



Competition figures 2023/24

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Strong demand overall in the German passenger transport market



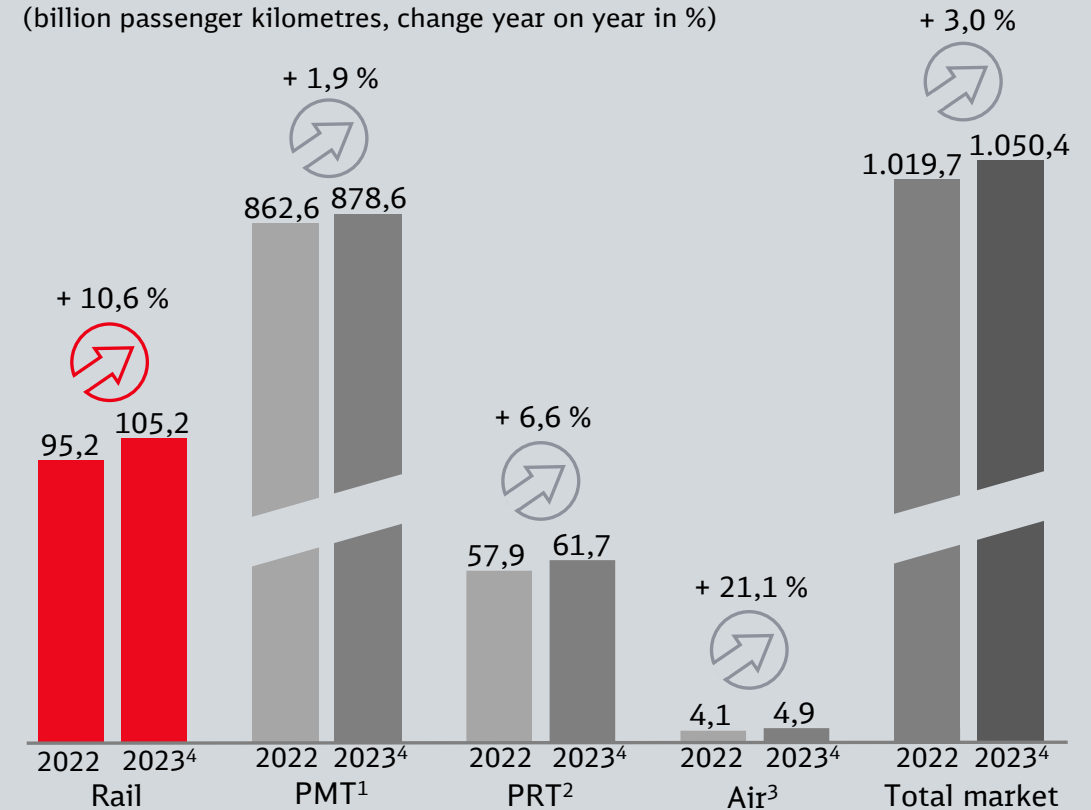
Passenger transport

Total market in Germany in 2023/2024

- Volume of passenger transport in Germany rose by 3.0% in 2023 to around 1,050 billion passenger kilometres (billion pkm)
- Pre-pandemic level almost reached (2019: 1,101 billion pkm)
- Market still shaped by changes in mobility behaviour during the pandemic (commuting and business travel partly replaced by telework and digital communication)
- Growth momentum varied by transport mode: largest increases were in domestic air transport (+21.1% starting from a low level) and rail (+10.6%)
- Regional/local rail and public road transport benefited from the Deutschland-Ticket introduced on 1 May 2023; this resulted in some passengers switching from long-distance rail to regional and local transport services
- 2024: Growth rate of around 2.0% expected for passenger transport volume in Germany

Development of transport volume in Germany

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



1 Private motorised transport
2 Public road transport

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

Sources: Destatis, DB

Rail makes largest gains in market share, fall in share of private motorised transport



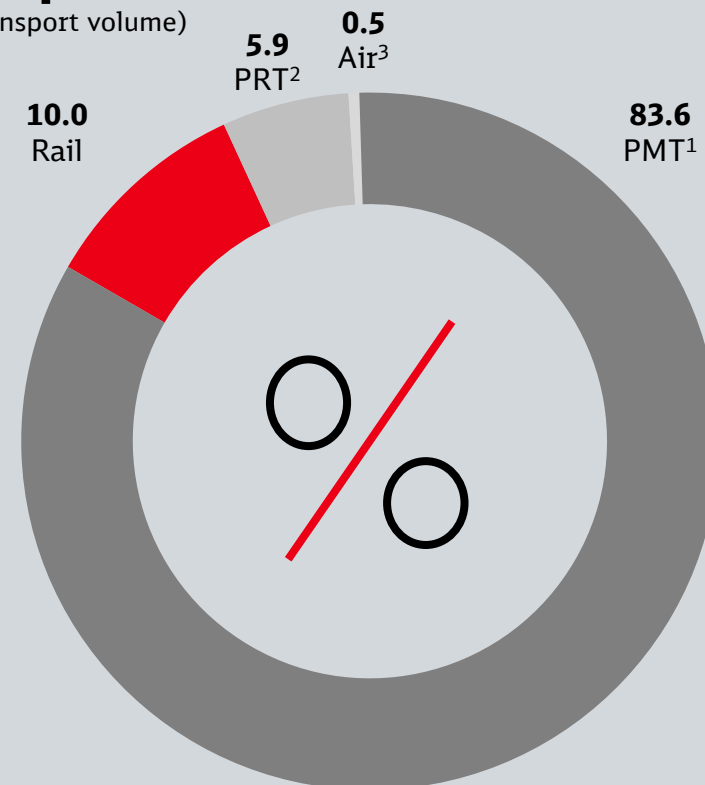
Passenger transport

Total market in Germany in 2023/2024

- **Rail:** Transport volume increased to around 105.2 billion pkm; pre-pandemic level slightly exceeded (2019: 102.0 billion pkm); market share climbed to 10.0% (2022: 9.3%)
- **Private motorised transport:** Lowest growth rate of all modes of transport in 2023 at an estimated 1.9%; transport volume increased to an estimated 878.6 billion pkm but remained below the pre-pandemic figure (2019: 917.4 billion pkm) and is not expected to reach it in 2024 either; market share of PMT fell to 83.6% in 2023 (2022: 84.6%)
- **Public road transport:** Transport volume grew to 61.7 billion pkm in 2023; this was below the pre-pandemic figure (2019: 71.2 billion pkm); market share increased to 5.9% (2022: 5.7%); further increase in demand expected in 2024
- **Domestic air traffic in Germany:** Transport volume of 4.9 billion pkm in 2023 was significantly below pre-pandemic figure (2019: 10.1 billion pkm); market share increased to 0.5% (2022: 0.4%); share of the market is expected to remain low in 2024 due to the reduced offering of domestic flights

Modal split 2023⁴

(based on transport volume)



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

Sources: Destatis, DB

Long-distance transport: Strong growth in 2023, weaker development in the early months of 2024



Passenger transport    

Long-distance rail in Germany in 2023/2024

- The volume of long-distance rail passenger transport in Germany increased to 47.6 billion pkm in 2023 (+9.7% compared with 2022); pre-pandemic level exceeded (2019: 44.7 billion pkm); Q1 2024: 6% decline in transport volume (due to extensive engineering works and strikes, among other factors)
- Transport volume at DB Long Distance increased by 9.0% to 45.2 billion pkm in 2023 (2022: 41.5 billion pkm); competitors' growth rate was significantly higher at 26.3%, partly due to catch-up effects following much-reduced services during the coronavirus pandemic; competitors' market share of the transport volume in long-distance passenger rail reached 5% (2022: 4%)
- DB Long Distance is investing in its vehicle fleet and depots; the aim is to double transport volume compared with 2015 levels to more than 70 billion pkm a year
- Flixbahn, ÖBB and WESTbahn also plan to further expand their services according to the German Federal Network Agency
- The significant increase in train-path prices looming in 2025 poses major economic challenges for long-distance rail passenger transport operated on a purely commercial basis (increases in train-path prices for regional and local rail passenger services are limited by law; long-distance passenger transport and rail freight traffic are therefore disproportionately affected)



Continued recovery in regional transport; competitors increase their market share



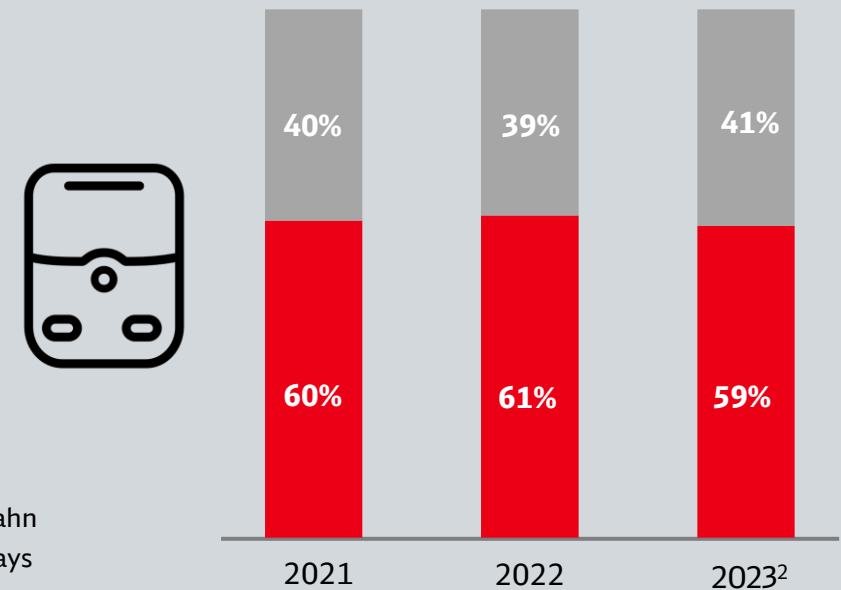
Passenger transport

Regional and local rail in Germany in 2023/2024

- Transport volume increased to 57.6 billion pkm in 2023 (2022: 51.8 billion pkm); pre-pandemic level exceeded (2019: 57.3 billion pkm); Deutschland-Ticket increased demand
- Q1 2024: Volume of regional and local rail passenger transport increased by 25% year on year (base effect from the introduction of the Deutschland-Ticket in May 2023)
- Non-DB rail companies increased their market share (based on train kilometres) to an estimated 41% in 2023 (2022: 39%)
- Market conditions remain challenging:
 - Ongoing cost pressure (personnel, energy, infrastructure)
 - Tenders and ongoing contract management need adapting to the changed environment
 - Putting partial services out to tender fragments the value chain and reduces scope to balance risks and opportunities
 - Number of bidders in contract award procedures has fallen: average number of bidders for competitively awarded transport contracts down from 2.5 in 2018 to 1.4 in 2022 (Federal Network Agency)
 - Achievable rates of return in regional and local rail passenger transport remain low; only around 60% of companies ran at a profit in 2022 (Federal Network Agency)

Market shares in regional transport¹

(measured in train services ordered)



¹ Figures rounded, ² Estimated

Sources: Federal Network Agency, DB

High popularity of the Deutschland-Ticket



Passenger transport 

Deutschland-Ticket: Results so far

- 11.2 million passengers have a Deutschland-Ticket (as of March 2024).
- Deutschland-Ticket holders use regional and local public transport more frequently and for longer journeys.
- 14% of journeys with a Deutschland-Ticket represented a shift from other modes of transport, and around 8% involved a switch from private motorised transport to public transport.
- Deutschland-Ticket supports digitalisation:
 - Around half of tickets are digital mobile phone tickets (52%).
 - Around two-thirds of tickets were purchased digitally via a website (40%) or app (22%).
- Long-term funding from 2026 is not yet in place but is essential for the long-term success of the Deutschland-Ticket and to enable the industry to plan.

- **Digital ticket for EUR 49 per month as a subscription**
- **Cancel with one month's notice**
- **Valid nationwide on regional and local public transport**



European railways on a growth path



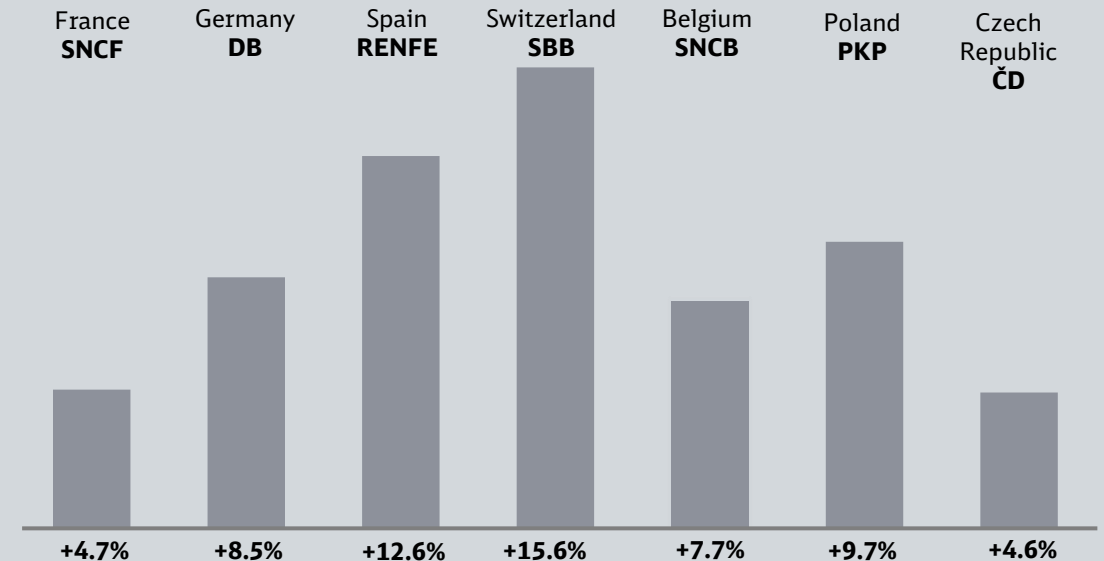
Passenger transport

European railways in 2023/2024

- Significant growth in transport volume for European railways in 2023:
 - Double-digit growth again at
 - SBB (Switzerland) with +15.6%
 - RENFE (Spain) with +12.6%
 - Relatively strong growth at
 - PKP (Poland): +9.7%
 - DB: +8.5%
 - SNCB (Belgium): +7.7%
 - SNCF (France) and ČD (Czech Republic) increased their transport volume by 4.7% and 4.6% respectively

Performance in passenger rail in Europe (2023)

(measured by transport volume, change year on year)



Sources: UIC, DB

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Negative economic trend cuts freight transport in Germany



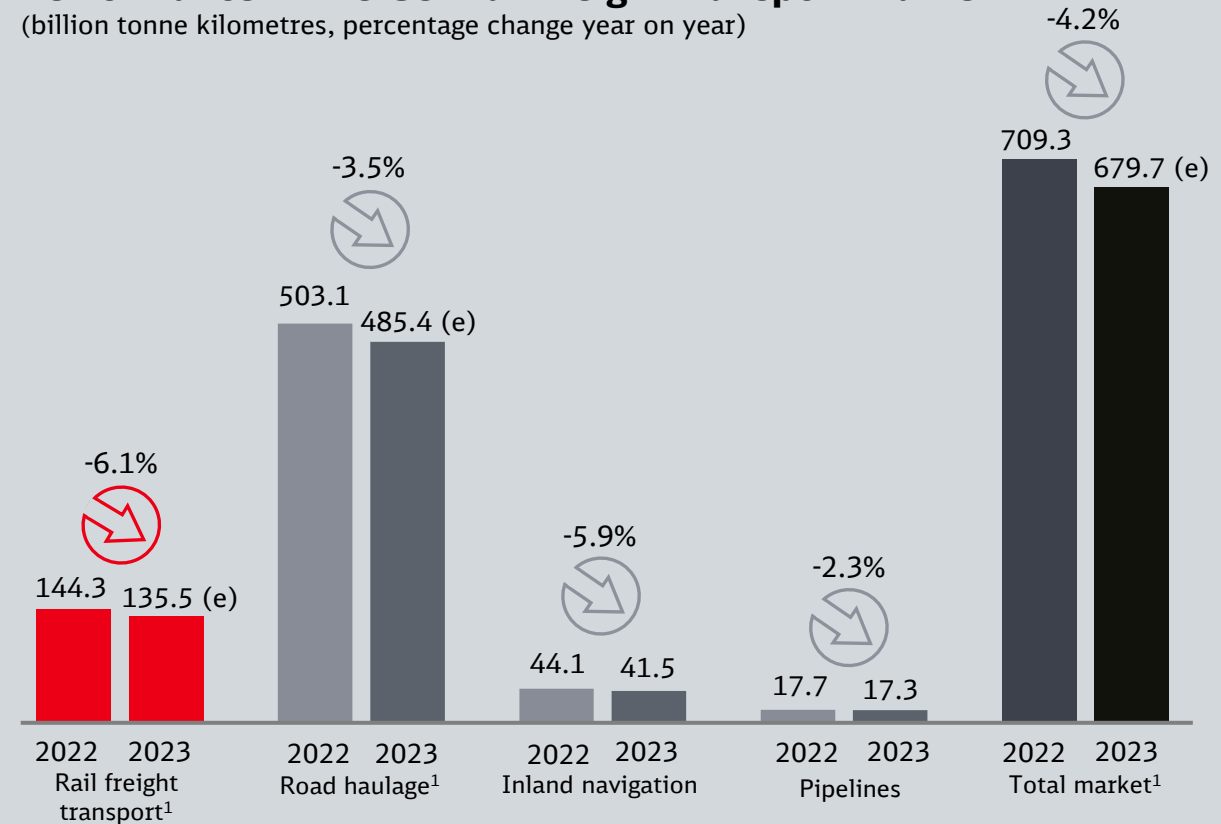
Freight transport

Total market in Germany in 2023/2024

- Negative trend in key economic figures in Germany in 2023:
 - Economic output (GDP) -0.1%
 - Industrial production -0.9%
 - Trade in goods -2.5%
- Freight transport volume in 2023 estimated at 679.7 billion tonne kilometres (billion tkm); significantly below the previous year (2022: 709.3 billion tkm); accelerated downward trend (2023: -4.2%; 2022: -0.2%)
- Factors behind falling transport demand: weak industrial activity, slump in demand in the construction industry, lower output in the chemical and steel industries
- Demand for transport was also hit by higher factor costs and prices
- 2024: Freight transport volume expected to grow again (+1.0%)

Performance in the German freight transport market

(billion tonne kilometres, percentage change year on year)



¹ Provisional, estimated (e)

Sources: Destatis, DB

Road haulage gains market share



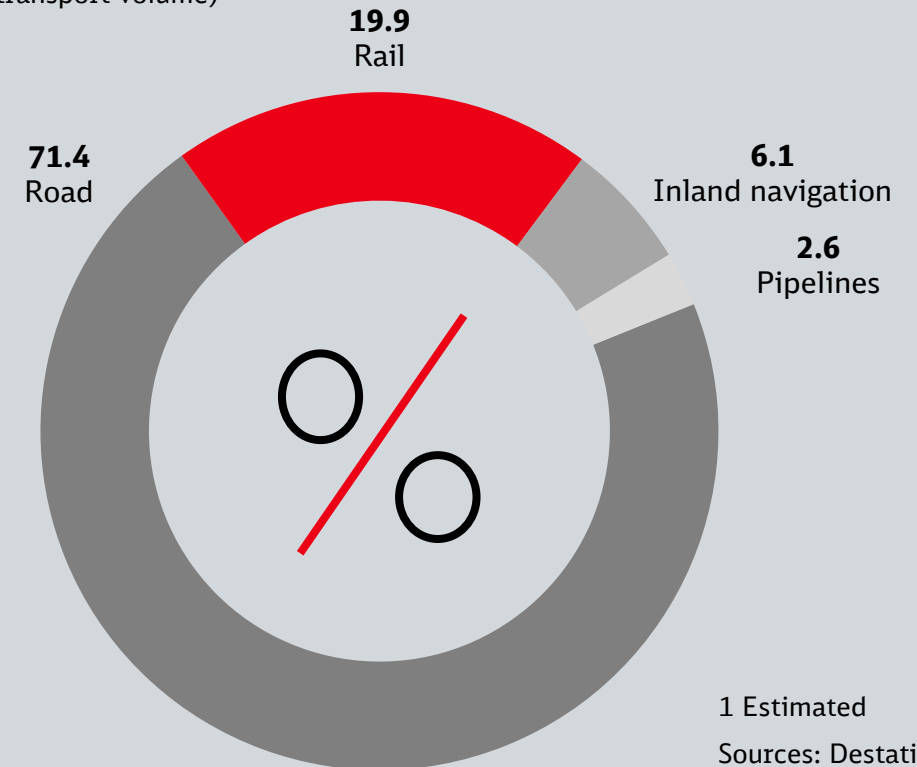
Freight transport

Total market in Germany in 2023/2024

- **Rail:** Transport volume declined by 6.1% in 2023 and market share fell by 0.5 percentage points to 19.9%, partly due to lower demand from major rail-using industries (chemicals, steel, metals and coal); further year-on-year decline in transport volume of 5.6% in Q1 2024 due to weak demand given the economic situation; additional effects from strikes and lower support for train-path prices and facility prices
- **Road haulage:** Transport volume down by 3.5% (a smaller decline than for rail and inland waterways); increase in road's market share by 0.5 percentage points to 71.4%; the expanded and emissions-based road toll for trucks has not yet led to any discernible modal shift (since December 2023: truck toll linked to CO₂ emissions (surcharge: EUR 200 per tonne of CO₂); road toll mandatory for trucks with a total weight of 3.5 tonnes or more since July 2024)
- **Inland navigation:** After a historic low in 2022, further downward trend in transport volume in 2023 (-5.9%); market share down by 0.1 percentage points to 6.1%; drivers include declining transport of grain, steel and coal

Modal split 2023¹

(based on transport volume)



Persistently high competitive pressure in rail freight transport: market conditions squeezing rail companies in multiple areas



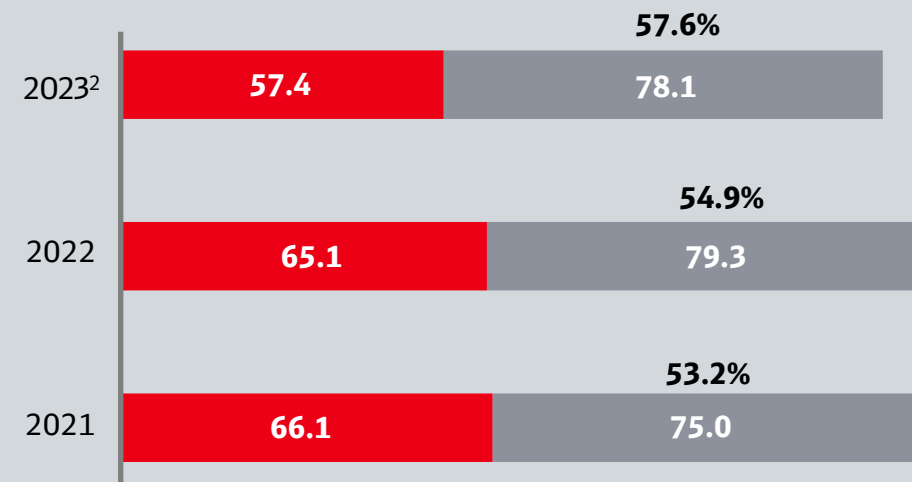
Freight transport

Rail freight transport in Germany in 2023/2024

- Non-DB rail companies saw a smaller fall in transport volume (-1.5%) in 2023 than DB Cargo (-11.7%); market share of competitors grew to 57.6% (2022: 54.9%)
- Criticism from industry associations:
 - Deteriorating environment for rail freight and further infrastructure restrictions (capacity and quality)
 - Cuts in train-path and facility prices support pose major challenges for price-sensitive and low-margin rail freight transport (train-path price support 2023: EUR 350 million, 2024: EUR 229 million; facility price support 2023: EUR 85 million, 2024: EUR 20 million)
 - In addition: a significant increase in train-path prices is looming in 2025 (increases in train-path prices for regional and local rail passenger services are limited by law; rail freight traffic and long-distance passenger transport are therefore disproportionately affected)
 - Positive effects expected from new support for single wagonload transport (funding from July 2024; funding volume: EUR 1.7 billion for 5 years)

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

Low economic growth and significantly declining transport demand in Europe



Freight transport 

European railways in 2023/2024

- Key economic data in Europe shows lower growth rates for 2023 compared with the previous year
 - Economic output (GDP): +0.6% (2022: +3.5%)
 - Industrial production: -1.8% (2022: +2.8%)
 - Trade in goods: -1.9% (2022: +5.4%)
- Positive trend expected in 2024 for economic growth (+0.9%) and trade in goods (+0.4%); industrial production expected to fall by another 1.8%
- European rail freight transport volume* 2023: -6.8%; expected to fall by a further 2.5% in 2024
*EU 27, Switzerland, Norway and United Kingdom
- Falling demand for rail transport due to weak economy, high inflation and costs (especially traction power)
- Fall in demand, especially in energy-intensive industries (chemicals, steel); weak trade between Europe and the rest of the world led to significantly lower container volumes in North Sea ports (Antwerp, Rotterdam, Hamburg) in 2023; result: sharp falls in volume in combined transport (CT)



European rail companies see big declines in transport volume



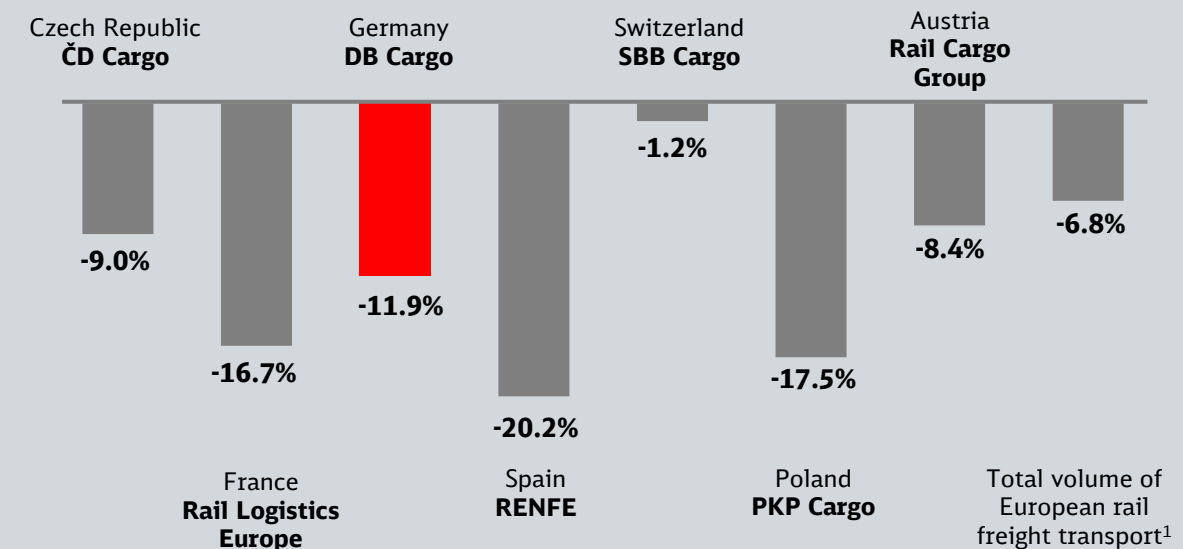
Freight transport

European railways in 2023/2024

- Negative trend in rail freight transport volume in Europe* began back in 2022 (-0.2%); larger decline in 2023 (-6.8%)
*EU 27, Switzerland, Norway and the United Kingdom
- The extent of the fall in transport volume varies greatly by rail company
 - Sharp declines at Spain's Renfe (-20.2%), Poland's PKP Cargo (-17.5%) and the French company Rail Logistics Europe (-16.7%; partly due to the company being forced by the EU to give up routes)
 - Significant losses for DB Cargo (-11.9%), Czech ČD Cargo (-9.0%) and Austrian Rail Cargo Group (-8.4%)
 - Slight decline at Switzerland's SBB Cargo (-1.2%)
- Market development runs counter to the European target of increasing rail freight transport by 50% by 2030 and 100% by 2050

Performance of selected freight operating companies in Europe 2023

(measured by transport volume, change year on year)



1 DB estimate

Sources: Eurostat, UIC, companies

The current trend calls for targeted priorities in the new legislative period



Freight transport 

European railways in 2023/2024

Measures called for by the Association of German Transport Companies (VDV) to increase rail freight transport:

- Make shifting freight transport to rail the maxim of European transport policy
- Infrastructure upgrades to enable modal shift
- Targeted financial support for combined transport and single wagonload transport
- Introduce technical innovations (e.g. digital automatic coupling) throughout Europe and make them mandatory in all EU Member States
- Re-examine initiatives that will only boost road haulage

European industry associations fear modal shift back to road¹

- Risk of traffic shifting back to the roads if dimensions and weights are changed in favour of trucks
- Study: Up to 21% of rail freight traffic could move to the roads; this would mean an additional 10.5 million truck journeys, 6.6 million tonnes of CO₂ emissions and around EUR 2.2 billion in external costs every year



¹ Including Community of European Railway and Infrastructure Companies (CER), European Rail Freight Association (ERFA)

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With their higher demand for train-paths, non-DB rail companies increased their share of operating performance to 39.2% in 2023



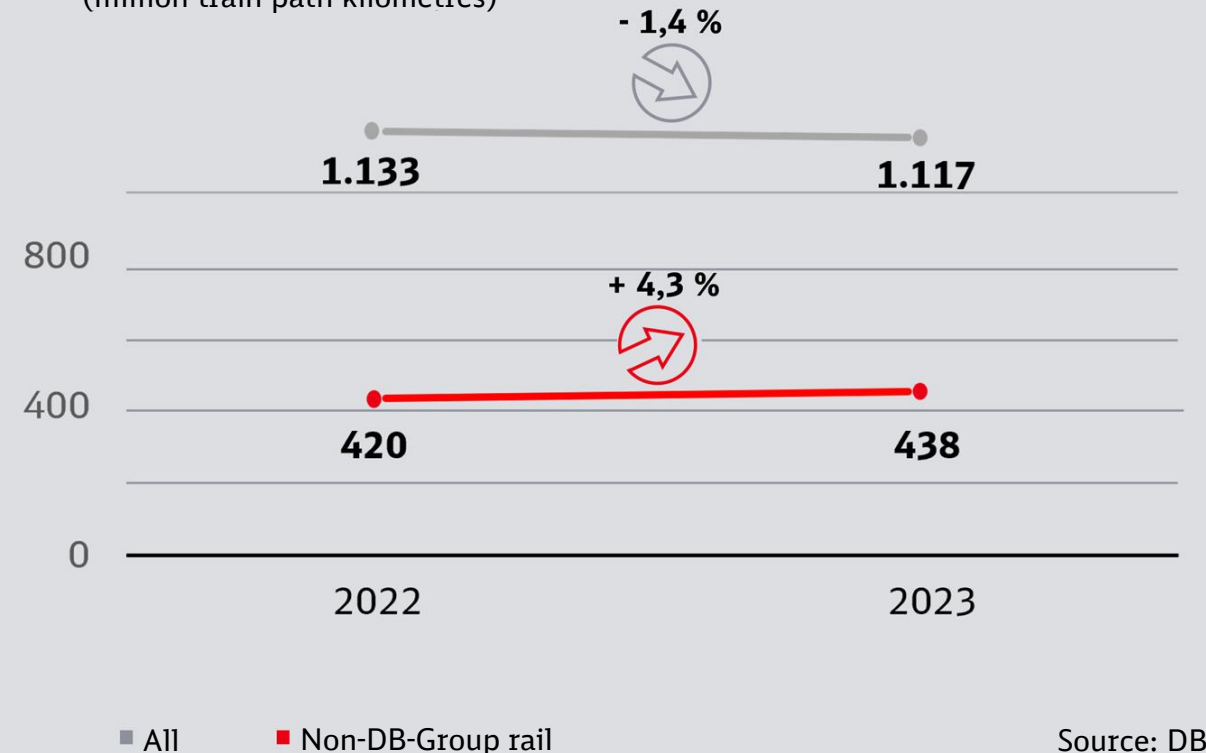
Infrastructure

Use of the DB rail network in 2023/2024

- Slight decline in total operating performance on the DB network to an overall figure of 1,117 million train-path kilometres (million t-p km) in 2023
- Demand for train paths was influenced by weaker demand in rail freight transport due to the economic situation and by one-off effects (strikes, severe weather, construction-related restrictions)
- Non-DB rail companies increased their operating performance by 4.3% to around 438 million t-p km; share of total operating performance climbed to 39.2% (2022: 37.1%)
- Operating performance of DB Group rail companies fell by 4.7% to around 680 million t-p km
- H1 2024:
 - Operating performance on DB's rail network down 1.8% year on year
 - Operating performance of non-DB rail companies up 2.7%; share of total operating performance on the DB network reached 40.8%

Operating performance on the DB network

(million train-path kilometres)



Germany needs efficient infrastructure



Infrastructure

An efficient rail system starts with infrastructure (1/3)

- Since the 1994 Rail Reform, public funding for the rail network, service facilities and stations has not sufficed to maintain performance and quality amid growing traffic volumes (since 1994 operating performance has increased by 28% on a DB network that has shrunk by 17% in terms of the length of line operated)
- Current condition of infrastructure impairs quality and stability of rail operations, limits growth and modal shift, and increasingly jeopardises the achievement of climate and transport policy goals
- The German Federal Government and DB are taking action with a full overhaul and modernisation of existing infrastructure as well as targeted expansion and new construction
 - January 2024: Launch of the new common-good oriented rail infrastructure company DB InfraGO AG, accompanied by the largest renovation and modernisation programme for the rail network and stations since the Rail Reform of 1994
 - July 2024: Revised Federal Rail Infrastructure Extension Act enters into force with new funding options for the Federal Government (e.g. for maintenance expenses)
 - 2024 – 2027: Federal Government provides an additional EUR 27 billion for rail infrastructure; this does not yet fully cover the identified EUR 45 billion needed by 2027



Largest infrastructure programme in DB's history launched



Infrastructure

An efficient rail system starts with infrastructure (2/3)

- With the installation of DB InfraGO AG, the operation, funding and management of the DB infrastructure has changed fundamentally:
 - DB InfraGO AG combines the former DB Station&Service AG and DB Netz AG under one roof
 - The Federal Government formulates clear objectives for the infrastructure that are oriented towards the common good, and ensures funding
 - DB InfraGO AG implements these targets efficiently and transparently, based on the available funding as a commercial enterprise
- Core task of DB InfraGO AG: implement key measures for improved capacity and quality of the rail network and stations
- Strong focus on improving the condition of infrastructure



Key measures for improved capacity and quality of the rail network and stations



Infrastructure

An efficient rail system starts with infrastructure (3/3)

- **High-performance network:** Overhaul of more than 4,000 km of highly congested lines organised into 41 corridors by DB InfraGO AG; aim: high-performance network covering around 9,200 km of line
- **Extended network:** Gradual modernisation of around 24,000 km of line to improve the condition of infrastructure more widely
- **Existing network:** More capacity and improved punctuality through small and medium-sized measures that are particularly effective and quickly noticeable (examples: track change facilities, switches, passing loops, additional signals, new platforms)
- **New construction and expansion:** Targeted expansion and new construction of infrastructure where the need for extra capacity is anticipated; additionally: further electrification of the rail network
- **Digitalisation:** More capacity through digitalisation of further routes (including fitting with ETCS)
- **Service facilities:** Increased capacity (especially sidings) for the preparation and post-processing of train runs by building new and expanding existing service facilities
- **Stations:** Capacity-increasing measures to accommodate growing passenger numbers and provide attractive facilities (e.g. modern passenger information, accessibility and expanded waiting areas)

General overhaul of corridors on the highly congested network

- This will involve the complete modernization of a corridor – from the extended platform to the superstructure to the interlocking technology
- Start: July 2024 with the Riedbahn (Mannheim–Frankfurt am Main line)

Development of stations of the future

- 2024: Modernisation of first stations begins, turning them into "stations of the future" (including 20 stations as part of the Riedbahn general overhaul)
- A future milestone is for a third of stations in Germany to be stations of the future – that adds up to 1,800 stations, serving over 50% of travellers across the country

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Shifting traffic to rail supports the necessary decarbonisation in Germany and Europe



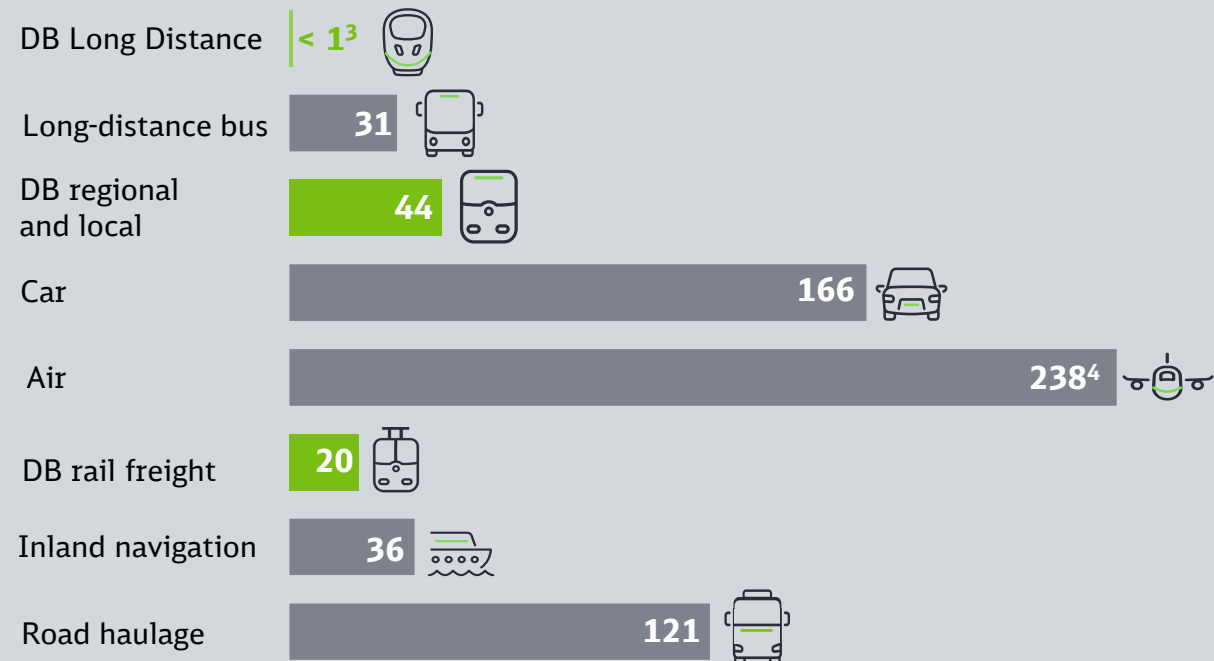
Climate protection

Rail's contribution to protecting the climate

- No other motorised transport today is as climate-friendly and space-efficient as the railway
- Only rail transport has been able to continuously reduce its CO₂ emissions in Germany since 1990
- Low-friction wheel-rail system will remain the most efficient form of energy use even in a largely electrified transport sector
- Emissions in the German transport sector in 2023 amounted to approximately 146 million tonnes of CO₂ equivalents (-1.2% compared with 2022)
 - Figure is significantly higher than the annual emissions of 134 million tonnes of CO₂ equivalents specified in the Federal Climate Protection Act
 - The main driver of the fall in emissions compared with 2022 was a decline in road haulage

Climate-friendly rail

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



Sources: German Federal Environment Agency, 2024 (TREMOT 6.51 [1/2024], year of reference: 2022); rail: DB AG (year of reference: 2023)

¹ CO₂e: total greenhouse gases (carbon dioxide, methane, 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 aims to be climate neutral by 2040



Climate protection

Rail's contribution to protecting the climate

Climate-neutral DB

- In DB's rail infrastructure and operations, four levers are to contribute to achieving this goal: increasing the share of green electricity, expanding electrification, phasing out diesel (alternative fuels/drive systems), decarbonising heating
- Next milestones for Germany (non-exhaustive list):
 - All power supplied to depots, office buildings and stations to be renewable starting from 2025
 - Increase the share of renewable energy in the DB traction current mix to 80% by 2030 (as of 2023: 68%)
 - Completely switch DB rail companies to renewable power by 2038 at the latest; DB Long Distance has been running on 100% renewable power since 2018
 - Further electrify the DB rail network: as of 2023, 62.3% of the overall network and 99% of the high-performance network was electrified
 - Increase the proportion of recycled materials by 2030 (rail steel to 45%, track ballast to 40%, concrete ties to 30%)

68%

2023

100%

2038

Share of renewable power in the DB traction current mix

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Transport performance data since 2019 at a glance



Passenger transport

Transport volume in Germany in billion passenger kilometres

	2019	2020	2021	2022	2023 ¹
Rail	102.0	58.8	57.6	95.2	105.2 (e)
Public road transport	71.2	44.5	44.4	57.9	61.7 (e)
Private motorised transport	917.4	798.7	835.9	862.6	878.6 (e)
Air travel (domestic in Germany)	10.1	2.6	2.1	4.1	4.9 (e)
Total market	1,100.8	904.6	940.1	1,019.7	1,050.4 (e)

1 Provisional data, estimated (e)

Sources: Destatis, DB

Transport performance data since 2019 at a glance



Freight transport

Transport volume in Germany in billion tonne kilometres	2019	2020	2021	2022¹	2023²
Rail	138.2	128.0	141.0	144.3	135.5 (e)
Road	498.7	487.5	506.1	503.1	485.4(e)
Inland navigation	50.9	46.3	48.2	44.1	41.5
Pipelines	17.6	16.7	15.7	17.7	17.3
Total market	705.5	678.5	710.5	709.3	679.7 (e)

1 Road and total market data for 2022 provisional

2 Rail, road and total market data for 2023 estimated (e)

Sources: Destatis, DB


Transport performance data since 2019 at a glance



Infrastructure

Operating performance in Germany in million train-path kilometres	2019	2020	2021	2022	2023
On the network	1,090	1,066	1,109	1,133	1,117
Of which non-DB-Group customers	368	385	414	420	438

Source: DB



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