

2021 Annual Report on the Railway Sector

The Madrid-Barcelona corridor registers 20% more passengers in the second quarter of 2022 compared to the same period in 2019

- The Madrid-Barcelona high-speed line has seen the best recovery from the Covid-19 crisis, registering 5.6 million passengers in 2021.
- The introduction of competition in this corridor has led to this evolution, with rail significantly improving its modal share compared to air travel.
- Passenger transport recorded 37% less traffic in 2021 than in 2019.
- Freight transport, which did not suffer as much as passenger transport in 2020, has already recovered pre-crisis traffic levels.

Madrid, 29 November 2022.- The CNMC publishes the 2021 Annual Report on the Railway Sector ([INF/DTSP/040/22](#)). The report offers an overview of the sector's activity in 2021 and presents a first analysis of the liberalisation of passenger transport.

Liberalisation of passenger transport

The Spanish passenger rail transport market has been open to competition since December 2020, although it was not until May 2021 that Ouigo began operating on the Madrid-Barcelona high-speed line, and a month later Renfe's Avlo.

The entry of the new operator has not meant a drop in passengers for Renfe, which reached a share of 80.9% in the second quarter of 2022.

On 25 November, Iryo became the third railway operator in Spain to compete with Renfe, its low-cost product, Avlo, and Ouigo.

The corridor that was exposed to competition has seen the best recovery from the crisis. It has registered 5.6 million passengers in 2021 and in the second quarter of 2022 demand exceeded pre-pandemic demand by 20%.

The modal share of air travel on the Madrid-Barcelona route was 24.2% in 2021, compared to 35% in previous years.

Passenger transport

2021 closed with a total of 324 million passengers transported. Even so, the figure is still 36.6% lower than in 2019.

The suburban service was the biggest contributor in terms of passengers (87.7% of all passengers) and the long-distance high-speed service in terms of passenger-kilometres (39.3% of the total).

Long-distance high-speed trains accounted for 13.49 million passengers in 2021, an increase of 77.4% compared to 2020, but still 40% below 2019. The most important corridor was Madrid-Barcelona with 5.6 million passengers and 42% of all passengers.

Suburban trains registered 284.1 million passengers, almost 20% more than in 2020, but still 36% less than before the pandemic.

Freight transport

Freight transport experienced a strong recovery in 2021, with 10,432 million net tonne-km transported (and 25.57 million net tonnes transported), 11.4% more than in 2020 and at similar levels to 2019. Renfe's freight transport market share was 56.6% in 2021, with its competitors gaining ground in recent years.

[\(INF/DTSP/040/22\)](#)