



2025  
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**Austrian  
Rail Industry**



# Austrian Rail Report

The Importance of the Austrian Rail  
Supply Industry for the Economy, Climate  
Protection, and Innovation

# The A to Z of Railways—We Supply Everything that Makes Train Travel Possible

From high speed routes, to urban public transport, or regional railways in rural areas: before a train can move at all it requires far more than just rails and a locomotive. The Austrian Rail Industry Association (ARI) represents those companies that, as suppliers, fill the rail network with life.

**We are suppliers, not operators  
But without our technology, nothing moves.**

We are suppliers—of everything that enables modern, climate-friendly, and safe railways to operate.

Our members design, develop, build, and maintain the technological infrastructure that provides the basis of Europe's most sustainable form of mobility:

### Digital mobility

From digital interlocking and real-time information to e-ticketing or autonomous driving—we are bringing railways into the digital age.

### Infrastructure

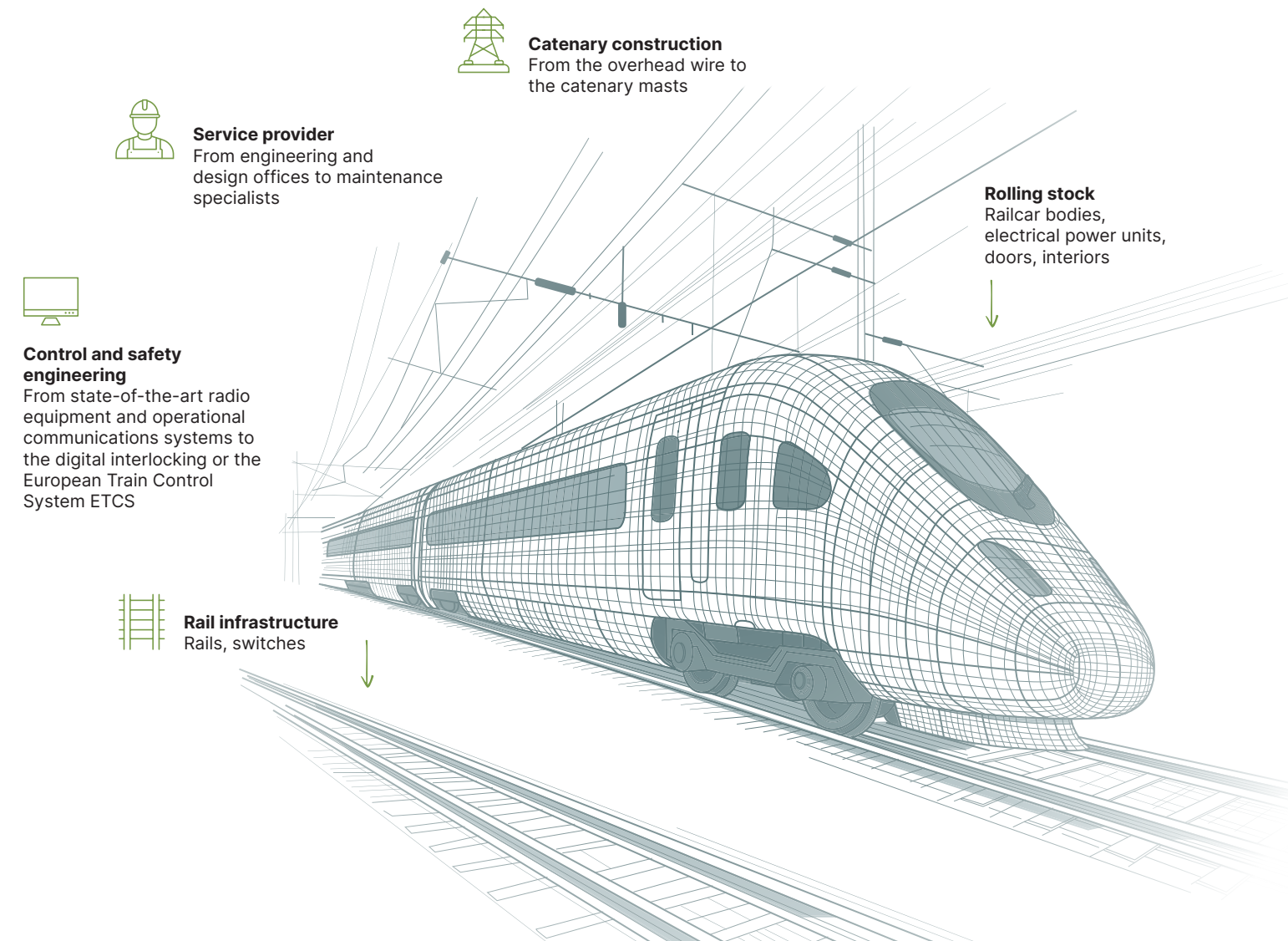
From tracks and switches to overhead lines and state-of-the-art energy supply systems—our companies form the backbone of the rail network.

### Safety engineering

Train control and command systems, signaling systems, and control and communication technology ensure that trains run safely and efficiently.

### Rolling stock & high-tech components

We supply energy-efficient power units, lightweight components, and smart rolling stock engineering—from regional trains to high-end trams.



# The Rail Industry: A Motor for Innovation, Jobs, and Climate Protection

The rail industry is and will remain a **cornerstone of the Austrian economy**. The Rail Report 2025 offers further proof: the sector makes a key contribution to value creation, the safeguarding of high-quality jobs, and the achievement of our climate targets. Despite global challenges and falling export levels; Austria's **innovative energy, excellent research, and high quality standards** ensure that the country is a **European leader** in the rail sector.



## More than 34,000 jobs

The rail industry ecosystem safeguards more than **34,000 jobs**—which represents a significant increase of over **20% since the Rail Report 2023**.



## Three billion euros of value creation

By triggering total **gross value creation of over three billion euros**, the rail industry makes a major contribution to Austria's economic output. The **extremely high economic multiplier effect of 1.9** underlines the key role of the sector for sustainable growth.

# The Rail Industry gets People Moving—Including on the Labor Market

The rail industry is a key creator of Austrian jobs: with a total of almost **34,100 people working in the sector**, including around 18,800 in the rail supply industry, the **number of jobs has increased significantly**. In comparison: the total figure in the Rail Report 2023 was still around 27,800.

Overall value creation has also increased and has reached a **new record of over three billion euros**. The directly employed workforce alone generates a gross value added of around 1.6 billion euros of gross value, safeguarding high-skilled industrial jobs in all of Austria's provinces.

Another particularly impressive figure is the **employment multiplier of 1.81**. This means that, in purely mathematical terms, **every job in the rail industry more or less secures one further job in Austria**. In other words, the rail industry stands for not only technology and exports but also **social stability and sustainable employment**.

## Jobs Rail Report 2025



**+ 22%**  
since the Rail Report 2023

- ⊗ 18,806 direct
- ⊗ 11,348 indirect
- ⊗ 3,926 induced

**34,079 total**

## Gross value creation Rail Report 2025



**+ 13%**  
since the Rail Report 2023

- €1,590 million direct
- €1,116 million indirect
- €314 million induced

**€3,020 million total**



## 1.87 billion euros in gross wages and salaries

The rail industry provides high-quality jobs right across Austria. With **total gross wages and salaries of 1.87 billion euros**, the industry is responsible for 0.96% of all gross wages and salaries earned in the country.



## European leader in R&D

With **R&D investment of 16.5 euros per capita**, Austria remains **Europe's leading producer of rolling stock**, well ahead of the Czech Republic (7.4 euros) and Germany (3.6 euros).



## Export ratio of 68%

The rail industry's export ratio may have fallen by almost 6% in the past few years, but Austria remains **Europe's undisputed number one** in terms of per capita exports in the rail sector.



## A total of over 1.17 billion euros of tax

... and contributions are generated by the rail industry and related sectors. This makes it a **key financing component** of the national budget.

# Fiscal Impact: The Rail Industry Pays for itself

The rail industry is not only a driver of jobs and innovation but also an important financing component of Austria's national budget thanks to its **fiscal impact**, which totals over **1.17 billion euros**. This is roughly equivalent to the pension contributions paid by government employees in 2023 and illustrates the **huge economic importance** of the sector.

Equally remarkably, **the direct contributions paid by the rail industry** represent three-quarters of the amount raised by capital gains tax in Austria (894 million euros in 2023). A major part of this overall impact is represented by the more than 610 million euros that benefit the social security system. A further 568 million euros go to federal and municipal authorities and other public sector institutions.

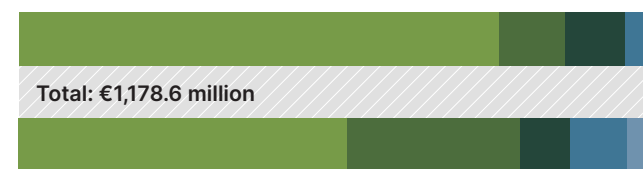


## Types of taxes and contributions

Rail Report 2025

Wage-related taxes and contributions	€909.0 million
Domestic income tax	€124.1 million
Other production-related taxes	€113.9 million
Taxes on products	€52.6 million
Value added tax	- €21.0 million

Types of taxes and contributions



Distribution among public bodies

## Distribution among public bodies

Rail Report 2025

Social security agencies	€610.5 million	51.8%
Federal government	€321.2 million	27.3%
Provincial governments	€93.7 million	8.0%
Municipalities	€104.2 million	8.8%
Other public sector institutions	€48.9 million	4.1%

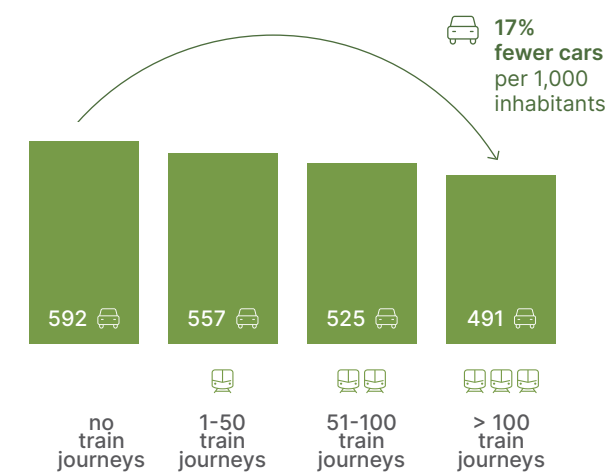
Source: Economica

# On Track for Tomorrow: Rail as a Driver of Climate Protection?

A state-of-the-art hybrid electric train produces almost zero emissions and requires only **one-thirtieth of the energy** required by a car per kilometer per passenger. The benefits for goods traffic are equally clear: a freight train consumes 3.5 kWh per kilometer per ton—whereas a diesel truck consumes six times as much. Most goods in Austria continue to be carried by road. This is why the 2030 Mobility Master Plan envisages a significant increase in the share transported by rail.

## The more rail connections, the fewer cars

Breakdown of Austria's 124 regional centers in terms of train journeys per weekday. Number of private cars per 1,000 inhabitants.



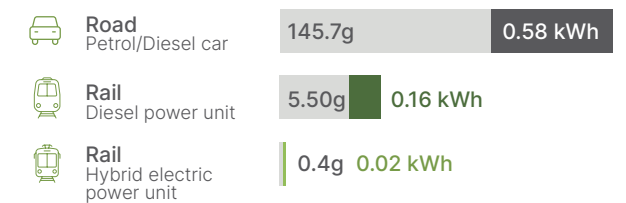
Source: Statistics Austria 2023

This breakdown of Austria's regional centers clearly demonstrates that a good train service can change people's mobility habits: **the higher the number of rail connections, the lower the number of private cars owned by households**—this is clear evidence of the potential of rail to replace motorized private transport.

Rail transport is one of the most climate-friendly means of moving both passengers and goods. Those who choose rail not only reduce emissions, but also make an active contribution to the mobility transition.

## Regional railways are climate friendly and energy efficient

CO<sub>2</sub> emissions and energy demand per kilometer per capita



Source: Environment Agency Austria 2023

Rail transport is not only efficient and climate friendly, but also saves space. **One track is all that is required to transport 20,000 people per hour in one direction**, whereas a twelve-lane road would be needed to perform the same task. This makes it clear: rail transport is the backbone of climate-friendly mobility.

## Public transport creates room for active mobility

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



12 car lanes



1 underground railway or tram track



9 bus lanes

Source: VCÖ 2022



# Austria's Rail Industry as a Global Competitor

Rolling stock and all the associated equipment are exported to more than 90 countries around the globe. With an export volume of around 1.5 billion euros and a stable export surplus, the sector continues to make a positive contribution to Austria's trade balance.

The rail industry continues to be one of Austria's strongest exporting sectors.

With a figure of \$179, Austria continues to be Europe's number one exporter per capita—ahead of the Czech Republic (\$134) and Slovakia (\$132). But there has been a decline in terms of the global ranking: whereas Austria was still the world's fourth largest exporter of rolling stock in 2021, it currently occupies seventh place. The world's leading exporters of rolling stock are now China (13%), Germany (10%), and the USA (10%).

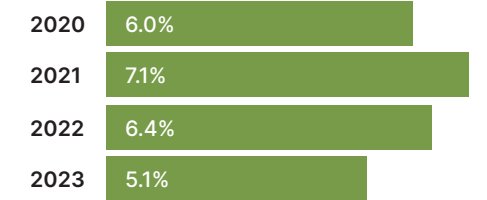
Austria's share of the global trade in rolling stock has fallen from 6.4% to about 5.1%. And while this figure remains impressive when compared with Austria's share of the global population (0.11%), the need to intervene in the global competitive environment is becoming increasingly apparent.

In the area of research and development, R&D intensity has fallen since 2023. This clearly signals that targeted investment in research and innovation will become even more important in future as Austria seeks to safeguard its position as a technology leader over the long term.

These numbers make it clear: the rail industry remains a strategically significant export and innovation sector but is facing a number of challenges. In order to secure Austria's position as a high-tech hub, it requires targeted investment in research, digitalization, and vertical integration, so that technology "Made in Austria" remains visible on global markets.

## Austria's share of global trade

in rolling stock and associated equipment



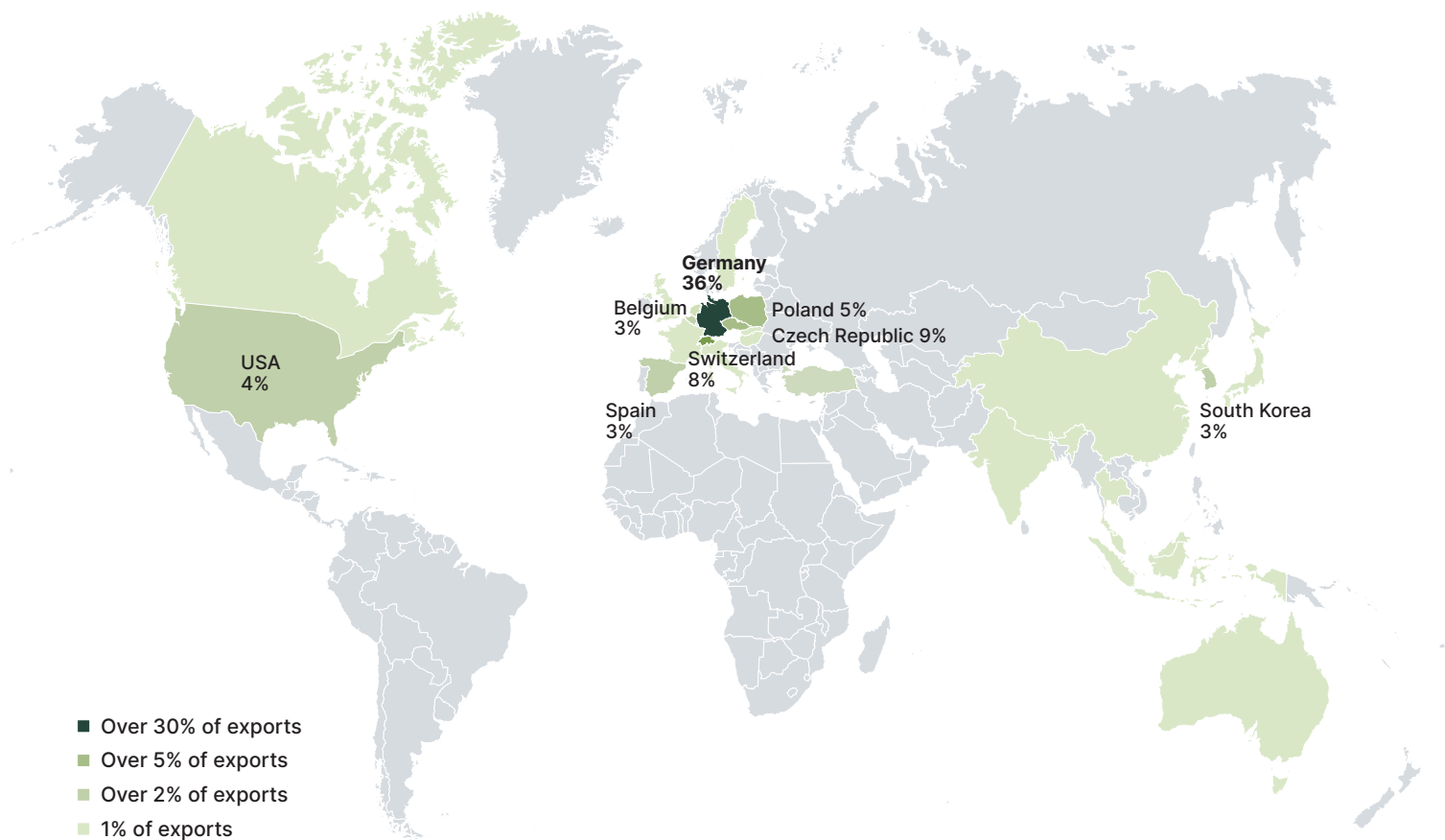
Sources: BACI, Economica

## A year-by-year comparison of exports from Austria

of rolling stock and associated equipment



Source: Statistics Austria



- Over 30% of exports
- Over 5% of exports
- Over 2% of exports
- 1% of exports

With a share of over 36%, Germany is by far the largest export market for the rail industry.

Source: Statistics Austria (based on 2024 data), Economica

## International comparison of exports in 2023

Rolling stock and associated equipment



Sources: BACI, Statistics Austria, Economica



# Austria Gets Innovation on Track

In 2025, Austria once again retained its position as the leading innovator in the construction of rolling stock. The latest figures confirm this: **R&D expenditure of 16.5 euros per capita means that Austria is still number one in the EU**, well ahead of the Czech Republic with 7.4 euros and Germany with 3.6 euros.

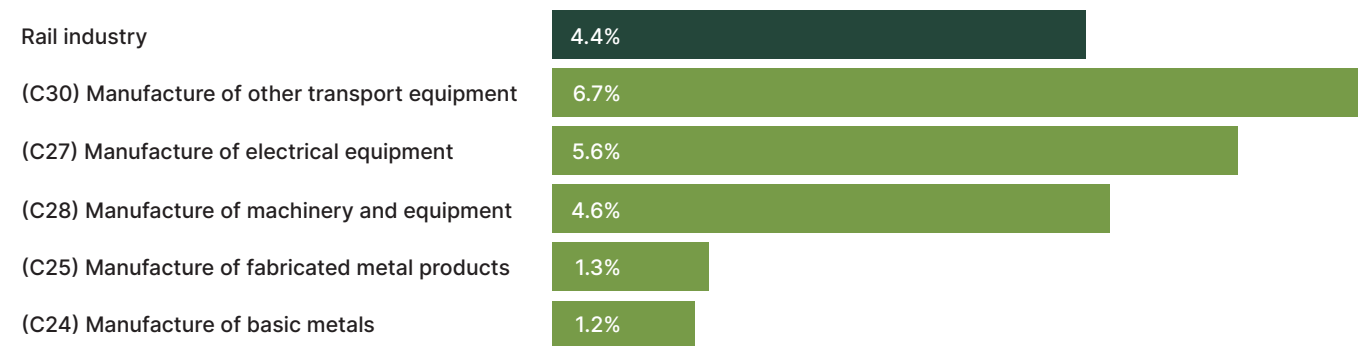
Compared with the last survey for the Rail Report 2023, this represents an **increase of around 26%** and is a clear signal of the sector's **continuing focus on research**, despite growing international competition. This intensifying competition is largely a result of rising R&D expenditure in other countries. For example, the Czech Republic has increased its per capita R&D spending by 90% since 2023.

**R&D intensity** in the rail industry currently stands at 4.4%. This represents a small decline and is lower than in other research-heavy sectors such as electrical equipment (5.6%) or other transport equipment (6.7%). This slight fall in R&D intensity underlines the fact that innovation cannot only be linked to increasing levels of production, but also requires targeted investment.

**The patent situation remains strong: with around 90 patent applications per annum**, Austria remained in **third place** in the EU in 2025 behind Germany and France. In view of the relatively small size of the market, this clearly demonstrates the innovative energy of Austria's rail industry.

## R&D intensity in Austria

ÖNACE classification

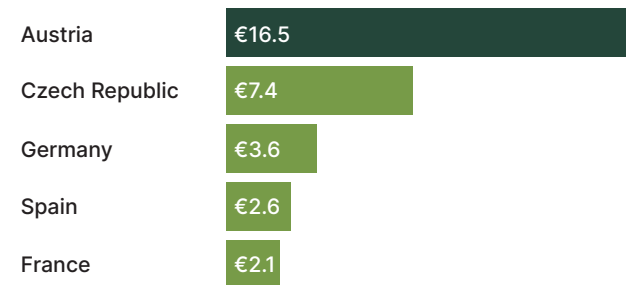


Sources: Statistics Austria, Economica

R&D Intensity Base year for sectors 2021, rail industry 2023  
R&D Intensity = R&D expenditure as a proportion of turnover

## Country-by-country comparison of R&D expenditure

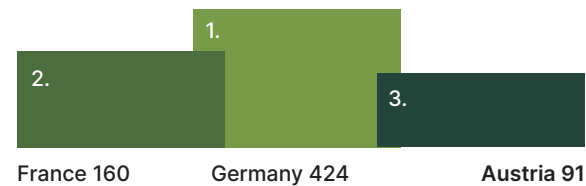
C30.2 Manufacture of railway locomotives and rolling stock, per capita, 2023



Highest R&D expenditure per capita in the EU  
Sources: Eurostat, Statistics Austria, Economica

## Patents in the rail sector in the EU

2013-2023, per annum



Source: Economica

Nearly five out of every one hundred euros of turnover are invested in R&D.



# About the Austrian Rail Industry Association

Ever since it was founded as an independent interest group in 2005, the Austrian Rail Industry Association (ARI) has been the **most powerful voice of the Austrian rail supply industry**. It represents around 50 companies—from global market leaders that are active worldwide to specialized, highly innovative SMEs. Together, these companies form a key sector that is making a central contribution to the mobility and climate transition in Austria.

The ARI sees itself as a **platform for positioning and representing the strategic interests of its members** vis-à-vis politicians, public sector organizations, business, and society. At the European level, the executive committee and the managing directors of the association

actively raise matters of interest to the Austrian rail industry in the European Rail Industry Association (UNIFE, [www.unife.org](http://www.unife.org)).

The rail supply industry in Austria is broadly based: it includes the “manufacture of other transport equipment” as defined by ÖNACE, as well as key related sectors such as the manufacture of basic metals, the manufacture of electrical equipment, and the manufacture of rubber and plastic products. The member companies of the ARI develop and produce components, systems, and integrated solutions for modern rail transport systems worldwide—from rolling stock, via signaling technology, to digital control systems.



## Imprint

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