Push-Pull Trains –
Opportunities in cross-border rail transport
SCI Verkehr is an independent medium-sized management consultancy focusing on strategic issues in the international railway, infrastructure and logistics business

SCI Verkehr GmbH

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Systematic market observation
20 current studies

International customer base

Experience from
28 years

Expert knowledge of global transport markets

Individuel consulting
> 3,500 projects
The share of Push-Pull Trains based on operational performance (counted in train-kilometers) in Germany is about 15% in regional transport and 25% in long-distance / intercity transport.

Share of operational performance in passenger transport in Germany

- **Long-distance:** ~150 million train-km
  - HS Trains (ICE) 75%
  - Push-Pull Trains 25%

- **Regional:** ~700 billion train-km
  - Multiple Units 85%
  - Push-Pull Trains 15%
5 Theses on Push-Pull Trains

01. European intercity markets provide growth potential

02. Push-pull trains are advantageous especially in international transports

03. Assets become more modular and can thus be deployed more flexibly

04. The market for push-pull trains is set significantly to grow until 2030

05. The market for night trains is experiencing a revival
European intercity markets provide growth potential

Long-distance transport in Germany has been growing at an above-average rate since 2015 – 2020 cut due to Covid-19 pandemic

Drivers of growth in Europe
- Infrastructure development
- Political support
- Changing mobility behavior
- Fleet renewal
- Competition on rail

Source: Destatis
Push-pull trains are advantageous especially in international transports

**Rail could not grow in cross-border traffic in Europe** (Index)

- **Push-pull trains can provide technical and operational advantages** – depending on route and passenger capacity
  - Multi-system locomotives / locomotive swap
  - Operational flexibility
  - Intercity-Segment <250 km/h
  - Simple approval process
  - Advantageous procurement costs

Source: Eurostat, Index, EU27 international passengers
Assets become more modular and can thus be deployed more flexibly

Benefits for long-term (re)use

- Modular design of interior
- Low-floor concepts possible
- Flexible capacity adjustments
- Wide country approval for coaches
- Approval of different configurations
- Flexible deployment of locomotives
The market for push-pull trains is set significantly to grow until 2030

Market volume for push-pull trains reaches EUR 1.2 bn in 2026
(Intercity-Segment, in EURm)

Selection projects coaches the coming years

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Source: SCI Verkehr
The market for night trains is experiencing a revival.

~1,200 Sleeping and couchette cars in Europe

Market volume grows to over 250 EURm by the mid-2020s

Fleet is very old at 37 years on average

Travellers are exploring alternatives to short/medium-distance flights

Picture: Siemens
Can modern push-pull trains provide a new impetus for long-distance transport?
Thank you for your attention!

Our new MultiClient Study "Push-Pull Trains - European Market Trends" has been published one month ago…

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