

Rail Asset Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Rail Asset Management Market size is estimated at USD 13.43 billion in 2025, and is expected to reach USD 18.03 billion by 2030, at a CAGR of 6.07% during the forecast period (2025-2030).

The rail asset management solution comprises systems, processes, and tools which can be used to maximize operational performance and reduce risks over the whole rail infrastructure and vehicle life cycle. The solution includes real-time network management, security, information management for rail facilities, power supply management, infrastructure management, time management (HRM), incident management, etc.

Key Highlights

- The governmental investments in various railway infrastructures and the trend of the PPP model for rail project implementation worldwide are driving the market. The need for rail asset management solutions will likely increase with more infrastructure and vehicles.
- In addition, PPP can speed up infrastructure construction and offer investment opportunities to the private sector, increasing the use of technology for operational effectiveness and accelerating the adoption of rail asset management solutions. Public and private investors may benefit from increased efficiency and a broader source of income from PPP rail projects that permit shared use of the tracks, which might lead to an improved rail network and increased competitiveness, thus driving the market due to its application in increasing operational efficiencies of the railways.
- For instance, as of May 2023, Tunisia's USD 11.7 billion planned investments in the rail sector are expected to be mostly funded through PPP mode by 2040. These funds are expected to support the government's initiatives to extend the Greater Tunis light metro network to connect the Tunis Lake region and the updation of rail cars between 2024 and 2026 by the Ministry of Transportation.

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- However, due to high initial deployment costs, rail companies and infrastructure owners frequently face financial constraints when investing in asset management technologies. Organizations may struggle to set aside adequate funds to install comprehensive asset management systems. Budget restrictions might make delaying or scaling back deployments necessary, preventing the market from growing.
- Post-pandemic, rail freight, as well as travel via passenger trains, is expected to come to the pre-pandemic level, which may require rail operators to enhance passenger experience coupled with enhancing the operational efficiency of the rail, thus indicating growth in demand for rail asset management solutions.

Rail Asset Management Market Trends

Growing Demand for Effective Rail Operations to Drive the Market

- Rail transportation is known for its efficiency in moving large volumes of goods and passengers over long distances. It offers advantages such as high capacity, lower energy consumption per unit of freight or passenger, and reduced traffic congestion compared to other modes of transportation. As the demand for transportation continues to rise, the need for efficient rail operations becomes more crucial.
- Moreover, rail transportation is experiencing a surge in demand due to several factors, such as urbanization, population growth, and the need for sustainable transportation options. As more passengers and goods rely on rail services, efficient and reliable operations are needed. Effective rail asset management enables operators to enhance capacity, optimize scheduling, and ensure smooth operations to accommodate increased rail traffic.
- Rail transportation is considered more environmentally friendly compared to road or air transport. Trains produce lower greenhouse gas emissions per ton-mile or passenger-mile, contributing to reduced carbon footprints. For instance, according to the International Energy Agency (IEA), in the Net Zero Scenario, by 2030, electricity is anticipated to account for around two-thirds of the total final energy consumption. Diesel and biodiesel account for the remaining three quarters. Hydrogen penetration is expected to be minimal. With increasing awareness of climate change and the need for sustainable transportation options, rail operations are seen as an attractive solution.
- Furthermore, advancements in technology are revolutionizing rail operations. Automation, digitalization, and data analytics improve asset management, predictive maintenance, optimized scheduling, and enhanced safety measures. These technological advancements are driving the demand for effective rail operations to leverage the benefits of innovation.
- Demand for effective rail operations drives technology adoption and data-driven solutions for rail asset management. This includes implementing asset management software, sensor-based monitoring systems, and predictive analytics tools. These technologies enable better asset tracking, real-time performance monitoring, and data-driven decision-making, improving operational efficiency and cost savings.
- Overall, the increasing demand for effective rail operations transforms the rail asset management market. It drives investment, promotes technological advancements, emphasizes asset performance and safety, and creates opportunities for market expansion. Rail asset management becomes a critical component in meeting the evolving needs of the rail industry and ensuring efficient and reliable rail operations.

Asia-Pacific to Witness Significant Growth

- The Asia-Pacific region is anticipated to grow significantly during the forecast period due to the emerging economies and the increasing governmental focus in the countries such as India, China, and Japan. This creates an opportunity for market vendors to expand their businesses in the APAC region, driving the rail asset management solutions market. For instance, in April 2023, the

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Siemens consortium and Gujarat Metro Train Corporation partnered to create advanced train electrification solutions, in which Siemens is expected to manage the project to implement power supply, train electrification technology, and distribution systems.

- The rolling stock segment has been registering significant growth in the Chinese market because enterprises in the rail industry have been increasingly adding advanced strategies. According to Railtech, more than 3,000 kilometers of new railway lines were expected to be operated in China in 2022, including 2,500 kilometers of high-speed railways. This will increase the demand for rail asset management, as this will help enable strategic decision-making for long-term planning and investment.
- With its large network, rail asset management in India faces several challenges that impede its efficiency and effectiveness. One significant challenge is the vast size and complexity of the railway network, which spans over 67,000 kilometers and comprises diverse assets, including tracks, bridges, signaling systems, rolling stock, and stations. Managing and maintaining these assets requires meticulous planning, resource allocation, and coordination. Hence, developing a centralized asset inventory includes detailed information on all railway assets, such as age, condition, maintenance history, and performance data. This inventory will serve as a foundation for effective asset management planning.
- Japan's railway system is renowned worldwide for its efficiency, reliability, and advanced technology. As the country continues to experience population growth, urbanization, and increased transportation demands, rail asset management has emerged as a critical aspect of maintaining and optimizing the railway infrastructure.
- The Rest of the Asia-Pacific includes Australia, South Korea, Thailand, and others. The asset management market in Australia has experienced significant growth and increasing demand in recent years, making it an attractive market for rail asset management solutions.

Rail Asset Management Industry Overview

The global rail asset management market is moderately competitive. It has many major players contributing significantly to the market share through their long-term partnerships in providing rail asset management solutions to railway operators, including public and private organizations. Market vendors are performing strategic investments in research and development, partnerships, mergers and acquisitions, and new technological development in their solutions to increase their market share. Some of the major players in the market are Siemens AG, Hitachi Ltd., Alstom, IBM Corporation, etc.

In April 2023, Quebec City, Canada, issued a contract with Alstom, a global leader in smart and sustainable mobility, to supply 34 Citadistrams for the city's tramway project for approximately USD 1 billion, which would include the rolling stock design, supply, and maintenance.

In January 2023, The SNC-Lavalin Group Inc was chosen as the delivery partner for Calgary's Green Line LRT (Light Rail Transit), in which the company would use its technical and business know-how in large, complex projects to support the completion of Phase-1 of the Calgary Green Line LRT Project, an 18 km transit system connecting the city's existing Red and Blue LRT lines and four MAX BRT routes.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

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2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHT

4.1 Market Overview

4.2 Industry Attractiveness- Porter's Five Forces Analysis

4.2.1 Bargaining Power of Suppliers

4.2.2 Bargaining Power of Buyers

4.2.3 Threat of New Entrants

4.2.4 Threat of Substitutes

4.2.5 Intensity of Competitive Rivalry

4.3 Assessment of the Impact of COVID-19 on the Market (by Major Countries)

4.4 Technology Outlook

4.4.1 Increasing Demand for Advanced Transportation Infrastructure

4.4.2 Smart Cities Gaining Traction

4.5 Rail Infrastructure Investment Outlook (Provides Coverage on Major Countries' Spending on Railway Infrastructure)

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Growing Demand for Effective Rail Operations

5.1.2 Increase in Government Initiatives and Public-Private Partnership Model

5.1.3 Rapid Urbanization in Developing and Underdeveloped Countries

5.2 Market Challenges

5.2.1 High Initial Deployment Costs

5.2.2 Difficulties with Legacy Infrastructure Integration

6 MARKET SEGMENTATION

6.1 By Deployment

6.1.1 On-Premises

6.1.2 Cloud

6.2 By Application

6.2.1 Rolling Stock

6.2.2 Infrastructure

6.3 By Geography***

6.3.1 North America

6.3.1.1 United States

6.3.1.2 Canada

6.3.2 Europe

6.3.2.1 United Kingdom

6.3.2.2 France

6.3.2.3 Germany

6.3.3 Asia

6.3.3.1 China

6.3.3.2 India

6.3.3.3 Japan

6.3.4 Australia and New Zealand

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6.3.5 Latin America

6.3.6 Middle East and Africa

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles*

7.1.1 Siemens AG

7.1.2 Hitachi Ltd.

7.1.3 Alstom

7.1.4 IBM Corporation

7.1.5 Wabtec Corporation

7.1.6 SAP SE

7.1.7 Capgemini SE

7.1.8 Cisco Systems Inc.

7.1.9 Huawei Technologies Co.

7.1.10 Accenture PLC

7.1.11 Trimble Inc.

7.1.12 Bentley Systems Incorporated

7.1.13 SNC-Lavalin Group Inc.

7.1.14 ZEDAS GmbH

8 INVESTMENT ANALYSIS

9 MARKET OPPORTUNITIES AND FUTURE TRENDS

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