

# Rail Signaling and Train Control Systems Market Research

FIVE-YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2023

## CONSOLIDATION AND NEW TECHNOLOGY WILL DISRUPT INDUSTRY

This report serves as an effective planning guide for suppliers of rail signaling and train control systems and components as well as companies considering entry into this marketplace. It addresses the market size and forecasted growth (2018-2023) on a global scale, market drivers and opportunities in the global market, supplier market shares, product availability, alliances, and strategies, plus the impact of key trends such as population growth, increased urbanization, awareness of the effects of carbon emissions, replacement of old trains with electrification, emergence of Industrial IoT, and consolidation.

Chinese suppliers are winning projects outside of China, while a bevy of smaller competitors are vying for pieces of each rail transport project, making for a crowded and competitive field.

While single-digit growth is forecast for the market, tremendous potential exists for systems that meet the European Rail Traffic Management System (ERTMS) and Communication Based Traffic Control (CBTC) requirements.

Increasing standardization of rail signaling solutions is one of the most important trends impacting the market today. Standardization allows suppliers to develop core, standards-based global architectures that both enable the interoperability necessary to meet local safety requirements and provide a common, reliable platform for building local solutions.

For more information about this research, please contact your ARC Client Manager or visit us at [www.arcweb.com/market-studies/](http://www.arcweb.com/market-studies/).

## STRATEGIC ISSUES

The market represents a mix of mature and emerging markets such as Europe, China, and the Middle East. Safe operation remains paramount, including compliance with local safety mandates such as PTC in the US. Key questions addressed include:

- How can suppliers help railways meet escalating requirements in this era of fiscal austerity?
- How can suppliers best respond to the trend toward digitalization?
- How can technology suppliers and rail operators leverage the value of global platforms?

## RESEARCH FORMATS

This research is available as a Market Intelligence Workbook (Excel) and/or a concise, executive-level Market Analysis Report (PDF), with or without detailed charts.

## RESEARCH FOCUS AREAS

### STRATEGIC ANALYSIS

Major and Regional Trends  
Strategies for Buyers and Suppliers

### COMPETITIVE ANALYSIS

Market Shares of the Leading Suppliers

Market Shares by Region:

- North America
- Europe, Middle East, Africa
- Asia
- Latin America

Market Shares by Hardware, Software, and Services

Market Shares by System Type

- Automatic Train Control
- Automatic Train Operation
- Automatic Train Protection
- Automatic Train Supervision
- Communication Based Control
- Electronic Interlocking
- Electronic Signaling Systems
- Operations or Office Control
- Positive Train Control

Market Shares by Geographical Standard

- ETCS Level 1
- ETCS Level 2
- CTCS

Market Shares by Type of Train Service

- Freight
- High Speed/VHS
- Industrial/Mining
- Light Rail
- Mainline
- Metro/Subway

Market Shares by Driver vs. Driverless

Market Shares for Wired vs. Wireless

Market Shares by Wireless Protocol

### MARKET FORECAST & HISTORY

Total Shipments of Rail Signaling and Train Control Systems

Shipments by Region

Shipments by Hardware, Software, and Services

Shipments by System Type

Shipments by Geographical Standard

Shipments by Type of Train Service

Shipments by Driver vs. Driverless

Shipments by Wired vs. Wireless

Shipments by Wireless Protocol

### INDUSTRY PARTICIPANTS

The research identifies and profiles 16 suppliers serving this market.

