

# The Global Rail Supply Industry: the market

## Market Analysis – 2017-2023 Trends – Corporate Strategies

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### Exclusive extracts from this 120-page-long report:

#### - What is the business?

The rail supply industry serves four main market segments: rolling stock (freight and passenger vehicles), infrastructure, rail control and signalling, and other services. In recent years, a fifth segment has emerged: system integration, which encompasses a very small share of the total market value but is seeing fast growth. Rail products and services are destined for a range of rail sub-markets, including mainline passenger transport, mainline freight, light urban rail, metro systems and high-speed rail. [...]

#### - What are the main markets?

The scope and type of rail supply products and services required vary from one country to the next depending on the type of existing infrastructure and its utilisation. Markets with well-developed networks require less actual infrastructure and more services while fledgling rail systems require more rail infrastructure development and new rolling stock fleets. However, variation goes even further than this. For example, although North America is home to the longest network of train tracks, they are primarily used for shipping freight, are not electrified, require few intersections and are simple single-track lines. [...]

#### - Who are the key players?

Two major types of leading global players in the rail supply market can be identified; pure players and diversified players. Alstom (following GE's acquisition of its energy division), Greenbrier, and CAF are pure players, with the focus of their activity exclusively on the railway industry. However, the majority of major railway equipment manufacturers are highly diversified industrial groups, present in various businesses, notably aerospace, defence, and electrical equipment. These diversified groups generally enjoy synergies between their different businesses. [...]

#### - How intense is competition?

Competitive rivalry in the rail supply industry has intensified over past decades, in line with shifts in the industry landscape. The deregulation and liberalisation of railway markets has not only increased the size of the accessible market but also the number of competitors in particular markets. Furthermore, varying levels of liberalisation have distorted competition since not all markets are open to the same extent to all players. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

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