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URBAN RAIL IN INDIA 2020

Sector Analysis, Investment Opportunities, Emerging Trends and New Opportunities

- Report (PDF)
- Data-set (Excel)

The report covers:

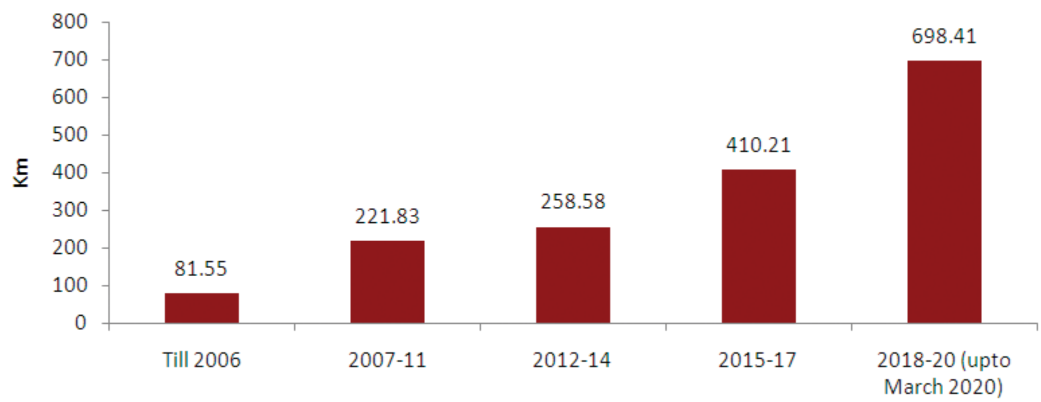
- Emerging trends, new opportunities and investment requirements for the sector
- Detailed analysis of the operational urban rail systems in India
- Extensive profiles of under construction, approved, awarded and announced projects in the metro, light rail, regional rapid rail and MetroNeo segments
- Market size, emerging trends, new innovations and investment opportunities in the rolling stock, fare collection, construction, tunneling, and signaling and telecommunication segments stakeholders

INDIA INFRASTRUCTURE RESEARCH

Report Summary and Key Insights

India's metro footprint is expanding at a steady pace. The urban rail network has increased significantly, up from 81 km in 2006 to ~700 km operational currently. The network has expanded from two cities in 2006 to about 13 cities as of March 2020. Delhi Metro has the highest operational network of 348 km, followed by Hyderabad Metro (66 km) and Chennai Metro (45 km).

Operational Urban Rail Network in India

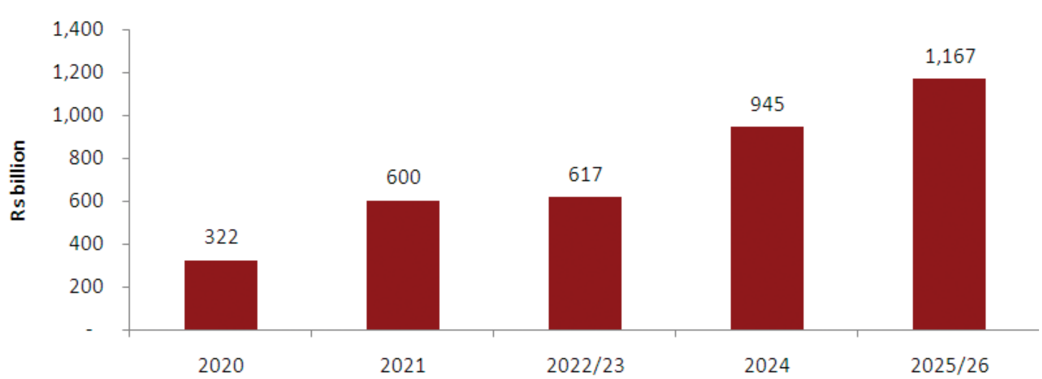


Source: India Infrastructure Research

Metro network in India recorded the highest growth in a span of three years during 2018-20 (up to March), with metro stretches spanning about 288 km being completed in key cities such as Chennai (17.9 km), Hyderabad (38.44 km), Delhi (130.54 km), Noida (29.71 km), Ahmedabad (6.5 km), Mumbai (11.28 km), Kochi (6.8 km), Nagpur (24.5 km), Jaipur (2.35 km) and Lucknow (14.38 km).

The current pipeline of projects in the urban rail sector spells significant opportunity for stakeholders across the board. Over 25 cities in India will have operational metro rail networks in the coming years. In the next 4-5 years, at least Rs 3-4 trillion worth of projects are expected to be commissioned. While metro rail will continue to be the dominant mode of commuting, new modes such as rapid rail and light rail are also being explored.

Year-wise Investment Requirement (Rs billion)



Source: India Infrastructure Research

The urban rail sector is growing at a rapid pace. While the Metro Rail Policy was a much awaited move, its benefits have mostly been unrealised with the industry expecting changes to the policy. The sector has a promising outlook given the policy support, robust project pipeline and increasing emphasis on efficient modes of mass transport. The recent Covid-19 outbreak will have a bearing on the pace of project execution for the next six to eight months at least. Labour migration, limited liquidity and halt on Chinese imports will impact construction activities in the next few months.

The recent times have seen focus shifting on Tier II cities. New metro rail constructions are upcoming in cities such as Kanpur, Indore, Surat, Patna, etc. While some have metro rail projects on the drawing board, others are testing the waters with Metrolite and MetroNeo systems. This is a big opportunity for consultants as well as rolling stock providers to tap.

Emerging segments such as station branding, commercial development and real estate development will also provide significant opportunities in the years to come. New concepts and technologies such as mobility-as-a-service (MaaS), internet of trains, big data, predictive maintenance, and the use of renewable energy to power trains and stations are also being explored.

The overall maturity of the sector hinges on a number of factors such as creation of UMTA, integration of various transport modes, smart ticketing, etc. While countries including Singapore and Japan have advanced subway and metro systems, India has a long way to go. Treading on the right path, the country needs to fully exploit the sector's potential and tap the opportunities for stakeholders across the value chain.

About India Infrastructure Research

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SECTION III: PROJECT PROFILES

Each profile covers the project scope (network length, alignment details, number of stations, rolling stock, fare system, signaling and telecommunications, traction, etc.), ownership details, implementing agency, cost estimates, key consultants, key contractors, key milestones, funding pattern, actual/expected ridership, recent contracts, upcoming tenders, and the detailed current status.

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