

URBAN RAIL MARKET IN INDIA 2024

Market Analysis, Growth Trends and Upcoming Opportunities

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

The Urban Rail Market in India 2024 report will cover the following:

- ❖ Sector Overview, Network Growth and Market Opportunities
- ❖ Recent Developments, Emerging Trends and Technology Innovations
- ❖ Upcoming Projects, Key Contract Awards and Tenders
- ❖ Analysis of Key Sub-segments – Construction, Rolling Stock, S&T, Traction, Station Redevelopment, Fare Collection
- ❖ Market Projections and Investment Requirements
- ❖ Detailed Profiles of 50+ Completed and Upcoming Urban Rail Transit Systems

India has emerged as one of the fastest growing markets for urban rail-based transit systems. Over 900 km metro network is operational across 20 cities, while more than 1,500 km of MRT network is at various stages of development. New and emerging modes like Metrolite, MetroNeo and RRTS are expected to be the predominant metro systems in the next two decades. Over 600 km of MetroLite network and more than 100 km of MetroNeo network are upcoming across cities such as Kochi, Jammu, Srinagar, Coimbatore and Gorakhpur. Metro operators are actively looking at non-fare revenue augmentation, technology collaboration, integrated mobility and smart station solutions. Sustainability, indigenisation and enhanced passenger experience are other emerging key focus areas.

SUMMARY AND INSIGHTS

SECTION I: SECTOR TRENDS, ANALYSIS, OUTLOOK AND OPPORTUNITIES

1. Market Overview and Key Trends

- ❖ Network Size and Growth
- ❖ Ridership Trends and Analysis
- ❖ Fare Trends and Analysis
- ❖ Key Government Initiatives
- ❖ Emerging Trends
- ❖ Recent Developments
- ❖ Risks and Challenges
- ❖ Future Outlook and Industry Recommendations

2. Project Pipeline Analysis and Assessment

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

3. New Modes of Transit (Metrolite, Metroneo, RRTS and Water Metro)

- ❖ Current Market Size
- ❖ Key Operating Features, Standards and Specifications
- ❖ Cost Economics and Analysis
- ❖ Key Collaborations (Technology, Financing, etc.)
- ❖ Key Upcoming Projects

4. Investment and Financing Trends

- ❖ Trends in Funding
- ❖ Key Revenue Sources
- ❖ New Revenue Streams
- ❖ Innovative Funding Options (Land Value Capture, TOD Policy, Deferred Capex, Bonds, etc.)
 - ❖ Cost Components and Project Economics
 - ❖ PPP Landscape
 - Experience So Far
 - Potential for Unbundled PPPs
 - Upcoming PPP Projects
 - ❖ Investment Outlook

5. Market Opportunities and Key Projections

- ❖ Projected Network Addition
 - Immediate term (By 2025)
 - Near to Medium term (By 2028)
 - Medium to Long Term (2028 and Beyond)

- ❖ Projected Ridership
- ❖ Projected Investment Requirements (New Construction, Network Expansion, Rolling Stock, Signaling Systems, AFC Systems, Traction, etc.)
- ❖ Market Opportunities and Outlook

6. New and Emerging Opportunities

- ❖ Focus on Integrated Mobility
- ❖ Transit Oriented Development
- ❖ Real Estate and Commercial Development
- ❖ Project Management (BIM, CDE, Cloud Computing, Other Dashboards/Software, etc.)
- ❖ First and Last-Mile Connectivity
- ❖ Train leasing and O&M Outsourcing
- ❖ Technology and Digital Solutions (MaaS, IoT, Big Data, Account-based Ticketing, etc.)
- ❖ Smart Station Solutions (Smart Depot, Energy Conservation, etc.)

SECTION II: SEGMENT ANALYSIS: GROWTH, KEY DEVELOPMENTS, AND PROJECTIONS

7. Rolling Stock

- ❖ Market Size and Growth
- ❖ Systems in Use and their Specifications
- ❖ Production and Supply
- ❖ Emerging Trends
- ❖ Competitive Landscape and Key Suppliers
- ❖ Recent Contract Awards
- ❖ Procurement Plans
- ❖ Segment Outlook and Projections

8. Signalling, Train Control and Telecommunications

- ❖ Market Size and Growth
- ❖ Technologies and Systems in Use
- ❖ Recent Deployments and New Innovations
- ❖ Competitive Landscape and Key Players
- ❖ Recent Contracts Awards
- ❖ Future Plans
- ❖ Segment Outlook and Projections

9. Fare Collection and Advancements

- ❖ Size and Growth
- ❖ Systems in Use and their Specifications (Closed loop, Open loop, QR code-based ticketing, etc.)
- ❖ Innovations in Fare Media (NCCM, contactless ticketing, mobile wallets, etc.)
- ❖ Recent Deployments
- ❖ Competitive Landscape and Key Players
- ❖ Recent Contract Awards
- ❖ Future Plans of Metro Corporations
- ❖ Segment Outlook and Projections

10. Construction: Elevated and At-grade Structures

- ❖ Size and Growth
- ❖ Cost Analysis
- ❖ Prevalent and Emerging Methods and Techniques
- ❖ Role of Technology
- ❖ Key Contractors and Market Share
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

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 Projections

12. Traction

- ❖ Size and Growth
- ❖ Systems in Use and their Specifications
- ❖ New Innovations
- ❖ Energy Management and Conservation (Traction vs Non-Traction)
- ❖ Key Contractors and Market Share
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

13. Station Infrastructure and Key Components

- ❖ Market Size and Growth
- ❖ Recent Developments under:
 - Elevators
 - Climate Control and Ventilation Systems
 - Public Information Display Systems
 - Security and Surveillance
 - Platform Screen Doors
 - Others
- ❖ Key Players
- ❖ Recent Contract Awards
- ❖ Segment Outlook and Projections

SECTION III: PROJECT FOCUS: DETAILED PROFILES OF OPERATIONAL AND UPCOMING METRO RAIL PROJECTS**14. Key Project Profiles****❖ Metro Rail**

- Agra Metro Rail
- Ahmedabad-Gandhinagar Metro (Phase I and Phase II)
- Bengaluru Metro (Phase I, Phase II, Phase 2A, Phase 2B and Phase III)
- Bhopal Metro Rail Phase I
- Bhubaneswar-Cuttack Metro Rail
- Chennai Metro (Phase I, Phase I Extension and Phase II)
- Coimbatore Metro Rail
- Delhi Metro (Phase I, Phase II, Airport Express Line, Airport Express Line Extension, Phase III, Phase IV, Gurgaon Rapid Metro- Phase I and Phase II)
- Hyderabad Metro Rail (Phase I and Phase II)
- Indore Metro Rail Phase I
- Jaipur Metro Rail (Phase I and Phase II)

- Kanpur Metro Rail Phase I
- Kochi Metro (Phase 1, Phase 1A, Phase 1B, Phase II and Water Metro)
- Kolkata Metro (North-South, North South Expansion and East-West)
- Lucknow Metro Rail
- Madurai Metro Rail
- Mumbai Metro (Line 1, 2A, 2B, 3, 4, 4A, 4, 6, 7, 7A, 9, 8, 10, 11, 12, 13, 14 and Monorail Line 1)
- Nagpur Metro (Phase I and Phase II)
- Navi Mumbai Metro Rail (Phase I, Phase II, Phase III and Phase IV)
- Noida-Greater Noida Metro Rail Project (Aqua Line and Aqua Line Extension)
- Patna Metro Rail Phase I
- Pune Metro (Corridor I, II, III, Swargate to Katraj Corridor and Line III Extension)
- Raipur Metro Rail
- Rajkot Metro Rail
- Surat Metro Rail
- Thane Metro Rail
- Others
 - Gurgaon-Manesar-Bawal Metro Rail
 - Old Gurugram-New Gurugram Metro Rail
 - Gurgaon-Faridabad Metro Rail
 - Noida-Ghaziabad Metro Rail
 - Jewar Airport-New Delhi Railway Station Metro Rail
 - Etc.

❖ Metrolite/LRT

- Ahmedabad-Dholera SIR Light Rail
- Chennai LRT
- Delhi Metrolite
- Dehradun-Haridwar-Rishikesh Light Rail
- Gorakhpur Light Rail
- Guwahati Metrolite Phase I
- Jammu Light Rail
- Kochi Metrolite
- Kozhikode LRT
- Nagpur Metrolite
- Noida Sector 142 – Botanical Garden Metrolite
- Prayagraj Light Metro Rail Phase I
- Pune LRT
- Srinagar Light Rail Phase I
- Thiruvananthapuram LRT
- Varanasi Light Rail
- Visakhapatnam Light Metro Rail
- Vijayawada Light Rail
- Others

❖ MetroNeo

- Bhavnagar MetroNeo
- Nashik MetroNeo
- Pune MetroNeo
- Warangal MetroNeo

❖ RRTS

- Delhi-Ghaziabad-Meerut Regional Rapid Transit System
- Delhi-Gurugram-SNB Regional Rapid Transit System Phase I
- Delhi-Panipat-Karnal Regional Rapid Transit System
- Madhya Pradesh Rapid Rail

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