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WORLD RAIL MARKET STUDY

forecast 2018 to 2023



COVER PHOTOS
From left to right: Bombardier Transportation,
Siemens, Adif, Strukton Rail/Martin Uitvlugt

BACKGROUND GRAPHICS
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WORLD **RAIL** MARKET STUDY

forecast 2018 to 2023

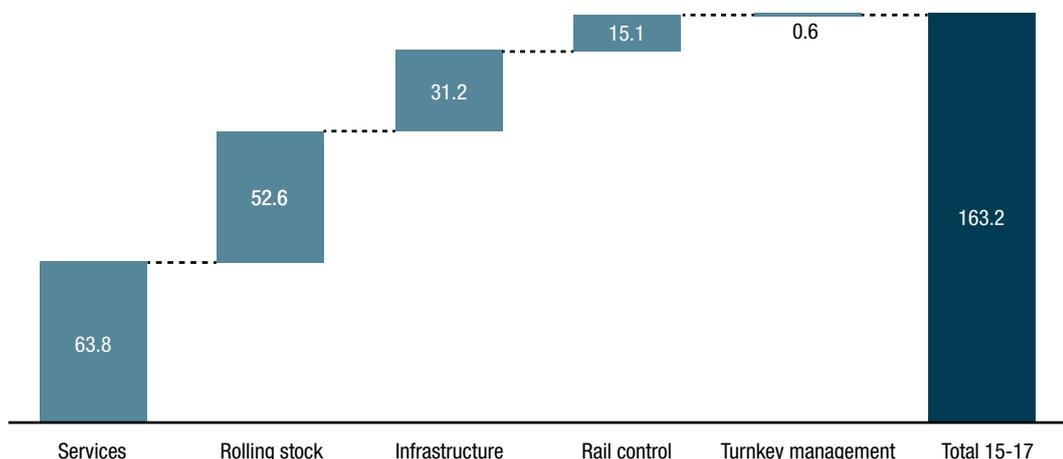
ABSTRACT OF THE STUDY

The seventh edition of the UNIFE World Rail Market Study once again provides a comprehensive view of the current status and expected development of the total and accessible world rail supply market. The study covers the market development of 60 countries, which jointly comprise more than 98% of global rail traffic, clustered into seven regions. Data for countries that are not part of the focus group has been extrapolated on the basis of track kilometres, transportation units, passenger kilometres, and tonne kilometres.

Positive market development in recent and future years

Driven by considerable investments in services, infrastructure, and rail control, the rail supply market has grown by 1.2% per year from the 2013-2015 period to the 2015-2017 period and now has a volume of EUR 163.2 bn.

The current annual total rail supply market volume in the years 2015-2017 amounts to EUR ~163 bn per annum



Current annual market volume by segment [EUR m]

TOTAL MARKET

2015-2017

163.2 BN EUR

CURRENT AVERAGE

ANNUAL TOTAL MARKET VOLUME



services

63.8 BN EUR



infrastructure

31.2 BN EUR



rail control

15.1 BN EUR



turnkey management

0.6 BN EUR



rolling stock

52.6 BN EUR

Especially Western Europe and Asia Pacific have contributed to this positive development of the market, while other markets such as Africa/Middle East, Latin America, or CIS display a decline. Considerable investments in infrastructure and rail control were undertaken in Europe and Asia Pacific, for instance in Poland and India. Furthermore, some rolling stock segments have strongly supported this market growth like EMUs in Western Europe and Asia Pacific as well as metro vehicles in Africa/Middle East, Asia Pacific, Europe, and NAFTA.

The study projects the future global rail supply market based on an evaluation of several thousand rail projects and verification through several top-down calculations. This projection forecasts the market to grow by an annual rate of 2.7% until 2023, when the annual volume is expected to reach approximately EUR 192 bn.

Among the key drivers for this positive market development is a growing foundation from mature rail markets, where operators consistently invest in upkeep and extension of their infrastructure and rolling stock bases. Furthermore, upgrades and modernisations of signalling systems will further drive the market in established rail regions. In addition, emerging rail markets, such as Africa/Middle East or Latin America, contribute to market development through continued development of their infrastructure and rail systems.

Special features of the study

The 2018 edition of the study qualitatively analyses the advantages of rail as a means of transportation as well as general trends which both increase the demand for railways and rail equipment.

Rail – whether for mainline, urban/suburban, or freight transportation – has significant advantages compared to other modes of transportation. Among these advantages are the green footprint of railways, its safety record and the high capacity. Furthermore, railways can be a driver of economic growth and benefit travellers through easy access, productive travel time, and a high level of comfort. This edition of the World Rail Market Study analyses these advantages as well as the resulting implications for the rail supply industry.

Beside the advantages of rail, several trends drive the growth of the rail supply industry. Megatrends such as increasing security concerns, urbanization, globalization, or sustainability have a positive effect on the demand for rail solutions. On top of that, the industry is also transformed by digitalization, artificial intelligence, e-mobility, private financing as well as liberalisation of rail operators. In the study, these trends and their expected impact on the rail supply industry will be evaluated.

In sum, readers of the 2018 World Rail Market Study will obtain:

- Detailed information on the installed base of infrastructure and rolling stock, the latter broken down into transport segments and products by region (e.g. locomotives in NAFTA)
- A comprehensive assessment of the current rail supply market volume for the 2015-2017 period on regional level for different product segments
- A detailed forecast of expected rail supply market volumes in the years 2021-2023 per region for rolling stock, infrastructure, services, and rail control segments
- A distinction of the total and accessible markets for both the current and future periods
- An assessment of the share of turnkey projects in relation to total market volumes
- A qualitative analysis about the advantages of rail and the general trends increasing the demand for railways and rail equipment
- Thorough descriptions of the methodology and forecast logic, combining top-down algorithms with vast bottom-up information provided by and aligned with rail suppliers

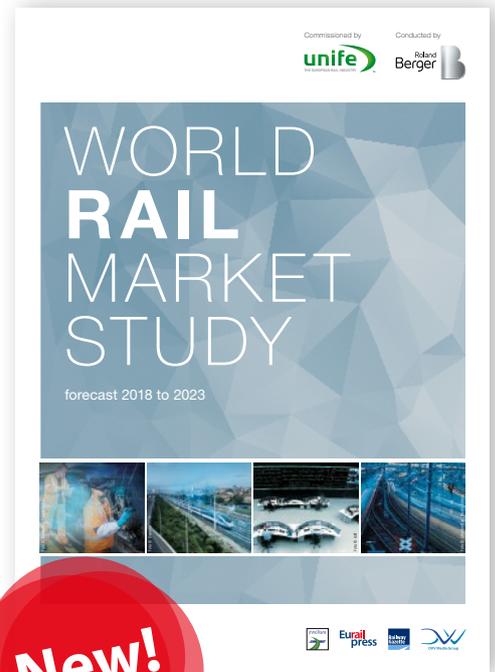
World Rail Market Study (7th edition) forecast until 2023

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The UNIFE World Rail Market Study provides a comprehensive view of the current status and expected development of the total and accessible world rail supply market. Based on project data from UNIFE member companies, a sophisticated forecasting model as well as interviews with rail executives, market volumes are quantified by region and segment.

Beside market figures, buyers will get detailed information about the global installed base of track and rolling stock as well as a qualitative analysis about the advantages of rail and the general trends in the industry.

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