

2017



THE RAILWAY MARKET IN RUSSIA AND THE CIS

Facts, Figures, Players and Trends

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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.

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CONTENTS

1	Executive Summary: The Railway Market in Russia and the CIS	22
1.1	Transport Performance	23
1.2	Manufacturers	29
2	Objective of the Study and Delimitation of the Railway Market	30
2.1	Objective of the Market Analysis	30
2.2	Delimitation of the Rail Market	31
2.3	Temporal Focus	35
3	Market Analysis Methodology	36
3.1	SCI Forecasting Tool	36
3.2	Railway Infrastructure/ System Technology Forecast	38
3.3	After-Sales Market Forecast	39
3.4	Analysis of Drivers in the Railway Industries Market.....	40
4	The Railway Market in the CIS: General Overview	43
4.1	Drivers of Market Development.....	43
4.2	Socio-Economic Indicators and Developments	44
4.3	Transport Markets	45
5	Major Projects of Rail Development	50
5.1	High-Speed Passenger Rail	51
5.2	Mainline Passenger Rail and Rail Freight	53
5.3	Urban Rail Projects	55
6	Major Industrial Players in the Regional CIS Market	62
6.1	Freight Wagon Manufacturers	63
6.2	Locomotive Manufacturers.....	67
6.3	Manufacturers of Passenger Rail Rolling Stock.....	68
6.4	Infrastructure and System Technology Suppliers.....	69
6.5	Rolling Stock Leasing Operators	71
7	The Core Railway Markets	75
7.1	Russia.....	75
7.2	Ukraine	87
7.3	Kazakhstan.....	94

8	The Product Markets: Infrastructure and Systems Technology	100
8.1	Track System	100
8.2	Electrification	105
8.3	Control Command and Signalling	110
8.4	Passenger-Related Information Technology	113
9	The Product Markets: Rolling Stock.....	118
9.1	Overview.....	118
9.2	High-Speed Trainsets	119
9.3	Electric Locomotives	125
9.4	Diesel Locomotives	136
9.5	Electric Multiple Units.....	146
9.6	Diesel Multiple Units.....	154
9.7	Passenger Coaches	161
9.8	Freight Wagons.....	170
9.9	Metro Vehicles.....	184
9.10	Light Rail Vehicles	195
ANNEXE.....	207

4.3.1 Performance and Characteristics: The European CIS

[...]

Transport Performance: European CIS					
Rail Freight Transport		Mainline Passenger Rail Transport		Urban Rail Transit	
Performance 2016 [million tkm]	Growth 2016–2021 [% p.a.]	Performance 2016 [million pkm]	Growth 2016–2021 [% p.a.]	Performance 2016 [million pkm]	Growth 2016–2021 [% p.a.]
2 573 307	[...]	168 539	[...]	61 623	[...]

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[...]

5.2 Mainline Passenger Rail and Rail Freight

[...]

Sakhalin Island Regauging		
Length	Costs	Opening
805 km	EUR 5.340 billion (RUB 330 billion)	2020
<p>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.</p>		

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[...]

Kyrgyzstan

North-South Railway (Balykchy-Kochkor-Kara-Keche-Arp)		
Length	Costs	Opening
358 km	EUR 877 million (USD 970 million)	n.a.
<p>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.</p>		

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[...]

6 Major Industrial Players in the Regional CIS Market

[...]

Important Rolling Stock and Infrastructure Suppliers in the CIS Region

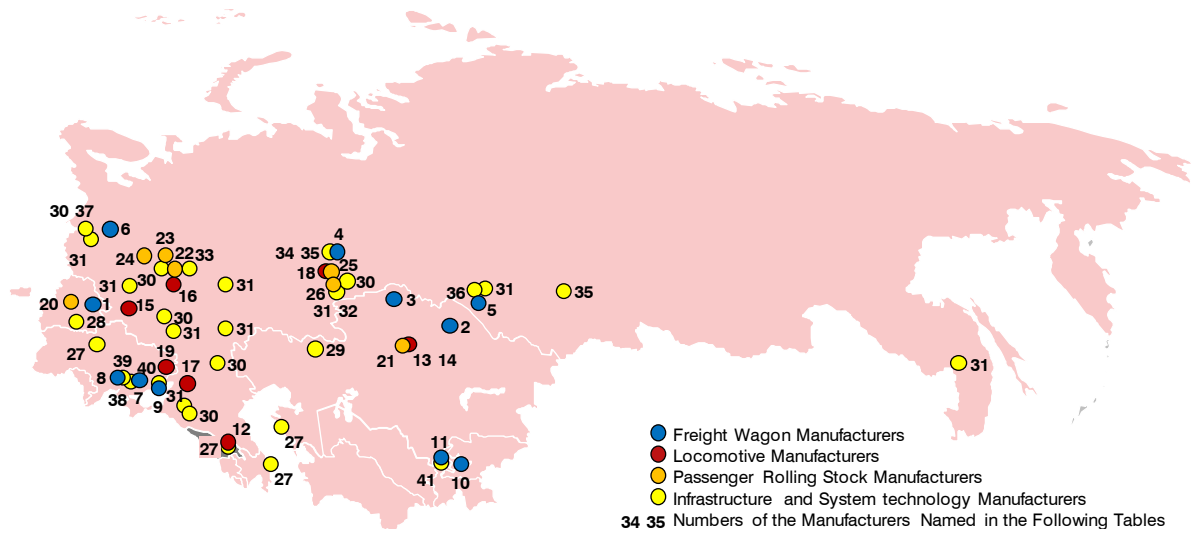


Figure 1: Important Rolling Stock and Infrastructure Suppliers in the CIS Region

[...]

6.5 Rolling Stock Leasing Operators

[...]

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

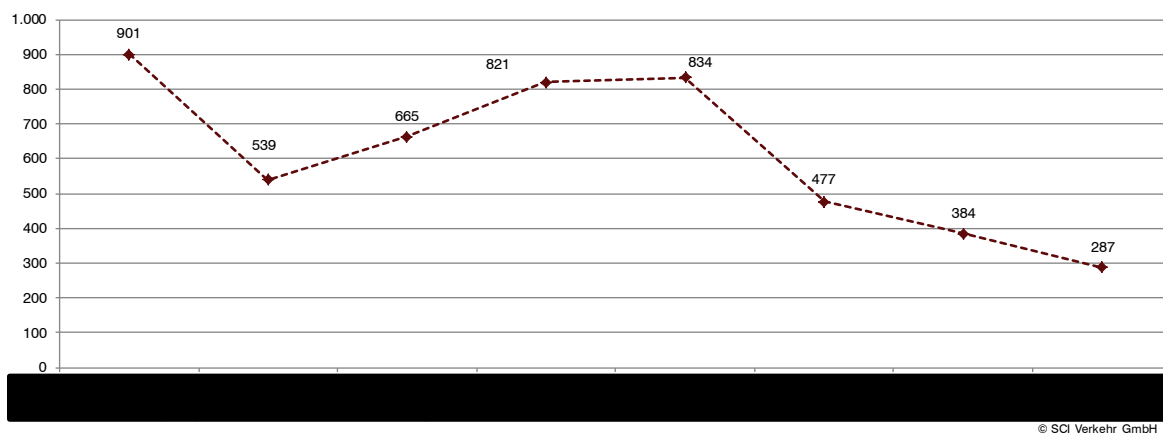



Figure 2: Development of the Real (inflation-adjusted) Daily Leasing Rate per Freight Wagon 2008–2015

[...]

7 The Core Railway Markets

[...]

7.2 Ukraine

Profile 2016			
	Socio-Economic Data		
	Population 2016	[million]	[...]
	Population Growth 2016–2021	[% p.a.]	[...]
	Urbanisation 2016	[%]	[...]
	GDP per Capita (in PPP) 2016	[USD]	[...]
	GDP Development 2016–2021 in constant prices	[%p.a.]	[...]
	Rail Infrastructure		
Mainline Railway Network Length	[route-km]	[...]	
Degree of Mainline Railway Electrification	[%]	[...]	
Urban Transport Network Length	[route-km]	[...]	

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[...]

Ukraine: Rail Transport Performance	2015	2016	CAGR 2016–2021 [% p.a.]
Rail Freight Transport [million tkm]	194 320	187 220	[...]
Mainline Passenger Transport [million pkm]	35 430	36 950	[...]
Urban Rail Transit [million pkm]	9 600	9 350	[...]

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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

[...]

Electric Locomotives – Installed Base 2016 by Country [no. of units]

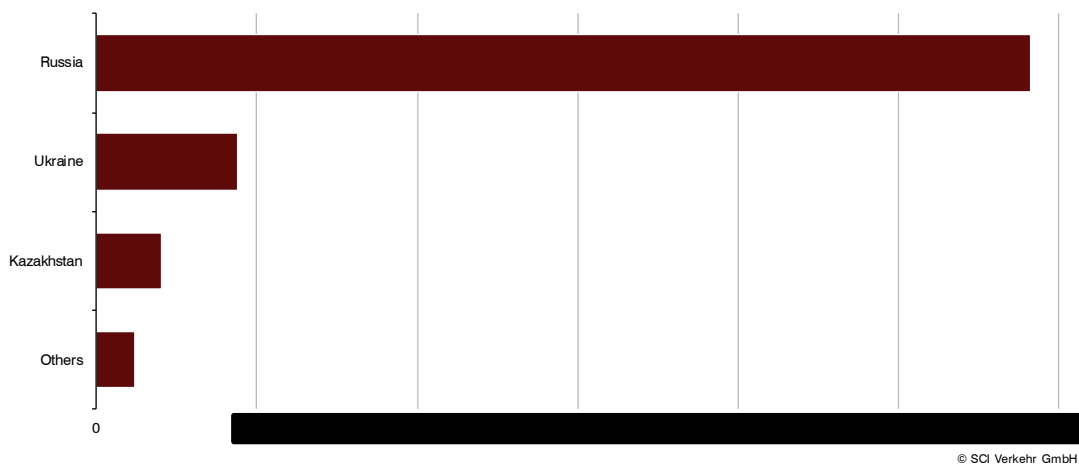


Figure 3: Electric Locomotives – Fleet Sizes 2016 by Country

[...]

Electric Locomotives – Age Structure by Country [no. of units]

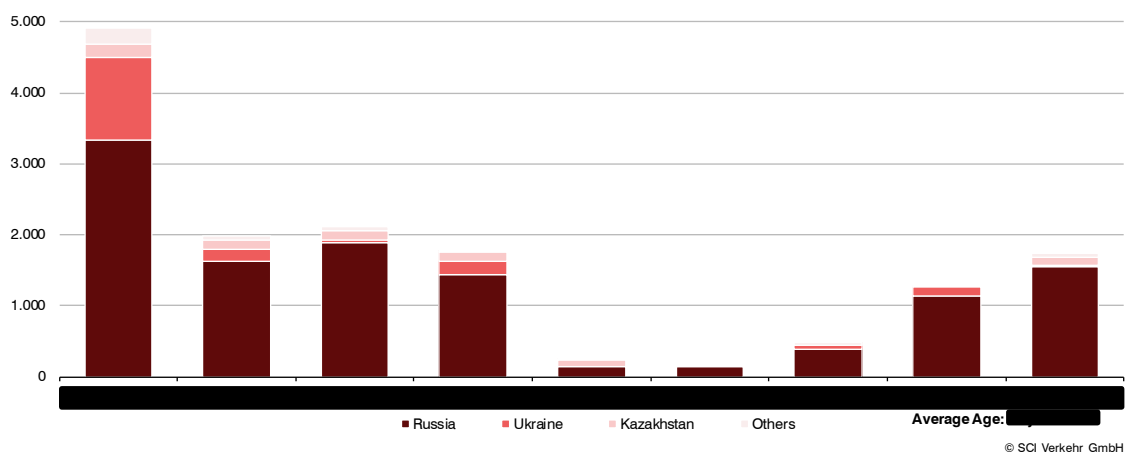


Figure 4: Electric Locomotives – Age Structure

[...]

Bestellformular MC Russia and the CIS

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Hiermit bestelle ich die Marktstudie „Worldwide Manufacturers of Rail Infrastructure 2017“

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