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**Austrian
Rail Industry**

Austrian Rail Report

The importance of the Austrian rail supply industry for the economy, for the climate, for innovation.

The railway industry: the engine powering Austria's economy



More than 27,000 employees

work in the rail supply industry, either directly or indirectly. Of those, 15,000 work in the industry itself, helping to create an equivalent number of jobs elsewhere in Austria.



€790 m in taxes

and public duties produced by the rail supply industry, generating a greater fiscal impact on the country than revenue from Austria's NoVa standardised consumption tax (€406 m) or land tax (€760 m).



€1,831 m in exports

of rolling stock and associated equipment leave Austria by rail, making Austria the No. 1 exporter per capita, significantly ahead of Switzerland (€204 vs €114 per capita), and No. 4 in absolute terms.



17 times less CO₂

per passenger-kilometre in Austria compared to combustion engine passenger vehicles. The CO₂ equivalent is 12.6 grams for railways, compared to 216.6 grams per passenger-kilometre for combustion engine vehicles.



Europe's undisputed R&D leader

in rolling stock construction is Austria, investing €13.1 in research and development per capita, ahead of €3.9 in Czechia and €3.3 in Germany. The number of patents held by the railway industry in Austria is also impressive: Austria has the third-most patents of any country in Europe in absolute terms.





Fiscal impact of the railway industry

The industry also has a significant **impact on fiscal policy**. The rail supply industry delivers **€790.3 m** to the state budget.

Around half of that goes towards social security, while roughly one in every three euros goes into the government coffers. The **direct contribution made by the railway industry underwent enormous growth** between 2019 and 2021, increasing by **10.6%** in the space of three years.

The railway industry: driving the Austrian economy

As the need for sub-supplies rises and investments and spending continue to grow, the railway industry is responsible, directly and indirectly, for some **28,000 jobs** and a total gross value added of nearly **€2.7 billion**. This leads to an employment multiplier which is above average, with nearly **every job** in the rail supply industry **creating an additional job elsewhere in Austria**.

Taxes and government revenue

Railway industry
Generated in the years 2019-2021

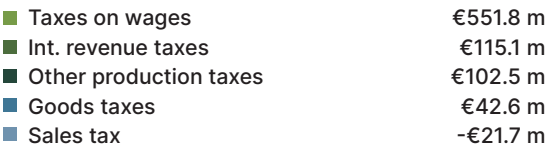


2019-2021: + 10.6%

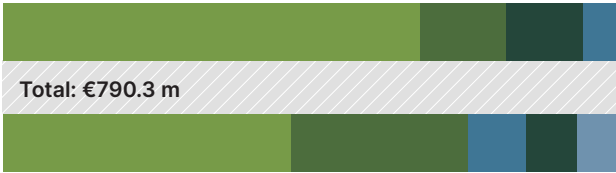
Source: Economica

Breakdown by revenue type

2021



Breakdown by revenue type



Distribution to public entities

Distribution to public entities

2021



Source: Economica



Jobs in 2021



15,010 directly
9,290 indirectly
3,545 induced

27,845 total

Gross value added



€1,629 m directly
€792 m indirectly
€250 m induced

€2,671 m total

The **approximately 15,000 people directly employed** in the rail supply industry enable Austria to generate gross value added (GVA) of more than **€1.6 billion**.





















The railway industry: a lighthouse for international trade

The railway industry is a real **flagship for the export of Austrian goods** and consistently makes a **positive contribution to net international trade**. Austria is **No. 1 in the world** per capita in the sub-industry “Rolling stock and associated equipment”. Products include rail vehicles in Berlin, Tube trains in London and trams in the Australian Gold Coast Region.

In absolute terms, **Austria is No. 4** when it comes to the export of rolling stock and associated equipment, exceeded only by the global economic superpowers of Germany, China and the USA.

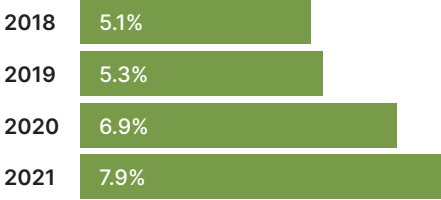
International exports in 2021

Rolling stock and associated equipment
Source: UN Comtrade, UNCTAD, OFX, Economica

     	Germany	€3,190 m
   	China	€2,246 m
   	USA	€1,843 m
   	Austria	€1,831 m

Austria's share in the global market

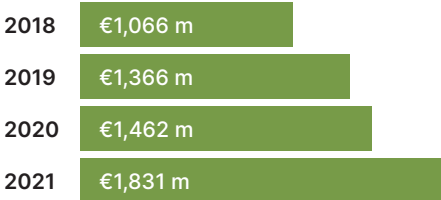
for rolling stock and associated equipment



Source: UN Comtrade, UNCTAD, OFX, Economica

Exports from Austria year-on-year comparison

of rolling stock and associated equipment



Source: Statistics Austria, Economica

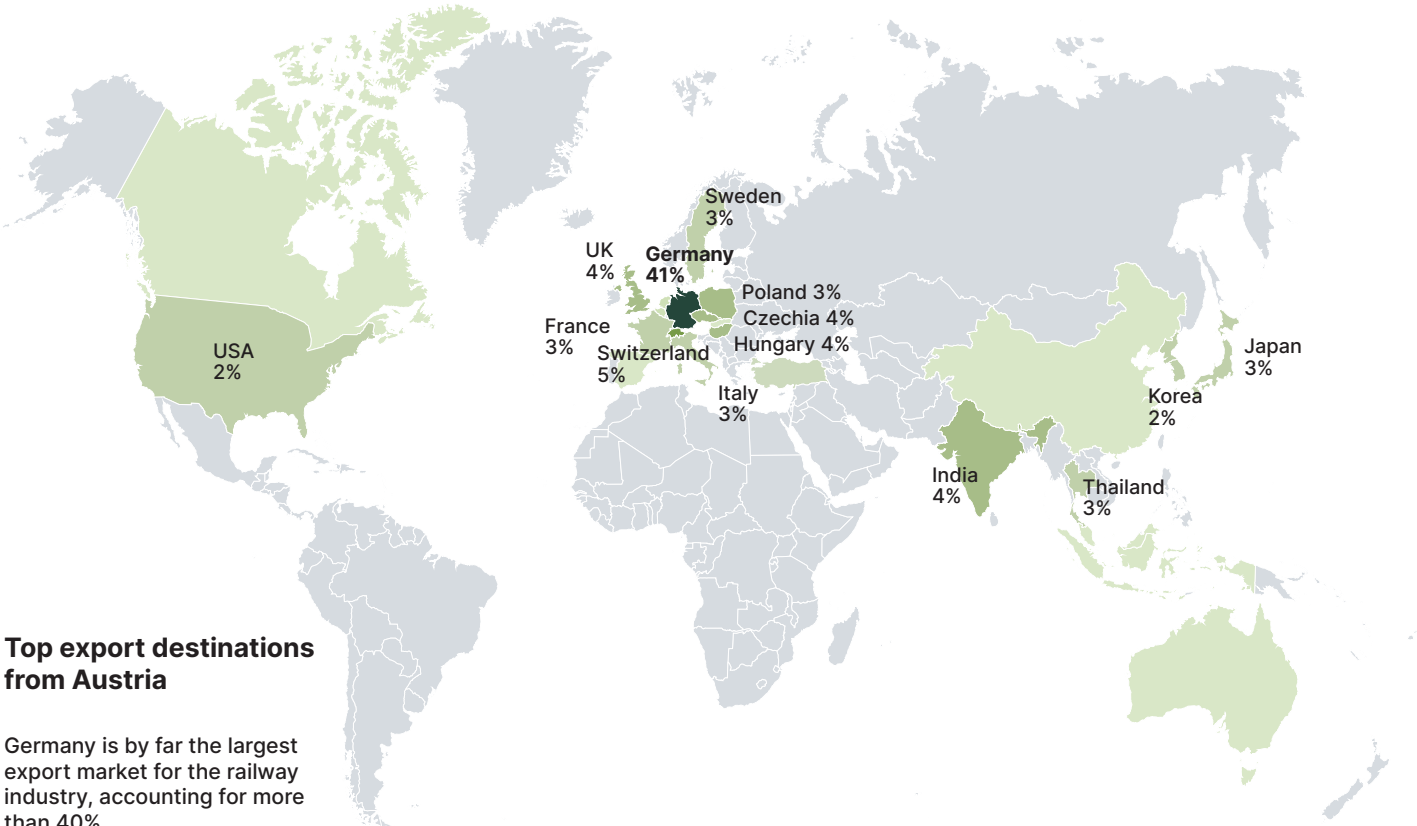
The relevance of Austrian businesses in this sub-industry is also evidenced by the rapid **increase in their share of the global market** which has grown from around 5% in 2018 to nearly **8% in 2021** – an outstanding achievement considering that Austria's population accounts for just 0.11% of the global population.

Top export destinations from Austria

Germany is by far the largest export market for the railway industry, accounting for more than 40%.

Source: UN Comtrade, UNCTAD, OFX, Economica

■ Supply 1%



Railway industry = the industry of climate action

Numerous studies show that railways are one of the most environmentally friendly modes of transport for people and goods alike. A look at figures for CO₂ consumption, in particular, makes it clear that **the mobility revolution needs railways**:

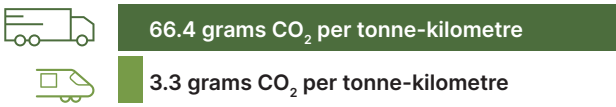
The same distance covered by train produces **17 times** less CO₂ per passenger-kilometre than an average combustion engine vehicle and **7 times** less than an electric car over the same distance. For freight traffic the reduction is even 20 times higher for railways compared to cars.



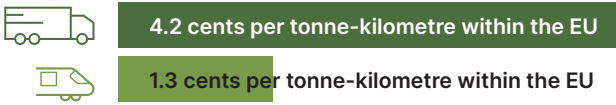
Rail is more eco-friendly and more cost-effective than HGV transport

Source: Environment Agency Austria 2021

Railways 20 times more eco-friendly



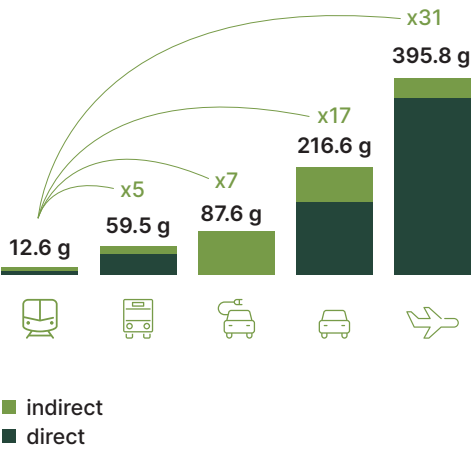
External costs three times higher for HGVs than for rail transport



Lower emissions from public transport

CO₂ equivalents in grams per passenger-kilometre in Austria

Source: Environment Agency Austria 2021

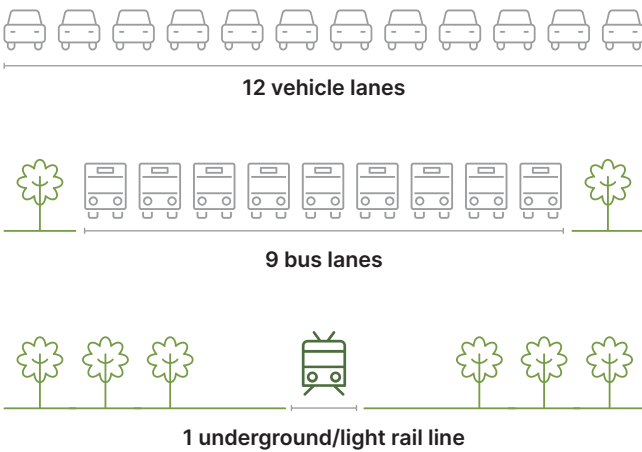


Rail transport is also the solution when it comes to **soil sealing** which is progressing at a significant rate in Austria. Transporting 20,000 people per hour in a single direction in a city requires just one railway line but 12 vehicle lanes. Even when compared to the 9 bus lanes that would be required to transport this many people, the railway still leaves **significantly more room for green spaces**.



Public transport creates space for active mobility

In order to transport 20,000 people per hour and direction, a city needs:



Source: VCÖ 2022

On-track innovations: Made in Austria!

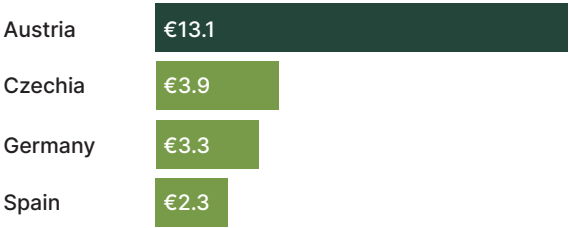
Austria is also a trailblazer when it comes to innovations in railway transport. The Austrian rolling stock construction industry is the **front runner** in spendings on research and development. It is a hugely innovative sector, especially in comparison to other EU countries, spending **€13.1** per capita on R&D, or **more than three times** what all other countries in Europe spend.

This high level of spending is also reflected in the number of patents. **In absolute terms, Austria ranks third among the EU-27 in number of patents** and is again outranked only by France and Germany, two significantly larger countries.

R&D spending internationally

C30.2 Manufacture of railway locomotives, per inhabitant 2019

Source: Eurostat, Statistics Austria, Economica



Highest R&D spending per capita in the EU

Railway patents in the EU

2011-2021, per year

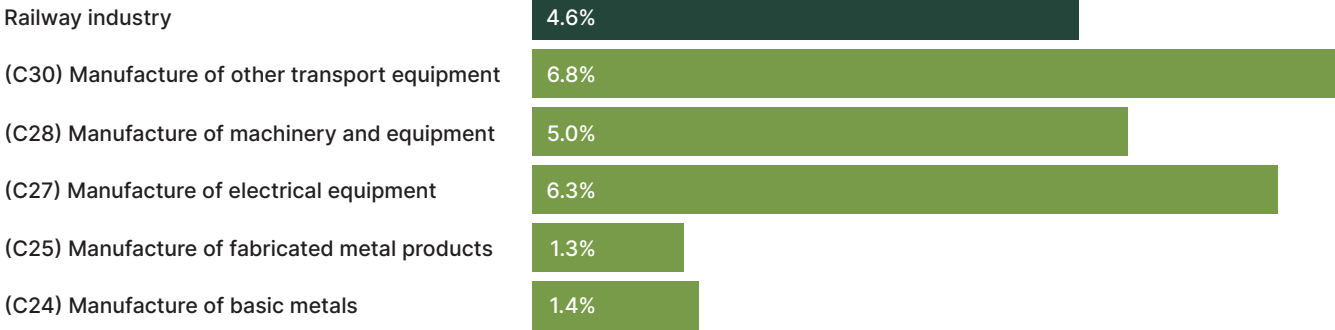
Source: Economica



Intensity of R&D in Austria

Austrian NACE categories

For every €100 in turnover, approx. €5 is spent on R&D.



Source: Statistics Austria, Economica

Intensity of R&D 2019
Intensity of R&D = R&D spending as percentage of turnover



About the ARI

Founded in 2005 as an independent industry association, the **Verband der Bahnindustrie** (ARI; Austrian Rail Industry) is the largest professional organisation of rail supply operators in Austria. Its duties are to **represent, position and speak on behalf** of its **40-plus member companies**. At a European level, the ARI represents Austria's interests within the Association of the European Rail Supply Industry (UNIFE, www.unife.org) through its Committee and Management.

The rail supply industry comprises “Manufacture of other transport equipment” according to the ÖNACE, the statistical classification of economic activities in Austria, plus a wide range of other (sub-) industries, such as the manufacture of basic metals and the manufacture of electrical equipment and rubber and plastic goods. All our member companies are engaged in production and development and create **innovative solutions for a variety of railway systems worldwide**. These solutions range from complex rail vehicles, to security, control and communications systems, and individual vehicle components.



Legal notice

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