

Maintenance of Rail Vehicles – Long-term Growth Prospects for Manufacturers and Independent Suppliers

[14.12.2010] *The latest market study by SCI Verkehr, "[Rolling Stock Maintenance – Global Market Trends in After-Sales Service](#)", analyses for the first time the maintenance markets for rolling stock, their structures and development trends and the strategies of the competing players. The rolling stock maintenance market, which has been largely closed up to now, is slowly opening up and represents a growth area for manufacturers in the long term, besides the market for new vehicles. Independent suppliers of maintenance services will also gain market shares in the future.*

The market for rolling stock after-sales services currently has a market volume of around EUR 37 billion and will grow by around 3.8% in the years to come. Around 70% of the total market is still accounted for by rail companies which maintain their own vehicles. However, many rail companies are announcing plans to concentrate primarily on their core business, the transportation of passengers and freight. By doing so, they offer manufacturers and independent maintenance companies room for projected strategic growth in this segment, albeit slower than many of those operating in the market would like. A rapid shift in market shares of companies is being prevented because of the current structures in the operator markets and the importance of good maintenance and repair for safe railway operation.

In terms of the accessibility of the maintenance market a positive trend is evident. More and more maintenance services are being awarded in competitive procedures today. However, market structure, market openness and contracting practice vary considerably depending on the country:

- In the market regions North America, South America and Australia, which are dominated by rail freight transport, vehicle manufacturers and independent suppliers are now already playing a significant role. Here, the cost effectiveness of railway operation has top priority.
- In Russia and India, maintenance is almost only performed by the national rail companies. In China, local vehicle manufacturers are responsible for inspections and refurbishments, in addition to the Chinese railway.
- The diverse markets in Europe are still largely shaped by national railway reforms. Exceptions are Sweden, the UK and Spain, where private players already enjoy a large portion of the market volume.

Maintenance remains a local business meaning that market shares can only be increased through local workshop capacities. SCI Verkehr has identified more than 6 000 sites worldwide that offer rolling stock maintenance, 30% of which are accounted for by manufacturers and independent suppliers. In Europe, there are almost 2 000 sites for rolling stock maintenance, making it the world market region with the highest density.

Consulting company SCI Verkehr GmbH, which specialises in the field of railway technology and logistics, has comprehensively analysed the maintenance market and developed forecasts for the market volumes and market shares of the players involved. The annex includes company and site profiles for the most important rolling stock manufacturers, contact addresses of companies providing maintenance services as well as worldwide refurbishment and maintenance projects. The complete study "[Rolling Stock Maintenance – Global Market Trends in After-Sales Service](#)" is available now:

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