

Bahnmärkte in Süd- und Mittelamerika – Glänzende Aussichten mit einigen Risiken

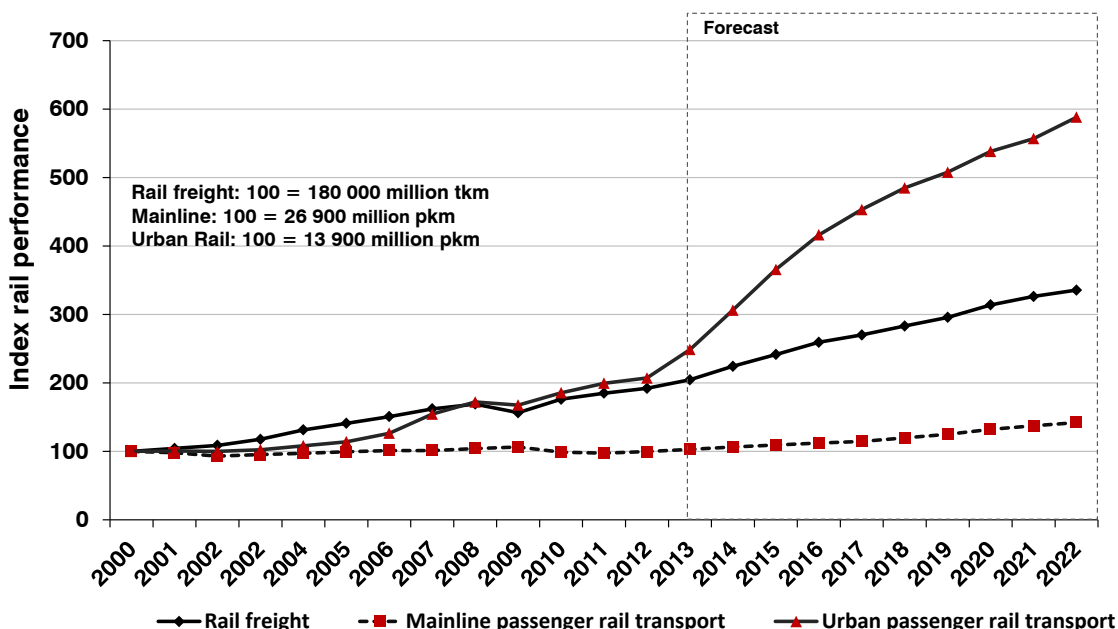
[16.07.2013] In der Schienenverkehrsbranche werden die fragmentierten Märkte Süd- und Mittelamerikas sehr unterschiedlich eingeschätzt: Optimisten bezeichnen die Region als „Hidden Champion“, da die Nachfrage nach Schienenverkehr durch die angestrebte Lebensqualität in den Städten sowie das wachsende Güteraufkommen enorm ist und gleichzeitig eine Vielzahl an neuen Projekten angekündigt wird. Pessimisten hingegen bezeichnen die Region als einen „Phantommarkt“, auf dem zwar viele Projekte angekündigt, aber nur wenige umgesetzt werden. Die neue Marktstudie von SCI Verkehr analysiert die Chancen und Risiken auf den süd- und mittelamerikanischen Eisenbahnmärkten. Getrieben von Brasiliens Entwicklung werden in Zukunft sehr hohe Wachstumsraten im Stadtverkehr und signifikante Wachstumsraten im Schienengüterverkehr erreicht. Das derzeitige durchschnittliche Marktvolumen für Bahntechnik beträgt ca. 4,6 Mrd. Euro. Der gesamte Markt wird jährlich um 4% wachsen. Dennoch hat jeder einzelne Ländermarkt durch nationale und regionale Besonderheiten seine eigene Entwicklungstendenz.

The market volume for railway technology products and services currently totals approximately EUR 4.6 billion, of which EUR 2.5 billion are for new business development and rolling stock and 2.1 billion for after sales services. Up to 2017, the overall market will continue to grow at a rate of 4% per year to almost EUR 5.6 billion. The Region of South and Central America is going through a boom in urban rail construction and provides great opportunities for international companies to expand on the market, especially in rolling stock delivery or realisation of turnkey projects.

Brazil's railway market has a dominant position in the region of South and Central America. This market has more than a 50% share of the entire railway technology market volume in this region, and an 85% share based on cargo transport performance. Naturally, all major infrastructure projects, as well as the procurement plans of rolling stock are concentrated in Brazil. The further development of other countries in Latin America is of particular interest, and is therefore one of key issues of the new market study "The railway market in South and Central America".

A large increase in the railway freight and urban rail passenger transport is expected due to numerous projects which are under construction or to be awarded in the nearest future. Further exploitation of the continent's natural resources will push forward the development of freight corridors, especially connecting larger ports in the hinterland. Brazil alone wants to award 12 concessions to construct 10 000 km of new railways in 2013. In contrast, long distance transport plays only a minor role. SCI Verkehr estimates a 7% p.a. growth for the freight transport performance and 17% p.a. for the urban rail transportation performance.

Development of transportation performance in South and Central America (Indexation) [Index 2000 = 100]



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"The railway market in South and Central America"

Several countries in the region of South and Central America will make a major investment in railway infrastructure with financial support from abroad. However, the precarious economic situation in some of the countries and to a certain extent also their political situation may delay the implementation of the proposed projects. The following countries are likely to show a positive development in the rail sector in the medium term: Brazil, Chile, Colombia, Ecuador, Peru and Uruguay. In contrast, countries such as Bolivia, Paraguay and Venezuela are unlikely to carry out large infrastructure projects.

The study contains a number of fact sheets illustrating the development in each country of the region including major infrastructure projects and a description of future prospects. Additionally, markets for infrastructure products, system technology and rolling stock and the information about most important players on the market are presented.

The MultiClient Study "[The railway market in South and Central America – Facts, Figures, Players and Trends](#)" is now available in English from SCI Verkehr.

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