

Der Bahnmarkt in Afrika: Der “Hidden Champion” auf Wachstumskurs

[12. Juni 2013] Über Jahrzehnte war Afrika sowohl bei der Entwicklung des Schienenverkehrs als auch im Bahnmarkt eher eine Randfigur. Das Interesse an seine reichhaltigen Bodenschätze hat das Land allerdings zu einer der dynamischsten Marktregionen werden lassen. Die Entwicklung dieses herausfordernden Marktes ist Hauptthema der neuen Marktstudie der SCI Verkehr GmbH [“The African Rail Market”](#). Die Industriemärkte für Schienenfahrzeuge, Infrastruktur und Systemtechnik erreichen derzeit ein Volumen von 3,6 Mrd. Euro und werden im Zeitraum bis 2017 pro Jahr um durchschnittlich 8,7 % auf 5,4 Mrd. Euro steigen. Beim Neu- und Ausbau von Streckennetzen und Flotten ist das zu erwartende jährliche Wachstum zweimal so hoch (+15,1 % p. a.). Das stärkste Wachstum erlebt derzeit die Sub-Sahara-Region.

In many ways, railway infrastructure is a key factor for social and economic development. Between isolated mine-port links, extensive upgrades and extensions of existing networks and creation of completely new ones, various developments are being projected and are partly already under construction. The study contains a number of fact sheets picturing in detail what is to be expected, when it will be built and what it will cost. The demand for railway services will grow significantly. Passenger and freight services will at least double their present growth rates over the next five years, still leaving numerous major cities without effective public transport.

By Transport Mode	Market Volume 2012 [route-km]	Market Volume 2017 [route-km]	CAGR 2012-2017 [% p.a.]	Volatility 2012-2017 [%]
Africa				
High-Speed Rail	40	390	+55.1	n/a
Conventional Railway	81 770	95 540	+3.2	2.6
Metro	70	110	+8.5	7.6
Light Rail Transit	220	320	+8.7	12.9
Total	82 100	96 360	+3.3	2.5
Abbreviations: km = kilometres; CAGR = Compound Annual Growth Rate; p.a. = per annum				

Table 1: Infrastructure and System Technology – Network Development

© SCI Verkehr GmbH

Source: SCI Verkehr GmbH, Multi Client Study “The African Rail Market”

The traditional economic leader in the region, South Africa, currently is and will also remain Africa’s biggest railway market. The states along the Mediterranean shore, which used to form the continent’s second economic and infrastructural pole, will develop far more reluctantly; the impacts of recent political unrest in this area are still lasting. The strongest

annual growth rates (+11.9% p.a.) are expected in Sub-Saharan Africa, where several new routes and even networks are currently planned and will most probably be realized. To a certain degree this also applies to Southern Africa, where economic and political stability is weaker, and existing networks and fleets are mostly worn down. Several projects, mainly for coal transport, will provide cut-offs and network integration between the shores and the hinterland, however.

As a result, most countries in this region will receive long-awaited, effective railway links built by modern standard and in many cases extending or even creating entirely new networks. The right political handling of these new possibilities will be crucial to turn this development into a socio-economic success. Therefore, the study focuses not only on facts and figures, but also highlights the market environment, as well as the aspects of politics and society that drive the market's development.

The MultiClient Study "[The African Rail Market – Facts, Figures, Players, Trends](#)" is available in English language from SCI Verkehr.

Contact:

SCI Verkehr GmbH

Vanessa Ruehmann

Phone: +49 221 9317820

E-mail: v.ruehmann@sci.de

www.sci.de