

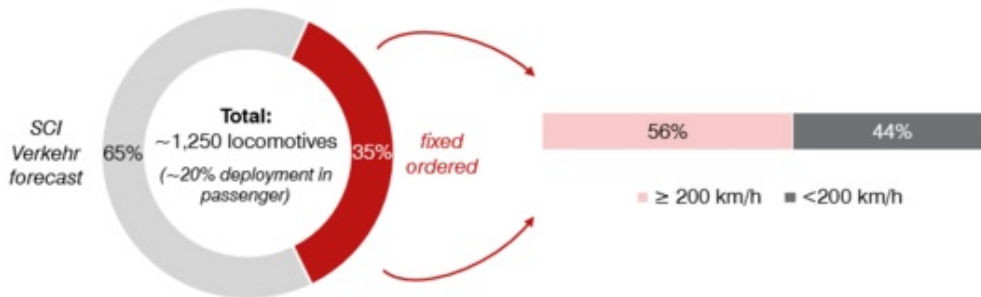
**Modern electric locomotives spur competition in European long-distance passenger rail transport
Study shows growing demand for universally deployable, faster and more powerful electric locomotives**

In European long-distance passenger rail transport, the state railways have traditionally held a dominant position in the market - despite increasing liberalisation of the markets, in particular the considerable investments in trains have so far represented too high of an entry barrier for competitors.

In the new MC study, SCI Verkehr shows that modern electric locomotives will be a key factor for the successful market entry of competitors in long-distance transport. SCI Verkehr sees a growing potential for locomotive-hauled trains with passenger coaches, especially for the operation of cross-border services. Modern electric mainline locomotives offer powerful traction suitable for long-distance traffic and can be used much more flexibly than multiple units. These locomotives, which have a speed of at least 200 km/h and can be used in cross-border transport, can be offered by leasing companies not only to rail freight operators, but also to new operators in long-distance passenger rail transport.

In the MultiClient study "Electric locomotives - Global Market Trends 2022", SCI Verkehr analyses this trend and also shows that there is currently a growing demand worldwide for emission-free, high-performance electric locomotive traction. In many regions of the world, however, the market for environmentally friendly transport with electric mainline locomotives is being held back by a lack of track electrification.

Expected deliveries of electric mainline locomotives in Europe 2022-2026
(and classification of already contracted locomotive orders according to top speed)



Currently, there is a high demand for emission-free, high-performance electric locomotive traction worldwide. Most world regions have become much more aware of environmentally friendly transport. With its low environmental footprint, rail offers a great potential for reducing emissions in the transport sector, both in passenger and especially in freight transport - electric locomotive traction is strongly promoted.

The global market for new electric locomotives was at a high level of around EUR 4.8 billion in 2021. The Asian market in particular, with its high degree of electrification and the core countries of China and India, is driving the global market and will contribute significantly to further increase the global market volume in the coming years.

However, regional differences are significant. In important rail markets such as the United States, with an electrification level of 1%, rail freight operators today can only use diesel traction due to the lack of electrified lines - electric locomotives only play a secondary role in passenger rail transport here. A low global electrification level of 29% is holding back the market for environmentally friendly rail transport in many regions and thus even stronger growth in the market for electric mainline locomotives. Unlike in passenger transport, catenary-free traction in rail freight transport will be difficult to replace in the long term in view of expensive and lengthy electrification projects in many regions. Alternatively powered locomotives serve as a necessary bridging technology in many world market regions.

Around 9,000 electric mainline locomotives were delivered worldwide between 2017 and 2021. Chinese rolling stock manufacturer CRRC was the clear market leader with a 27% share of all deliveries, followed by Indian manufacturer CLW with 21%. Due to the increasingly more powerful locomotives, SCI Verkehr observes a rising price level in many regions.

The market study "[Electric locomotives - Global market trends 2022](#)" is available in English from SCI Verkehr GmbH from March 7th, 2022 at a price of EUR 3,700.00.

On March 22nd, 2022 we provide an online [webinar](#) for all interested persons free of charge.

Yours sincerely

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