

WHITEPAPER
RAILWAYS
IN BRAZIL

CESCON BARRIEU



THE LEGAL INTELLIGENCE CENTER

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OVERVIEW

JURISDICTION

Jurisdiction over railway transportation services that cross state or territorial boundaries lies with the Federal Government¹, which may operate them directly or indirectly, by delegating them to the private sector through authorization or concession mechanisms.

States, the Federal District, and municipalities are also responsible for granting railway transportation services within their respective transport systems.

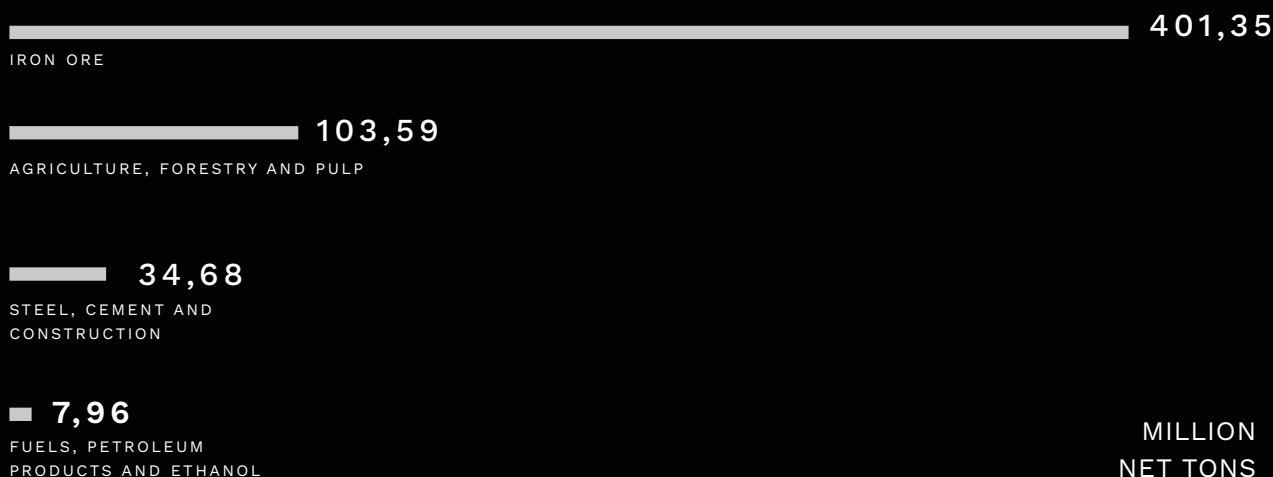
RAILWAY SECTOR IN NUMBERS

Rail freight transportation in 2025 totaled 555.48 million net tons, representing a 2.57% increase compared to 2024².

The operational railway network currently exceeds 21,000 km, with an additional 8,000 km classified as non-operational³.

MAIN COMMODITIES TRANSPORTED

The main commodities transported by rail in 2025 were⁴:



¹ Federal Constitution, Article. 21, XII, "d".

² Available in: <Link >. Access in 03/09/2026.

³ Available in: <Link >. Access in 03/10/2026.

⁴ Available in: <Link >. Access in 03/09/2026.

Data indicates that more than one-quarter of agribusiness, forestry and related products were transported via rail in 2025⁵.

PLANNED INVESTMENTS

Between 2023 and 2025, BRL 40 billion were invested in the railway sector.

For 2026, the Ministry of Transport forecasts 8 auctions expected to mobilize over BRL 600 billion in investments⁶.

BRL 40

BILLION BETWEEN 2023 AND 2025

Additionally, the Growth Acceleration Program (PAC) provides for BRL 28.1 billion in railway investments after 2026⁷.

MULTIMODAL LOGISTICS INTEGRATION

Brazil's infrastructure is increasingly oriented toward multimodal logistics integration, aiming to reduce costs, increase competitiveness, and lower emissions.

In 2024, Decree No. 12,022 established the Integrated Transport Planning framework. A key component is the National Logistics Plan 2050, drafted by the Ministry of Transport, which seeks to rebalance the transport matrix and promote efficiency across transport modes. One of its main guidelines is the development of integrated corridors connecting production areas to export hubs⁸.

As an example of this integration, over 52 million net tons of rail cargo were transported to the Port of Santos⁹.

⁵ Available in: <Link >. Access in 03/10/2026.

⁶ Available in: <Link>. Access in 13/03/2026.

⁷ Available in: <Link>. Access in 03/09/2026.

⁸ Available in: <Link >. Access in 03/13/2026.

⁹ Available in: <Link >. Access in 03/10/2026.

REGULATORY ASPECTS OF THE SECTOR

KEY REGULATIONS

The railway sector in Brazil is primarily regulated by **Federal Law No. 14,273/2021** and **Decree No. 11,245/2022**.

KEY STAKEHOLDERS



FEDERAL GOVERNMENT

Responsible for direct or indirect operation of railways.



STATES, FEDERAL DISTRICT AND MUNICIPALITIES

Grant railway services within their transport systems.



NATIONAL LAND TRANSPORT AGENCY (“ANTT”)

Grants railway operations to private parties through concessions or authorizations.



NATIONAL ASSOCIATION OF RAILWAY TRANSPORT OPERATORS (“ANTF”)

Self-regulatory entity responsible for technical and operational standards.

PRIVATE SECTOR PARTICIPATION MODELS

CONCESSION

Paid transfer of public railway infrastructure.

Formalized through a concession agreement following a public tender.

Maximum term: up to 35 years.

Public law regime.

AUTHORIZATION

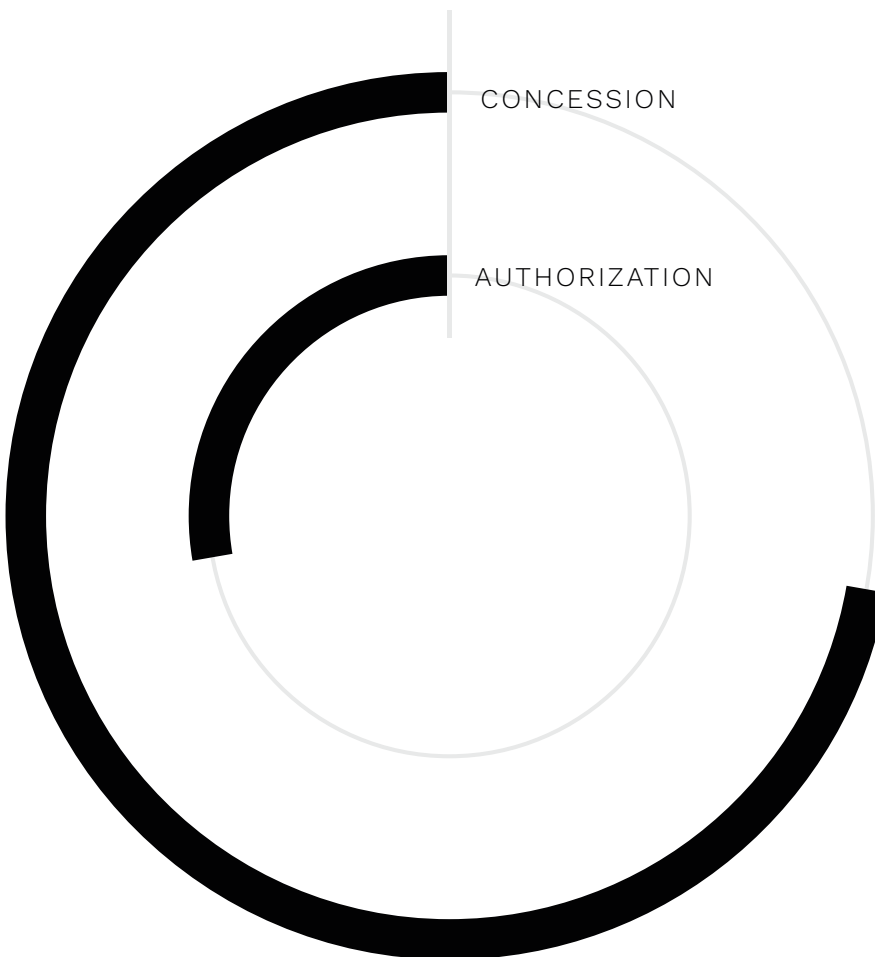
Granting of rights to operate privately-owned railways.

Formalized through an adhesion agreement.

Term: 25 to 99 years.

Private law regime.

CURRENT RAILWAY STRUCTURE



Source: [Concessions e Authorizations](#)

FEDERAL RAILWAY PROJECT PIPELINE

There are currently 10 railway projects underway¹⁰:

SOUTHEAST RAILWAY RING (EF-118)

Object: Connection between Santa Leopoldina (ES) and Nova Iguaçu (RJ), totaling 575 km.

Status: Under review by the Federal Court of Accounts (“TCU”).

Estimated CAPEX: BRL 4.2 billion.

EF-151 NORTH-SOUTH RAILWAY (AÇAILÂNDIA/MA – BARCARENA/PA)

Object: 477 km extension.

Status: Studies underway with contracted partner.

FERROVIA CENTRO-ATLÂNTICA S.A. (FCA)

Object: Early renewal of concession contract.

Status: Filed with TCU.

Estimated CAPEX: BRL 13.82 billion

FERROVIA TEREZA CRISTINA S.A. (FTC)

Object: Early renewal of concession (164 km).

Status: Public consultation open.

Estimated CAPEX: BRL 131.1 million

RUMO - MALHA OESTE

Object: Re-bidding of concession (1,973 km).

Status: Under TCU review.

Estimated CAPEX: BRL 18.95 billion

RUMO – MALHA SUL

Object: Federal railway concession (~7,223 km), divided into three corridors (Paraná-Santa Catarina, Rio Grande and Mercosul).

Status: Studies in progress.

EAST-WEST RAILWAY CORRIDOR

Object: Integration of FIOL (EF-334) and FICO (EF-354), totaling 1,666 km.

Status: Public consultation completed.

Estimated CAPEX: BRL 28.5 billion

PARANÁ WEST RAILWAY – FERROESTE (EF-277)

Object: (i) new railways (Maracaju/MS – Cascavel/PR and Guarapuava/PR - Paranaguá/PR);

(ii) upgrade of the current railway line (Cascavel/PR – Guarapuava/PR);

(iv) construction of a railway branch between Cascavel/PR and Foz do Iguaçu/PR totaling a 1.567 km extension.

Status: awaiting bid notice.

Estimated CAPEX: BRL 14.5 billion.

EF-170/MT/PA RAILWAY (FERROGRÃO)

Object: 933 km export corridor connecting Central-West grain production to Pará.

Status: Public consultation completed.

Estimated CAPEX: BRL 25.2 billion

FERROVIA TRANSNORDESTINA LOGÍSTICA S.A. (FTL)

Object: Early renewal (4,238 km).

Status: Under ANTT review

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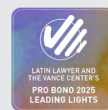
CESCON BARRIEU

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