

## Locomotive-hauled trains enable rapid growth of cross-border passenger rail transport

[24.05.2022] The demand for more attractive cross-border rail transport connections is growing dynamically. Passengers increasingly want to use rail instead of air transport between European countries. In 2022, these transport figures grew by double digits again despite the Covid-19 pandemic. An important building block for the further expansion of attractive connections is the availability of a sufficient number of suitable rolling stock. The current study "Push-Pull Trains – European Market Trends" by SCI Verkehr proves: locomotive-hauled trains can close this gap quickly and efficiently. They also offer new providers the chance to procure fast multi-system locomotives and the required passenger coaches on the leasing market.

Cross-border transport in Europe is becoming more attractive. The increasing environmental awareness of the population is leading to a shift in demand from air to rail transport for journeys between the European metropolises and within the regions of Europe. The strong interest in international travel remains high - in April 2022, Deutsche Bahn reported growth of almost 25% compared to April 2019, the previous record year for passenger traffic.

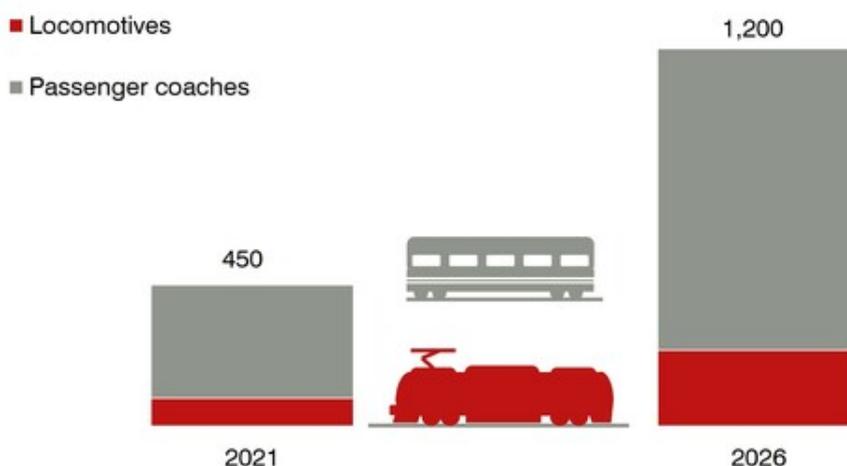
Other operators are also reacting to the increasing demand and intend to expand their international portfolio. The private German operator FlixTrain is planning trips to Switzerland, the private Swedish operator SJ has announced connections to Germany that will even operate as night trains and the Austrian operator Westbahn started cross-border services to Munich in April 2022.

In order to be able to offer these climate-friendly European transports, the operators need suitable rolling stock that can not only master the challenges of cross-border operation but can also be available on short notice. SCI Verkehr sees great potential here in the so-called "push-pull" trains. These are locomotive-hauled passenger coaches that can be used for different demands due to their modular design.

New operators wishing to enter the European intercity market also have the opportunity to procure multisystem-capable locomotives with speeds of up to 200 km/h on the leasing market. Locomotives already meet the special requirements of European cross-border traffic in freight transport and can therefore be used more flexibly and faster than multiple units.

At the same time, many manufacturers of passenger coaches, such as Siemens and Talgo, have already received larger orders for passenger coaches and are preparing for strong demand in the future. While the OE market for push-pull trains was still EUR 450 million in the Central European market in 2021, SCI Verkehr expects a volume of EUR 1.2 billion in 2026 and thus annual growth of 21.7%.

### Market volume in Central Europa for Push-Pull Trains reaches 2026 1.2 bn Euro (Intercity segment, in mn Euro)



**In concrete terms, this market study includes:**

- A differentiated look at the European market for passenger coaches and locomotives as parts of push-pull trains in the intercity segment (160-249 km/h) including an in-depth analysis of five selected country markets.
- An analysis of the European and selected national intercity markets including transport market, competition and market shares of the operators
- A comprehensive analysis of the push-pull industry markets including a fleet overview, manufacturers and products as well as OEM and after sales market volume and development
- An overview of the most important drivers behind the procurement and refurbishment of push-pull trains
- A comprehensive analysis of the current fleet stocks concerning quantities and age structures as well as future procurement potential up to 2030. An analysis of the current market shares of important manufacturers
- A focus analysis of the European Night Train Market including future volumes for new wagon procurements

The market study "[Push-Pull Trains - European Market Trends 2022](#)" is available in English from SCI Verkehr GmbH from May 24th 2022.. A data appendix in Excel format is also available for the study, which presents all the figures contained in the study in a transparent and clear manner.

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