

Railway Wiring Harness Market by Application(HVAC, Lighting, Traction System, Infotainment), Material, Train (Metro/Monorail, Light Rail, HRS), Component (Wire, Connector), Voltage (High, Low), Cable, Wire length,End Use and Region - Global Forecast to 2026

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Abstracts

The railway wiring harness market, by value, was USD 1.5 billion in 2021. It is projected to grow at a CAGR of 4.6% from 2021 to 2026, to reach USD 1.9 billion by 2026. Rapid urbanization in emerging countries has increased the demand for public transport such as rail networks. In addition, the increasing demand for a safe and efficient mode of transportation is expected to drive the growth of the market. The high population growth rate, particularly in Asia Pacific countries such as China and India, has intensified the need to increase mass transportation and expand the existing rail infrastructure. China invested USD 50.3 billion in the railway sector during the first half of 2020. Investments in railways are expected to provide growth opportunities for the railway wiring harness market in future.

According to World Economic Forum, while in 1950, less than 20 percent of Africans and sns lived in cities, that number had increased to 43 percent and 51 percent, respectively, by 2020 South America also increased urban populations majorly during the same time period, arriving at an urban population share of more than 80 percent – higher than that of Europe. Increasing urbanization is expected to drive the growth of rapid transit systems such as metros, subways, light rails, and trams. Various countries are increasingly investing in metro systems to reduce traffic on roads. Emerging countries such as India, China, Egypt, and Brazil are investing significantly in the development of metro infrastructure which in turn will support the growth of railway wiring harness.

According to UIC, the global extension of the high-speed rail network is expected to reach more than 80,000 km by 2030–2035. Countries such as Japan, China, Germany, France, and Spain have successfully installed high-speed rail networks, which have revolutionized transportation in these countries. For instance, the high-speed rail line between the Chinese cities of Xi'an and Chongqing has reduced travel time from 9.5 hours to 5.5 hours. These aspects related to high-speed rail transit drive the growth of high voltage electrified rail tracks, which, in turn, are expected to boost the growth of the railway wiring harness market.

“INCREASED INVESTMENTS FOR INTRODUCING ADVANCED TECHNOLOGIES IN TRAINS IS TO DRIVE WIRE SEGMENT BY COMPONENT”

The wire segment is expected to be the largest and fastest-growing market due to the increasing number of electronic systems in a train and rising trend of driverless trains. Increasing urbanization, rising demand for increased connectivity, and the comfort, reliability, and safety offered by rail transport have led to the growth of wire components for rail transportation. Rolling stock plays a vital role in the infrastructure of a city or a country. There is a rising demand for convenient, eco-friendly, and safe modes of transportation from commuters and governments. For instance, in 2020, China announced investments of USD 14 billion for Intercity transportation and high-speed rail projects. In 2020, 24 European countries came together to boost international rail routes and provide international services for passengers who travel in a range of 300 km-800 km such as digital solutions for complex ticketing systems for multiple journeys. This is expected to boost the passenger transportation market in the coming years. Thus, with growing applications of wiring harnesses in railways, wiring with different lengths would witness significant demand.

“INCREASING DEMAND FOR HIGH END CONNECTED TRAIN IS DRIVING RAILWAY WIRING HARNESS MARKET”

OEM is estimated to hold the largest market share during the forecast period. Increasing advanced rolling stock orders and deliveries, economic growth across the regions, and increasing demand for passenger comfort in trains are the factors driving the railway wiring. Most new trains are equipped with advanced features such as enhanced lighting, HVAC and infotainment, leading to higher demand for the wiring harness. As a result, OEMs segment would continue dominating the market. In 2020, Over 7,000 conventional coaches are expected to be denounced as Indian Railways has begun the massive exercise of replacing the entire fleet with German-designed LHB (Linke Hofmann Bosch) coaches in a phase-wise manner, a move aimed at

strengthening safety and increasing the speed of all trains. Aftermarket is estimated to show the highest CAGR growth due to the changing technologies which require regular upgradation in the rolling stocks system.

“Improving Safety of The Electrical and Electronic Systems of The Train To Drive The Market”

The global demand for rail vehicles is fuelled by the rising population in urban areas, which is placing significant pressure on the existing transportation infrastructure and necessitates the expansion of the network infrastructure. According to UNCTAD (2020 report), 51.1% lived in urban areas ten years ago. The share of the urban population increased to 55.7% in 2019. It is generally higher in the developed (80.5% in 2019) than in the emerging world (51.1%), with transition economies in between the two (65.4%). Over the last ten years, urbanization has been most prominent in emerging economies, especially in Asia, which witnessed the urbanization rate increase from 42.3% in 2009 to 49.1% in 2019. The increasing urban population is expected to require governments to increase urban transportation facilities such as metros, light rails, monorails, and subways. This is expected to drive the demand for new rail vehicles including locomotives, multiple units, wagons, and coaches. The increase in rail projects will directly impact the demand for railway wirings as they carry and provide electric energy for the systems across the train. Presently, trains have a greater number of wiring due to the inclusion of a larger number of electric systems such as surveillance cameras, sensors, visual boards, and chargers. A wire harness is compact and is insulated with plastic, which improves the safety of the electrical and electronic systems of the train. It has become vital for wiring harness manufacturers to meet the global demand and comply with safety standards in order to become more agile and adapt to consistent technological enhancements.

The study contains insights from various industry experts, ranging from component suppliers to tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 - 52%, Tier 2 – 27%, Others - 21%

By Designation: C level - 47%, D level - 37%, Others - 16%

By Region: Asia Pacific- 28%, North America - 22%, Europe - 26%, Middle East and Africa -14%, RoW-10%

Major players profiled in the report are Hitachi Ltd. (Japan), Prysmian Group (Italy), TE Connectivity (Switzerland), Leoni (Germany), and Nexans (France).

Research Coverage

The report segments the railway wiring harness market and forecasts its size, by value, on the basis of train type (metro/monorail, light rail, and high-speed rail/bullet train), application (HVAC, lighting, brake, traction system, engine, infotainment, and others), component (wire, connector, terminal, and others), cable type (power cable, transmission cable, jumper cable, and others), voltage (low voltage, medium voltage, and high voltage), Wiring harness Length (less than 5 feet, 5-15 feet, more than 15 feet), end use (OEM and Aftermarket) and region. It also covers the competitive landscape and company profiles of the major players in the railway wiring harness market ecosystem.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market with information on the closest approximations of revenue and value for the railway wiring harness market and its sub segments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

The report will also help the market players understand the impact of COVID-19 on railway wiring harness market.

The report also helps stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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