China Railway Locomotive and Rolling Stock Market Report, 2010-2011

May 2011
This report

◆ Analyzes the policy environment and development of Chinese railway industry.

◆ Focuses on the status quo of Chinese railway locomotive market, wagon market, passenger train market, and High-speed EMU Market.

◆ Highlights the operation of key enterprises in China.

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Abstract

Along with the reconstruction of railway lines and the rising demand for transport capacity in China during the recent years, the domestic railway locomotives & rolling stock have entered the stage of rapid renewal. The acquisition expense of railway locomotives & rolling stock in China arrived at RMB100 billion in 2010, and it will climb 26% to RMB126 billion in 2011 according to the latest construction planning of Ministry of Railways of the People’s Republic of China. Across the 12th Five-Year Plan period, the market demand of railway locomotives & rolling stock will remain on the rise.

Acquisition Expense of Railway Locomotives & Rolling Stock in China, 2006-2011 (Unit: RMB bn)

Source: Ministry of Railways; ResearchInChina
As for high-speed EMU market, there are mainly 4 enterprises, i.e. CNR Changchun, CNR Tangshan, CSR Qingdao Sifang, and Qingdao BST, the joint venture of CSR Qingdao Sifang and Bombardier.

Key Railway Locomotive & Rolling Stock Enterprises and Their Major Products in China

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<th>Enterprises</th>
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<td>CNR Changchun</td>
<td>EMU, passenger train, urban rail &amp; subway vehicles</td>
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<tr>
<td>CNR Dalian</td>
<td>Railway locomotive</td>
</tr>
<tr>
<td>CNR Tangshan</td>
<td>Railway locomotive, passenger train, EMU</td>
</tr>
<tr>
<td>CNR Datong</td>
<td>Railway locomotive</td>
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<tr>
<td>CNR Qishuyan</td>
<td>Wagon</td>
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<tr>
<td>CSR Qingdao Sifang</td>
<td>EMU, passenger train, urban rail &amp; subway vehicles</td>
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<tr>
<td>CSR Zhuzhou</td>
<td>Railway locomotive, urban rail &amp; subway vehicles</td>
</tr>
<tr>
<td>CSR Nanjing Puzhen</td>
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<td>CSR BST</td>
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Source: ResearchInChina

In regard to railway locomotive market, CNR Dalian Locomotive & Rolling Stock Co., Ltd., CNR Datong Electric Locomotive Co., Ltd., CSR Zhuzhou Electric Locomotive Co., Ltd., and CSR Qishuyan Locomotive Co., Ltd. are presently the most competitive enterprises in China. Up till 2010, the various locomotives produced by CNR Dalian had surpassed 50% of the possession quantity of domestic locomotive market, while CSR Zhuzhou Electric Locomotive Co., Ltd. had seized 50% of railway electric locomotive market by virtue of its superiorities in electric locomotive field.

From the perspective of wagon market, the wagon manufacturing capacity of CNR Qiqihar Railway Rolling Stock Co., Ltd. and CSR Yangtze Co., Ltd., the two magnates, reached respectively 12000 and over 5500 in 2010.

The passenger train market is evidently controlled by CNR Changchun Railway Vehicles Co., Ltd., CNR Tangshan Railway Vehicle Co., Ltd., CSR Qingdao Sifang Co., Ltd., and CSR Nanjing Puzhen Rolling Stock Co., Ltd. Up to 2010, CNR Changchun had produced nearly 28 thousand passenger trains. CSR Nanjing Puzhen is the largest passenger train manufacturer under CSR.
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<tr>
<td>Contact Person:</td>
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