



Competition figures 2024/25

Passenger transport

- Another increase in demand for passenger transport in Germany
- Further gain in modal share for rail, loss in share of private motorised transport
- Fall in demand for long-distance rail passenger transport in Germany
- More travellers in regional and local passenger transport – partly due to the Deutschlandticket
- Varying transport volume performance for European railway undertakings
- Extensive new services in international long-distance rail passenger transport

Freight transport

- Continued weak economic performance in Germany, stagnation in freight transport
- Increased market share for rail freight transport
- Growth in rail freight transport by non-DB railway undertakings
- Weak economy and lower demand for transport in Europe
- Declined transport volume at most European railway undertakings

Infrastructure

- Non-DB railway undertakings' share of total operating performance on the DB network exceeds 40% in 2024 for the first time
- Strong increase in rail infrastructure investment in Germany
- Industry requires greater planning certainty through continuity of investment and strategic management by the federal government
- Strategic importance of railway infrastructure in Europe greater than ever

Climate protection

- Shifting traffic to rail is key to achieving climate targets in Germany and Europe
- DB is making progress towards climate neutrality

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Another increase in demand for passenger transport in Germany



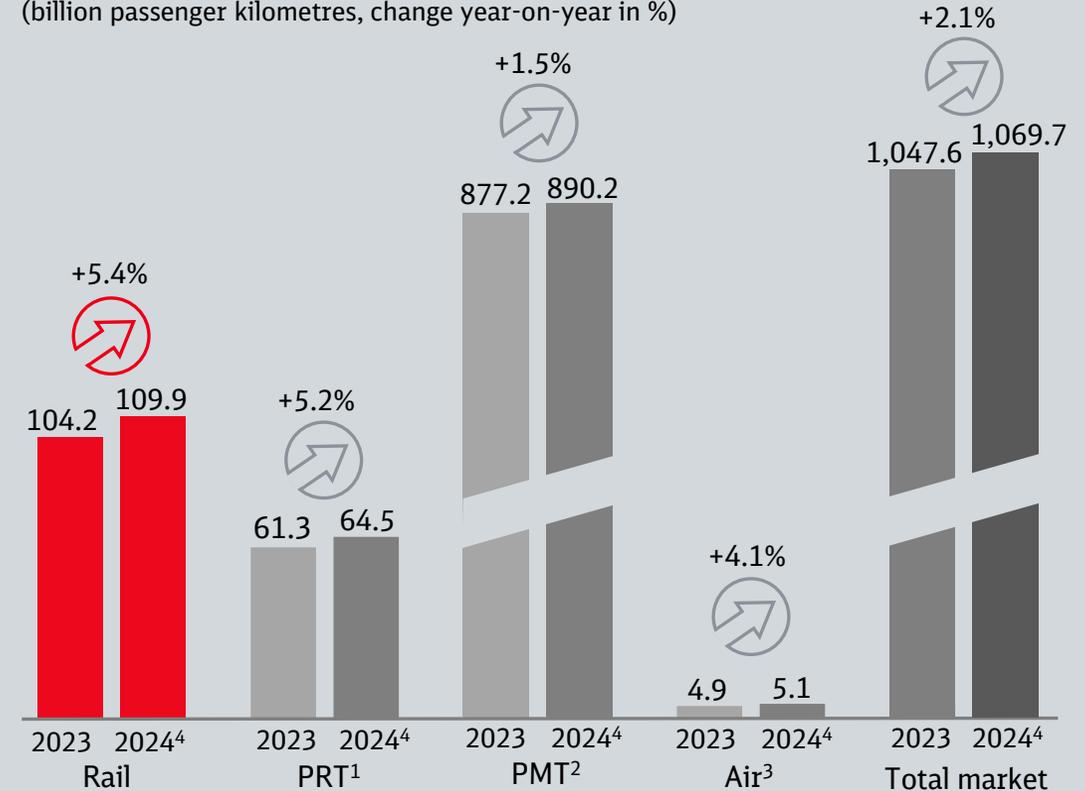
Passenger transport

Total market in Germany

- The volume of passenger transport in Germany rose by 2.1% in 2024 to an estimated 1,069.7 billion passenger kilometres (pkm). This compared to 1,047.6 billion pkm in 2023. Further growth is expected for 2025 (+1.5%).
- All modes of transport saw growth in 2024 – but this differed in pace:
 - The strongest growth in transport volume was recorded in rail passenger transport (+5.4%). This was driven by 11.5% growth in regional rail passenger transport. The volume of long-distance rail passenger transport declined slightly (-1.8%).
 - Public road transport grew by 5.2%.
 - Deutschlandticket provided a stimulus to public road transport and local rail passenger transport. The continued use of mobile working (less commuting) and digital communication slowed this growth.
 - The lowest growth in transport volume (+1.5%) was seen in private motorised transport. Domestic air traffic in Germany reached an increase of 4.1%.

Development of transport volume in Germany

(billion passenger kilometres, change year-on-year in %)



1 Public road transport
2 Private motorised transport

3 Air travel (domestic in Germany)
4 Provisional, partly estimated, figures rounded

Sources: Destatis, DB

Further gain in rails' modal share, fall in share of private motorised transport



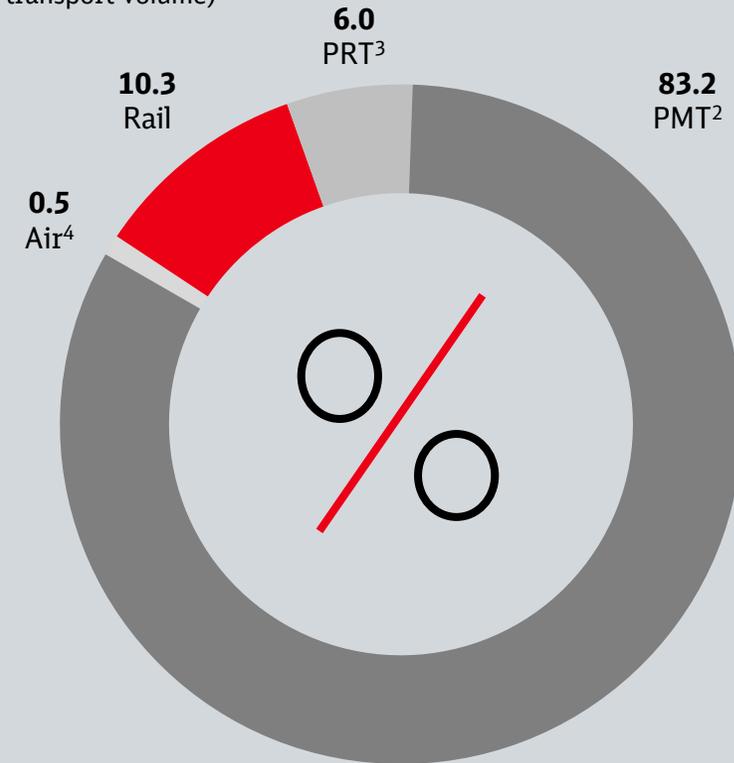
Passenger transport

Total market in Germany

- **Rail:** At around 109.9 billion pkm, rail was the only mode of transport to exceed pre-pandemic levels in 2024 (2019: 102.0 billion pkm); its market share rose to 10.3% (2023: 9.9%); transport volume is expected to increase in both regional and long-distance transport in 2025.
- **Public road transport (PRT):** Market share climbed to 6.0% in 2024 (2023: 5.9%); transport volume (64.5 billion pkm) remained significantly below pre-pandemic level (2019: 71.2 billion pkm); 2025: increase in transport volume expected.
- **Private motorised transport (PMT):** Further drop in market share of 0.5 percentage points to 83.2% in 2024 (2023: 83.7%); volume of PMT (estimated at 890.2 billion pkm in 2024) expected to grow in 2025 but will remain below pre-pandemic levels (2019: 917.4 billion pkm).
- **Domestic air travel in Germany:** Market share unchanged at 0.5% in 2024; transport volume of 5.1 billion pkm well below the pre-pandemic level (2019: 10.1 billion pkm); trend driven by a reduction in the number of seats offered by airlines, lower demand from business travellers, multiple strike waves and increased airport costs; a slight increase in transport volume is expected for 2025.

Modal split 2024¹

(based on transport volume)



- 1 Figures estimated and rounded
- 2 Private motorised transport
- 3 Public road transport
- 4 Air travel (domestic in Germany)

Sources: Destatis, DB

Decrease in demand for long-distance rail passenger transport



Passenger transport 

Long-distance rail in Germany

- The volume of long-distance rail passenger transport fell by 1.8% in 2024 to 46.7 billion pkm (causes included high level of engineering works affecting infrastructure, severe weather, strikes by the German Train Drivers' Union in the first quarter of 2024, changes in travel behaviour (e.g. mobile working, Deutschlandticket)).
- Following a 3% fall in transport volume to 44.1 billion pkm in 2024, DB Fernverkehr increased its transport volume again in the first half of 2025 (+5.2% year-on-year to 21.9 billion pkm).
- Competitors' market share rose to 6% in 2024 (2023: 5%, based on transport volume). The German Federal Network Agency expects this trend to continue in 2025. Competitors have announced or already introduced new services.
- **Industry sees need for subsidies and reform of track access charging:** To compensate for the sharp rise in track access charges for long-distance rail passenger transport (2025: +17.7%), the industry needs track access charge subsidies of EUR 200 million p.a. until the reform of the track access charging system announced in the coalition agreement¹ takes effect. The reform includes fair distribution of costs between market segments. At present, increases in track access charges for regional rail passenger transport² are capped, as set in the Railway Regulation Act. Hence, long-distance rail passenger services and rail freight transport face disproportionate increases in track access charges.



Sources: Destatis, DB, German Federal Network Agency

¹ Coalition agreement for the 21st legislative period (2025 to 2029)

² Increase in track access charges for regional rail passenger transport in 2025: +0.6%

More travellers in regional transport – partly due to the Deutschlandticket



Passenger transport

Regional rail passenger transport in Germany

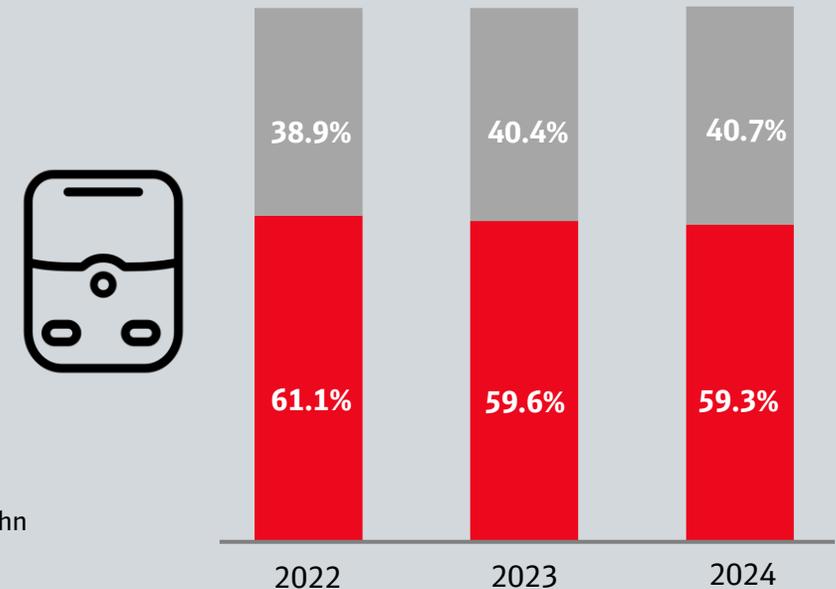
- The volume of regional rail passenger transport rose to 63.2 billion pkm in 2024 (+11.5% year-on-year).
- The average distance travelled was 23 kilometres (+5.0% year-on-year). This indicates that the Deutschlandticket is also being used for longer journeys.
- The market share of non-DB railway undertakings increased slightly to 40.7% in 2024 (2023: 40.4%, measured in train services ordered).
- The low average number of bidders in contract award procedures (2023: 1.5 bidders) indicate that railway undertakings see little opportunity for return. According to the German Federal Network Agency, more than a third of regional railway undertakings recorded a negative operating result in 2023. Railway undertakings face rising operating and personnel costs, a shortage of skilled labour and infrastructure restrictions.
- **Industry associations¹ are calling for a forward-looking reorganisation of the market.** Their requests include greater standardisation of award procedures/contracts as well as a better balance of risks and returns for operators and contracting authorities.

Sources: Destatis, Bundesverband SchienenNahverkehr

¹ Association of German Transport Companies, Bundesverband SchienenNahverkehr, mofair

Market shares in regional transport¹

(measured in train services ordered)



¹ Figures rounded

Source: Bundesverband SchienenNahverkehr

Varying transport performance for European railway undertakings



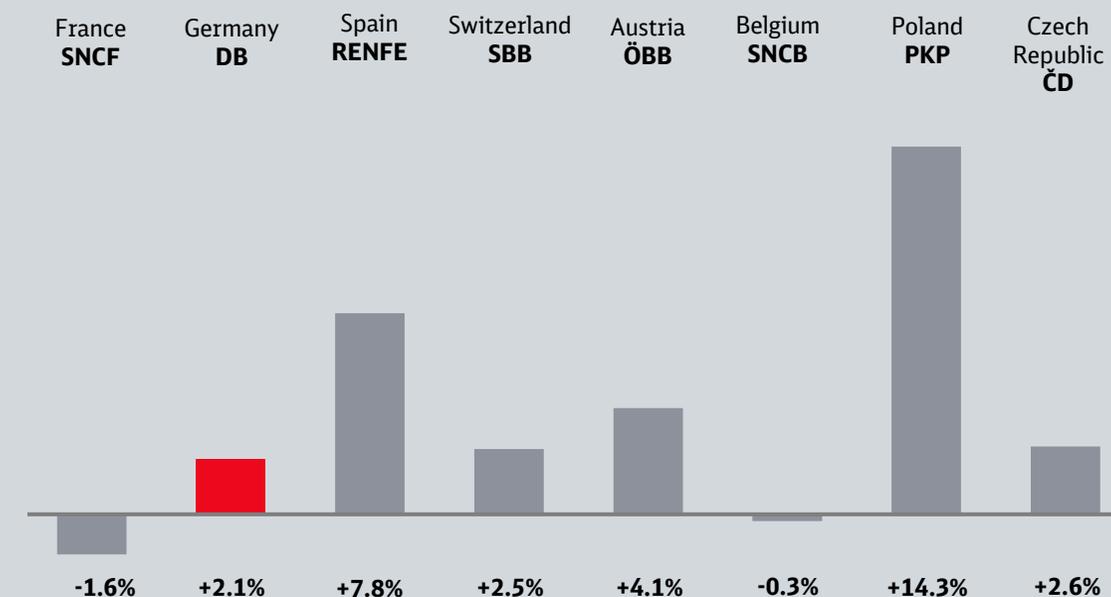
Passenger transport

Passenger rail transport Europe

- Trends in transport volume for European railways differed from country to country in 2024:
 - PKP (Poland) recorded double-digit growth of 14.3%. RENFE (Spain) achieved a substantial growth rate of 7.8%. ÖBB (Austria) increased its transport volume by 4.1%.
 - ČD (Czech Republic), SBB (Switzerland) and DB achieved moderate growth rates of 2.6%, 2.5% and 2.1% respectively.
 - France's SNCF (-1.6%) and Belgium's SNCB (-0.3%) saw slight declines in transport volume.
- Hopes for more competition in public passenger transport services by rail:
 - In December 2023, the Fourth Railway Package removed the general exemption¹ permitting direct awards of contracts. This option had been utilised in Austria, France and Spain, among other countries.
 - Germany is one of the European countries with the highest proportions of competitive tendering in rail passenger transport. In 2023, 86% of train kilometres under public service contracts were awarded in competitive procedures.²

Performance in passenger rail in Europe (2024)

(measured by transport volume, change year-on-year)



Sources: UIC, ÖBB, DB

¹ Unconditional direct awards were permitted under the PSO Regulation – Article 5(6), of EU Regulation No. 1370/2007 on public passenger transport services by rail and by road, in the version modified by Regulation 2016/2338 – unless prohibited by national law. A maximum contract term of ten years (or 15 years in special cases) applied.

² IRG-Rail: 13th Annual Market Report 2025

Extensive new service offers in international long-distance rail passenger transport



Passenger transport

Passenger rail transport Europe

- **First direct ICE service between Berlin and Paris:** Service operated since December 2024 through a partnership between SNCF Voyageurs and DB. Since 2007, some 33 million passengers have travelled on Franco-German high-speed rail services.
- **New direct services from 2026:** *As of May 2026:* direct service from Prague to Copenhagen via Berlin through partnership between DB, DSB (Danish State Railways) and ČD (Czech Railways); *as of end of 2026:* Munich–Milan and Munich–Rome in partnership between Trenitalia, DB, ÖBB (Austrian Federal Railways); phased extensions to Berlin and Naples planned from December 2028. The new direct services are two of ten pilot projects supported by the European Commission aiming to remove barriers to international rail transport, improve market conditions and develop attractive and sustainable mobility in Europe.
- **Eurostar announces route network expansion:** Eurostar plans to procure up to 50 new trains by 2030. It aims to increase patronage to 30 million passengers per year (2024: 19.5 million). The plans include new direct services from London to Germany and Switzerland.
- **FlixTrain sees market potential in Germany and Europe:** FlixTrain announced investment in 65 high-speed trains, which are to be compatible with numerous European countries. In Germany, the FlixTrain network currently serves 50 cities directly.



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Continued weak economic performance in Germany, stagnation in freight transport



Freight transport

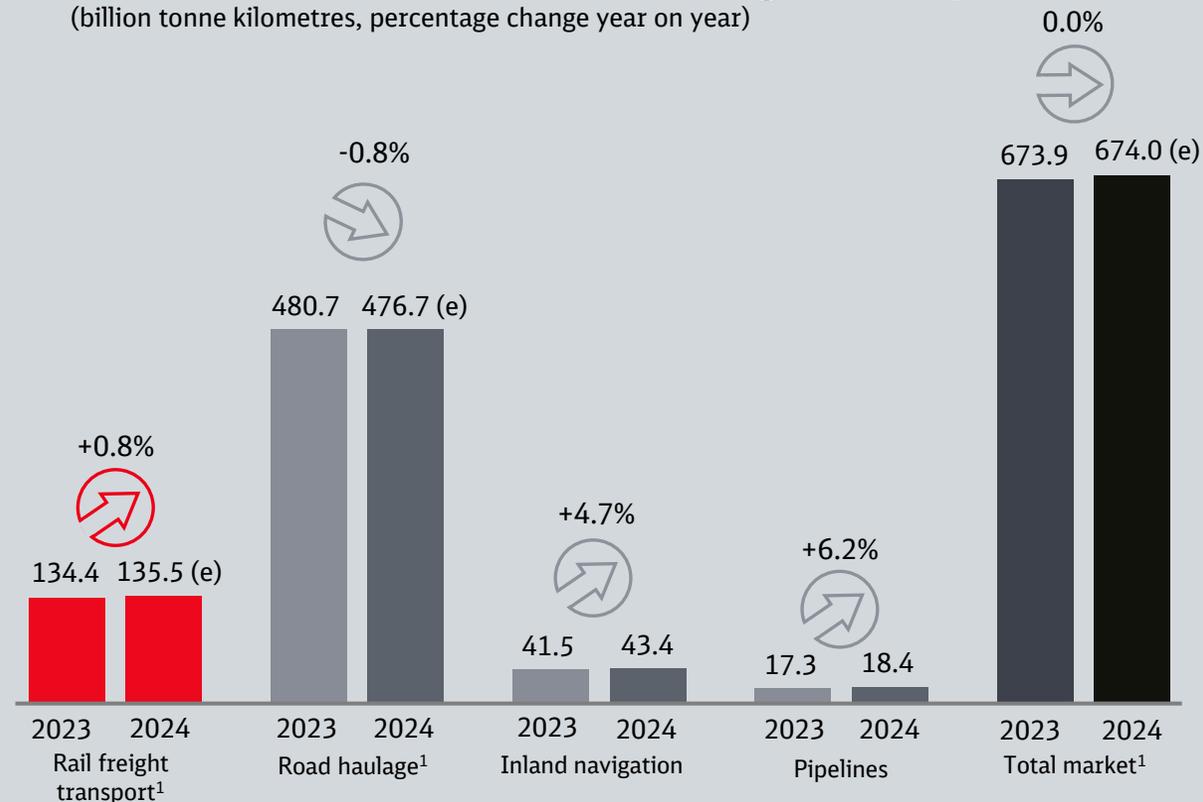
Total market Germany

- Key economic indicators¹ in Germany deteriorated once again in 2024:
 - Economic output (GDP): -0.2% (2023: -0.1%)
 - Industrial production: -4.6% (2023: -1.9%)
 - Trade in goods: -2.6% (2023: -1.9%)
- Industrial production in Germany was at a historically low level in 2024 – particularly in core industries such as automotive and steel.
- The volume of freight transport in Germany stagnated in 2024 at an estimated 674.0 billion tonne-kilometres (2023: 673.9 billion tkm). Rail freight transport still recorded slight growth (+0.8%).
- Slight economic growth is forecast for Germany in 2025 (+0.2%). Trade in goods (-0.4%) and industrial production (-0.7%) are expected to fall again. A decline of 1.0% is expected in freight transport volume.

¹ Source: Oxford Economics (data as of June 2025)

Performance in the German freight transport market

(billion tonne kilometres, percentage change year on year)



¹ Provisional, estimated (e)

Sources: Destatis, DB

Higher market share for rail freight transport



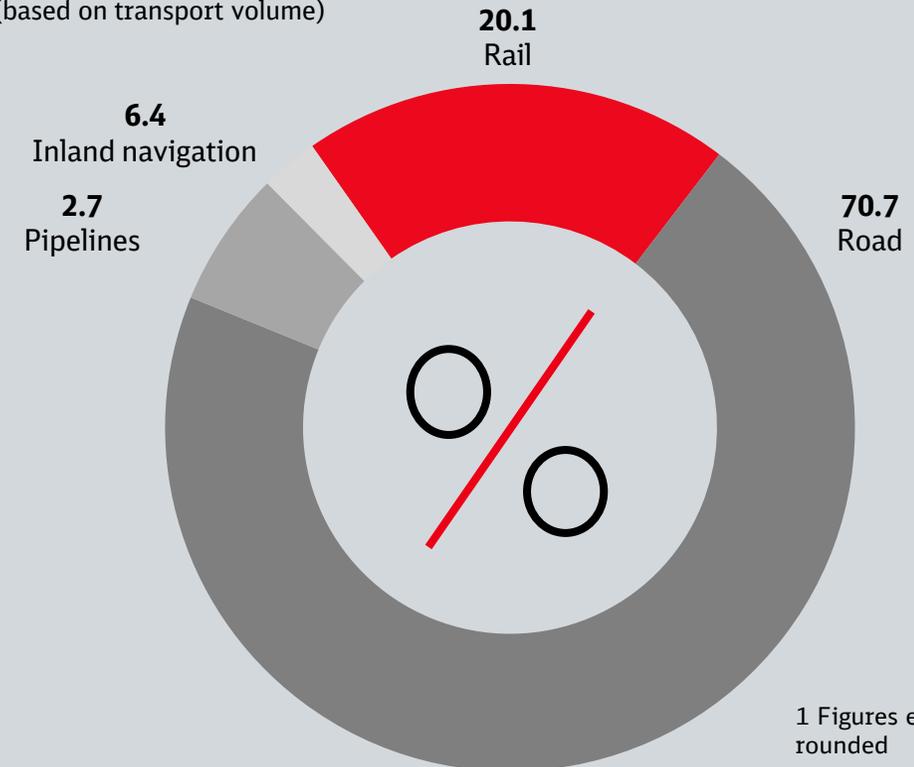
Freight transport

Total market Germany

- **Rail:** Transport volume (+0.8% to 135.5 billion tkm) and market share (+0.2 percentage points to 20.1%) increased in 2024. Contributing factors included strong growth in combined transport and increasing demand for transport in the chemicals sector. There was declining or weak demand in metals and coal, automotive and consumer goods.
- **Road haulage:** Transport volume (-0.8% to 476.7 billion tkm) and market share (-0.6 percentage points to 70.7%) fell. In addition to the weak economy, increased truck toll (introduction of CO₂ surcharge, toll extended to CNG-/LNG-powered vehicles and to HGVs with a total weight of 3.5 tonnes or more) had a negative impact on market development in 2024.
- **Inland navigation:** After significant declines in transport volume in the preceding years (2023: -5.9%, 2022: -8.4%), there was an increase of 4.7% to 43.4 billion tkm in 2024. The market share of inland waterways rose by 0.2 percentage points to 6.4%. Demand increased for the transport of iron ore and coke as well as grain, waste and chemicals. Coal transport, on the other hand, continued to decline sharply by more than a third compared with 2023.

Modal split 2024¹

(based on transport volume)



¹ Figures estimated and rounded

Sources: Destatis, DB

Growth in rail freight transport by non-DB companies



Freight transport

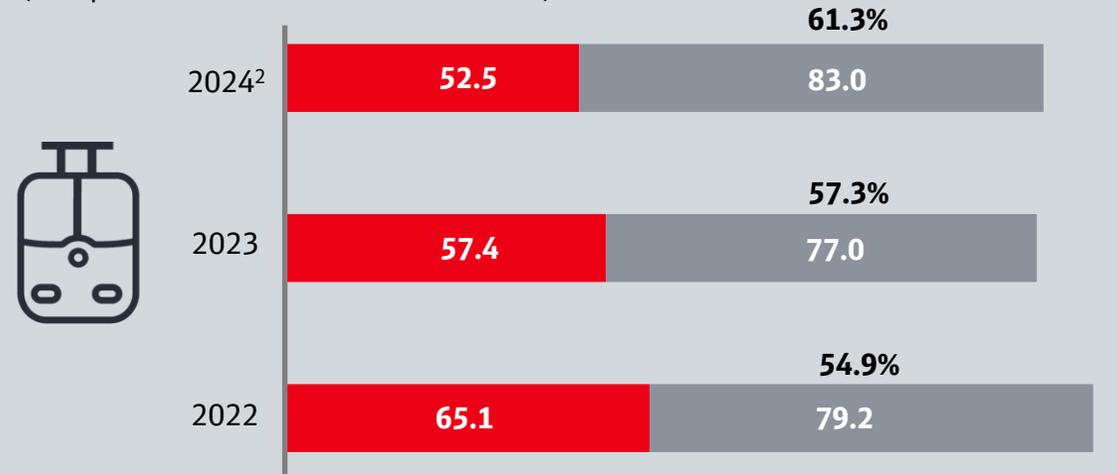


Rail freight transport Germany

- Non-DB railway undertakings increased their transport volume by 7.8% and expanded their market share to 61.3% in 2024. In 2023, their market share was 57.3%.
- DB Cargo lost market share with a significant decline in transport volume (-8.5%)¹, driven by the economic situation, construction-related restrictions and strikes. DB Cargo is undergoing a transformation and restructuring process with the aim of being profitable by the end of 2026. To improve profitability, unprofitable services are being discontinued.
- **Industry: Framework for rail freight transport must be geared towards strengthening intermodal competitiveness:**
 - *Operating cost subsidies for single wagonload transport:* The subsidies, introduced in 2024 and time-limited until 2029, must be made more efficient and effective following an evaluation. In addition to ample funding, full disbursement of the subsidies in line with the market conditions must be ensured.
 - *Track access subsidies:* To compensate for the sharp rise in track access charges in rail freight transport (2025: +16.2%), EUR 350 million p.a. is required until the reform of the track access charging system announced in the coalition agreement² takes effect. The necessary reform includes a fair distribution of costs between the different modes of transport.

Change over time in performance of freight operating companies¹

(transport volume in billion tonne kilometres)



■ Deutsche Bahn
 ■ Competitors
 % Competitors' market share in percent

1 According to status as principal carrier; figures may deviate when including volume transported as a subcarrier on behalf of other railways
 2 Estimated

Sources: Destatis, DB

1 According to status as principal carrier; figures may deviate when including volume transported as a subcarrier on behalf of other railways

2 Coalition agreement for the 21st legislative period (2025 to 2029)

Weak economy and lower demand for transport in Europe



Freight transport

Rail freight transport Europe

- Economic growth in Europe remained weak in 2024¹:
 - Economic output (eurozone GDP): +0.8% (2023: +0.6%)
 - Industrial production (EU): -2.5% (2023: -1.4%)
 - Trade in goods (eurozone): -1.0% (2023: -2.8%)
- Compared with the previous year, the decline in transport volume in European rail freight transport² slowed significantly in 2024 (2024: -0.9%; 2023: -7.8%). The weak economic environment and high costs dampened demand for rail transport.
- The general environment, including high factor costs and geopolitical uncertainty, will remain difficult in 2025. Rail freight volumes in Europe are therefore expected to fall again (-1.2%).



Sources: Destatis, DB

1 Source: Oxford Economics (data as of June 2025)
2 EU 27, Switzerland, Norway and the United Kingdom

Decline in transport volume for most European rail companies



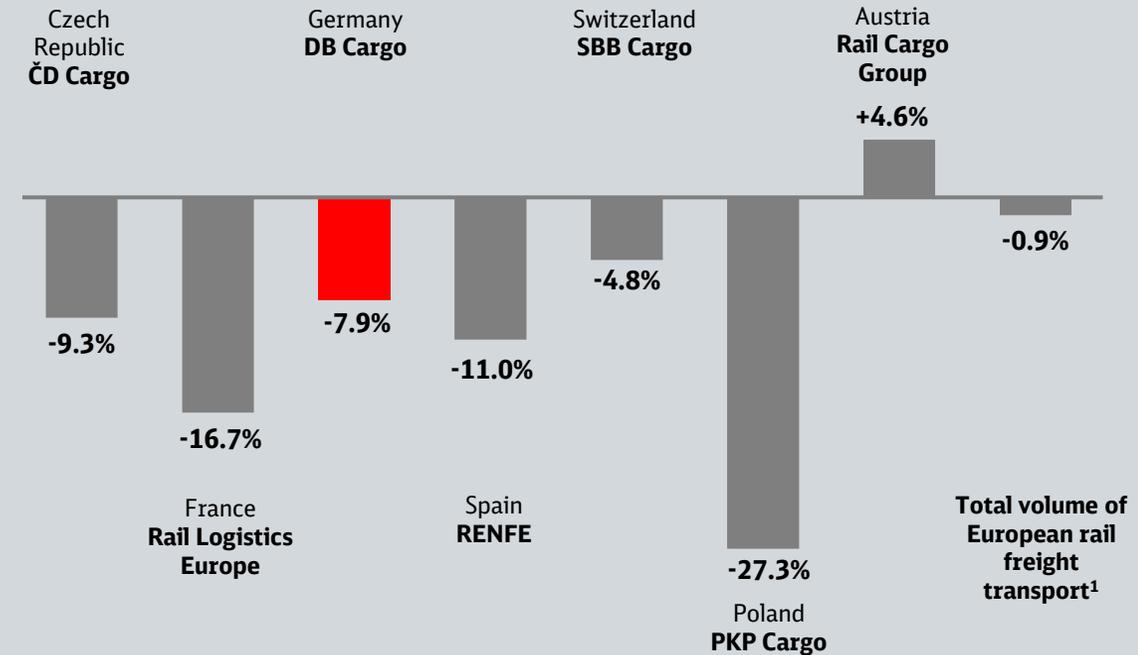
Freight transport

Rail freight transport Europe

- The falling demand for transport in Europe affected the railway undertakings to varying degrees in 2024:
 - Polish PKP Cargo recorded a double-digit decline for the second year in a row (2024: -27.3%; 2023: -16.0%). The same applied to France's Rail Logistics Europe (2024: -16.7%; 2023: -20.0%) and Spain's RENFE (2024: -11.0%; 2023: -20.2%). However, these two companies were able to slow their losses compared with the previous year.
 - Transport volume at the Czech ČD Cargo (2024: -9.3%; 2023: -13.7%) and at DB Cargo (2024: -7.9%; 2023: -11.9%) also decreased. The decline was less pronounced than in previous year.
 - Switzerland's SBB saw a sharper fall than in the previous year (2024: -4.8%; 2023: -1.2%). Austria's Rail Cargo Group returned to growth after a decline in 2023 (2024: +4.6%; 2023: -8.4%).
- Current market developments increase the pressure to progress with efficiency-enhancing measures such as the digital automatic coupler.

Performance of selected freight operating companies in Europe in 2024

(measured by transport volume, change year-on-year)



¹ DB estimate

Sources: Eurostat, UIC, companies

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Non-DB rail companies' share of total operating performance on the DB network exceeds 40% in 2024 for the first time



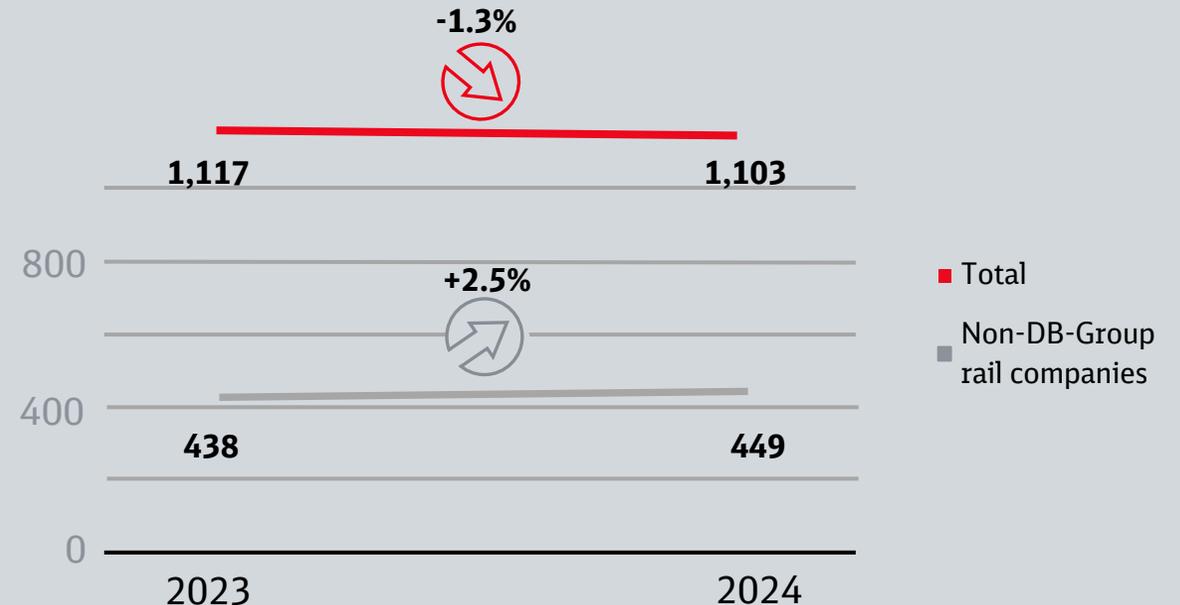
Infrastructure 

Use of the DB rail network

- 460 infrastructure customers¹ operated a total of 1,103 million train-path kilometres (t-p km) on the DB network in 2024 (-1.3% compared with 2023).
 - Non-DB railway undertakings increased their operating performance by 2.5% to around 449 million t-p km. Their share of total operating performance rose to 40.7% (2023: 39.2%).
 - The operating performance of DB Group rail companies fell by 3.8% to around 654 million t-p km.
- Train-path demand rose in regional passenger transport. It fell in rail freight transport due to the economic situation.
- The development of operating performance was also influenced by one-off effects (strikes, severe weather, construction-related restrictions).
- In the first half of 2025, total operating performance increased by 1.1% year-on-year to 554 million t-p km. Demand for train paths increased in passenger transport and decreased again in freight transport. The market share of non-DB railway undertakings reached 41.0%.

Operating performance on the DB network

(Million train-path kilometres)



Source: DB

¹ Including railway undertakings that supply engineering worksites or operate measurement and inspection trains, e.g.

Strong increase in rail infrastructure investment in Germany



Infrastructure

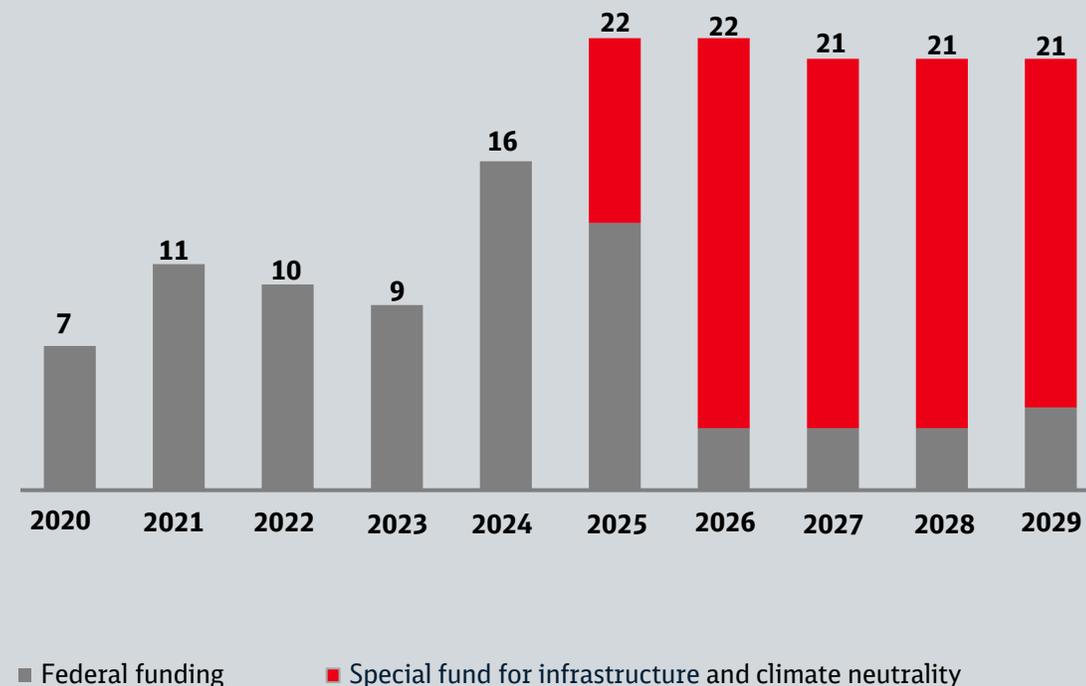
Reversing the current trend in infrastructure (1/2)

- In 2024, government investment in rail infrastructure in Germany rose to EUR 198 per capita (+74%).¹ Nevertheless, Germany lagged behind countries such as the UK (EUR 221), Sweden (EUR 259), Norway (EUR 294), Austria (EUR 352), Switzerland (EUR 480) and Luxembourg (EUR 587).
- In the legislative period from 2025 to 2029, the federal government has earmarked EUR 166 billion for investment in transport infrastructure: 60% more than in the previous five-year period (2020 to 2024). To reduce the backlog of modernisation, maintaining existing infrastructure is to take precedence over building new lines.
- Around EUR 107 billion is to be invested in Germany's rail infrastructure between 2025 and 2029. Around EUR 81 billion of this is to be financed from the new special fund for infrastructure and climate neutrality.
- DB sees this as an important foundation for further progress on overhauling and modernising infrastructure in the coming years. Key measures include overhauling corridors in the highly congested network, modernising the extended network, renewing signalling systems, implementing targeted digitalisation and developing stations of the future. Ongoing upgrade and new-build projects will also continue.

¹ Pro-Rail Alliance

Federal funding for rail infrastructure 2020 to 2029

(in EUR billions)



Sources: Federal budget, Federal financial plan

The industry requires greater planning certainty through continuity of investment and strategic management by the federal government



Infrastructure 

Reversing the current trend in infrastructure (2/2)

New **strategic management** by the federal government could sensibly and efficiently link infrastructure planning and financing:

- The federal government will formulate a **rail infrastructure development strategy** for infrastructure development based on Germany's nationwide integrated regular-interval timetable, define a **target network for 2035** as a key milestone and set out specific targets and measures for the next five years in the **Infraplan**. These instruments are all aimed at maintaining the network and expanding capacity.
- The **federal government** will **control** infrastructure through its ownership of DB and **via the Infraplan and corresponding government financing agreements** (existing network, upgrades/new lines). The new agreement with DB InfraGO (InfraGO Performance Agreement) will cover the maintenance, modernisation and digitalisation of the existing network.
- **Funding** is to be needs-based and reliable:
 - Federal resources for the railways will correspond to the requirements resulting from the Infraplan. The funding sources will be linked (regular budget, special Infrastructure fund, special Climate and Transformation fund).
 - More predictable funding is to be provided over multi-year periods – the coalition agreement plans to achieve this through the establishment of a railway infrastructure fund.



Strategic importance of railway infrastructure in Europe



Infrastructure

Railway infrastructure in Europe

Community of European Railways and Infrastructure Companies CER:

- Investment in transport infrastructure is crucial to realising Europe's potential. There is a need to regain lost ground: since the 2000s, public infrastructure investment has stagnated in relation to GDP – this jeopardises Europe's long-term productivity and prosperity.
- Rail infrastructure is strategically important for European integration, competitiveness, decarbonisation, security and defence. The steps required:
 - Creating a Single European Railway Area, modernising and expanding the Trans-European Transport Network (TEN-T)
 - Using the Multiannual Financial Framework (MFF) to promote the expansion, modernisation and digitalisation of the railways; prioritising rail-related projects in the MFF, establishing a targeted programme for cross-border infrastructure
 - Providing sufficient funding in the MFF for digitalisation of infrastructure, trains and operations; digitalisation (European Rail Traffic Management System, digital automatic coupler, digital capacity management) is crucial for greater productivity and interoperability
 - EU railway infrastructure fund could supplement MFF (e.g. income from emissions trading (EU ETS))



Laying Tracks for Growth: European Railway Infrastructure as Strategic Investment¹

¹ Community of European Railway and Infrastructure Companies (CER) Essay, February 2025

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Shifting traffic to rail: key to achieving climate targets in Germany and Europe



Climate protection

Rail's contribution to protecting the climate

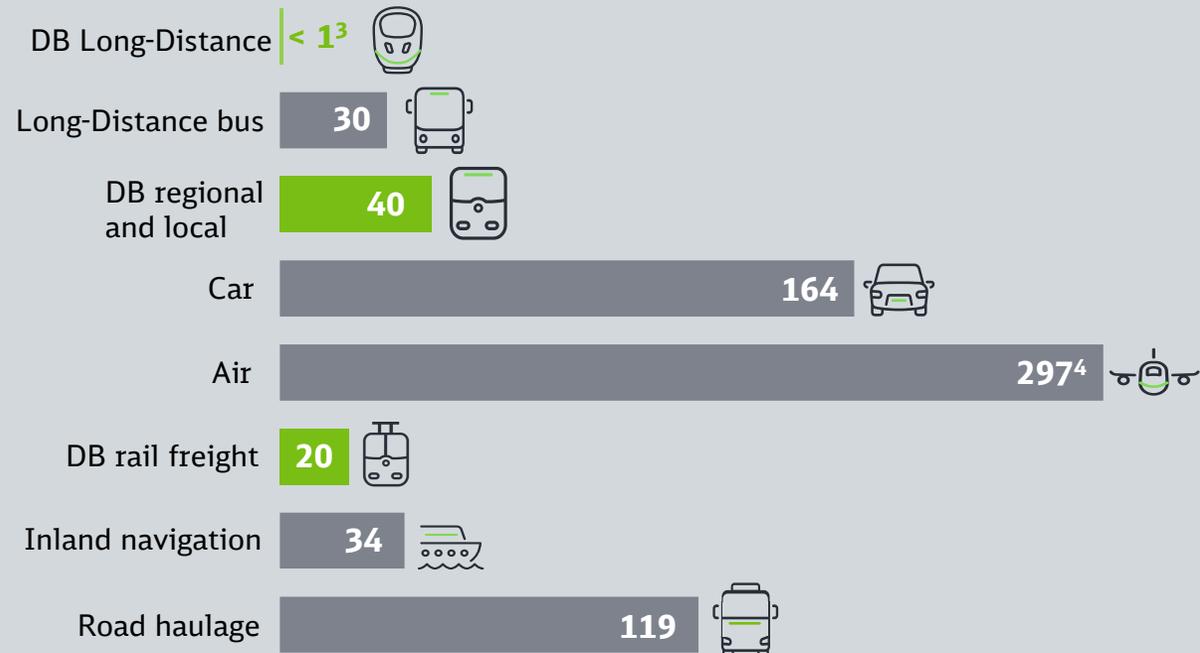
- Transport has a key role to play in achieving climate targets. Rail has clear advantages over other motorised modes of transport: low greenhouse gas (GHG) emissions, high spatial efficiency and high energy efficiency (low-friction wheel-rail system).
- Modal shift is a key lever for decarbonising the transport sector. GHG reduction in Germany has so far been inadequate.
 - GHG emissions¹ from transport in 2024: approx. 143 million tonnes of CO₂ equivalent (-1.4% year-on-year); figure is 18 million t CO₂e above the target in the Federal Climate Action Act; sector also set to exceed target for cumulative annual emission volumes between 2021 and 2030 by 169 million t CO₂e.
 - Germany is at risk of missing its targets under the EU Effort Sharing Regulation due to insufficient progress in transport and buildings²; expected overshoot 2021 to 2030: 226 million t CO₂e.
- Climate targets remain ambitious:
 - Germany: GHG emissions are to be reduced by 65% by 2030 and by 88% by 2040 (versus 1990 levels); climate neutrality by 2045.
 - EU: 55% reduction in GHG emissions by 2030, climate neutrality by 2050; new interim target for 2040: 90% reduction in GHG compared with 1990 levels (European Commission proposal of July 2025).

¹ Data: Federal Environment Agency

² Under the EU Effort Sharing Regulation, member states must reduce emissions in certain areas that are not covered by EU emissions trading.

Climate-friendly rail

(Greenhouse gas emissions (CO₂e¹) in grams per person/tonne and kilometre in Germany²)



Sources: German Federal Environment Agency, 2025 (TREMOD 6.61c [2/2025], year of reference: 2023); rail: DB AG (year of reference: 2024)

¹ CO₂e: Total greenhouse gases (carbon dioxide, methane and nitrous oxide); emissions from the supply and conversion of energy sources are included ² Figures rounded ³ Includes unelectrified journeys (< 2%) ⁴ Includes all effects on the climate from air traffic

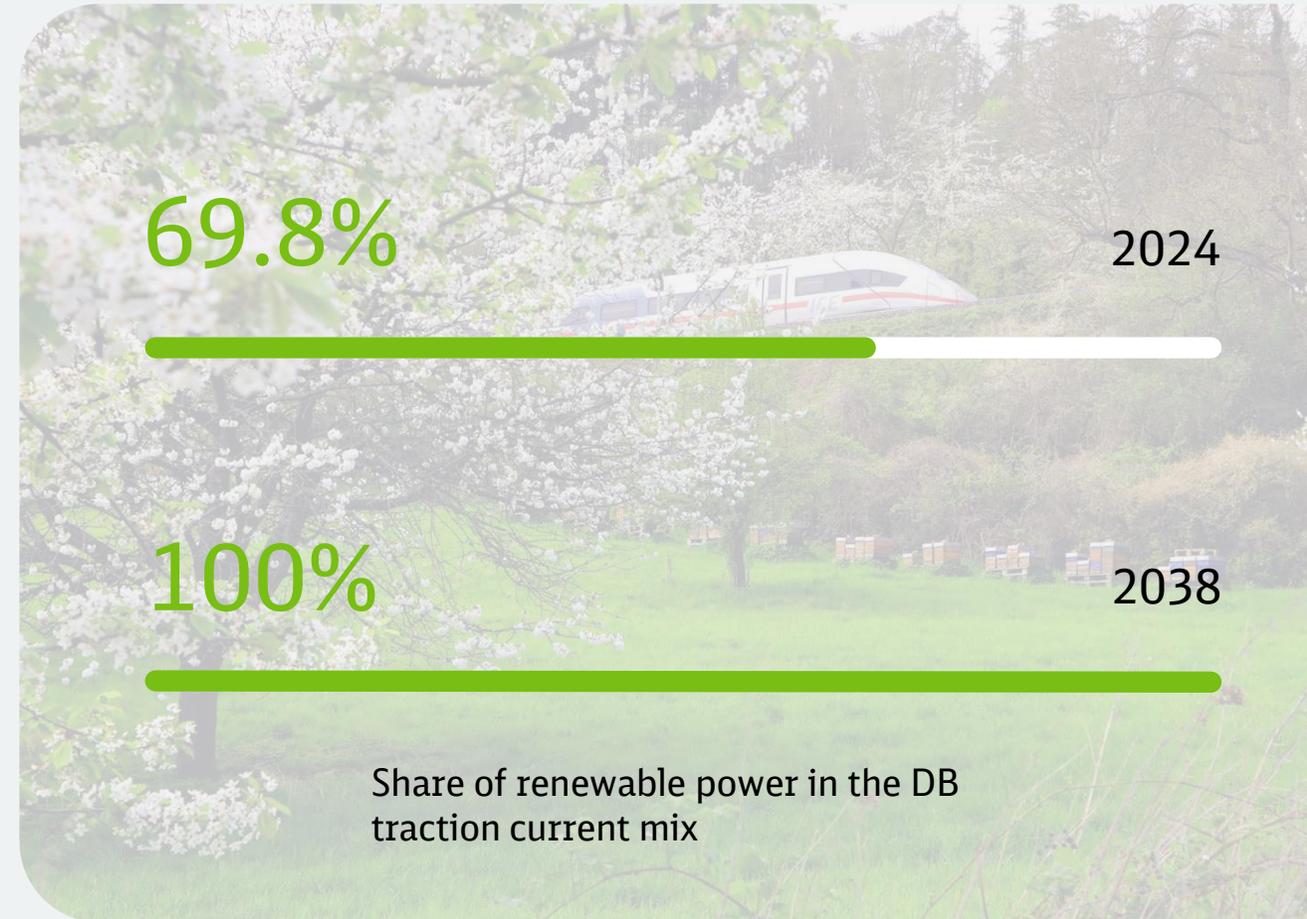
DB's progress on the path to climate neutrality



Climate protection

On the path to a climate-neutral DB

- Key levers for achieving DB's goal of climate neutrality by 2040:
 - Increasing the share of renewable energy
 - Electrification and phasing out diesel
 - Increasing energy efficiency
 - Using low-emission building materials
- Milestones for Germany (non-exhaustive list):
 - 100% renewable power as of 2025 for all DB depots, office buildings and stations in Germany supplied by DB Energie
 - 80% renewable power in the DB traction current mix by 2030, 100% renewable power in the DB traction current mix by 2038 (2024: 69.8%)
 - Passengers travelling on DB's long-distance trains in Germany are already using 100% renewable power
 - Further electrification of the DB rail network: as of 2024, 62.3% of the whole network and 99.1% of the high-performance network is electrified; more than 90% of the transport on Germany's rail infrastructure is already electrified today



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Transport performance data since 2020



Passenger transport

Transport volume in Germany (in billion passenger kilometres)

	2020	2021	2022	2023	2024 ¹
Rail	58.8	57.6	94.3	104.2	109.9 (e)
Public road transport	44.5	44.4	57.5	61.3	64.5 (e)
Private motorised transport	798.7	835.9	865.5	877.2	890.2 (e)
Air travel (domestic in Germany)	2.6	2.1	4.1	4.9	5.1
Total market	904.6	940.0	1,021.3	1,047.6	1,069.7 (e)

1 Provisional data, estimated (e)

Sources: Destatis, DB

Transport performance data since 2020 at a glance



Freight transport

Transport volume in Germany (in billion tonne-kilometres)	2020	2021	2022	2023	2024¹
Rail	128.0	141.0	144.3	134.4	135.5 (e)
Road	487.4	505.7	503.1	480.7	476.7 (e)
Inland navigation	46.3	48.2	44.1	41.5	43.4
Pipelines	16.7	15.7	17.7	17.3	18.4
Total market	678.4	710.6	709.2	673.9	674.0 (e)

1 Provisional data, estimated (e)

Sources: Destatis, DB

Transport performance data since 2020 at a glance



Infrastructure

Operating performance in Germany in million train-path kilometres

	2020	2021	2022	2023	2024
On the DB network	1,066	1,109	1,133	1,117	1,103
Of which non-DB-Group customers	385	414	420	438	449

Source: DB

Publishing details

Deutsche Bahn AG
Economic, Political
and Regulatory Affairs
Potsdamer Platz 2
10785 Berlin, Germany

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As of October 2025

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