

# China Railway Transportation and Equipment Industry Report, 2009-2010

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## Abstracts

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To accelerate railway construction has been taken by China central government as an important measure to stimulate domestic demand and propel economic growth since 2008, when the worldwide economic downturn occurred. In 2009, China's railway fixed assets investment exceeded RMB700 billion, up 69.1% year-on-year.

With the recovery of the economy and rising investment in railway construction, the railway transport industry also has witnessed rapid growth. In 2009, China's railway achieved 86,000 km of operating mileage, surpassing Russia to rank the 2nd place around the world. Besides, it transported 1.53 billion passengers in all in 2009 around, up 4.3% year-on-year; and 3.22 billion tons of cargo, rising 1.9% year-on-year.

Apart from the analysis on the status quo of railway investment & construction and passenger & freight transport in China, the report also highlights the supply & demand, competition layout and key companies of railway locomotive, passenger car, wagon and EMU.

**Locomotive:** The period of 2005-2009 witnessed the acceleration of China's locomotive growth, and the output reached 1,810 units in 2009, up 23.6% from a year earlier, which was 2.2 times that of 2005. With the improving rate of railway network electrification and the development of high-power locomotive, it is expected that China's locomotive demand will be nearly 2,000 units in 2011 and around 2,200 units in 2012.

**Railway Wagon:** During 2009H1, the wagon market remained depression, which resulted in a 25.5% y-o-y drop in wagon output of the whole year, down to 44,122 sets. In spite of a fall in the growth of the wagon industry in 2009, the wagon suppliers with certain competitiveness still made remarkable achievements, for instance, CNR Qiqihar Railway Rolling Stock Co., Ltd, China's biggest manufacturer of railway wagon, took a 27% market share, and its sales revenue reached RMB5.67 billion in 2009, up 11.6% year-on-year; and wagon output was 12,000 tons, up 14% year-on-year.

**Railway Passenger Coach:** Fueled by the policy of making up for the shortage of freight traffic by increasing the passenger traffic carried out by the Ministry of Railways of the People's Republic of China, China's Railway passenger coach made breakthroughs in 2009, with the population hitting 49,355 units, up 9.5% from a year earlier; and the output 7,167 sets, rising 142.3% year-on-year.

**EMU:** CSR and CNR, China's biggest suppliers of railway locomotive and rolling stock, respectively accounts for 60% and 40% shares in EMU field. In 2009, they both delivered 89 EMUs in total, CSR 49 and CNR 40 separately.

As four vertical and four horizontal railway passenger transportation lines and intercity railways in six metropolitan areas have been successively constructed, EMU in China will enter a rapid development period in the future and the delivery of EMUs will grow incessantly. It is expected that the EMU delivery of CSR and CNR will arrive at 200 units and 150 units respectively in 2011.

## Contents

### **1. DEVELOPMENT ENVIRONMENT OF CHINA'S RAILWAY TRANSPORTATION INDUSTRY**

#### 1.1 Policy Environment

- 1.1.1 Policies Related to Railway Transport
- 1.1.2 Policies Related to Railway Equipment

#### 1.2 Social Environment

- 1.2.1 Urbanization
- 1.2.2 Transport with the Trend of Low Carbon
- 1.2.3 Transport with the Trend of Low Energy Consumption

### **2. STATUS QUO OF CHINA'S RAILWAY INVESTMENT & CONSTRUCTION**

#### 2.1 Investment

#### 2.2 Railway Network Construction

- 2.2.1 National Backbone Network
- 2.2.2 Regional Railway Trunkline Network
- 2.2.3 High Speed Rail

#### 2.3 Railway Operation

#### 2.4 Latest Railway Network Plan

### **3 CHINA'S RAILWAY TRANSPORTATION INDUSTRY**

#### 3.1 Development Overview

#### 3.2 Railway Freight

- 3.2.1 Transportation Lines
- 3.2.2 Freight Capacity
- 3.2.3 Locomotive Market

#### 3.3 Railway Passenger Transportation

- 3.3.1 Transportation Lines
- 3.3.2 Freight Capacity
- 3.3.3 Locomotive Market

### **4 RAILWAY EQUIPMENT INDUSTRY**

#### 4.1 Entering a Golden Development Period

#### 4.2 Investment Layout

- 4.3 Market Scale
- 4.4 Production
  - 4.4.1 Locomotive
  - 4.4.2 Passenger Coach
  - 4.4.3 Wagon
  - 4.4.4 EMU
- 4.5 Demand
- 4.6 Import & Export
  - 4.6.1 Import
  - 4.6.2 Export
  - 4.6.3 Import & Export Comparison
  - 4.6.4 Export Orders of Key Companies
- 4.7 Competition

## **5 KEY LOCOMOTIVE COMPANIES**

- 5.1 Competition Pattern
- 5.2 Key Electric Locomotive Companies
  - 5.2.1 CSR Zhuzhou Electric Locomotive Co., Ltd
  - 5.2.2 CSR Qishuyan Locomotive Co., Ltd
  - 5.2.3 CNR Dalian Locomotive & Rolling Stock Co., Ltd
  - 5.2.4 CNR Datong Electric Locomotive Co., Ltd
- 5.3 Key Diesel Locomotive Companies
  - 5.3.1 CSR Qishuyan Locomotive Co., Ltd
  - 5.3.2 CNR Dalian Locomotive & Rolling Stock Co., Ltd

## **6 KEY EMU COMPANIES**

- 6.1 Competition Pattern
- 6.2 CSR Sifang Locomotive & Rolling Stock Co., Ltd
  - 6.2.1 Profile
  - 6.2.2 Operation
  - 6.2.3 Competitive Edge of Products
  - 6.2.4 Development Plan
- 6.3 CNR Tangshan Railway Vehicle Co., Ltd
  - 6.3.1 Profile
  - 6.3.2 Competitive Edge of Products
  - 6.3.3 Development Plan

## **7 KEY RAILWAY VEHICLE COMPANIES**

### 7.1 CNR Changchun Railway Vehicles Co., Ltd

#### 7.1.1 Profile

#### 7.1.2 Products

### 7.2 CSR Nanjing Puzhen Rolling Stock Works

#### 7.2.1 Profile

#### 7.2.2 Products

## **8 KEY RAILWAY LORRY COMPANIES**

### 8.1 Competition Layout

### 8.2 CNR Qiqihar Railway Rolling Stock Co., Ltd

#### 8.2.1 Profile

#### 8.2.2 Products

#### 8.2.3 Technical Strength

### 8.3 Baotou Beifang Chuangye Co., Ltd

#### 8.3.1 Profile

#### 8.3.2 Products

### 8.4 CSR Zhuzhou Rolling Stock Works

#### 8.4.1 Profile

#### 8.4.2 Products

#### 8.4.3 Technical Strength

### 8.5 Chongqing Changzheng Heavy Industry Co., Ltd

#### 8.5.1 Profile

#### 8.5.2 Products

#### 8.5.3 Strategies

### 8.6 CSR Yangtze Rolling Stock Co., Ltd

#### 8.6.1 Profile

#### 8.6.2 Products

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