

# **Rolling Stock Market by Component Product Type (Locomotive, Rapid Transit, & Coach), Locomotive Technology (Conventional, Turbocharged, & Maglev), Application (Passenger Transportation & Freight transportation) & Region - Global Forecast to 2028**

<https://marketpublishers.com/r/RFB2397CCE0EN.html>

Date: May 2023

Pages: 383

Price: US\$ 4,950.00 (Single User License)

ID: RFB2397CCE0EN

## **Abstracts**

The global rolling stock market, by value, is estimated to be 54.6 USD Billion in 2023 and is projected to reach 65.6 USD Billion by 2028, at a CAGR of 3.8% from 2023 to 2028. Rolling Stock market growth would be supported by favourable government policies and investment towards railway industry. In Addition to this, leisure travel has become increasingly popular across the globe. This significantly increases the demand for long-distance high-speed rail services as well as local light rail for tourists using public transport due to which demand for rolling stock will be high in the forecast period.

Globally, there has been a rapid increase in industrial activities. Industries need transportation networks to move raw materials and finished goods efficiently. Freight transportation by rail has proved to be more cost-effective and reliable compared to road transport. More than 1.42 billion metric tons of freight were transported in India through the railways during 2022. Increased mining activities in emerging economies are also expected to positively impact the market for freight transportation, which, in turn, is expected to propel the demand for freight wagons and locomotives. According to the International Organizing Committee for the World Mining Congress (WMC) 2022, global mining production was 17.2 billion metric tons in 2020, and Asia accounted for 59.8% of the total production. In 2021, although passenger traffic in the railway industry has declined, freight transportation has increased at a significant rate worldwide. For example, freight transportation increased by 11% in Europe, 9% in the US, 12% in China, 25% in India, and 12% in Oceania. Therefore, mineral-rich countries are expected to expand their rail networks to enhance connectivity.

“Europe region holds the largest market share of EMUs segment.”

The passenger application in Europe accounts for the largest market share of the overall rolling stock market in the region. In Europe, EMUs are majorly used for passenger transportation to reduce emissions from rolling stock. In February 2023, Esko Državna (D) launched a tender for the supply of 47 dual-voltage regional EMUs, including the provisioning of selected spare parts and complete services for a period of 15 years. USD 398 million is the estimated value of the contract. The growth of the market in Asia Oceania can be attributed to the high usage of passenger transportation. Due to such developments, the demand for EMUs will increase during the forecast period. The demand for EMUs is expected to increase significantly due to new high-speed train lines in China and the demand for new vehicles in Russia, Japan, Brazil, and the US. In October 2022, Spanish operator Renfe placed a USD 200 million order with CAF for the supply of 29 commuter EMUs together with spare parts. The contract includes an option to extend the future scope of the contract to nine additional EMUs, plus extra cars to extend the units in the initial order.

“By, Locomotive technology, Conventional locomotive hold the largest market share in rolling stock market.”

The Asia Oceania region is the leading producer of rolling stock across the globe and is expected to retain this position during the forecast period for conventional locomotives. Developments in rail transport in Asia Oceania are expected to meet the increasing need for the modernization of the passenger transport system. Growing urbanization increases the development of additional public transportation to overcome issues related to traffic congestion in urban areas. Railway transport serves as a viable option to meet the demand for an urban commute as well as long-distance travel. Various railway projects are in the developmental phase, with heavy investments. For example, in its Union Budget 2022-23, the Indian government allocated Rs. 140,367.13 crore (USD 18.40 billion) to the Ministry of Railways. In December 2022, Network Rail secured USD 37.1 billion in government funding for operational railway infrastructure in England and Wales for the next five years. Also, In January 2023, Siemens AG received an order for 1,200 locomotives of 9,000 horsepower (HP) from Indian Railways, marking the single largest locomotive order in the history of Siemens Mobility and the single largest order in the history of Siemens India. Developments in the field of electric locomotives are expected to fuel the growth of the rolling stock market. This is expected to boost the rolling stock market in the near future.

“Asia Oceania hold the largest market share in the coaches segment”

In terms of volume and value, the Asia Oceania market is projected to grow at the highest rate owing to increasing investments for developments in railway infrastructure in the region. The demand for passenger transportation is also expected to rise due to the increase in urbanization in regions such as Asia Oceania and Europe. In December 2022, the Moscow Metro signed a supplementary agreement with Transmashholding for the procurement of 500 additional rolling stock coaches. In 2022, Indian Railways has selected seven companies to supply propulsion equipment for 58 160km/h Vande Bharat EMUs. Where Siemens will supply traction equipment for 16 trains and Alstom 9. For this purpose, Siemens is set partner with modern coach factory in Amethi, while Alstom will manufacturer its trains in partnership with a rail coach factory at Kapurthala. Thus, due to such developments, the demand for coaches will be high during the forecast period.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: Tier I - 18%, Tier II - 42%, and OEMs - 40%

By Designation: C Level Executives - 23%, Directors - 43%, and Others - 34%

By Region: Asia Oceania-35%, Europe-25%, North America-20%, MEA-15%, RoW-5%

The rolling stock market comprises major companies such CRRC Corporation Limited (China), Alstom SA (France), Siemens AG (Germany), Stadler Rail AG (Switzerland), and Wabtec Corporation (US).

Research Coverage:

The market study covers the rolling stock market size and future growth potential across different segments such as by product type, locomotive technology, component, application, and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

### 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 numbers for the overall rolling stock market and its subsegments.

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

### The report provides insights on the following pointers:

Analysis of key drivers (Increasing preference for railway-based public transport to reduce traffic congestion, Rising demand for energy-efficient transport, Increasing demand for comfort and safety, Increasing electrification of railway networks, Growth in rolling stock order), restraints (Refurbishment of existing rolling stock, Capital-intensive rolling stock), opportunities (Big data applications in rail industry, Increase in industrial and mining activities, Development of hydrogen fuel cell locomotives, Development of battery-operated trains, Development of solar-powered trains), and challenges (High overhaul and maintenance costs, Requirement of high R&D investments).

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the rolling stock market.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the rolling stock market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the rolling stock market.

**Competitive Assessment:** In-depth assessment of market shares, growth

strategies and service offerings of leading players like CRRC Corporation Limited (China), Alstom SA (France), Siemens AG (Germany), Stadler Rail AG (Switzerland), and Wabtec Corporation (US) among others in the electric rolling stock market.

**Strategies:** The report also helps stakeholders understand the pulse of the automotive airbags & seatbelts market and provides them information on key market drivers, restraints, challenges, and opportunities.

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## **13 RECOMMENDATIONS BY MARKETSANDMARKETS**

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