

Competing in train manufacturing - Global market undergoing swift development

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Abstracts

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SUMMARY

Train manufacturing around the world has experienced significant change over recent years, impacting the extent of competition within the global market. Leading companies are now larger than ever following a spate of mergers and acquisitions, enabling the biggest companies to compete for more contracts in more countries. Yet increased competition overseas has also had a negative impact on some domestic markets; the two leading players in China merged after a period of fierce price reductions. Even in developed economies competition revolves as much around keeping the trust of governments as it does around producing high-quality trains, and this is even more so the case in the developing world.

KEY HIGHLIGHTS

The United Kingdom serves as a useful example of the impact transport policy can have on competition among train manufacturers. Several high-profile projects have resulted in extensive orders being placed in a relatively short period of time, attracting much foreign competition.

Itself the result of a mega-merger between the two leading Chinese train manufacturing companies, CRRC is seeking to expand overseas and has already made a big impact, forcing existing players in several valuable markets to compete harder to win contracts.

Consolidation has been a leading theme in the market in recent years. Leading companies have raced to acquire companies operating in alternative markets, an easier process than attempting to create new operations from scratch. In response to the Chinese merger, two leading European companies – Siemens and Alstom – merged, creating a European company capable of competing against CRRC.

SCOPE

Explores how governments can impact the shape of the train market.

Looks at the impact of CRRC on the international market.

Assesses how the industry has changed due to consolidation.

Analyses the risks and opportunities presented by emerging economies.

REASONS TO BUY

How is competition impacted by the transport policies of governments?

What has been the impact of CRRC on the international market?

What risks and opportunities do emerging markets conjure?

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Overview

Catalyst

Summary

United Kingdom government demands more than low costs when awarding contracts

Hitachi wins lucrative contracts after opening assembly plant in United Kingdom

Renewal of fleet is boosting competition in the domestic train market

CAF attracted to UK market by quantity of contracts on offer

CRRC is changing train manufacturing market forever

Scale of CRRC makes the company a colossus of train manufacturing

CRRC is stretching around the world, changing the train market

Despite vast size, CRRC still interacts with rivals in joint ventures

Loss of New York subway contract suggests future could be tough for Chinese giant

Consolidation is changing shape of train manufacturing

Siemens Alstom merger incited by need to compete against Chinese mega-merger

CRRC created by Chinese merger reduced domestic competition and changed the international market

Small player numbers are reducing amid industry-wide consolidation

Emerging markets involve geopolitics, denuding competition development

After failing to sell in the United States, Japan takes high-speed rail to India, but only with government help

Chinese venture into Indonesia evidences risks of emerging markets

International governments are key to European overseas adventures

Conclusions

Competition in train manufacturing is moving at speed but is also creating problems

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