



# WORLDWIDE ROLLING STOCK MANUFACTURERS

**Market Insights and Factsheets for Top 50 Manufacturers and  
Overview of 190 Companies and 370 Production Sites**

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### Market Insights and Factsheets for the Top 50 Manufacturers and Overview of 190 Companies and more than 370 Production Sites

Available in English from 06<sup>th</sup> November 2018.

Now you can also purchase the **data annex in Excel format** (see overview data sheets on page no. 6 for more information).

SCI Verkehr presents the current product and service range of around 190 rolling stock manufacturers and also offers company figures and information about the current and future orientation of the world leaders in the manufacture of rolling stock in this MultiClient study. Furthermore, the study shows their production sites in detail, analysed by regional distribution and capacities.

The study “Worldwide Rolling Stock Manufacturers” analyses and explains the market along the revenues with new rolling stock. Previously to the publication of this study, SCI Verkehr surveyed the 50 largest manufacturers of rolling stock averagely from 2013 to 2017.

In terms of sites, the production facilities of traditional rolling stock production are taken into consideration first of all. Sites at which the maintenance and/or refurbishment of the vehicles are performed are not taken into consideration. A site is defined as a geographical place or location where a company or an operating facility of a company is located. For smaller companies, the site is also generally the company headquarters.

Within the scope of this study, SCI Verkehr is mainly focusing on the top of the value creation chain. Manufacturers of subsystems, components and assemblies are not considered. All input data used for these assessments has been summarized in corporate fact sheets; they have been sent to the respective market players for discussion and revaluation, and can be found in the studies and easily used for further detailed analysis.

#### In concrete terms, this market study “Worldwide Rolling Stock Manufacturers” provides:

- Worldwide trends and market volumes in the rolling stock industry
- Analysis of the production sites by product segment and production capacities
- Manufacturer analysis by regional presence, products and profitability
- Detailed profiles of the 50 most important rolling stock manufacturers worldwide, including company figures, production and services focus segments as well as analyses regarding the current and future strategic direction of the company
- Contact addresses and basic information on all 359 rolling stock manufacturing sites worldwide in the appendix of the study



#### Explore our additional offer of the data annex in Excel format

- All in this study displayed figures and graphs concerning markets, installed bases and deliveries are transparently and comprehensively available
- Apply the data sets for an individual evaluation and configuration or to access and supplement available market data

SCI Verkehr GmbH is an independent consultancy company specialising in the markets and economics of transport. We have close connections to the rail industry, with consultants in a wide range of specialist fields. We have an extensive network of experts in Germany and abroad and we specialise in market and strategy issues for the mobility sector. Our activities focus on companies in the transport and rail industry, logistics, public and private transport companies and transport and economics departments in public administrations at national, regional and municipal levels.

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- 1.5 Manufacturers Worldwide (Data)
- 1.6 Top 10 by Product Segment (Data)
- 1.7 Development by Product Segment (Data)
- 1.8 Market Share by Vehicle Type (Data)

Manufacturer	units	cars	Share
Other Manufacturers	xxx	xxx	xxx
CRRC	xxx	xxx	xxx
Trinity Industries	xxx	xxx	xxx
Greenbrier	xxx	xxx	xxx
Uralvagonzavod	xxx	xxx	xxx
UWC	xxx	xxx	xxx
UTLX	xxx	xxx	xxx
American Railcar Industries	xxx	xxx	xxx
Freight Car America	xxx	xxx	xxx
Altaivagon	xxx	xxx	xxx
Ruzhimash	xxx	xxx	xxx
RCF	xxx	xxx	xxx
ICF	xxx	xxx	xxx
Bombardier	xxx	xxx	xxx
Alstom	xxx	xxx	xxx
GE Transportation	xxx	xxx	xxx
Transnasholding	xxx	xxx	xxx
TMH	xxx	xxx	xxx
Uralvagonzavod	xxx	xxx	xxx

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- 2.6 Development Capacities per Region (Data)

Region	Product Subsegment	Unit	Year	Value
World market overview	Total	Locomotives	2010	xxx
World market overview	Total	Locomotives	2015	xxx
World market overview	Total	Locomotives	2017	xxx
World market overview	Total	Locomotives	2020	xxx
Africa / Middle East	Total	Locomotives	2010	xxx
Africa / Middle East	Total	Locomotives	2015	xxx
Africa / Middle East	Total	Locomotives	2017	xxx
Africa / Middle East	Total	Locomotives	2020	xxx
Asia	Total	Locomotives	2010	xxx
Asia	Total	Locomotives	2015	xxx
Asia	Total	Locomotives	2017	xxx
Asia	Total	Locomotives	2020	xxx
Australia / Pacific	Total	Locomotives	2010	xxx
Australia / Pacific	Total	Locomotives	2015	xxx
Australia / Pacific	Total	Locomotives	2017	xxx
Australia / Pacific	Total	Locomotives	2020	xxx
CIS	Total	Locomotives	2010	xxx

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- 3.7 Capacities and Employees (Data)
- 3.8 Market Shares (Data)

Manufacturer	Subcriteria	Value
Alstom	New rolling stock	xxx
Alstom	Non-rail revenue	xxx
Alstom	Other rail revenue	xxx
Alstom	Rolling stock after sales	xxx
Altaivagon	New rolling stock	xxx
Altaivagon	Non-rail revenue	xxx
Altaivagon	Other rail revenue	xxx
Altaivagon	Rolling stock after sales	xxx
American Railcar Industries	New rolling stock	xxx
American Railcar Industries	Non-rail revenue	xxx
American Railcar Industries	Other rail revenue	xxx
American Railcar Industries	Rolling stock after sales	xxx
BEML	New rolling stock	xxx
BEML	Non-rail revenue	xxx
BEML	Other rail revenue	xxx
BEML	Rolling stock after sales	xxx
Bombardier Transportation	New rolling stock	xxx
Bombardier Transportation	Non-rail revenue	xxx
Bombardier Transportation	Other rail revenue	xxx
Bombardier Transportation	Rolling stock after sales	xxx

#### 4 Additional Tables

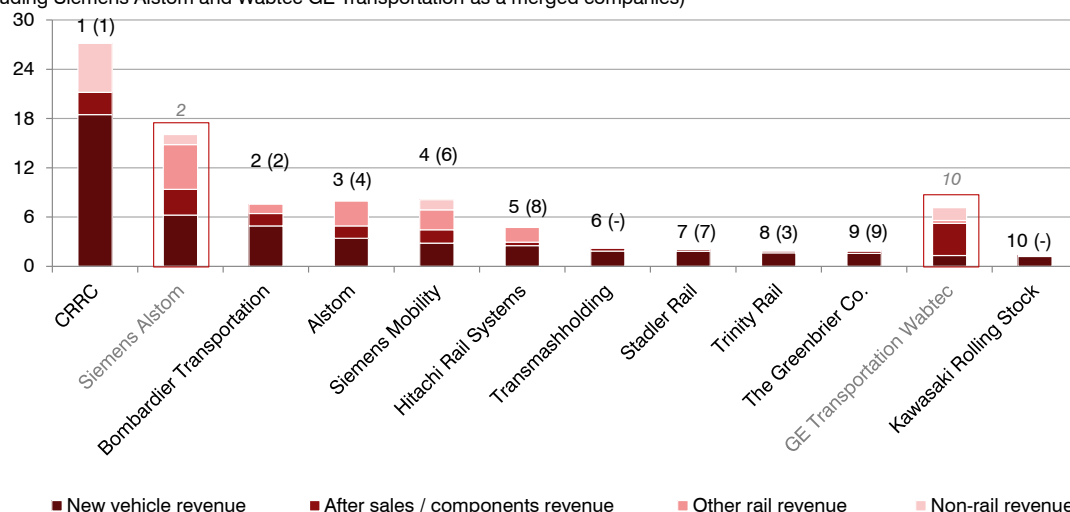
- 4.1 Worldwide Production Sites (Pivot)
- 4.2 Worldwide Production Sites (Data)



## 1.1 Overview

[...]

**Top 10 rolling stock manufacturers ranked by estimated new rolling stock revenue 2017<sup>1</sup> [EUR billion<sup>2</sup>]**  
(including Siemens Alstom and Wabtec GE Transportation as a merged companies)



<sup>1</sup> New vehicles' revenue partly estimated. Financial years ending in the first half of 2018 have been assigned to the year 2017.

<sup>2</sup> Foreign currencies have been converted with the average yearly exchange rate of the reporting period.

<sup>3</sup> The revenue for Siemens Alstom is the cumulated revenue of Siemens Mobility ending FY Sep. 2017 and Alstom ending FY Mar. 2018 without synergy effects.

<sup>4</sup> The revenue for GE Transportation is the cumulated revenue of GE Transportation ending FY Dec. 2017 and Wabtec Corporation ending FY Dec. 2017 without synergy effects.

<sup>5</sup> In 2017, The Greenbrier Co. acquired Astra Rail, resulting in the creation of the merged company Greenbrier-Astra Rail majority-owned by The Greenbrier Co.

Figure 1: The top ten manufacturers for new vehicles worldwide 2017

Data table (additional offer): 1 Overview Top 10

**The 10 most important rolling stock manufacturers generated a combined new vehicles' revenue of around EUR 40 billion in 2017, more than 70% of the global market for new vehicles with a volume of EUR 54.7 billion. Overall, there were eleven major rolling stock manufacturers with new vehicle revenue of more than EUR 1 billion in 2017.**

[...]

The changing rolling stock industry brought some interesting dynamics to the ranking of the largest companies in the industry. The planned merger of the rail divisions of Alstom and Siemens Mobility, which is expected to be finalised in the first half of 2019, will lead to the establishment of a second major player in the railway supply industry besides CRRC. The European Commission (EC) is concerned that this merger could reduce the competition in the fields of rolling stock and control command and signalling (CCS) technology, and lead to higher prices, less choice and lower innovation for tenders in these fields, due to the lower competitive pressure. Therefore, it is not clarified, if the EC will agree or make some requirements to this merger, e.g. Siemens and Alstom have to submit part of its revenue.

[...]

## 1.2 Development of companies and site strategies

[...]

### 1.2.1 Consolidation process intensifies with creation of new large manufacturers

The main reason behind the development of new products, new integrated solutions and the continuous push towards the After-Sales market in addition to geographical expansion is the competitive pressure felt by rolling stock manufacturers. As a reaction, many players even try to reposition themselves fundamentally, either exiting the industry or upgrading their position through external growth. The companies' recent quest to improve their competitive situation locally and/or globally thus saw the intensification of the consolidation wave which started in 2015:

–

[...]

- According to Wallner Weiß, the insolvency administrator responsible for the proceedings, Poprad-based freight wagon manufacturer **Tatravagonka** acquired insolvent company **Waggonbau Niesky** in September 2018. A definite completion of the transaction is still subject to the approval of competition authorities. Previously, Chinese company CRRC had been repeatedly linked to the acquisition. In addition, WBN and trade union IG Metall agreed on a location and employment guarantee as well as taking over tariff contracts.

[...]

### New market entries

[...]

- In April 2017, the **Diesel Plant LLC** was founded, which is part of the Aurum Group. The Aurum Group is a Ukrainian diversified industrial and investment group. The new company is focused on the production of freight wagons, including gondola wagons as well as grain hopper wagons. The plant intends to launch production of other types of rolling stock in the future. The company's capacities allow the production of up to 200 wagons per month.

[...]

### 1.2.2 Global expansion targets almost all market regions

[...]

### Global presence is a key factor in the strategies of the largest manufacturers

[...]

At the same time, several very large market regions remain comparably closed or require co-operations of some kind.

Players from the following regions currently stand out with regards to their global expansion:

- **Eastern Europe** – In the recent past, several traditional rolling stock manufacturers (or former maintenance providers) have strengthened their competitive position for new rolling stock. Aside from their expansion within Eastern Europe and partly to the CIS region, they are especially targeting Western Europe, where they add competition to the established manufacturers.



[...]

The following table shows offerings by vehicle segment of the eleven largest rolling stock manufacturers - all of which had a new vehicle revenue of at least EUR 1 billion (2017) - and their market shares for the period between 2013 and 2017: The market share is based on delivered units in the period from 2013 to 2017.

Worldwide market shares by segment for the period 2013-17* [units delivered]									
Manufacturer	E-Loce	D-Loce	HST	EMU	DMU	Metro	LRV	PC	FW
CRRC									
Bombardier Transportation									
Alstom									
Siemens Mobility									
Hitachi Rail Systems**									
Transmashholding									
Stadler Rail									
Trinity Rail									
The Greenbrier Co.									
Kawasaki Heavy Ind.**									
GE Transportation									

\* The list covers the 11 largest manufacturers ranked by their total new vehicle revenue above EUR 1 bn. Market shares are measured in cars or locomotive sections, LRVs are measured in units.

Figure 2: Worldwide market shares of the largest rolling stock manufacturers 2013-2017

Data table (additional offer): 1.3 Market share rolling stock

[...]

#### 1.2.4 Margins

[...]

1.3 Production sites and capacities in the regions

Around 190 companies manufacture rolling stock at approximately 370 sites worldwide. Many manufacturers are integrated rail technology groups and also provide components for rolling stock, vehicle services such as maintenance or refurbishment, as well as infrastructure and systems technology related products and services.

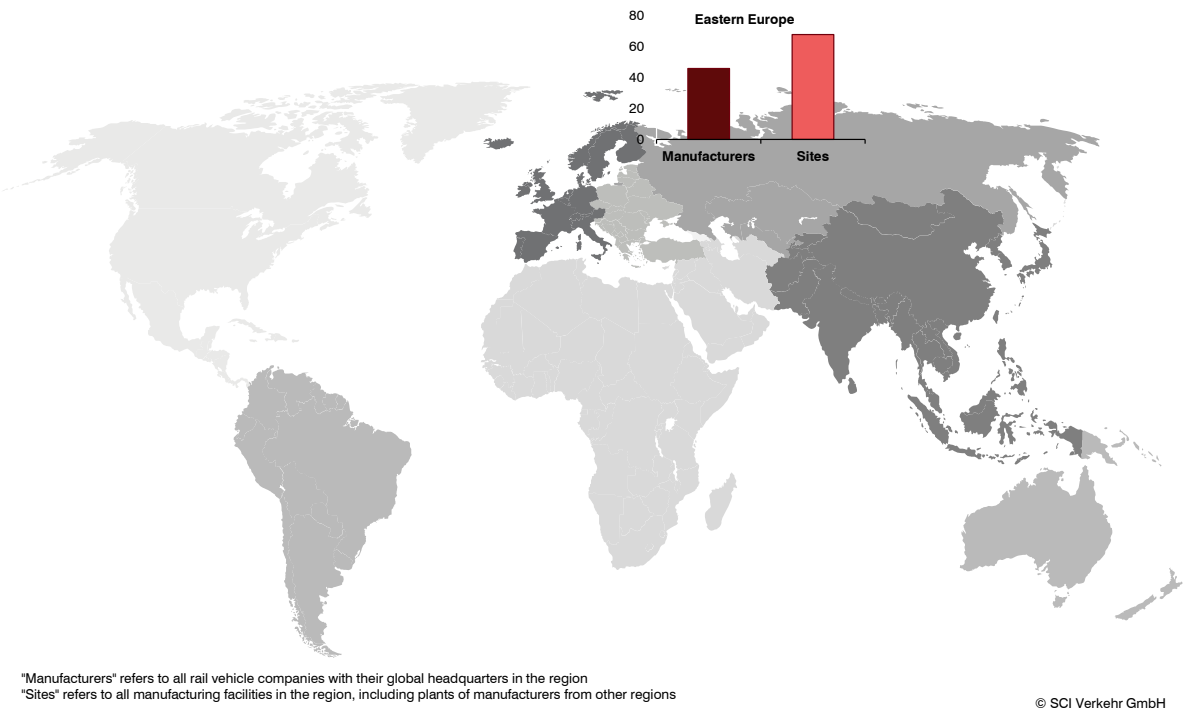


Figure 3: Worldwide distribution of manufacturers and sites  
Data table (additional offer): 2 Production sites

[...]

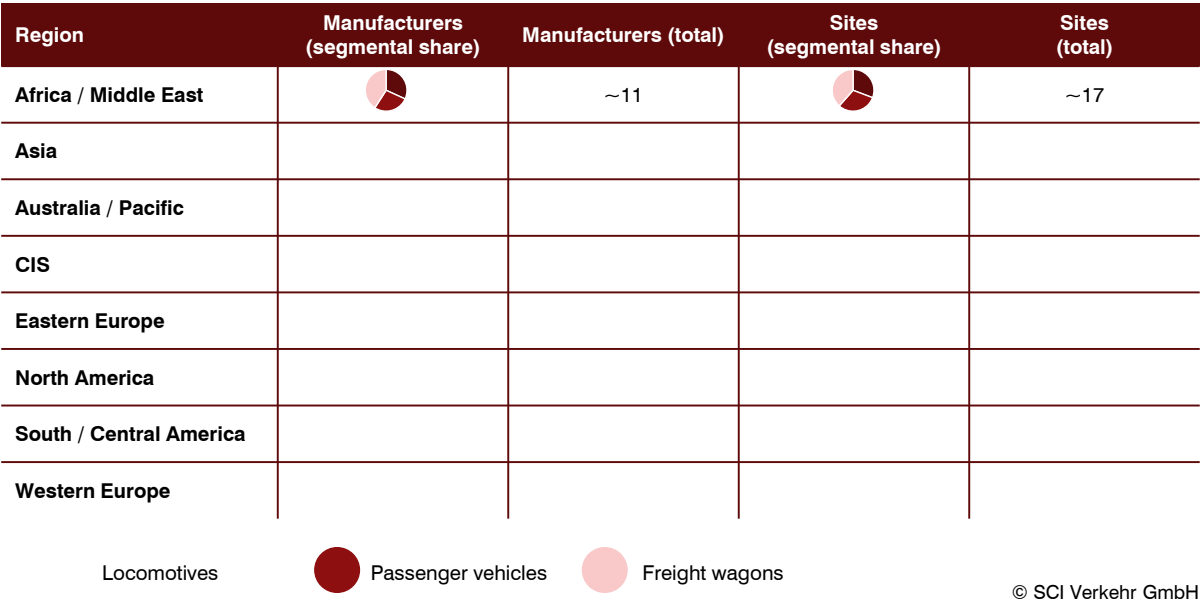


Figure 4: Regional manufacturing distribution of rolling stock segments  
Data table (additional offer): 2 Production sites

[...]

## 1.4 Regional market characteristics

[...]

### South/Central America

- South/Central America has a domestic-grown manufacturing scene for freight wagons with Greenbrier-Maxion (former AmstedMaxion) being the largest regional player. The locomotives and passenger vehicles segments are underdeveloped, but foreign multinationals such as Alstom, Bombardier, CAF, Hitachi, and Hyundai Rotem have opened sites in the region to cater to the growing demand. GE and EMD operate locomotive sites. CRRC is planning to build a production site for locomotives, freight wagons and passenger coaches. However, some of the production sites are not fully utilised due to decreasing demand in the market and political differences in some countries.
- Around 15 manufacturers are headquartered in South America. After Greenbrier Co. increased its directly owned stake in the JV Amsted-Maxion to 60%, the corporation is the largest freight wagon manufacturer in South America. Besides Greenbrier-Maxion, Randon is the only freight wagon manufacturer headquartered in South America, which is among the 50 most important manufacturers, worldwide. Manufacturers located in South America have about ten sites exclusively in South America.
- Out of around 20 production sites in South America, local manufacturers operate only around half. North American, Western European, and Asian manufacturers operate the other plants.
- South America was an attractive market, in which local and extra-regional manufacturers have positioned themselves. In the medium term, the development of even more new sites is not likely, because it will largely depend on the development of demand in the large country markets, such as Brazil and Argentina. For example, the Brazilian rolling stock industry is facing a crisis: there were still no orders for delivery in 2019 with date to May 2018. Currently, there are some tenders published. Simultaneously, the existing production sites are not fully utilised, why it is more likely to expand the existing production sites.

[...]

### 3 Rolling stock manufacturers

#### 3.1 Worldwide manufacturers of locomotives

**Worldwide, there are currently around 50 active locomotive manufacturers.** The manufacturing landscape is very diverse: Half of all locomotive manufacturers offer both electric and diesel locomotives. There are many specialised diesel locomotive manufacturers, but only a few specialised electric locomotive manufacturers. In general, the market for diesel locomotives is a global market with demand from all regions. In contrast, the market for electric locomotives is largely limited to the Eurasian double continent. The manufacturing sites are located, accordingly.

Among the specialised diesel locomotive manufacturers, there are many niche manufacturers that only offer smaller shunting locomotives, mainly for industrial or mining applications.

[...]

#### 3.1.2 Production sites and regional developments

[...]

Table 1: Capacities locomotives per region 2010 – 2020

Data table (additional offer): 2.1 Capacities and 2.2 Development capacities

Region	Capacity 2010	Capacity 2015	Capacity 2017	Capacity 2020	Growth 2010 - 2017	Expected growth 2017 – 2020
Africa/Middle East	350					
Asia	4,670					
Australia/Pacific	120					
CIS	1,660					
Eastern Europe	190					
North America	1,710					
South/Central America	200					
Western Europe	870					
<b>World total</b>	<b>9,790</b>					

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[...]

### 3.1.3 Capacities and utilisation per region 2017

Region	Production capacity p.a.	Capacity utilisation	Comment
North America	2,350	■ ■ ■	Medium utilisation of production capacities due to higher prices of new locomotives based on stricter emissions standards and increased focus on the modernisation and expanding of the useful life of the existing assets. After the low demand registered in 2016 and 2017, production figures are slightly going up.
<p>The short-term capacity (standard capacity) is usually around 70% of the maximum long-term capacity. The depicted utilisation rate relates to the standard capacity.</p> <p>Capacity utilization: ■■■ = very high, ■■■ = high, ■■■ = medium, ■■■ = low, ■■■ = none</p>			
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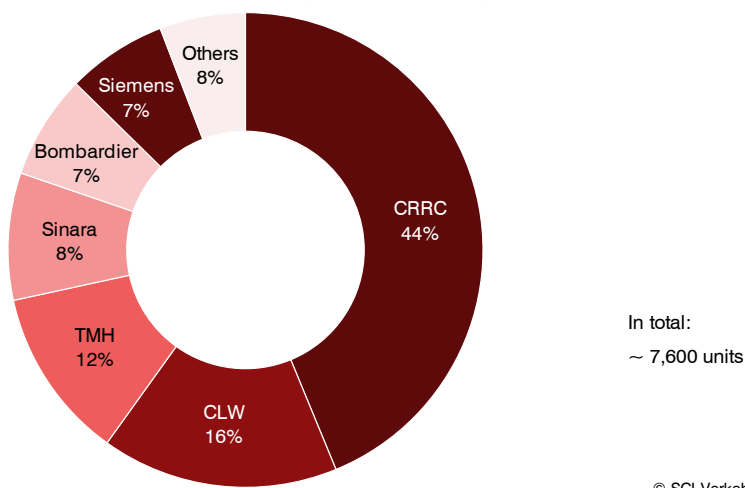
[...]

### 3.1.4 Market shares of locomotive manufacturers

#### Electric locomotives

[...]

#### Electric locomotives - World market share per manufacturer [2013-2017; units]



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Figure 5: Worldwide market shares electric locomotives 2013–2017  
Data table (additional offer): 1.3 Market shares rolling stock overview

About 60% of the electric locomotives delivered between 2013 and 2017 came from Asian manufacturers. This share was primarily achieved on the Asian market, although Chinese suppliers have been intensifying their export activities. Chinese electric locomotives have already been exported to Kazakhstan, Uzbekistan, Belarus, South Africa, Iran, Macedonia, Serbia and Ethiopia. Despite these, Chinese manufacturers have lost worldwide market shares in this period.

## 4 Factsheets of the largest vehicle manufacturers

### 4.15 J-TREC

Japan Transport Engineering Company (J-TREC)																												
Overview																												
<b>Headquarters</b> 3-1 Okawa, Kanazawa-ku, Yokohama 236-0043 Japan  www.j-trec.co.jp/eng/  Tel: +81 45 785 3009		<b>Development of revenue and profit of JR East (Transportation division)</b> (FY ending March)																										
<b>Management</b> Naoto Miyashita (President)		<table><caption>Data for Development of revenue and profit of JR East (Transportation division)</caption><thead><tr><th>FY</th><th>Operating profit (JPY billion)</th><th>Revenue (JPY billion)</th><th>ROS (%)</th></tr></thead><tbody><tr><td>2013/14</td><td>267</td><td>1,884</td><td>14%</td></tr><tr><td>2014/15</td><td>295</td><td>1,907</td><td>15%</td></tr><tr><td>2015/16</td><td>349</td><td>2,008</td><td>17%</td></tr><tr><td>2016/17</td><td>334</td><td>1,990</td><td>17%</td></tr><tr><td>2017/18</td><td>340</td><td>2,018</td><td>17%</td></tr></tbody></table> <p>© SCI Verkehr GmbH</p>			FY	Operating profit (JPY billion)	Revenue (JPY billion)	ROS (%)	2013/14	267	1,884	14%	2014/15	295	1,907	15%	2015/16	349	2,008	17%	2016/17	334	1,990	17%	2017/18	340	2,018	17%
FY	Operating profit (JPY billion)	Revenue (JPY billion)	ROS (%)																									
2013/14	267	1,884	14%																									
2014/15	295	1,907	15%																									
2015/16	349	2,008	17%																									
2016/17	334	1,990	17%																									
2017/18	340	2,018	17%																									
<b>Current shareholders</b> 100% JR East																												
Year	Employees	Revenue (EUR mn)	Operating Profit (EUR mn)	Order intake (EUR mn)																								
2017/18	1,150	16,990* (JPY 2,018 mn)	2,866* (JPY 340 bn)																									
*Revenues and operating profits stated include Transportation business of JR East incl. Services, Operations and Manufacturing																												
Company description																												
<b>Company introduction</b> Japan Transport Engineering Company (J-TREC) is a subsidiary of East Japan Railway Company (JR East), one of the largest passenger rail operators, worldwide. J-TREC's portfolio in the rolling stock segment includes LRVs and metros as well as HSTs (Shinkansen) and multiple units. In addition, J-TREC produces special-purpose vehicles such as containers, trailers and tank wagons as well as parking garages.																												
<b>Company history</b> Tokyu Car Corporation, the predecessor of J-TREC, was founded on 23rd August 1948. Tokyu Car was a licensee of an early-generation (early-1960s) stainless-steel commuter EMU train body and related bogie technology from the Budd Company of the United States. JR East took over the former Tokyu Car Corporation and added its own rail vehicle manufacturing facility Niitsu Rolling Stock Manufacturing Factory in April 2014 to form J-TREC. JR East founded the Niitsu Rolling Stock Manufacturing Factory, the first full-scale rail vehicle manufacturing plant owned by a railway operating company in Japan. This was accomplished by expanding the vehicle maintenance facilities in Niigata in 1994 with the aim of establishing a comprehensive management system for rail vehicles in which all the stages, from design to disposal, would be controlled.																												
<b>Recent business development</b>																												
<b>Revenue</b> For FY 2017/18, JR East's revenue totalled EUR 16.9 billion (JPY 2.02 trillion), remaining almost at the same level compared to the previous FY. J-TREC's revenue is only a fraction of this, and cannot be specified based on official documents. Regarding the operating profit, JR East reached JPY 340.4 billion in FY 2017/18, which corresponds to approximately EUR 2.87 billion.																												
<b>Current relevant company information</b> In January 2017, the Tokyo-based public railway transport operator Toei awarded J-TREC a contract for the delivery of 27 eight-car EMUs of the type Sustina S13 for operations on the Toei Asakusa Line from Nishi-Magome to Oshiage. The whole delivery will be completed by the end of 2021. Upon delivery, the EMUs of series 5300 from the years 1990 to 1997 will be																												

taken out of service.

On July 2017, the first of five EMUs of series 5000 to Tokyo commuter operator Keio Corporation were delivered to Wakabadaï depot on the Keio Sagami-hara Line. The ten-car trains entered passenger service in September 2017 and have been used on a new limited express service since spring 2018.

#### **New product platforms**

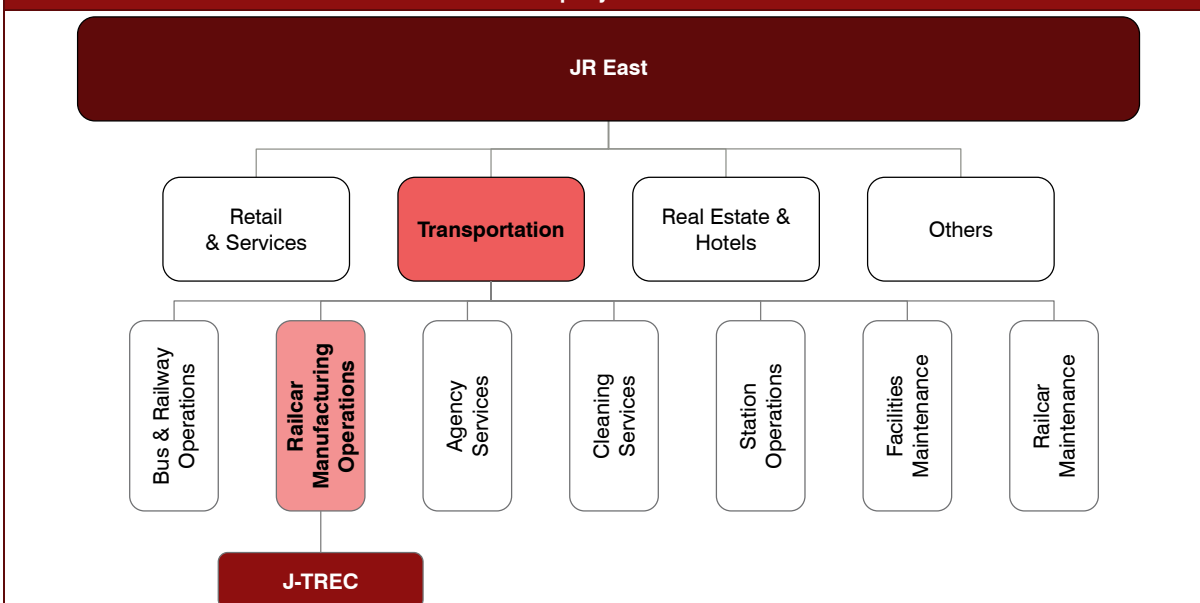
By 2020, JR East plans to introduce DC EMUs of the E235 series for commuter rail services on the Yamanote Line in Tokyo. A pre-series train was delivered in March 2015. The entire fleet of 52 E231-500 series trains formerly used on the line will be replaced by the E235 series trains before the 2020 Summer Olympics in Tokyo.

**Shinkansen ALFA-X:** In July 2017, JR East announced it would introduce a new ten-car test train, known as ALFA-X (Advanced Labs for Frontline Activity in rail eXperimentation), in spring 2019. The new 360 km/h model will operate on the Tohoku, Joetsu and other HSR lines. JR East will complete the next model by around FY 2030. The ALFA-X test train is expected to have two different end car nose profiles. It has not been announced whether J-TREC, another manufacturer or a consortium will build the new Shinkansen model.

#### **Medium- and long-term outlook of the company**

For FY 2017/18, the company plans to have revenue of JPY 2 trillion (EUR 16.8 billion). The company also has a target for operating profit of JPY 350 billion in 2020.

#### **Company structure**



#### **Breakdown of revenue by activities 2017/18 from JR East (Transportation division)**

New rolling stock	Rolling stock after sales services, spare parts and components	Other rail revenue	Non-rail revenue
~2.5% <sup>e</sup>	~1% <sup>e</sup>	~76.5% <sup>e</sup>	~20% <sup>e</sup>



Strategic focus			
Worldwide presence		J-TREC focuses sales on its domestic market of Japan. It delivers a large proportion of its production to parent company JR East. Nevertheless, J-TREC has also been successful in other markets, especially in Asia but also in the USA, and has become active in Europe as well.	
Product strategy	Focus on passenger rolling stock	J-TREC mostly produces passenger rail rolling stock, and can deliver a wide variety of segment products, such as metros, EMUs, DMUs and HSTs. It also produces containers and other special products for the freight transport industry.	
Value creation	Medium vertical integration	J-TREC manufactures a range of vehicle components in-house, but also sources important parts (e.g. electrical components) externally, for example from Toshiba and Mitsubishi.	
New markets	Export strategy	J-TREC has excess manufacturing capacities and has exported vehicles to foreign markets in order to better utilise its resources. Most recently, the manufacturer submitted a bid in the UK.	
Facilities and co-operations			
J-TREC's two sites in Yokohama and Niitsu (Niigata) can manufacture HSTs, EMUs, DMUs and metro vehicles.			
<b>Co-operations and joint ventures</b>			
Co-operations with other companies: J-TREC cooperates with other Japanese manufacturers such as Toshiba and Mitsubishi.			
Sites of final assembly			
Country	Site	Products	Remarks
Asia		HST, EMU, DMU, Metro	Production capacity: 1,220 cars p.a.
Japan	Yokohama	HST, EMU, DMU, Metro	Production area: 118,025 m <sup>2</sup> Production capacity: 920 cars p.a.
	Niitsu	HST, EMU, DMU, Metro	Production area: 43,000 m <sup>2</sup> Production capacity: 300 cars p.a.
Product segments			
Segment	Market shares (2013 – 2017)	Important platforms	Description and main customers of platform
EMU	~10% (Japan) ~5% (AS)	E233-8500	The E233-8500 is the newest EMU platform of the E233 series. The series can be configured as six-car trainset and has been operated in Japan by JR East since 2017.
		E235	The E235 series have stainless steel bodies and can be configured as an 11-car trainset with six motored (M) cars and five non-powered trailer (T) cars. Currently 143 are operated by JR East on the Yamanote Line.
		E353	The E353 series is a tilting EMU operated by JR East in Japan since December 2017. The E353 consists of one nine-car set and one three-car set.
		A3000	The A3000 series is a two-car EMU operated by Shizuoka Railway in Japan since 2016.
		EV-E301	The EV-E301 series is a two-car battery EMU operated by JR East on the Karasuyama Line and Tohoku Main Line since 2014.
DMU	~16% (Japan) ~3% (AS)	HB-E210	The HB-E210 series is a hybrid DMU operated by JR East in the Sendai area since 2015. The two-car trainset is equipped with a diesel engine and two banks of lithium-ion batteries.
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## 5 ANNEX

### 5.1 List of worldwide production sites for rolling stock

Region	Company	Country	City	HQ	Locos	PV	FW	Address	Phone Number
South-/Central America	Randon	Brazil	Caxias do Sul				x	R. Abramo Randon, 770 - S Etienne, Caxias do Sul - RS, 95055-010	+55 54 3239 2000
South-/Central America	SABB	Argentina	María Juana	x			x	Av. Bautista Buriasco 41 (S2445ADA) María Juana - Provincia de Santa Fe	+54 3406 47 1214
South-/Central America	TTrans	Brazil	Três Rios	x		x		Al. Carmo Nunes, 08, Cep: 25803-050 - Três Rios - RJ	+55 242251 7700
South-/Central America	Usiminas Mecânicas	Brazil	Vale do Aço	x			x	Rua 01, nº 2.000 - Usiminas, Ipatinga - MG, 35160-900	+55 31 38293600
North America	Alstom	USA	Hornell			x		1 Transit Drive - Hornell, NY 14843 - USA	+1 607 281 2200
North America	American Railcar Industries	USA	Paragould	x			x	901 Jones Rd, Paragould, AR 72450, USA	+1 870 236 6600
North America	American Railcar Industries	USA	Marmaduke				x	7755 AR-34, Marmaduke, AR 72443, USA	+1 870 597 2224
North America	Bombardier Transportation	Canada	La Pocatière		x	x		130 Route 230 La Pocatière, Québec, Canada G0R 1Z0	+1 418 856 1232
North America	Bombardier Transportation	Canada	Thunderbay			x		1001 Montreal Street, P.O. Box 67, Thunder Bay, Ontario, Canada P7C 4V6	+1 807 475 2810

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