

World Market for High-Speed Trains Getting Off the Ground

(16.02.2009) More than EUR 3.3 billion are invested per year in new procurements and more than EUR 2.2 billion per year in the service and maintenance of high-speed trains at present. The market will continue to grow in the future. As early as 2010, SCI Verkehr expects to see an annual market volume for new vehicles of more than EUR 4 billion. Regions such as Africa/the Middle East, South America and the CIS are benefiting increasingly from this growth. A large part of the market will, however, continuously dominated by Western Europe and Asia. More than 95% of the 2 200 high-speed trains operated worldwide are currently operated in these two regions.

The most important drivers for the procurement of high-speed trains include the further development of infrastructure, the growing mobility demand for fast passenger transport connections and, increasingly, procurements to replace the first series of high-speed trains, especially in Japan, the United Kingdom and France.

Because of the high priority of high-speed rail projects and the considerable influence of national states when it comes to infrastructure development, SCI Verkehr does not consider the dynamic development at risk as a result of the effects of the financial crisis. In many countries there are even more funds available for upgrades because of the economic stimulus packages initiated. In contrast, upgrade programmes which are to take place within the scope of PPP projects could be delayed significantly.

At the end of 2008 there were around 10 000 km of high-speed lines in operation with speeds of above 200 km/h. This represents a doubling of the line length in the past eight years. SCI Verkehr anticipates a significant expansion of the route-kilometres to more than 35 000 km by 2019. Lines with operating speeds of above 300 km/h offer the most growth prospects. The main countries for expected further infrastructure upgrades are China, Spain, France, Italy and, in the long term, the USA.

The largest players in the high-speed rail market are the French Alstom group as the manufacturer of TGV trains and the Japanese consortiums around Kawasaki, Hitachi and Nippon Sharyo as manufacturers of the Shinkansen, which together account for more than half of the world market. However, the importance of other manufacturers is increasing constantly as the market is becoming ever more regionally differentiated. For example, Spanish suppliers CAF and Talgo have benefited considerably from the growth of high-speed rail in their country in recent years. Siemens and Bombardier have also taken part in the growth of high-speed rail on the Iberian Peninsula with their products. Both are also operating successfully in the high-volume Chinese market, as are Alstom and the Japanese manufacturers.

The study "[Market Developments in High-Speed Transport](#)" includes an analysis of the global market differentiated by region as well as the current fleets in terms of operational purpose, quantities and age structures, in addition to future procurement potential. Furthermore, the study presents the high-speed rail infrastructure development, the current manufacturer market shares and product information and a forecast of future vehicle requirements in the individual regions. The annex to the study includes a list of all operators' vehicle fleets.

Further information: [Market Developments in High-Speed Transport](#)