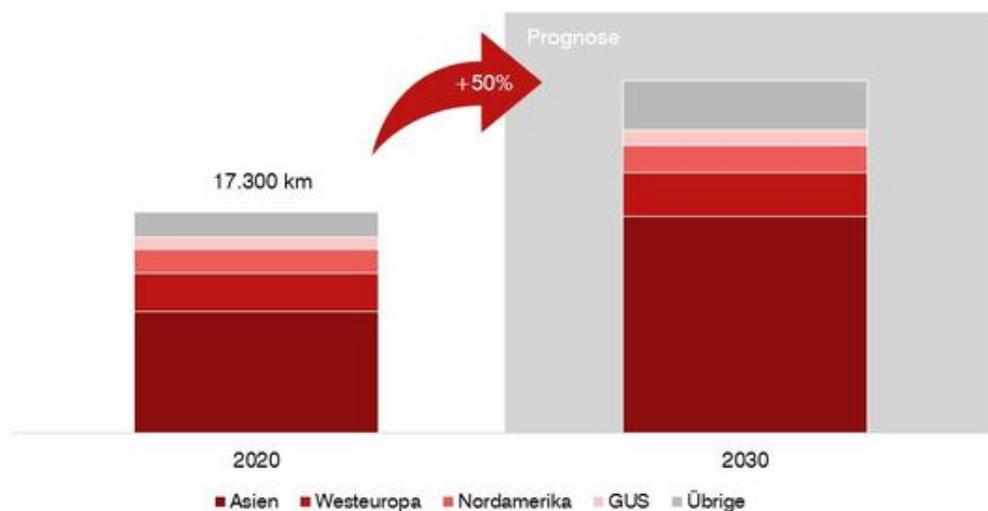


Megatrend urban mobility: the global metro network will grow by 50% until 2030

The Chinese state-owned manufacturer CRRC is the dominant manufacturer of metro vehicles and has also expanded its market shares outside of China. The global market volume is increasing by about 4.5% p.a. to approx. EUR 20 billion. The OEM market will increase at a high level in the next five years of about 2.5% p.a. After the market boom in China, new procurement in the coming years will mostly be made in Western Europe and North America to replace old fleets in order to ensue urban mobility. The after-sales market is growing strongly due to the increasing fleet size and modernisations with an average rate of almost 6% p.a. until 2026. For the first time, SCI Verkehr also forecasts the long-term market development until 2030 in this Multi-Client study.

The Covid-19 pandemic has had comparatively little effects on the metro market. However, the trend towards remote working and alternative means of transport such as the bicycle or car will persist and have a long-term impact on passenger numbers. In many metropolises in Asia and Latin America, however, traffic is threatening to collapse under the burden of rising car numbers, making efficient underground transport networks necessary.

17,300 km of metro network in operation worldwide – Growth by 50% by 2030



In Asia, Eastern Europe, Africa and the Middle East, metro networks will expand particularly strongly by 2030, while in Western Europe, North America and the CIS region few new lines will be built, and replacements will dominate.

Urbanisation is still a key driver of the metro market. Especially in Asia, Africa and the Middle East, there is great growth potential due to the increasing share of urban population. As political factors are decisive for infrastructure development in many regions, the political shift towards a more ecological focus is a driver for the expansion of metro networks.

CRRC is also a leader in supplying new metro vehicles outside its domestic market
(Global market shares excluding China 2017-2021)



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CRRC was the largest manufacturer in the metro vehicle market from 2017 to 2021. The Chinese company increasingly delivered abroad, for example to the USA, Turkey, India and Iran.

SCI Verkehr GmbH, a consultancy specialising in rail industry, analyses the current size, structure and players of the global markets for metro vehicles and produces forecasts up to 2030.

The complete study "[Metro Vehicles - Global Market Trends 2022](#)" is available now.

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