger railroad services never developed to the same extent in Turkey because of the mountainous terrain in many areas of the country.

As a result, much of the intercity passenger transport between neighboring cities is operated by buses. On some routes you will find luxury buses with fewer seats but higher fares. Some companies operate 24

The Mercedes-Benz O403 is a shorter bus that might be considered more typical for the Turkish market. It was one of several buses on display in the larger Mercedes-Benz booth. In keeping with European tradition, many of the manufacturers had local Turkish girls as models to help show off the buses.





The Mercedes-Benz Travego model is popular in Europe for tour and charter service. Most Mercedes-Benz intercity coaches sold in Europe are built at their plant in Turkey.



Mercedes-Benz also offers their Connecto model for city transit service. Most major cities in Turkey have transit agencies that operate with regular transit buses like these.

hours a day and hence provide overnight service between cities.

In most larger Turkish cities, city transit is provided by public agencies using typical transit buses. However, the major Turkish cities also have a substantial number of minibuses and midibuses that operate on fixed routes like a jitney. In my experience, it reminds me of the situation in Mexico City or the Jeepneys in the Philippines.

In some areas, authorities are trying to get the local operators to move up from minibuses to midibuses to reduce pollution and congestion. The smaller buses actually have some merit because they can provide

a relatively frequent headway and are small enough to find their way through traffic and congestion.

In recent years, approximately 40,000 buses are built annually in Turkey. Something like two-thirds are little minibuses that carry no more than 16 passengers. Next in popularity are the midibuses which seat 17-25 passengers. Some of these are very impressive since they ride, drive and handle like the big buses in spite of their size. Big buses have become an increasingly important segment of the Turkish bus building industry. In 2005, the number of big buses built increased to more than 5,000 units for the first time and this number

appears to be growing from year to year. Most of the big buses built in Turkey come from Mercedes-Benz, Neoman and Temsa and most are sold in other European countries.

The midibuses are both numerous and impressive. They are typically 25 to 30 feet long, have a front and a rear (not center) door, and a six speed manual transmission. The real surprise is that many of them appear to be integral or at least very high quality body-on-chassis. Many of them drive and ride very similar to full size coaches. I know of no equivalent vehicles in the United States and Canada.

An interesting note is that Turkey is becoming a major tourist destination. In addition to its natural and historical richness, the fact that different religions and cultures live in harmony make the country an attractive tourism center. In 2006, an estimated 12.55 million foreign tourists visited Turkey. English is becoming Turkey's second language and is increasingly in evidence at the airports, better hotels, and in many public places.

Here are some notes on the Turkish bus builders and exhibitors at Busworld Turkey.

Mercedes-Benz was one of the first companies to recognize Turkey as a good place to build larger buses. In 1967, they licensed Otomarsan to build their then-popular O350 integral coach in a suburb of Istanbul. Other models followed and in 1990, Mercedes-Benz acquired a majority interest in the company and changed its name to Mercedes-Benz Türk.

In subsequent years, Mercedes-Benz acquired property west of Istanbul at Hosdere and built a new factory. New models introduced included the O350-Tourismo

The Temsa Tourmalin is an interesting model that appears to be a step above a typical transit bus. It has become very popular for transporting school children and has become a popular model for Temsa in France. Temsa has a major sales office in Belgium and sells coaches all over Western Europe.



which is popular in both Europe and locally in Turkey. The factory also builds the O403-Connecto which was involved with a 1,000-bus order for Russia in 1996.

A major expansion at Hosdere in 2005 brought the total land area to about 89 acres with approximately 1.2 million square feet under roof. When we visited the Mercedes-Benz plant in Mannheim, Germany in October of 2006, most Mercedes-Benz intercity bus production for Europe was already being shifted to Hosdere although a plant in France will also remain active. Currently, the Hosdere plant builds approximately 4,000 units annually including both city buses and intercity coaches. Approximately 65 percent of the buses built are exported to as many as 70 different countries.

Mercedes-Benz had one of the largest display areas at the show. They showed an O403 midibus, a Connecto transit bus, a Sprinter van, and two versions of the Travego full size tour coach including a high-deck model. Mercedes-Benz had a large stage and runway in their display area and offered both entertainment and refreshments during the show.

Conspicuous by its absence at the show was Neoman, arguably the first of the major European bus builders to get start building in Turkey. In 1966, MAN joined with a Turkish partner to open the MANAS factory in Istanbul. In 1986, a new factory was built at Ankara which eventually replaced the Istanbul facility. In recent years the Ankara fac-



Following their success with intercity coaches, Temsa introduced a line of intercity transit buses which has had similar success. Their new Metropolis S transit was unveiled in a special ceremony at Busworld Turkey.

tory has been extended and is now producing about 2,000 buses annually, with about 75 percent being exported. In addition to complete buses, the Ankara factory also builds bus chassis for export to countries that provide local bodies.

Current production includes MAN's Lion Classic city buses. 450 of these city buses



The Opalin is one of Temsa's models in the midibus area. It is available with an optional rear door and even a restroom. Your editor was very impressed with the ride quality in spite of the size of the coach.

powered by CNG were recently built for the city of Ankara. MAN also offers a Lion's City T model with a low floor. Since the merger with Neoplan, both MAN and Neoplan intercity coaches are built in Ankara for export to the European market. Unfortunately, Neoman elected not to display at this show which was disappointing.

The newest and fastest growing of the big Turkish bus builders is Temsa. It is part of Sabanci Holdings, the second-largest conglomerate in Turkey that encompasses a total of 65 companies and 45,000 employees. Originally founded in 1968 as a manufacturer of heating and air conditioning equipment, Temsa began building buses under a Mitsubishi license in 1987.

In 2001, the Sabanci management made a major decision to take advantage of the Turkish bus building potential and developed its own line of buses. The company expanded its staff with experienced people in bus manufacturing and bus design, and put together an impressive line of coaches. Initially concentrating on intercity coaches, Temsa recently added a line of city buses which has also proven popular.

Today, Temsa offers a wide range of intercity coaches. They are still building a few coaches under license from Mitsubishi including the Safir and Prestij. Their own products include small buses such as the Opalin and a local product sold in Turkey called a Power Bus. Both are short coaches but drive and handle like big coaches. Their

Although they do not build buses in Turkey, Setra had three coaches on display including a double-deck coach (which can be seen to the rear). Shown here is a Setra S416GT-HD with two axles and a typical European center door. In Turkey, as elsewhere in Europe, the Setra is considered the top-of-the-line coach and is purchased by the higher quality charter and tour operators.





This photo shows the driver's area on the Tezeller Tiger LUX. Note the mechanical, floor-mounted transmission. Automatic transmissions appear to be rare on the midibuses.



Here is the passenger area of the Tezeller Tiger LUX. This particular coach does have a rear door, open overhead parcel racks and seat belts but does not have a restroom.

middle range coach is called the Safari which is available in different versions and with stainless steel construction. Their top-of-the-line coach, the Diamond, is nearly 14 meters (more than 45 feet) long.

Other products include the Tourmalin which has become popular in France and for student transport. The Metropol, Temsa's city transit bus, has become so popular that Temsa introduced an improved version at Busworld Turkey known as the Metropol S. Most of Temsa's bus production is exported with much of it going to Western Europe. By 2010, Temsa should have a 10 percent market share in Western Europe in its product areas.

Buses on display at the show by Temsa included the Tourmalin which we would consider an upscale transit or suburban model. It apparently has had substantial success as a school bus. Both a Safir VIP and a Prestij Deluxe were shown. Both of these are mid-size charter/tour coaches and part of the original Mitsubishi-licensed products. The Safir VIP is interesting because it has an interior with two-and-one seating, which is popular on some long distance coach services in Turkey.

On display also was the little Opalin, which has no equivalent in the United States. It comes in sizes from 25 to 28 feet with seating for up to 33 passengers (plus a driver and tour escort) and underfloor and rear luggage space. A rear door and restroom are

optional. What makes this coach really interesting is that it is fully integral and both drives and rides as much like a big coach as its wheelbase will permit. Temsa also unveiled its new Metropol S transit bus at this show. Already a leader in intercity coaches, Temsa is now making strong inroads in the transit bus market.

Setra showed three coaches in a fairly large display area. Included was an S416HDH, an S416GT-HD, and an S431-DT double deck coach. Although obviously connected with Mercedes-Benz through DaimlerChrysler and Evo bus, Setra coaches are still built in Ulm, Germany (see the March, 2007 issue of NATIONAL BUS TRADER). However, Turkey is an important market for Setra. As with Western Europe, the Setra is considered the top-of-the-line tour coach. Hence, many of the higher quality Turkish tour operators are anxious to import Setras for their fleets.

VDL from the Netherlands had a small stand where they showed an interesting double decker. According to the information we received, the chassis came from VDL but the body was made by a new company known as MJT which was formed by some of the people formerly involved with Ikarus.

A Chinese company known as the Xiamen King-Long United Automotive Industry Co. Ltd. displayed a full size tour coach built in China. It attracted a great deal of attention but we were unable to determine how it was sold and supported in Europe.

Another display area worthy of note was held by a relatively new company known as Solaris. Inquiries produced the information that the company originated as a Neoplan branch in Poland but eventually became independent and changed its name to Solaris. Four buses were on display including a tour

Tezeller from Bursa, Turkey is one of several companies building midibuses for sale in Turkey. This particular bus represents their Tiger LUX model which seats 35 passengers plus a driver and tour escort. Nearby photos show the interior of this coach.





Otoyol displayed this Iveco midibus that is known as the Eurocity model. Keeping with typical styling, it has both a front and a rear door. Noteworthy are several big bus features plus some distinctive styling.



Not all midibuses are alike. Andolu Isuzu showed three different midibuses. This one represented their Urban model. Expectedly, it had features more typical of a bus designed for local city transit service.

coach, a transit bus and two midibuses. All looked to be fairly good construction.

Most of the remaining display areas were given over to suppliers, vans and midibuses. Some of the vans were interesting. A local company in Istanbul showed a line of Volkswagen commercial vehicles which included three different vans. Other companies showed various van conversions with the Sprinter van being very popular. A company called Trimo from Bursa, Turkey specializes in van conversions and had three different vans on display. Two of them were particularly attractive with tables and a rear lounge. There are obviously higher quality passenger services in Turkey that use higher quality interiors.

Some display areas showed a combination of vans and midibuses. The Otoyol/Iveco display area had a combination of three buses and two vans. Located in Istanbul, Otoyol is a major bus and truck builder in Turkey but seems to specialize in smaller buses. Somewhat similar was the Andolu Isuzu partnership of a company from Kocaeli, Turkey with the Japanese Isuzu. They showed a number of midibuses that looked very attractive.

Other midibus builders included Otokar from Istanbul. They introduced their new nine meter long midibus at this show and had three minibuses on display. Their display area was continually busy

which can only suggest that their buses are popular with the local operators. A 30-year old company, Tezeller from Bursa, Turkey had two midibuses on display. Their midibuses were offered in lengths up to nine meters (29.5 feet) with seating for up to 35 passengers.

I had the opportunity to both inspect and ride on some of these midibuses. While I admit that there is a fairly wide range in quality from manufacturer to manufacturer, I was reasonably impressed by the quality. Most are integral construction and ride considerably better than body-on-chassis buses. Most have stick shift, some still floor-mounted, but many have additional passenger amenities and many have under-floor and/or rear luggage compartments. There might be a market for vehicles like this in the United States and Canada.

One of the more interesting vehicles on display at Busworld Turkey was this double-decker city bus. The bus chassis came from VDL in the Netherlands while the body came from MJT in Hungary, a company formed by former people from Ikarus. Note the extra wide doors for fast loading and unloading.



While Busworld is known more as a true industry show than a social event, there was a little celebration on the first night of the show. HKF Trade Fairs, the Turkish show partner of Busworld, graciously put together an evening reception at the Expo Center for exhibitors and press after the show closed to the public. An unexpected treat was a performance by belly dancers for the group. The girls were obviously well instructed since they paid particular attention to Luc Glorieux of Busworld, much to the delight of many in attendance who know Luc.

Both exhibitors and attendees made positive comments about this first Busworld Turkey. What with the increasing importance of Turkey as a bus manufacturing center, the show was very appropriate. As is typical with other bus shows, the big question will be in scheduling additional events in the future that do not conflict with other shows such as Kortrijk or Hannover. □

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