THE RAILWAY MARKET IN RUSSIA
AND THE CIS
Facts, Figures, Players and Trends
THE RAILWAY MARKET IN RUSSIA AND THE CIS
Facts, Figures, Players and Trends

Published in its fifth consecutive issue after 2006, 2009, 2012 and 2014, this study provides comprehensive and consistent overview and insight of the markets for rail transport and railway technology products in Russia and its neighbouring countries in the Commonwealth of Independent States (CIS).

The Market Region, its Sub-Regions and Core Markets

The analysis focuses on the installed base (networks, rolling stock fleets) and the market volumes in the years between 2016 and 2021 in the core markets of Russia, Ukraine and Kazakhstan, as well as in the neighbouring European and Asian nations. Special attention is paid on the political and economic conditions and developments in the region, from which the framework and the drivers of specific product markets have been derived. As in former issues of this study, a special section is dedicated to the leasing market for railway rolling stock.

In concrete terms, this MultiClient Study includes:
– An executive summary listing the most important developments and trends in the railway industry in the CIS
– Structures and development of the rail sector in Russia, Ukraine and Kazakhstan and other countries in the region
– Overview of the most important cooperation projects of foreign industrial companies
– Description of ongoing and planned infrastructure projects
– Installed bases and market volumes for rolling stock and infrastructure
– Fact sheets of the most important market players

The MultiClient Study “The Railway market in Russia and the CIS” will be available (in English) from 17th July 2017 from SCI Verkehr.

Your contact:
Ann Kathrin Arntz  Ahmed Yasin
Phone: +49 221 93178-0  Phone: +49 221 93178-0
E-Mail: a.arntz@sci.de  Email: a.yasin@sci.de
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4.3.1 Performance and Characteristics: The European CIS

[...]

<table>
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<tr>
<th>Transport Performance: European CIS</th>
<th>Rail Freight Transport</th>
<th>Mainline Passenger Rail Transport</th>
<th>Urban Rail Transit</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 573 307</td>
<td>[…]</td>
<td>168 539</td>
<td>[…]</td>
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</table>

[...]

5.2 Mainline Passenger Rail and Rail Freight

[...]

Sakhalin Island Regauging

<table>
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<tr>
<th>Length</th>
<th>Costs</th>
<th>Opening</th>
</tr>
</thead>
<tbody>
<tr>
<td>805 km</td>
<td>EUR 5.340 billion (RUB 330 billion)</td>
<td>2020</td>
</tr>
</tbody>
</table>

In 2003, the RZD started regauging the islands’ network to Russian broad gauge for a potential connection to the mainland, which is supposed to be built by 2030. This should allow for a better accessibility to ports of the Pacific ocean from the Russian mainland. In 2016, already 73% of the network was regauged and 53 new bridges were built.

[...]

Kyrgyzstan

North-South Railway (Balykchy-Kochkor-Kara-Keche-Arp)

<table>
<thead>
<tr>
<th>Length</th>
<th>Costs</th>
<th>Opening</th>
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<tbody>
<tr>
<td>358 km</td>
<td>EUR 877 million (USD 970 million)</td>
<td>n.a.</td>
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</table>

The Kyrgyz Railway (KTJ) plans to construct a North-South railway to attract more rail freight traffic and in the future better connections to China. In March 2016, the Kyrgyz government issued the tender for construction, which, however, was later on cancelled due to changed terms and increased costs. Hence, construction is pending and awaits a new tender.

[...]
6 Major Industrial Players in the Regional CIS Market

Important Rolling Stock and Infrastructure Suppliers in the CIS Region

Figure 1: Important Rolling Stock and Infrastructure Suppliers in the CIS Region

6.5 Rolling Stock Leasing Operators

Development of the Real (Inflation-Adjusted) Daily Leasing Rate per Freight Wagon 2008–2015 [RUB/unit]

Figure 2: Development of the Real (inflation-adjusted) Daily Leasing Rate per Freight Wagon 2008–2015
7 The Core Railway Markets

[...]

7.2 Ukraine

Profile 2016

<table>
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<tr>
<th>Socio-Economic Data</th>
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<tr>
<td>Population 2016</td>
<td>[million]</td>
<td>[...]</td>
</tr>
<tr>
<td>Population Growth 2016–2021</td>
<td>[% p.a.]</td>
<td>[...]</td>
</tr>
<tr>
<td>Urbanisation 2016</td>
<td>[%]</td>
<td>[...]</td>
</tr>
<tr>
<td>GDP per Capita (in PPP) 2016</td>
<td>[USD]</td>
<td>[...]</td>
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<tr>
<td>GDP Development 2016–2021 in constant prices</td>
<td>[%p.a.]</td>
<td>[...]</td>
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<th>Rail Infrastructure</th>
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<td>Mainline Railway Network Length</td>
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<tr>
<td>Degree of Mainline Railway Electrification</td>
<td>[%]</td>
<td>[...]</td>
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<tr>
<td>Urban Transport Network Length</td>
<td>[route-km]</td>
<td>[...]</td>
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Ukraine: Rail Transport Performance

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<tbody>
<tr>
<td>Rail Freight Transport [million tkm]</td>
<td>194 320</td>
<td>187 220</td>
<td>[...]</td>
</tr>
<tr>
<td>Mainline Passenger Transport [million pkm]</td>
<td>35 430</td>
<td>36 950</td>
<td>[...]</td>
</tr>
<tr>
<td>Urban Rail Transit [million pkm]</td>
<td>9 600</td>
<td>9 350</td>
<td>[...]</td>
</tr>
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</table>

Rail Freight Transport

Two thirds of the Ukrainian railway network is suitable for heavy loads, providing access to Russia, Byelorussia, Moldova, Poland, Romania, Slovakia and Hungary, as well as 18 Ukrainian seaports of the Black Sea and Sea of Azov basin.

Transport volumes in rail freight mirror the development shown above for transport performance. In intermodal comparison, however, not all transport modes showed a decline recently. Growth factors can be found in maritime and inland navigation, whereas land, air and pipeline transport volumes shrank.

[...]
9 The Product Markets: Rolling Stock

[...]

9.3 Electric Locomotives

[...]

9.3.2 Installed Base / Age Structure

[...]

Figure 3: Electric Locomotives – Fleet Sizes 2016 by Country

Figure 4: Electric Locomotives – Age Structure
Hiermit bestelle ich die Marktstudie „Worldwide Manufacturers of Rail Infrastructure 2017“

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