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CBTC Vendor Landscape 2026

Who actually supplies CBTC in 2026, what each platform is called, where it runs in the US, and what two mergers did to the competitive field.

Tier-1 suppliers

VENDOR	PLATFORM	INSTALLED BASE	US KEY PROJECTS	KNOWN FOR
Siemens Mobility	Trainguard MT	~380 km	NYCT Line 7 (40 km); NYCT L Line (15 km, commissioned 2017)	25 years of Paris Line 14 heritage; tightly integrated ecosystem.
Hitachi Rail	SelTrac (ex-Thales GTS)	~400+ km	BART TCMP (200+ km, awarded 2018)	40 years of Vancouver driverless operation; the deepest GoA 4 record.
Alstom	Urbalis / CITYFLO	~500 km	Muni Metro (150 km); MBTA Green Line design	ERTMS/ETCS compatibility; North American manufacturing.
Wabtec	I-ETMS	~15,000 km (freight PTC)	LIRR / NJ Transit advisory	The PTC-to-CBTC convergence bridge rather than an urban CBTC incumbent.

Tier-2 and regional

SUPPLIER	BASE	POSITION RELEVANT TO A US BUYER
CRRC / Traffic Control Technology	China	Dominates Chinese metropolitan CBTC; an estimated 15–20 percent of the global market. Effectively absent from North America on regulatory and supply-chain-security grounds.
Mitsubishi Electric	Japan	Substantial CBTC in Japan and automated people movers in North America; limited direct US rapid-transit CBTC presence.
CAF Signalling	Spain	Active across European and Latin American systems; limited North American penetration.
Nippon Signal · Kyosan Electric	Japan	Concentrated on the domestic market; minimal US activity.

Consolidation, and what it changed

EVENT	EFFECT ON A US PROCUREMENT
Alstom acquires Bombardier Transportation, 2021	Urbalis and CITYFLO merged into one product family. Agencies must now establish which platform generation a bid actually proposes.
Hitachi Rail acquires Thales GTS, May 2024 (~€1.66 bn, ~9,000 engineers)	SelTrac joins the Ansaldo STS estate under one owner. Hitachi becomes the deepest GoA 4 supplier in the Western market.
Net effect	A realistic bidder pool of three on a large US resignaling — Siemens, Alstom, Hitachi Rail — which raises the value of interface specifications, data rights and second-source strategy in the RFP.

Buy America footprint. Siemens — Sacramento, CA and New Jersey. Hitachi Rail — Coppell, TX and Pittsburgh, PA. Alstom — Rochester, Hornell and Plattsburgh, NY. Wabtec — multiple US facilities. All four tier-1 suppliers maintain US manufacturing and engineering capacity, so domestic content is rarely the discriminator it is assumed to be; verify against the specific facility a bid actually names.

Do not quote a single market size. Fortune Business Insights put the CBTC market near USD 9.5 bn in 2025 growing to about USD 20 bn by 2034 (~8.7 % CAGR); Global Market Insights sized the same-named category around USD 2.4 bn in 2024 (~8.1 % CAGR). Both may be internally sound; they are measuring different things. State the range and the definition, or leave the figure out of the business case.

Vendor profiles from *Communications-Based Train Control*, Volume 1, Chapter 15 (Table 15.1), by Chunjun (Francisco) Wang, updated to September 2026. Installed-base figures are order-of-magnitude and vendor- reported. Market-size estimates are attributed to the firms that produced them and are not reconciled, because they measure different categories.