

Now Available

# URBAN RAIL MARKET IN INDIA 2025

Network Growth, Recent Trends and Future Outlook

- ❖ Research Report
- ❖ Data-set (Excel)
- ❖ 52 Weekly Newsletters

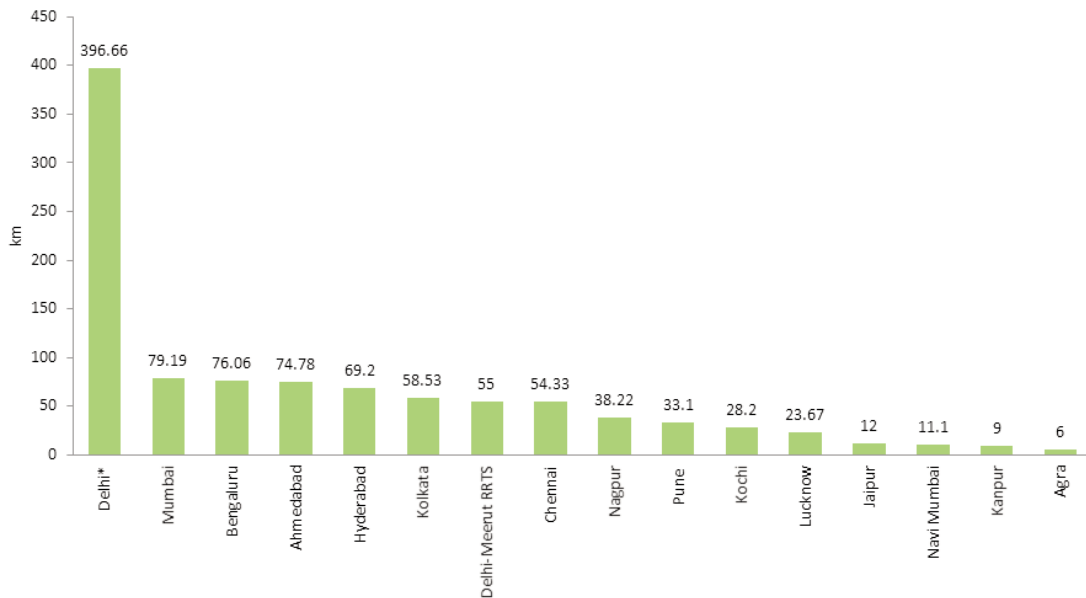
## The Urban Rail Market in India 2025. The report covers:

- ❖ Network Growth, Key Trends and Market Opportunities
- ❖ Analysis of Key Sub-Segments – Construction, Rolling Stock, S&T, Traction and Fare Collection
- ❖ Upcoming Projects, Key Contract Awards and Tenders
- ❖ Recent Developments, Technology Deployments, Sustainability Initiatives
- ❖ Market Projections and Investment Requirements
- ❖ Detailed Profiles of 60+ Projects (operational, under construction and upcoming)

## Report Summary and Key Insights

- India's urban rail sector is witnessing strong growth, driven by the need to improve intra-city connectivity, reduce congestion and promote sustainable mobility. Currently, over 1,000 km of metro network is operational in the country.
- The government is also promoting the development of newer mass transit systems such as water metro, MetroNeo, MetroLite and RRTS. Currently, Kochi water metro is partially operational. The project, upon completion, will span a total of 78 km, covering 38 terminals. Besides, around 500 km of MetroLite network and around 50 km of MetroNeo network are also upcoming across cities such as Varanasi, Guwahati, Bareilly, Nashik, etc. Under RRTS, 55 km of the Delhi-Meerut corridor is operational, with the remaining (27 km) to be completed by mid 2025.
- Metro corporations are moving towards driverless technology for greater operational flexibility. While Delhi Metro is India's first fully unmanned rail network, the first driverless train set is being procured for Bengaluru Metro and the production of the same for Chennai Metro has already begun.
- New ticketing and fare collection systems such as QR code ticketing, WhatsApp ticketing, etc. are being rapidly adopted across metro systems. Various metro systems are also upgrading their fare collection systems to become NCMC-compliant. DMRC has become fully NCMC-compliant while Chennai Metro launched Singara Chennai Card and Bengaluru Metro launched RuPay NCMC in 2023. In fact, the Reserve Bank of India has allowed such cards to be issued with a limit of Rs 3,000 without the KYC process for transit payments. To augment non-fair revenues, metro corporations are exploring new and innovative models such as branding, showcasing advertisements, health check-up kiosk, etc.
- Energy conservation, sustainable operations, increasing indigenisation, and digitalisation of construction are some of the other notable trends. New technologies like BIM, CDE, IoT, digital twins, drones, sensors, artificial intelligence, and video analytics are witnessing increased uptake to improve project execution.
- Going forward, the country's urban rail network is expected to expand to over 3,000 km by 2032. Key projects include Phase IV of Delhi Metro, Phase II of Chennai metro, Phase I of Patna metro, etc.

## City-wise Operational Network



\*Includes Noida-Greater Noida and Rapid Metro Gurgaon.

Source: India Infrastructure Research

## EXECUTIVE SUMMARY

## SECTION I: OVERVIEW, KEY TRENDS AND OUTLOOK

## 1. Sector Overview, Key Trends and Outlook

- ❖ Network Size and Growth
- ❖ Ridership Trends and Analysis
- ❖ Fare Trends and Analysis
- ❖ Policy and Regulatory Framework
- ❖ Emerging Trends and Recent Developments
- ❖ Recent Project Developments
- ❖ Future Outlook and Growth Drivers

## 2. Project Pipeline Assessment and Analysis

- ❖ Analysis by
  - Forms of Mass Transit (Metro Rail, Metro Neo, MetroLite, and RRTS)
  - Stage of Development (Announced, Approved, Under Construction)
  - Mode of Implementation (EPC, PPP)
  - Alignment (Elevated/Underground/At-grade)
  - Expected Completion
- ❖ State-wise Analysis
- ❖ Analysis of Upcoming Projects
- ❖ Key Upcoming Tenders

## 3. Emerging Modes of Transit

*This chapter includes Metrolite, MetroNeo, RRTS, Water Metro and others*

- ❖ Current Market Size
- ❖ Key Operating Features, Standards and Specifications
- ❖ Cost Economics and Analysis
- ❖ Key Collaborations
- ❖ New Mobility Options
- ❖ Key Upcoming Projects

## 4. Investment and Financing Trends

- ❖ Trends in Funding
- ❖ Key Revenue Sources
- ❖ New Revenue Streams
- ❖ Emerging Funding Options
- ❖ Investment Outlook

## 5. Market Opportunities and Projections

- ❖ Projected Network Addition
  - Immediate term (By 2026)
  - Near to Medium term (By 2028)
  - Medium to Long Term (2029 and Beyond)
- ❖ Projected Investment
- ❖ Projected Ridership
- ❖ Market Opportunities

## 6. Emerging Opportunities

- ❖ Focus on Integrated Mobility
- ❖ Key Components of Integrated mobility
- ❖ Real Estate and Commercial Development
- ❖ Project Management
- ❖ Train leasing and O&M Outsourcing
- ❖ Technology and Digital Solutions
- ❖ Energy Conservation

## SECTION II: SEGMENT OVERVIEW AND ANALYSIS

## 7. Rolling Stock

- ❖ Market Size and Growth
- ❖ Systems in Use and their Specifications
- ❖ Key Requirements and Procurement Plans
- ❖ Emerging Trends and Recent Developments
- ❖ Competitive Landscape and Key Suppliers
- ❖ Segment Outlook

## 8. Signalling, Train Control and Telecommunications

- ❖ Market Size and Growth
- ❖ Systems in Use and their Specifications
- ❖ Emerging Trends and Recent Deployments
- ❖ Competitive Landscape and Key Players
- ❖ Segment Outlook and Projections

## 9. Fare Collection and Advancements

- ❖ Market Size and Growth
- ❖ Systems in Use and their Specifications
- ❖ Emerging Trends and Recent Deployments
- ❖ Competitive Landscape and Key Players
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

## 10. Construction: Elevated and At-grade Structures

- ❖ Market Size and Growth
- ❖ Cost Analysis
- ❖ Prevalent and Emerging Methods and Techniques
- ❖ Recent Developments
- ❖ Key Contractors and Market Share
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Opportunities

## 11. Construction: Metro Tunnels

- ❖ Size and Growth
- ❖ Cost Analysis
- ❖ Prevalent and Emerging Methods and Techniques
- ❖ Analysis of TBM Market
- ❖ Key Contractors and Market Share

- ❖ Best Practices in Tunnel Design and Construction
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Opportunities

## 12. Traction

- ❖ Market Size and Growth
- ❖ Systems in Use
- ❖ Prevalent and Emerging Methods and Techniques
- ❖ Energy Management and Conservation Initiatives
- ❖ Key Contractors and Market Share
- ❖ Segment Outlook and Projections

## 13. Station Infrastructure

- ❖ Market Size and Growth
- ❖ Recent Developments under key components:
  - Elevators, Escalators and Travelators
  - Climate Control and Ventilation Systems
  - Passenger Information Display Systems
  - Platform Screen Doors
  - Security and Surveillance
  - Others
- ❖ Key Players
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Opportunities

## SECTION III: KEY PROFILES: OPERATIONAL AND UPCOMING PROJECTS

### 14. Key Project Profiles

#### ❖ Metro Rail

- Agra Metro Rail
- Ahmedabad-Gandhinagar Metro Rail
- Bengaluru Metro
- Bhagalpur Metro Rail
- Bhopal Metro Rail
- Bhubaneswar Metro Rail
- Chennai Metro Rail
- Coimbatore Metro Rail
- Delhi Metro Rail
- Gurgaon Rapid Metro Rail
- Gaya Metro Rail
- Gurgaon-Faridabad Metro Rail
- HUDA City Centre-Cyber City Metro Rail
- Hyderabad Metro Rail
- Indore Metro Rail
- Jaipur Metro Rail
- Kanpur Metro Rail
- Kochi Metro Rail
- Kolkata Metro Rail
- Kozhikode Metro Rail
- Lucknow Metro Rail

- Madurai Metro
- Meerut Metro Rail
- Mumbai Metro Rail
- Nagpur Metro Rail
- Navi Mumbai Metro Rail
- Noida Sector 142- Botanical Garden Metro Rail
- Noida- Ghaziabad Metro Rail
- Noida-Greater Noida Metro Rail
- Patna Metro Rail
- Pune Metro Rail
- Surat Metro Rail
- Thane Metro Rail
- Thiruvananthapuram Metro Rail
- Tricity Metro Rail
- Vijayawada Metro Rail
- Visakhapatnam Metro Rail
- Others

#### ❖ Metrolite/LRT

- Ahmedabad-Dholera SIR Light Rail
- Bareilly Light Rail
- Bengaluru Light Rail
- Chennai Light Rail
- Gorakhpur Light Rail
- Guwahati Metrolite
- Jammu Light Rail
- Prayagraj Light Rail
- Pune LRT
- Raipur Metrolite
- Rajkot MRTS
- Srinagar Light Rail
- Varanasi Light Rail

#### ❖ MetroNeo

- Nashik MetroNeo
- Warangal MetroNeo

#### ❖ RRTS

- Delhi-Ghaziabad-Meerut Regional Rapid Transit System
- Ghaziabad-Jewar Airport Regional Rapid Transit System
- Delhi-Panipat-Karnal Regional Rapid Transit System
- Delhi-SNB-Aiwar Regional Rapid Transit System
- Madhya Pradesh Regional Rapid Transit System
- Greater Noida-Gurugram Regional Rapid Transit System
- IGIA-Jewar Airport Regional Rapid Transit System

#### ❖ Water Metro

- Kochi Water Metro
- Mangaluru Water Metro
- Surat Water Metro

I would like to purchase the “Urban Rail Market in India 2025” report:

Format (PDF)	Price of the report
<b>Site Licence (Single Location)</b>	Rs 90,000
<b>GST @ 18%</b>	Rs 16,200
<b>Total</b>	<input type="checkbox"/> <b>Rs 106,200</b>
<b>Enterprise Licence (Multiple Locations)</b>	Rs 135,000
<b>GST @ 18%</b>	Rs 24,300
<b>Total</b>	<input type="checkbox"/> <b>Rs 159,300</b>

I am enclosing a cheque/demand draft for Rs \_\_\_\_\_, vide cheque/demand draft no. \_\_\_\_\_ drawn on \_\_\_\_\_ dated \_\_\_\_\_ in favour of “India Infrastructure Publishing Pvt. Ltd.”

Signature

.....

Name (Block Letters) \_\_\_\_\_

Designation \_\_\_\_\_

Company \_\_\_\_\_

Company GST No. \_\_\_\_\_

Mailing Address \_\_\_\_\_

Telephone \_\_\_\_\_ Mobile \_\_\_\_\_

E-mail \_\_\_\_\_

#### Wire transfer details:

**Beneficiary** : India Infrastructure Publishing Pvt. Ltd.  
**Bank Name** : The Hongkong and Shanghai Banking Corporation Ltd  
**Bank Address** : R-47, Greater Kailash–1, New Delhi - 110048  
**Account No.** : 094179587002  
**Swift Code** : HSBCINBB  
**IFSC Code** : HSBC0110006  
**GSTIN** : 07AAACI5880R1ZV

#### Contact details:

#### Swati Rawat

Manager, Research Services  
 India Infrastructure Publishing Pvt. Ltd.,  
 B-17, Qutab Institutional Area, New Delhi - 110 016, India  
 Mobile: **+91 78385 05223**  
 Email: swati.rawat@indiainfrastructure.com