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China-Europe Rail Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

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Report description:

The China-Europe Rail Freight Transport Market size is estimated at USD 12.70 billion in 2024, and is expected to reach USD 40.30 billion by 2029, growing at a CAGR of 25.99% during the forecast period (2024-2029).

Key Highlights
-The development of a rail network between China and Europe is part of the long-term strategy of the government of China, to achieve global connectivity through its One-Belt-One-Road (OBOR) initiative. The strategy aims to restore and develop the ancient Silk Road between China and Europe, by encouraging investment in Eurasian transport and logistics, including rail networks, to boost Chinese trade and investment and economic integration.
-Owing to the rising capital costs and wages in coastal areas, many manufacturing and production companies are relocating their plants to inland cities in China, which are far away from the Chinese commercial coastal lines. The companies like HP find it difficult to export products to Europe since the commodities need to travel thousands of kilometres east to the seaports and ship them back to the west of Europe. The development of railroads has offered companies in reducing transit times and shipping of goods from the production site directly to the Countries in Europe.
-According to China Railway, the trains have transported 972,000 twenty-foot equivalent units of cargo this year, a 5% increase from the same period last year. With 82 routes, the trains may now go to 200 cities across 24 nations in Europe, creating a transportation system that spans the whole continent. 53 different categories of goods, including grain and timber, apparel and accessories, and autos and parts, are all transported by trains. China has worked hard to boost train capacity by modernizing domestic transportation systems and coordinating infrastructure development with foreign railways. The average daily freight volume for the China-European freight train services on the eastern route increased by 41.3% from 2020 to 2022.
-The cooperation between Chinese regions, Russia, and other European countries is expected to lead to the evolution and growth of manufacturing activities across the network. This situation is anticipated to create further opportunities for the rail operators

and rail freight forwarding service providers, to look after the supply chains of the manufacturing companies involved in the region. The European exports to China by rail mainly consist of metals and metal products, and chemicals, while minerals consist of machinery and equipment, minerals and chemical raw materials.

China-Europe Rail Freight Transport Market Trends

Increasing freight volume driving the market

Following a freight train from Xi'an in Northwest China's Shaanxi Province to Hamburg, more than 10,000 China-Europe freight trains have used the rail network so far in 2022, surpassing the same milestone achieved in 2021 by 10 days earlier. In the first eight months of the year, total cargo moved increased by 5% year over year to 972,000 TEUs. China began operating new rail and maritime routes in 2022, beginning in Xi'an and the southwest city of Chongqing and leading to the Black Sea, the Caspian Sea, and Romania. The ports along the freight rail route between China and Europe have all been modernized.

The ports along the freight rail route between China and Europe have all been modernized. Data showed that from the start of 2022, the capacity of the west channel has increased by 20.7%, that of the middle channel by 15.2%, and that of the east channel by 41.37%. According to China Railway, the China-Europe freight train has completed 92 operational routes connecting 200 towns in 24 European nations, enhancing economic relations between China and Europe and the Belt and Road Initiative.

The imbalance in the rail traffic flow between China and Europe is subtly shifting. The proportion of eastbound to westbound trains has increased in terms of train count, rising from 50.6% in 2016 to 81.5% in 2021. That indicates that 5 trains are leaving for Europe, whereas 4 trains are leaving for China.

The fact that freight train delivery times are getting worse cannot be disputed, nevertheless. The level of service is not higher than it was previously. Due to the epidemic, a significant amount of freight migrated from the ocean to the railway, making it difficult for many long-time customers to obtain their shipping space. Westbound trains experienced delays due to the backlog and congestion at the Chinese border ports. If nothing changes, these issues might persist during this year's busy times.

Kazakhstan, the gateway for China-Europe southern railroad is supporting the market growth.

China's exports to Kazakhstan increased significantly by 19.5% to reach USD 13.98 billion, while its imports from Kazakhstan increased significantly by 15.3% to USD 11.27 billion. In 2022, Kazakhstan and China's bilateral trade increased by 23.6% and astoundingly reached USD 31.2 billion. If the current favorable dynamic continues, the two parties may surpass their declared objective of USD 35 billion in bilateral commerce long before the target year of 2030. The increase in Kazakhstan's exports to China of agricultural products (133.7% growth), oil (USD 4.1 billion), gas (USD 1.2 billion), copper ores and concentrates (USD 2.04 billion), uranium and nuclear fuel (USD 817 million), and other ores (iron, zinc, and precious metals at just over USD 1 billion) is primarily responsible for this positive trade dynamic.

Kazakhstan received a total of USD 960 million, USD 1.85 billion, and USD 996 million in gross direct investment from China in 2020-2022. It's interesting to note that in 2022, the fourth quarter saw a half of all Chinese investment. By the end of 2022, more than 12,000 trains had through the Alashankou and Khorgos border crossings in the direction of both China and Central Asia or an average of 33 per day. Going ahead, the rail transit volume is anticipated to reach 24.5 million tons of cargo, or 1.1 million 20-foot containers, by the end of 2023; by 2025, the number is targeted to reach 30 million tons.

The main transportation infrastructure projects, including the railway line that runs through Almaty and connects to the new Bakhty border crossing in China's Western Xinjiang Region, are also being worked on by Chinese enterprises. Also, the amount of goods transported through this route nearly tripled to over 1 million tons as a result of the completion of the Trans-Caspian International Transport Route.

The Dostyk railway station, which is close to the Chinese border, is actively building terminal infrastructure, which is projected to increase the trans-shipment capacity from the 160,000 tons handled in 2021 to 480,000 thousand tons per year.

The commencement in November 2022 of the building of a new full-cycle, multi-brand vehicle plant in Almaty, with a size of 100,000 square meters and a total expenditure of USD 222 million, is an example of a substantial collaborative industrial business project. The industrial location is special since it will manufacture vehicles for three well-known Chinese automakers: Chery, Changan, and Haval.

China-Europe Rail Freight Transport Industry Overview

The China-Europe Rail Freight Transport Market is fragmented and highly competitive with the presence of major international players. The rapid increase in the number of trains between China and Europe is leading to an increase in competition within the industry. The forwarding service in the market is dominated by major global players such as DHL and DB Schenker. Other key players are China Railway Corporation, Joint-stock company United Transport and Logistics Company Eurasian Rail Alliance, Far East, Land Bridge Ltd., DSV, and many others. As a mode of transport, rail freight transport is competitive with other modes, in terms of speed and cost. Moreover, the development of the infrastructure along the routes is decreasing transport costs and times.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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