

Press Release – Challengers achieve record market share but a gloomy picture for rail freight reliability and competitiveness

24 May 2026

The latest IRG-Rail (Independent Regulators Groups-Rail) [Market Monitoring Report](#) includes a record market share for challengers (58%) in 2024, mainly driven by the continuous growth of new entrants that almost equal domestic incumbents (41% vs 42%). This rising importance of challengers should not set aside an overall gloomy picture for rail freight that translates into decreasing reliability and negative traffic figure in 2024.

More than two decades after the opening of the rail freight market, challengers account for a large majority of the traffic with continuous growth observed year after year (see graph in second page). Challengers have been able to provide innovative ways to satisfy freight customers and develop new market segments while conventional single-wagon traffic was declining in most of the continent.

However, the report is also revealing that Europe's rail freight sector suffers from declining volumes, and persistent structural and operational constraints. In 2024, rail freight traffic decline by 3% in train-km and by 2% in tonne-km. Also concerning is the decline of international operations which experience a traffic reduction of 17% between 2022 and 2024.

Difficulties in terms of infrastructure restrictions, overall grim economic perspective and geopolitical uncertainties, persistence of cross-border obstacles, chaotic ERTMS deployment, and recently rising energy prices make a strong case in favour of a renewed effort to relaunch rail freight.

This new reality of the rail freight market should be better reflected in the design of EU and national rail policy. A renewed focus should be put on how to support these companies as a key engine of logistics, the Single Market and the decarbonisation of freight transport. As these numbers are a European average and still vary significantly from country to country, ensuring and facilitating access to the market should still be among the priorities of legislators and regulators.

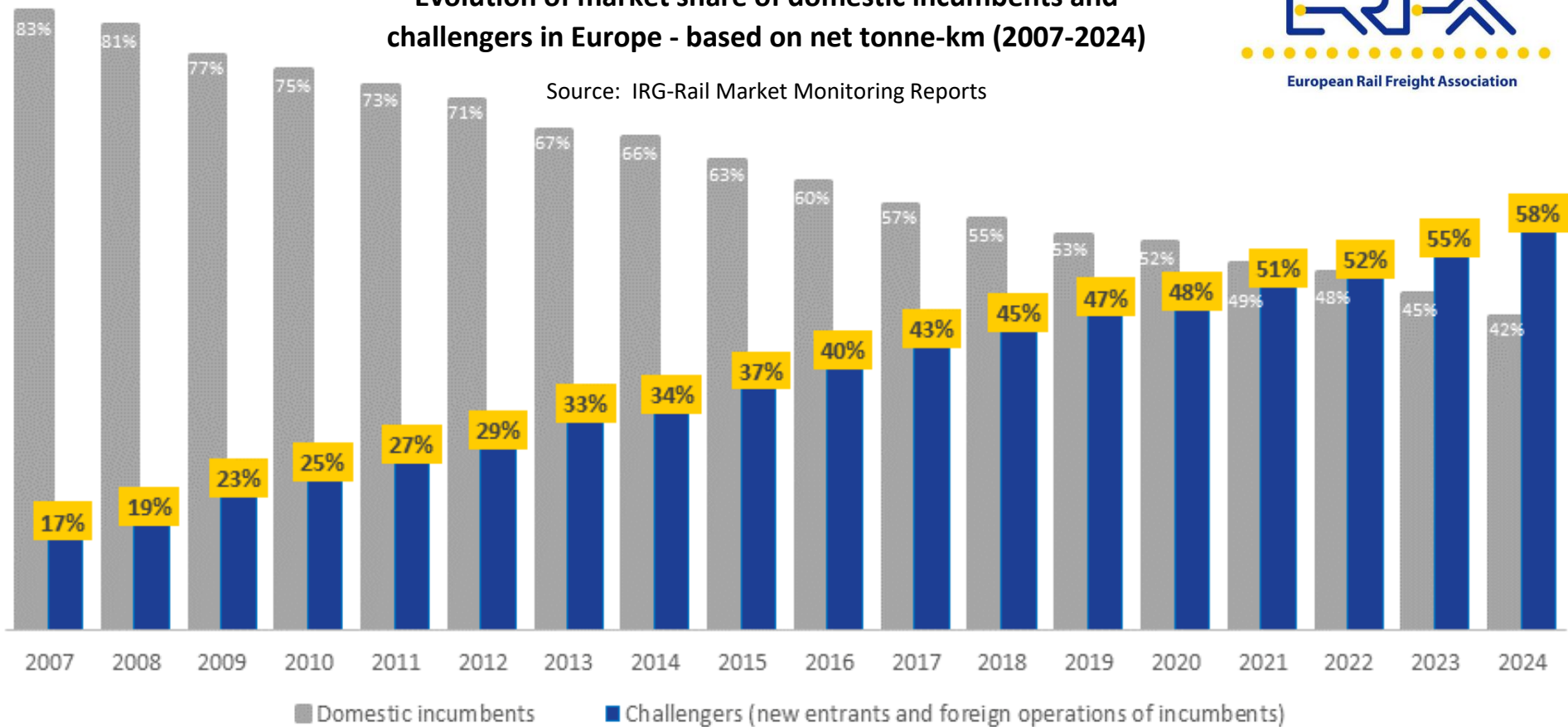
ERFA Secretary General, Maria Price, concluded, *“these IRG-Rail figures confirm that challengers are more than ever before central to the functioning and growth of rail freight market. However, the decline in overall traffic, and for cross-border operations are not signs of success. The upcoming [ERFA annual Event](#) (06 May) will focus on how to relaunch European rail freight and aim to identify practical solutions.”*

For more information, you can Contact:

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Rue Montoyer 39, B-1000 Brussels ; Reg nr. 0478.440.721. Belgian official gazette 26.11.2007

Evolution of market share of domestic incumbents and challengers in Europe - based on net tonne-km (2007-2024)

Source: IRG-Rail Market Monitoring Reports



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