

# Research Report on China Urban Rail Transit Industry, 2010-2020



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### Description

In China, urban rail transit mainly includes subway and light rail. China's first urban rail transit line was built in Nanjing in the 1930s and removed when the PRC was founded. And the first urban rail transit line (subway) since 1949 was built in 1965 and completed in 1969 in Beijing.

With fast economic development, prevalence of urbanization process and fast growth of population in major cities, traffic demand has increased remarkably in China which puts a heavy strain on city comprehensive transport system. Take Shanghai for example, by the end of 2014, civil car ownership had reached 2.5519 million, increasing by 418.8% compared with 2000 while the length of road per thousand people only doubled since 2000. That is to say, the growth rate of ground road construction is far slower than that of vehicle number.

The experience of developed countries shows that urban rail transit is an effective way to solve traffic jam. On one hand, the development of urban rail transit expands a city and makes the surrounding area more resided and better equipped with living and commercial facilities. On the other hand, the improvement of urban rail transit makes it easier for urban people to travel to outskirts and also for suburban dwellers to go to downtown.

As an important part of infrastructure, urban rail transit construction requires large investments. Relevant calculations have shown that every CNY 100 million investment will stimulate GDP growth by CNY 300 million and bring about thousands of jobs, obviously boosting economic development. Besides, its indirect effects on economic and social development like reduction of land occupation and environmental pollution and the best use of underground space are even harder to estimate.

The urban rail transit construction in China has paced up since the 21st century. The number of cities with operating urban rail transit lines in mainland China has increased from 5 to 22 during the period of 2002-2014. And Shanghai ranks first in the running mileage of urban rail transit which has surpassed 530 kilometers while cities like Zhengzhou and Harbin only report less than 30 kilometers.

By the end of 2014, among all 22 Chinese cities with operating urban rail transit lines, Shanghai ranks first in the total length of operating network with 539.2 kilometers and 14 lines, Beijing second with 520.3 kilometers and 18 lines, Guangzhou third with 245.4 kilometers and 9 lines, Chongqing fourth with 192.6 kilometers and 4 lines and Shenzhen fifth with 176.3 kilometers and 5 lines.

Over the last decade, the number of cities with urban rail transit in mainland China has rose from 8 to 22 with the number of operating lines rising from 17 to 83, the overall length of operating lines rising to 2699.6 kilometers with an average annual growth of 231.8 kilometers and the number of stations in operation rising from 237 to 1770.

The average annual growth rate of operating line was 109.7 kilometers during the first half of the past decade and 353.9 kilometers in the second half (hitting a record of 454.1 kilometers in 2010), three times that of the first half. By the end of 2014, three cities have a urban rail transit operation network measuring above 200 kilometers and four cities have the urban rail transit operating network measured above 200

kilometers in three cities and between 100-200 kilometers in four cities in China. And the urban rail transit in the top 2 cities, i.e. Shanghai and Beijing will undergo a rapid development, so does that in other cities.

By the first half of 2015, 39 cities have got their recent construction plan approved by the Chinese government. And it is estimated that by 2020, urban rail transit is set to open in about 50 cities with the total operating mileage reaching 6000-7000 kilometers and covering all major cities in China.

The total investment in Chinese urban rail transit industry is estimated to surpass CNY 2 trillion during the period of 2015-2020, which creates many investment opportunities for related companies in the industrial chain.

Readers can get at least the following information through this report:

- status of urban rail transit industry in China
- influencing factors of urban rail transit industry in China
- status of related industries of urban rail transit industry in China
- investment opportunities in urban rail transit industry
- forecast of urban rail transit industry

The author suggests the following groups of people purchase this report:

- manufacturers of rail transportation equipment
- construction units of urban rail transit
- operating enterprises of urban rail transit
- investors/ research institutions interested in Chinese urban rail transit industry

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