

Commercial high speed rail broke its record in the third quarter with 8.4 million passengers thanks to the competition along the Levante and Andalusia corridors

- The number of travellers grew by 32% in the third quarter of the year, compared to the same period in 2022.
- The Madrid-Alicante corridor, where there has been competition since April of this year, transported almost one million passengers (+66%).
- Iryo had a 32% share of passengers on the Madrid-Seville route and 27% on the Madrid-Málaga/Córdoba route.
- Freight traffic has dropped off and is at lows only exceeded at the beginning of the pandemic.
- Passenger data is now published in open and reusable format via [CNMCData](#).

Madrid, December 18, 2023.- Commercial high-speed rail services in Spain once again hit record passenger numbers with more than 8.4 million people travelling¹ between June and September (+32% year-on-year), according to the Third Quarter Rail Passenger Transport Report 2023 (INF/DTSP/111/23).

The highest year-on-year growth was recorded along the Madrid-Valencia corridor (+96%, 1.4 million passengers), followed by the Madrid-Alicante corridor (+66%, almost one million) and the Andalusia corridors (+30%). For the first time throughout the quarter, there was competition on the Madrid-Alicante corridor, specifically between three operators and four commercial brands: Ave, Avlo, Ouigo and Iryo.

Only the Madrid-Barcelona corridor (-10%) and the Madrid-Seville corridor (-8%) saw reduced passenger numbers with respect to the previous quarter, due to the summer period, but the decreases were lower than in other third quarters.

Productivity indicators (occupancy and utilisation) fell in year-on-year terms on all corridors due to the strong growth in the quantity of seats offered.

High-speed market shares

¹ Long-Distance High-Speed Services

Renfe Viajeros remained the leading operator on all corridors, with a share of between 50% and 74% of passengers. Iryo gained more than 7 percentage points of share on the corridors to Andalusia and claimed 32% on the Madrid-Seville route and 26% on the Madrid-Málaga/Granada line.

Cheaper tickets

Iryo's entry into the Madrid-Seville and Madrid-Malaga routes led to a sharp drop in prices, compared to the previous quarter, of 24% and 19% respectively, by at least 10 euros for all products, according to price data collected by the CNMC.² On the Madrid-Barcelona route, new entrants and Renfe's Avlo showed average prices of around 40 euros, on the Madrid-Valencia route around 22 euros, and on the Madrid-Alicante route between 25 and 30 euros.

On routes where competitors entered the market earlier, the, revenue per passenger.km —a measure that allows journeys of different lengths to be compared— was lower: Madrid-Barcelona and Madrid-Valencia were 6.61 and 7.3 euro cents respectively, whereas before liberalisation they were between 11 and 13 euro cents. The Madrid-Alicante fares were below 8 euro cents, around 30% less after the entry of competition.

Other passenger services

The discounts and free travel introduced by Royal Decree-Law 14/2022 meant that services under public service obligations, provided exclusively by Renfe Viajeros, saw considerable increases in passenger numbers: around 76% on Conventional Medium Distance, 40% on High Speed Medium Distance and 21% on Commuter lines, compared to the same quarter last year. In contrast, the number of conventional long-distance passengers fell by around 6%.

Freight transport

Freight transport activity worsened with respect to the previous quarter: 7.6% in net tonnes and 10.2% in net t.km. Year-on-year changes were also negative, with third quarter lows only exceeded by those of the second quarter of 2020, in the

² Prices posted on the operators' websites, every day in the third quarter of 2023, for travel from the following day, every day, until 40 days later, i.e., those posted in the third quarter of 2023 include ticket prices for travel until the beginning of November.

midst of the pandemic, according to quarterly data from the Rail Freight Report ([0INF/DTSP/111/231](#)).

The main operators were less active than in the previous quarter. Renfe Mercancías' market share (in tonne-km) was 45%, Captrain's 18%, and Continental's 15%. Compared to the same quarter of 2022, Medway's progress was notable.

Publication of data in CNMCData

For the first time, passenger data has been published in an open and reusable format through a [data portal \(CNMCData\)](#).

Related content:

- ([INF/DTSP/111/23](#)): Report on passenger rail transport (3Q-2023).
- ([INF/DTSP/111/23](#)): Report on rail freight transport (3Q-2023).
- [Press release](#) (2/10/2023): Spanish high-speed rail beat its all-time passenger record in the second quarter, boosted by competition between companies
- [Press release](#) (26/05/2023): The Madrid-Valencia corridor doubled the number of passengers in the first quarter of the year and hit one million users
- [Press release](#) (22/03/2023): The entry of Ouigo and Iryo onto the Madrid-Valencia corridor doubled the number of passengers in the last quarter of 2022
- [Press release](#) (30/12/2022): The Madrid-Barcelona high-speed corridor recorded 43% more passengers in the third quarter than in the same period in 2019
- [CNMC Data](#)