

Passenger and Transit Rail Vehicles: The U.S. Supply Chain



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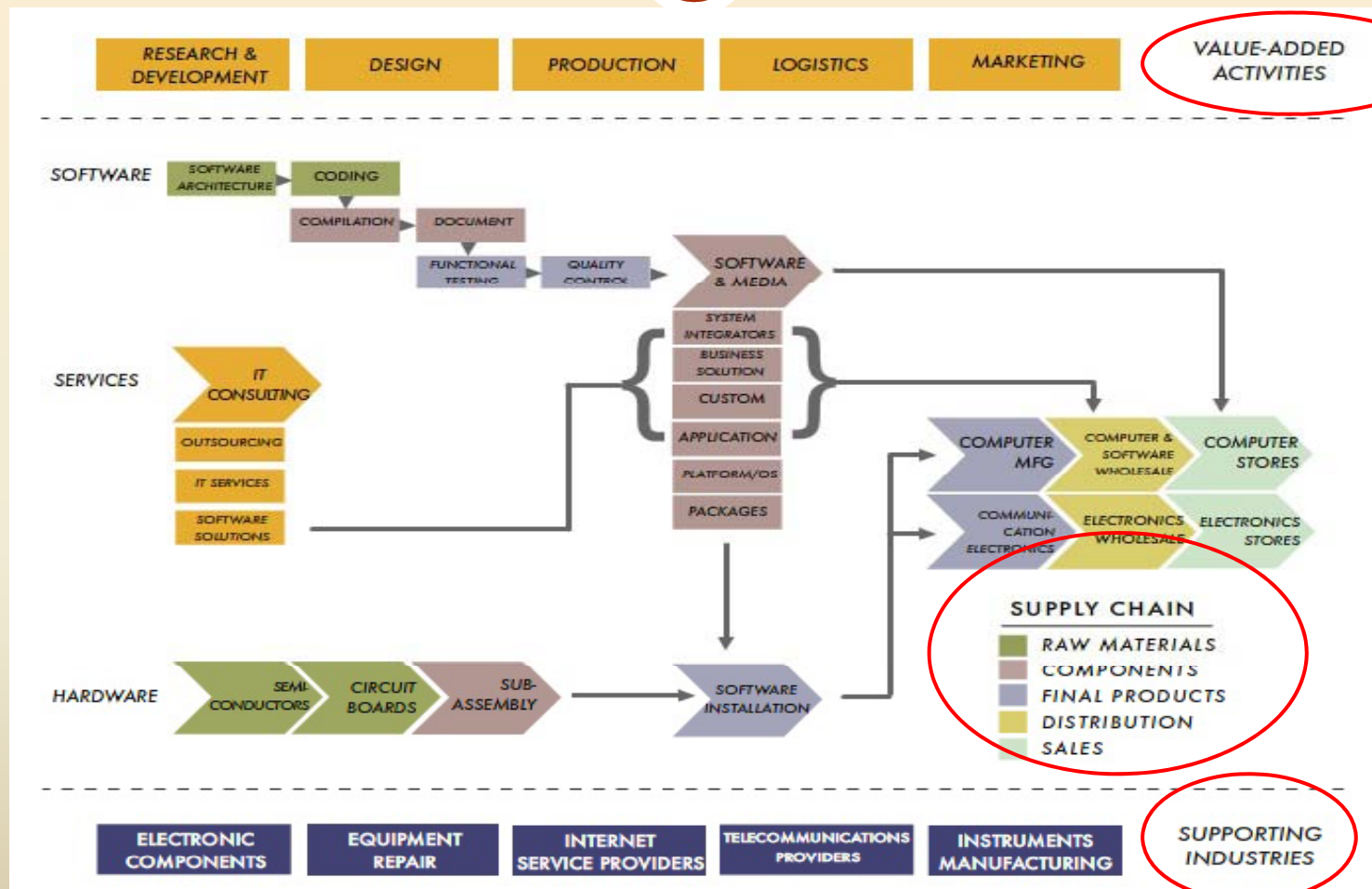
Good Jobs/Green Jobs

National Conference

May 4, 2010

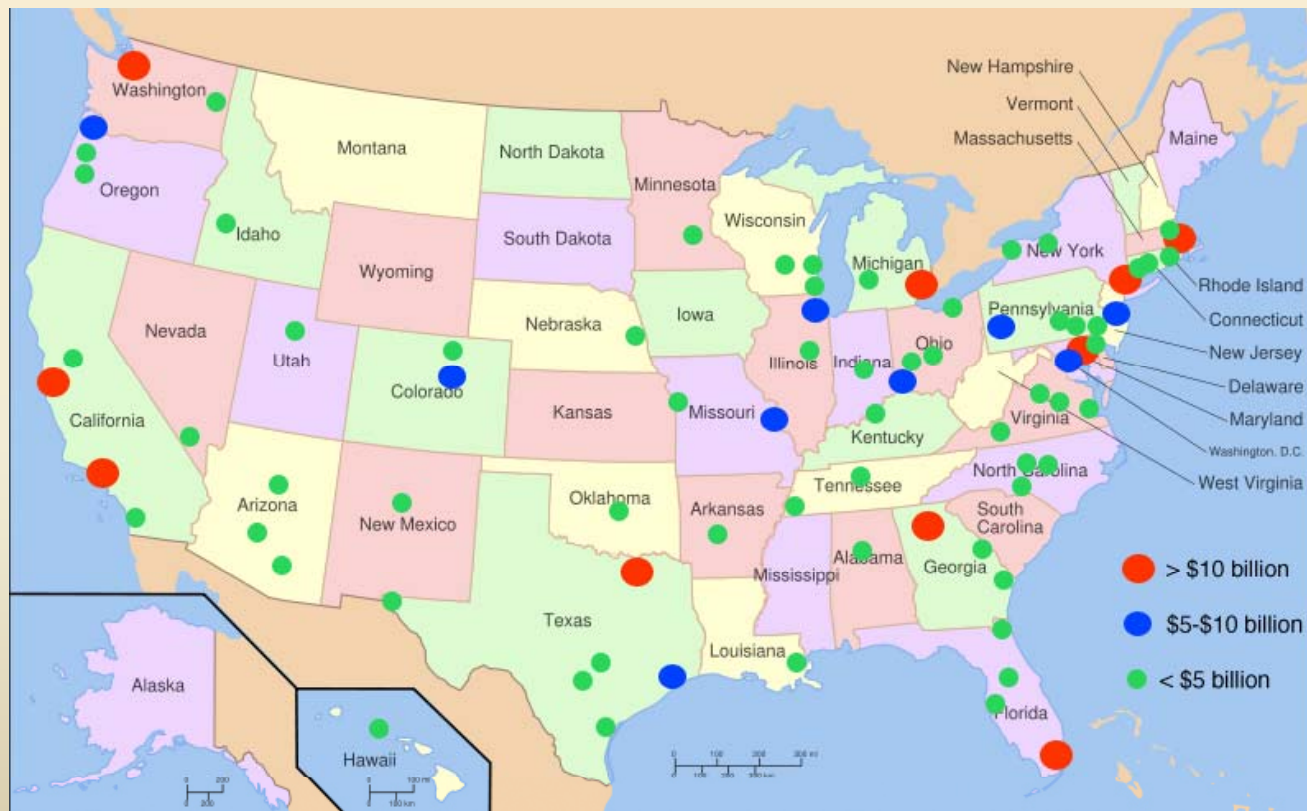
Washington, DC

What is a value chain?



Pent-up demand

- Over \$248 billion in new fixed guideway projects

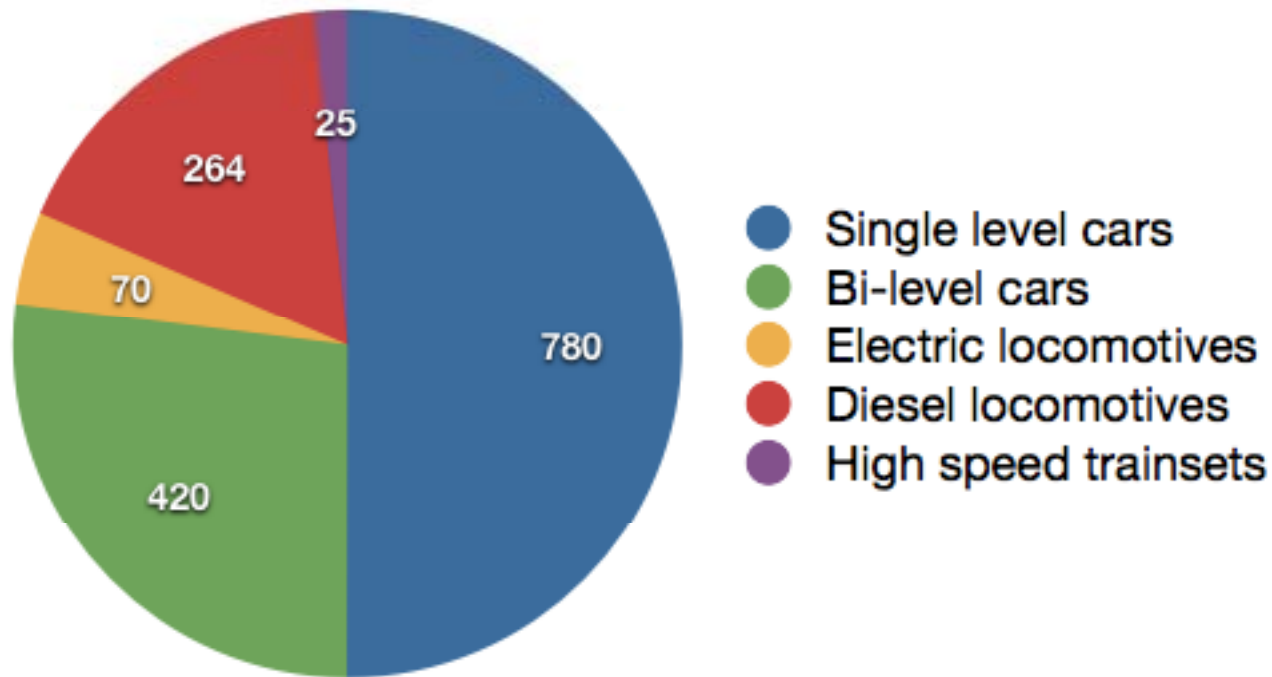


Based on data from Reconnecting America

...after decades of little or no investment

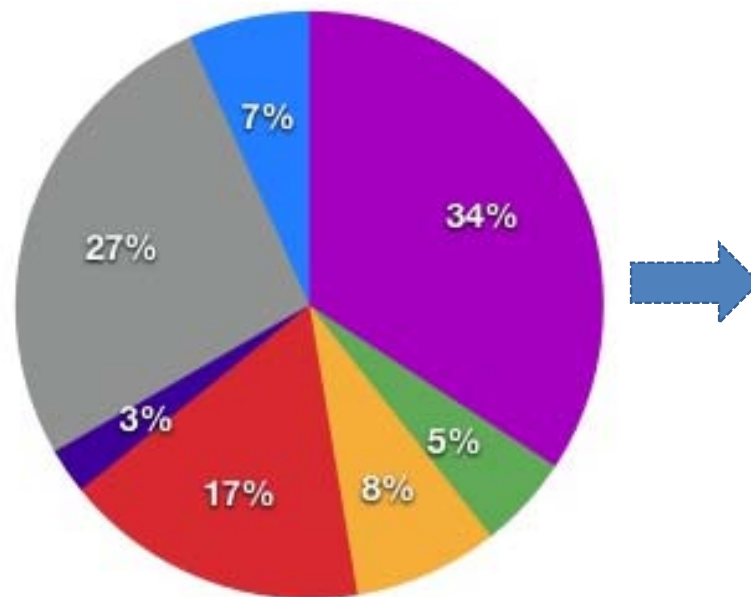


- Amtrak needs \$11 b. in new rolling stock 2010-2033



Based on data from Amtrak

Who has the largest rail equipment market?



- Western Europe
- NAFTA
- Africa/Middle East
- Eastern Europe
- Rest of America
- CIS
- Asia/Pacific

- **Total market:**
\$159 billion
- **“Accessible”:**
\$111 billion
- **Rolling stock:**
\$48 billion
- **Rolling stock for passenger & urban rail:**
\$19 billion (estimate)

Based on data from Roland Berger/UNIFE

Our focus: 6 rail types



Passenger rail:

Regional



Intercity



High-Speed Rail



Transit rail:

Metro



Light rail



Streetcar

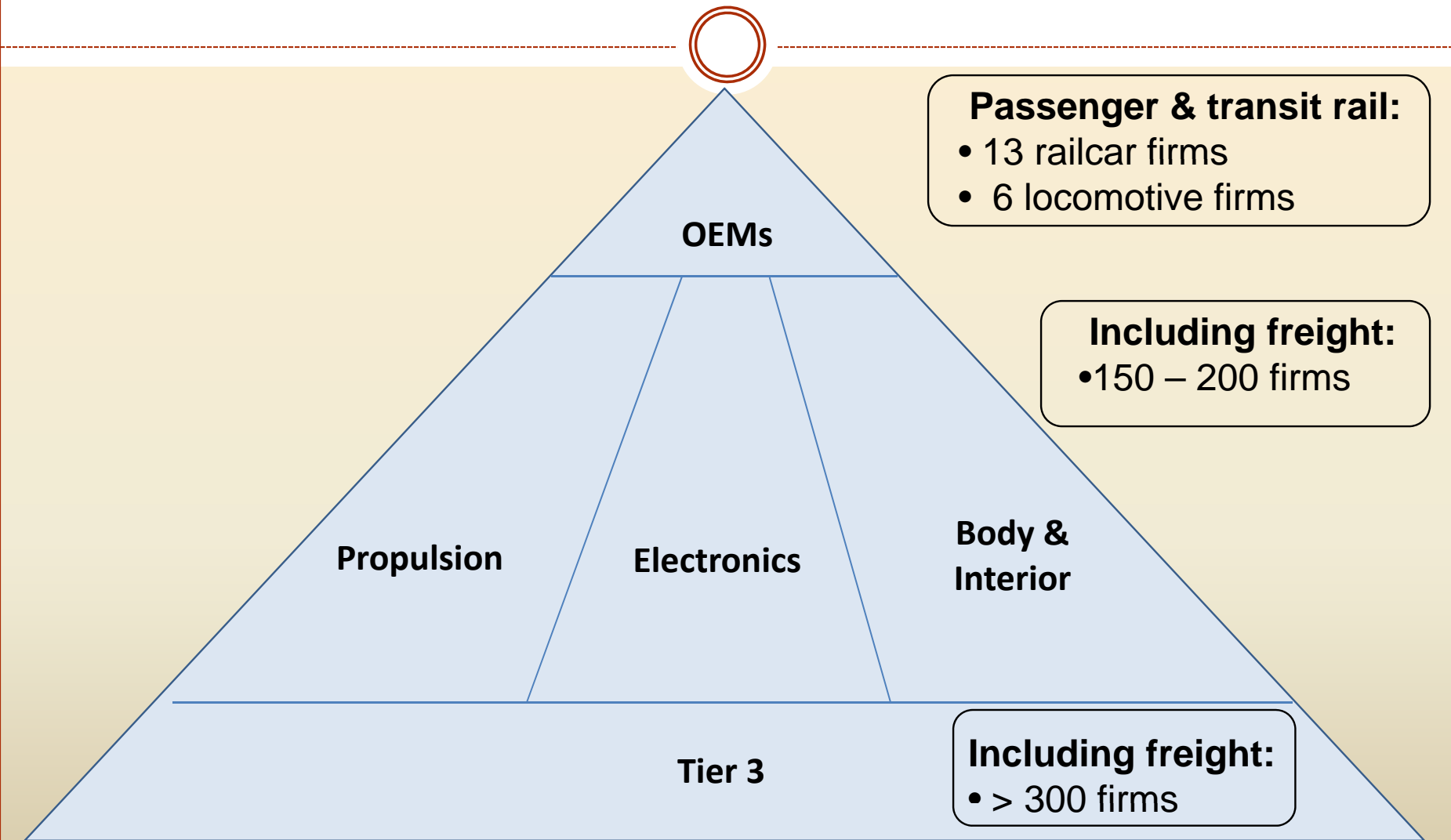


Who are the U.S. players?

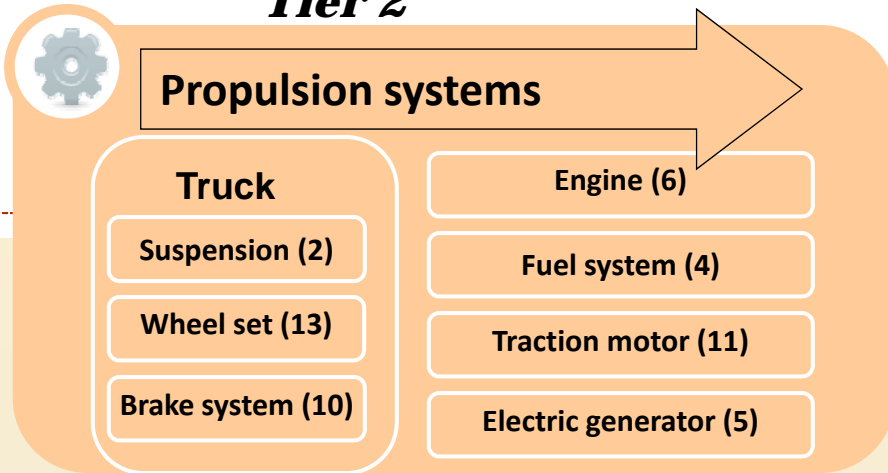


Railcar firms		Locomotive firms
Alstom	Kinkisharyo	Alstom
AnsaldoBreda	Kawasaki	Bombardier
Bombardier	Nippon Sharyo	Electro-Motive Diesel (EMD) 
Brookville 	Siemens	General Electric (GE) 
CAF	US Railcar 	National Railway Equipment 
Gomaco 	United Streetcar 	Motive Power (Wabtec) 
Hyundai Rotem		

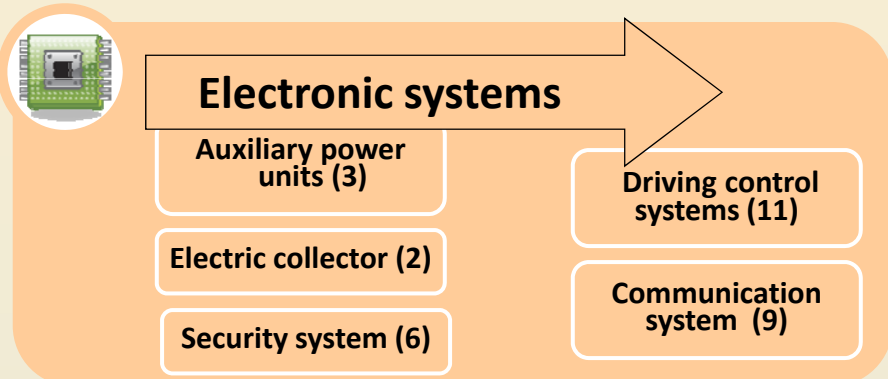
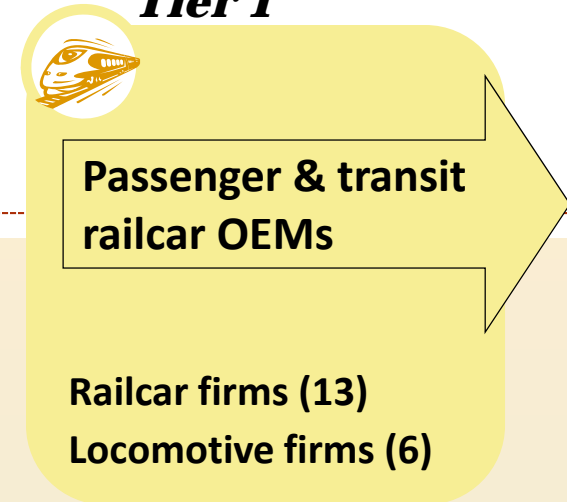
Who else is in the supply chain?



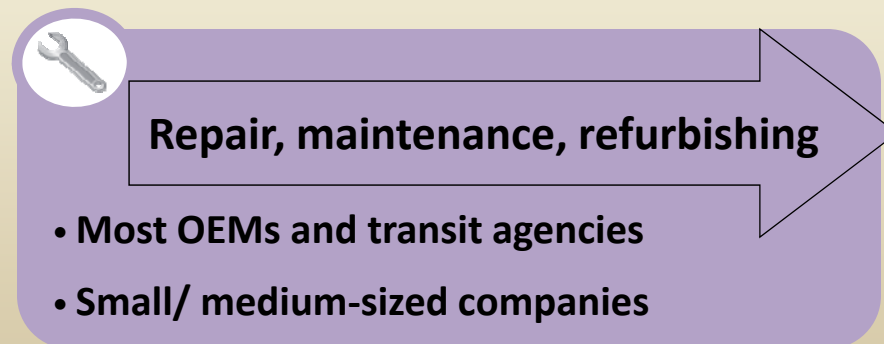
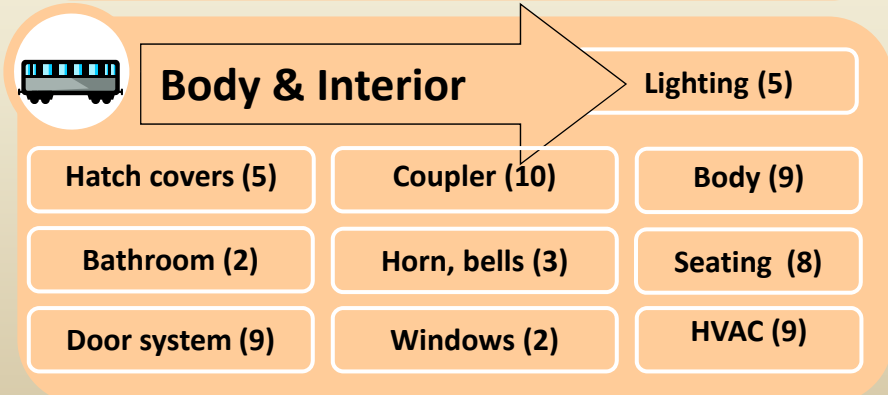
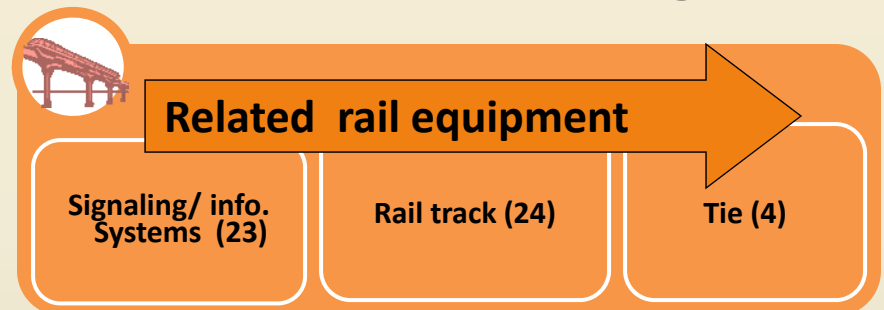
Tier 2



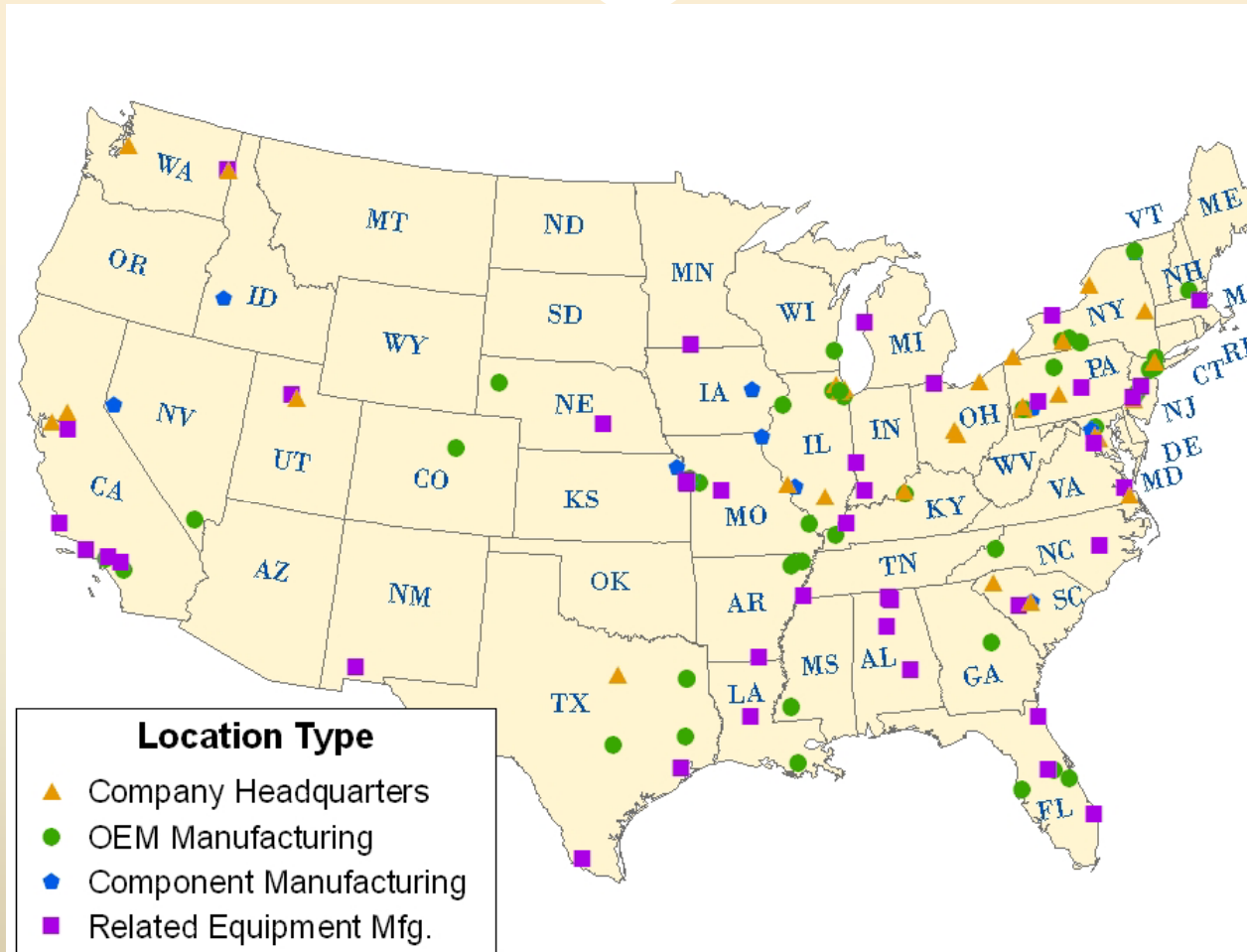
Tier 1



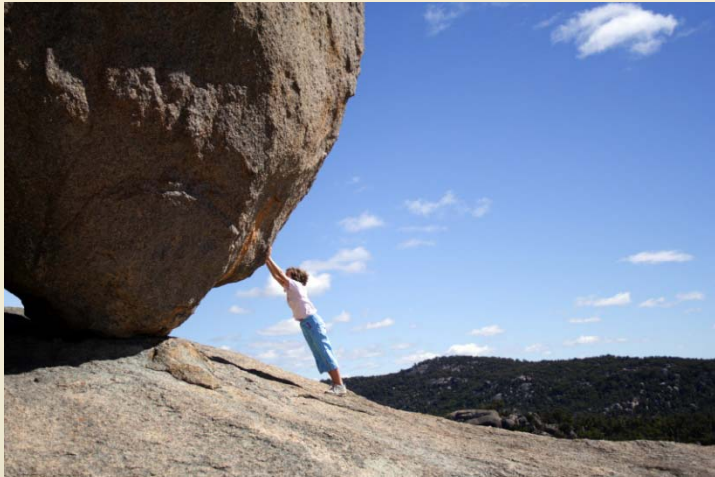
Related manufacturing



30 firms that pledged to expand U.S. manufacturing if they received HSR grants



More to come, in early June 2010





**Thank you for your
attention!**

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