



Historical view J.H.M. Urlings, President EFRTC,
General Meeting, POITIERS, October 9th, 2015

Railway Contractors (2003-2015)

Railway Contractors Market (2003-2015)

This presentation on the market for Railway Contractors provides an overview of the market changes in: Spain (2003-2015), Portugal (2003-2015) and BeNeLux (2003-2015).

First a start with an overview of all contractors of our host, the French Railway Contractors Association (SETF).

SPAIN: The next sheet provides an overview of all Spanish Railway Contractors in 2015. In Spain there are no Renewaltrains.

Ballastcleaners are dominant. In the overview, the numbers of Ballastcleaners are mentioned with all market players.

Only 5 acquisitions in 12 years. The number of Heavy Machinery is stable.

Railway Contractors Market (2003-2015)

PORTUGAL: The situation on the Portuguese market today (2015) is dramatic.

The total turnover of railways related contracts dropped till 15% compared to 2011. All five contractors are reorganizing and dependent on parent companies.

BeNeLux: In the Netherlands, after major new construction activities HSL (high speed) and Betuweline (cargo), the market stabilized at 65% of turnover as in 2003. Maintenance work is carried out 24/7 by 4 market parties. 5 railway contractors are available for renewal works, some with Heavy Machinery.

The Belgian and Luxembourg market is stable, no big changings.

France SETVF 2015



Spain 2015 (All market players)

Azvi //

 **OHL**

 **acciona**


**COMSA
EMTE**

Sacyr

Neopul

ACS

ACTIVIDADES DE CONSTRUCCIÓN Y SERV

**VIAS
TECOSA**

 **COPASA**

ferrovial
agroman

FCC



Grupo
eSSentium


GRUP  **ORTIZ**

R **Rover Alcisa**
GRUPO

 **COPROSA**
GRUPO

Spain 2003 - 2015

Guinovart → OHL 4*)  2004

Vías / Tecsca (ACS) 8*) 

Azvi 3*)

Comsa 5*) 1**)

Acciona 3*)

Ferrovial Agroman 1*)

Coalvi (Grupo Aldesa) 

Convensa → FCC  (2007)

Cycasa


Coprosa 1*)

Cosfesa → Grupo Ortiz 1*)  (2006)

Copasa 1*)

Hifer → Grupo Essentium  (2009)

Iberovías → Grupo Rover Alcisa  (2008)

Neopul (Sacyr) 1*) 



28*) ballastcleaners

1 **) renewaltrains

Portugal situation 2011 → today

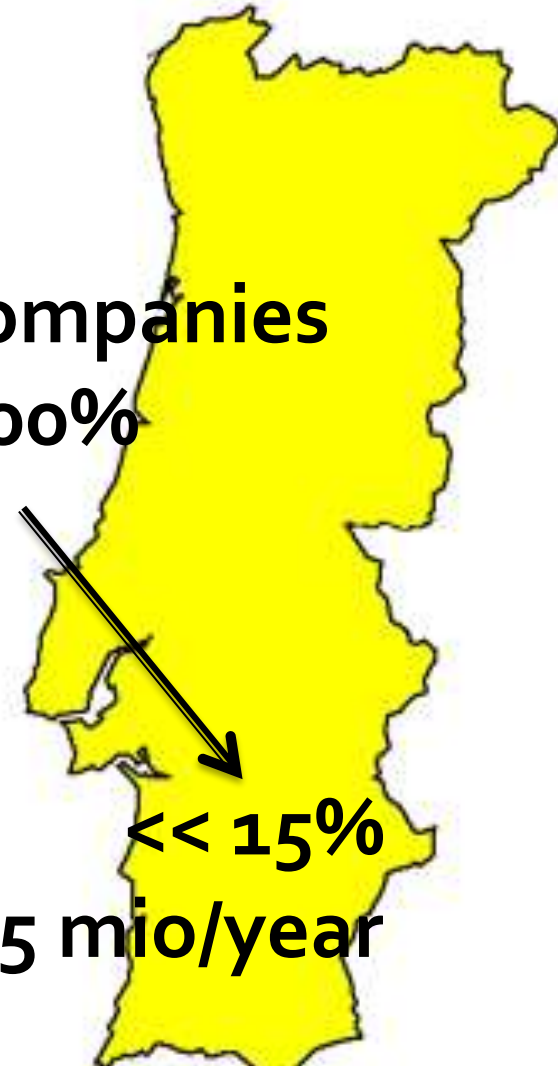


6
0
%
4
0
%



Turnover of companies
from 2011 = 100%

2014 = << 15%
Losses >> € 2,5 mio/year



Benelux 2003 - 2015

The Netherlands turnovers about 65%

Maintenance

3 → 4 contractors



Renewals and projects

3 → 4 main contractors



out



out



out



2012 new

Belgium turnovers are stable

Taveirne, Frateur du Pourcq and Strukton are the biggest players



2010 new



2013 new

Luxembourg stable

