



**Austrian
Rail Industry**

The Austrian Rail Industry

The economic impact of the
Austrian rail industry

www.bahnindustrie.at



The rail industry: Stimulus for the Austrian economy

The Association Austrian Rail Industry represents the interests of a rapidly growing economic sector in Austria and is committed to the continuous improvement of the framework conditions for this sector. In international comparison, the Austrian rail industry is disproportionately strong and innovative. Our member companies provide innovative products and services to operators and their customers. The rail industry active in Austria is market and technology leader in numerous areas and supplies its products worldwide – and this with success.

In 2018, the Austrian rail industry generated sales of 3.1 billion euros with almost 10,000 employees. Due to increased price pressure and lower profit margins, the contribution to value added falls to 906 million euros. This means that the rail industry is roughly as large as the R&D sector in Austria in terms of economic contribution and labour market effects. Taking into account the upstream and downstream sectors from Austria, the overall effect of the rail industry increases to a value added of 1.53 billion euros. Every 222th Euro generated in Austria can therefore be directly or indirectly attributed to the rail industry. The employment multiplier is above average at 2.04: every job created in the rail industry secures another job outside the rail sector in Austria.

No. 1

Inventor density
worldwide

No. 7

Export country worldwide
of railway-related rail
vehicles and related
equipment

6.4 %

R & D ratio
(sales-related)

817 million

Gross wages and
salaries

9.865

Employees

20,107

Direct, indirect and
induced employees

**906
million**

Direct added value

1.53 billion

Total added value

3.1 billion

Turnover



Export Champion Made in Austria

With an export rate of 64 percent, the Austrian rail industry is an important factor in Austrian foreign trade. On average, two out of three euros generated by the Austrian rail industry are earned abroad. Austria ranks 7th in the world for exports in the field of “rail vehicles and related equipment”, which is a remarkable achievement considering the size of Austria. In a relative per capita view, Austria is the world’s leading supplier of rail vehicle exports. Austria’s share of world trade for rail vehicles is five percent.

64 %

Export rate

5%

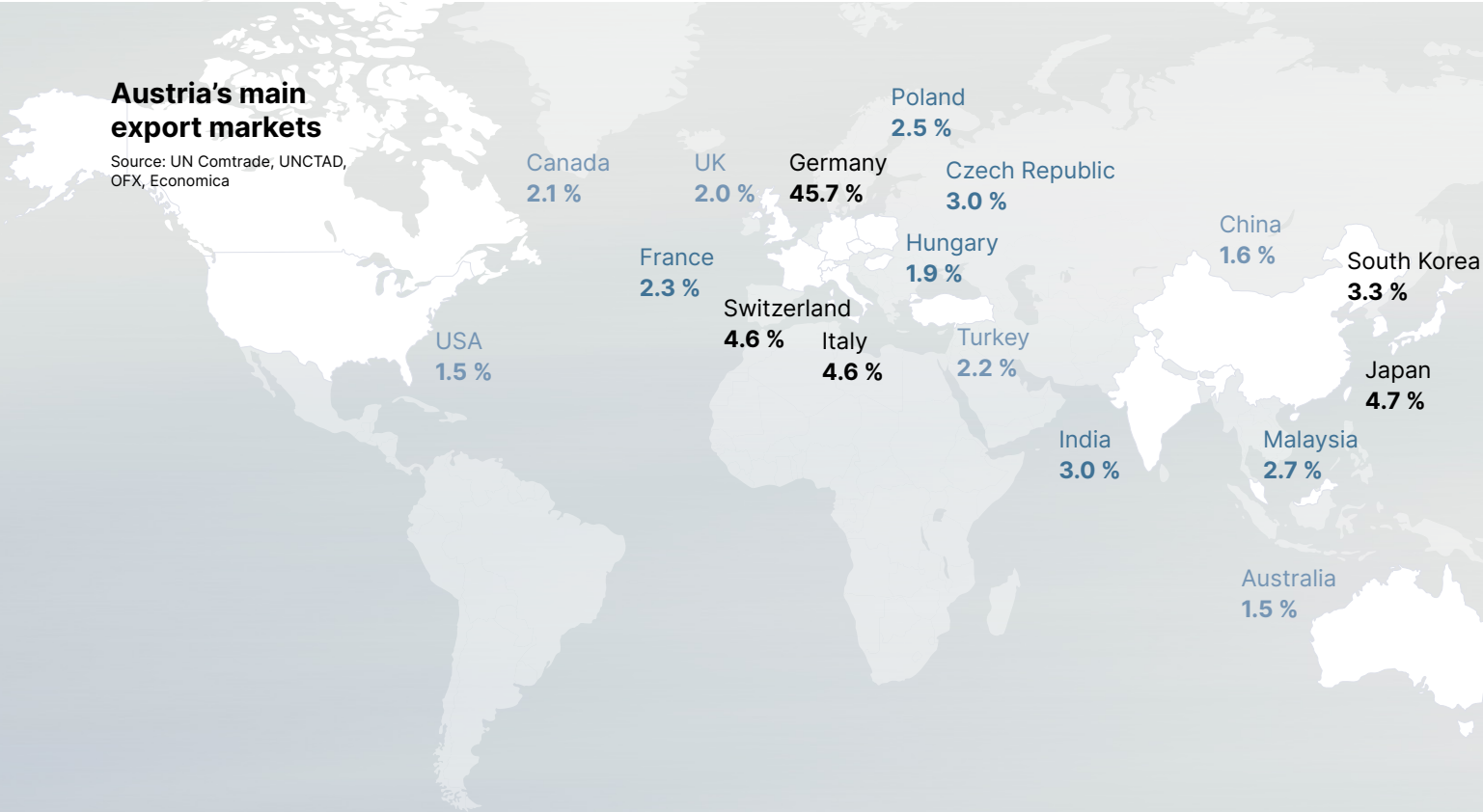
Share in world trade

No. 1

Rail vehicle exports per capita worldwide

Austria's main export markets

Source: UN Comtrade, UNCTAD, OFX, Economica

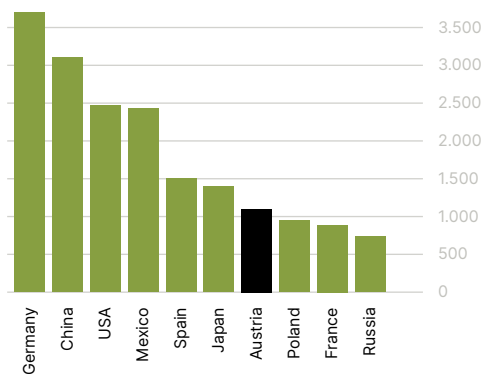


The rail industry as a cross-sectional matter

The rail industry is a so-called cross-sectional matter. This means that the industry does not only consist of „other vehicle construction“, but is also made up of a multitude of sub-sectors, such as metal production and processing, the manufacture of electrical equipment or the production of rubber and plastic goods. At first glance, the overall economic importance of the rail industry is therefore generally underestimated. In order to nevertheless examine such complex industries with regard to their economic contribution, so-called satellite accounts are used, which are able to map the entire value-added network of the rail industry. This enables the representation of both direct, but also indirect (along the upstream value chain) and induced effects (so-called income effects). A detailed look at the individual sub-sectors shows that the exports of the Austrian rail industry are multifaceted.

10 most important export countries for rail vehicles and related equipment in 2018

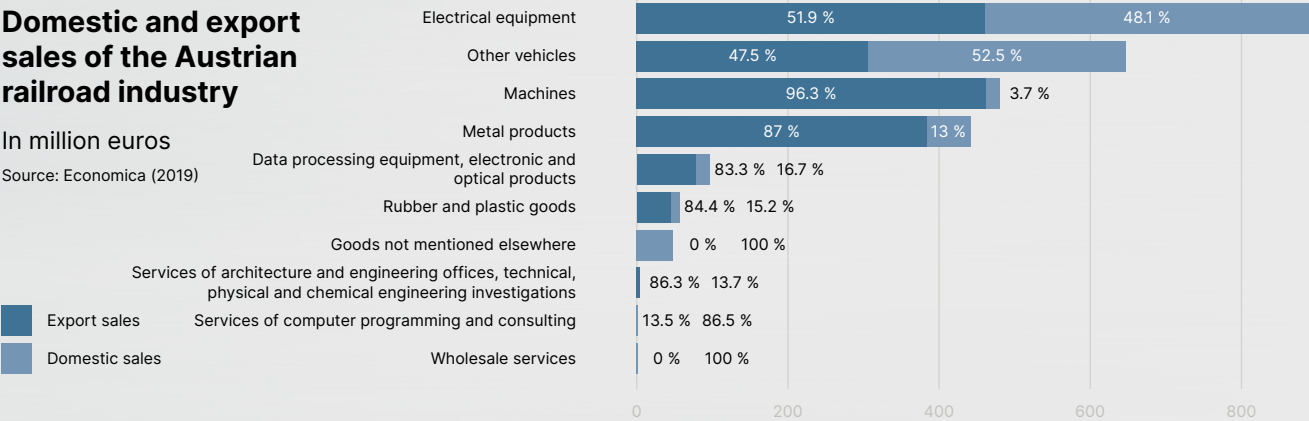
Exports in million euros
Source: UN Comtrade, UNCTAD, OFX, Economica



Austria is among the top ten export countries in the world for rail vehicles and related equipment.

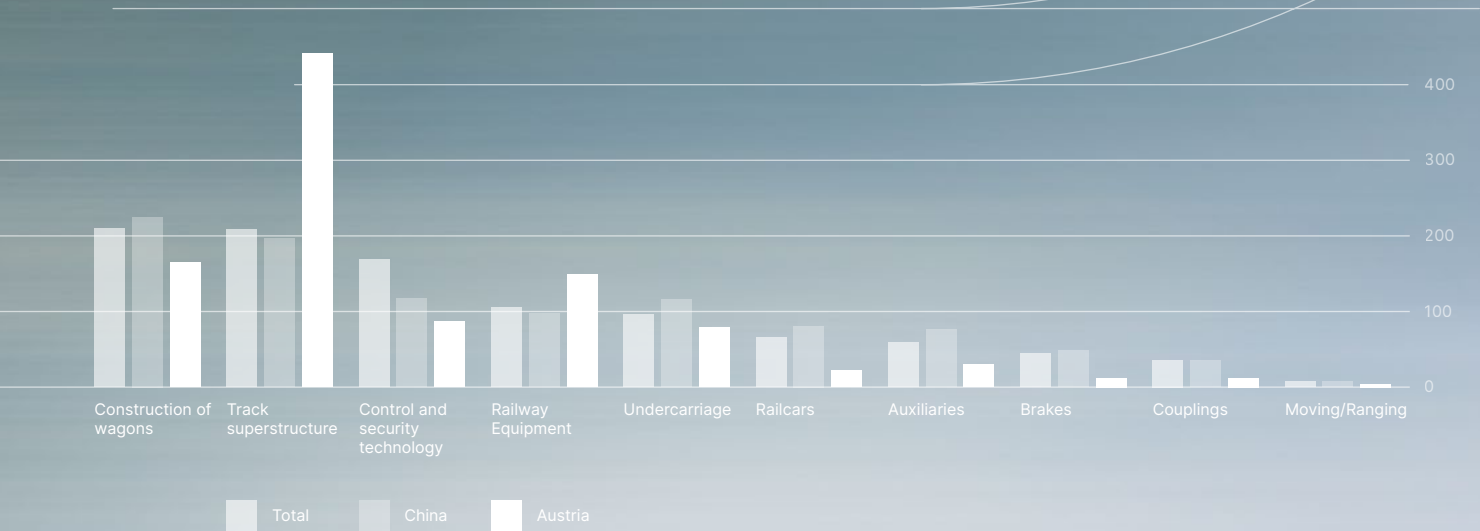
Domestic and export sales of the Austrian railroad industry

In million euros
Source: Economica (2019)



Distribution of railway-relevant patents from Austria between 2000 and 2018 by patent class

Source: Economica 2019

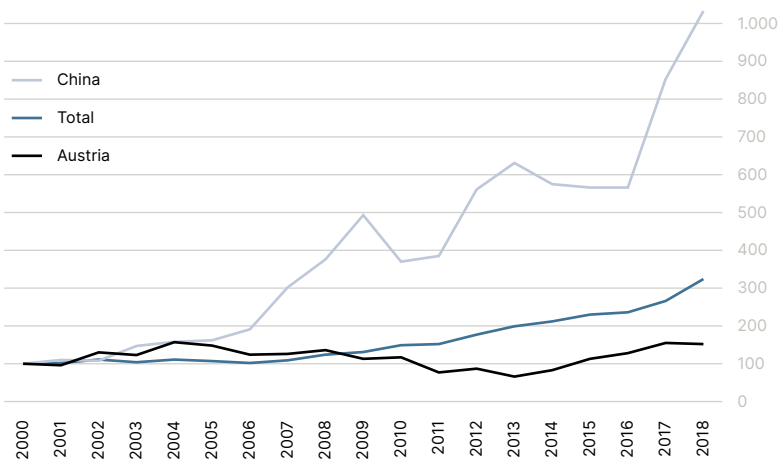


Innovation as a guarantee for success

There is no way around Austria when it comes to innovations in the rail industry. The companies in the Austrian rail industry are among the most innovative worldwide. Measured by the number of patents applied and the number of inventors, Austria ranks 6th in the world. Today, between two and three percent of all worldwide rail-relevant patents come from Austria, and in the field of track superstructure, even every second patent. The density of inventors in Austria is also remarkable: measured by the number of inhabitants, Austria has the highest density of inventors in the rail sector in the world with around 50 inventors per million inhabitants.

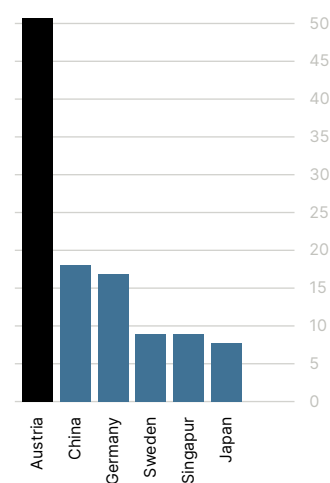
Patent publications Austrian rail industry 2000 – 2018

Percentage change compared to the initial year 2000
Source: Economica (2019)



Inventors per million inhabitants

Source: UN Comtrade, UNCTAD, OFX, Economica



Effective climate protection only by rail

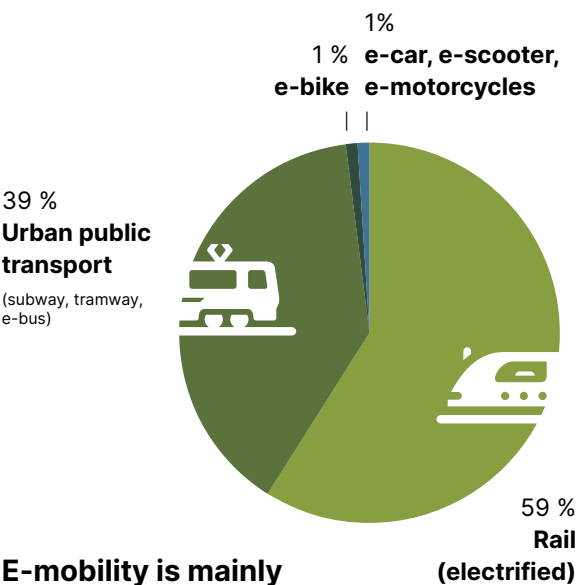
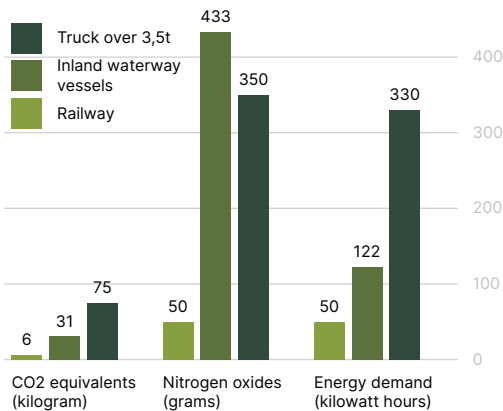
Austria is one of the leading railway countries in the world, with one of the most efficient railways in the world. All trains that travel in Austria every day circulate the globe once every two hours. Just through the contribution of the Austrian Federal Railways (ÖBB) an annual CO2 saving is generated, equivalent to the reforestation of the Austrian state Vorarlberg. And the Austrian companies in the rail industry produce everything that is needed for the whole system of railway.

Especially in urban areas, rail transport plays an important role in public transport to reduce CO2 emissions and create space for more green in cities. And there is no more environmentally friendly transport method than rail in freight transport either. As a pioneer of e-mobility, rail is thus becoming an important factor in the fight against climate change. And with it the Austrian rail industry, which thus becomes one of the future industries of our country.

Low emissions in rail freight traffic

Units in 1,000 ton-kilometers

Source: UBA 2017, Umweltbundesamt 2016



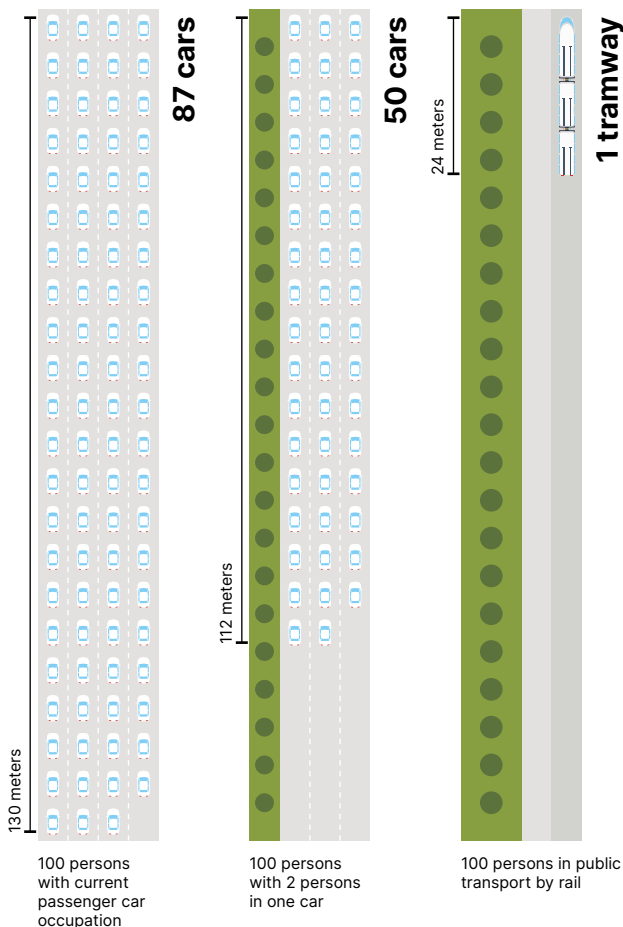
E-mobility is mainly public transport by rail

E-mobility in Austria in 2016: 19.9 billion passenger-kilometers

Source: VCÖ 2017, UBA 2017, Statistics Austria 2017

Potential for more green space through space-efficient rail transportation

Source: VCÖ 2018





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