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# WORLD RAIL MARKET study

forecast 2014 to 2019



DWV Media Group GmbH



**DVV Media Group GmbH**  
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WORLD  
RAIL **MARKET** study

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## A. ABSTRACT OF THE STUDY

This is the fifth edition of the World Rail Market Study which has been commissioned biennially by UNIFE since 2006.

The study covers the development of the global rail supply market.

It provides a detailed analysis of 55 focus countries, including the major existing rail markets and the most promising emerging ones. These countries are clustered into seven regions.

The current average annual total market volume amounts to EUR ~150 bn p. a.

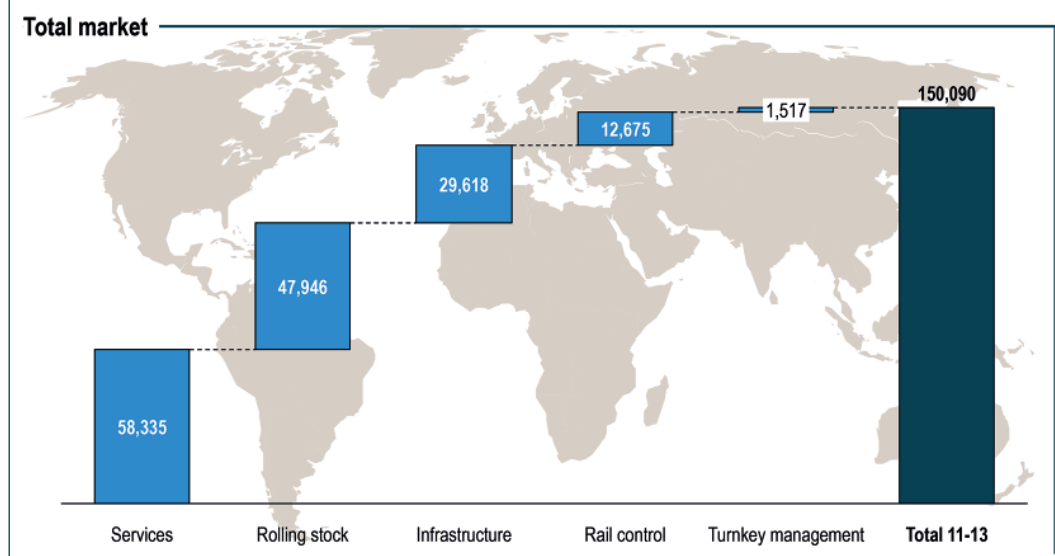


Figure 1: Current annual market volume by segment [EUR m]

Data for countries that are not part of the focus group has been extrapolated on the basis of traffic volumes, transportation units, passenger kilometres, and tonne kilometres.

## Steady growth in recent years

Despite low economic growth and/or public deficit problems in several important countries, the industry grew in the period from 2011 to 2013. The total annual market volume of the rail supply industry averaged approximately EUR 150 bn in the years 2011 – 2013. As reported in the previous study, services and rolling stock account for the majority of the market. Infrastructure is the third largest segment.

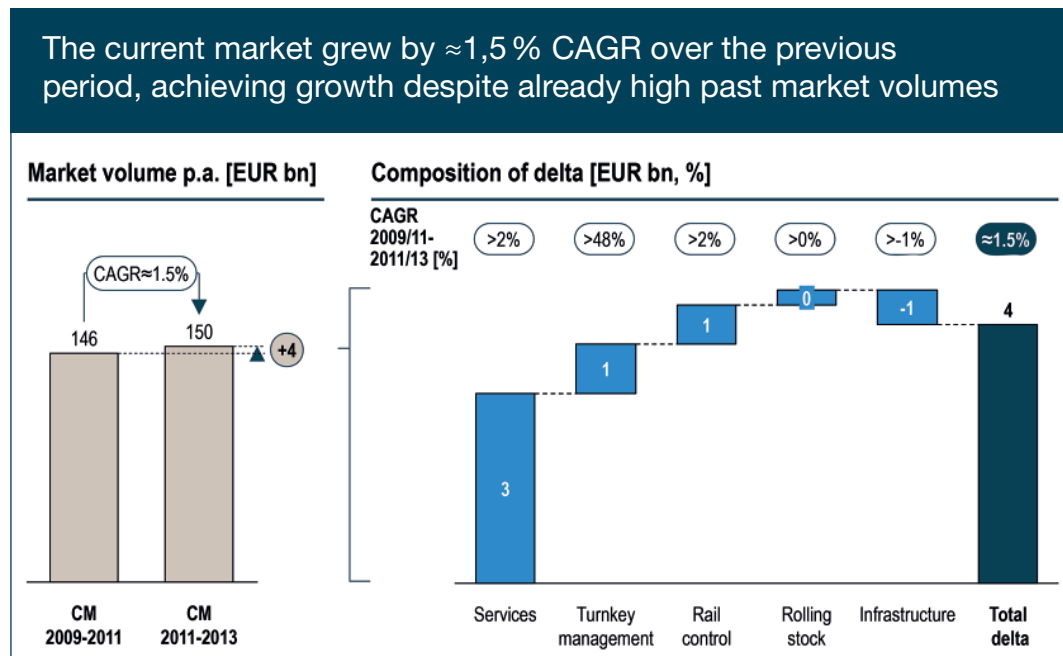


Figure 2: Growth in total annual market volumes and comparison of product segments<sup>1)</sup>

1) Rounding differences may apply

## Outlook for 2019 – Detailed analysis and forecast made, combining algorithms with insights of leading market players

Based on the analysis of several thousand rail projects and verifications by top-down calculation, the worldwide market for rail supply has been forecasted through 2019. The industry will remain on its growth path. A growth rate of 2.7 % per annum is predicted for the world's total rail supply market over the next six years. The total market will amount to approximately EUR 176 bn per year for 2017 – 19.

There are several trends that have driven the growth of the rail supply industry in the past and are likely to continue doing so. First, there are the megatrends such as population growth, urbanisation and increased demand for mobility, climate change and environmental concerns, deregulation, and liberalisation that will further contribute to the growth of the industry. Second, several initiatives at the EU level (e. g. free-trade agreement between EU and USA/Japan, revised TEN-T guidelines, stable rate of increase in ERTMS investments) will certainly improve the competitiveness of the European Rail Industry and meet the changing transport needs. Lastly, overall market demand is helped by increased order volumes in emerging markets and policies and measures like those mentioned above will enable mature markets to remain stable in upcoming years. Services, turnkey management, rail control and rolling stock contributed to this growth. Following a special focus on the turnkey market in this year's edition of the study, its market volume has been more reliably captured.

Regions with key significance for the rail supply industry will be Latin America, Asia/Pacific, Africa/Middle East and NAFTA. All regional markets are assessed regarding their development of the rolling stock, infrastructure, rail control, services, and turnkey integration development.

## Special features of this study

Investment in railways has always been dependent on the availability of public finance. However, public finance has become scarce. Therefore, alternative financing methods which help governments and rail transport companies to realise important projects become more important. This study elaborates on Public Private Partnerships (PPPs) and other alternative ways of financing.

In addition, two important rail markets are described in more detail to provide a comprehensive picture to the reader: Russia and the U.S. Both markets are large in absolute terms and will be important drivers of future growth of the industry.

In sum, readers of the 2014 World Rail Market Study will obtain:

- Detailed information on the installed base of rolling stock and infrastructure, broken down into transport segments and product segments by continent
- A comprehensive assessment of the current rail supply market volume for the 2011–2013 period on regional level for all products, product segments and transport segments of the rail supply industry
- A detailed forecast of expected rail supply market volumes in the years 2017–2019 per continent for the rolling stock, infrastructure, services, and rail control segments, applying the same breakdown as mentioned above
- An assessment of the share of turnkey projects in relation to the total market volumes
- An extensive analysis of the Russian and U.S. rail markets and of conventional and innovative financing methods in the rail supply industry
- Thorough descriptions of the methodology and forecast logic, combining top-down algorithms with vast bottom-up information provided by and aligned with market contenders

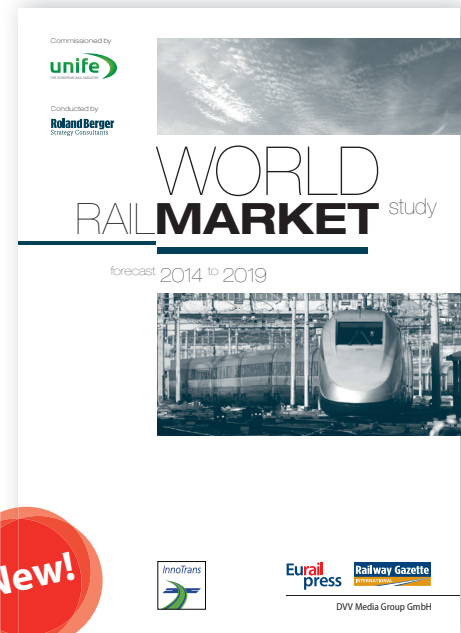
# World Rail Market Study (5<sup>th</sup> edition) forecast 2014 to 2019

A study commissioned by UNIFE – The European Rail Industry, conducted by Roland Berger Strategy Consultants and published by Eurailpress.

Based on a survey conducted in the 55 largest rail markets worldwide, the UNIFE World Rail Market Study provides market volumes and growth predictions from 2014 to 2019. Based on the testimony of UNIFE members and rail experts from all around the globe, the WRMS gives an account of short-term and long-term growth for all rail product segments and regions.

Strategic conclusions are elaborated for each product segment and region based on the order intake of UNIFE members, a sophisticated forecasting model and the expertise of selected high-level decision-makers in the most important rail markets in the world political and economic scenarios.

**Order this unique insight to the world rail market right now!**



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Prepayment is necessary. The Study will be sent as a **personalized PDF**. To read the secured PDF file you have to install a Plugin. You are allowed to open the PDF on three different PCs but you can only print it once.

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