

RAIL TRANSPORT STATISTICS - Q3 2022

The Madrid-Barcelona high-speed corridor recorded 43% more passengers in the third quarter than in the same period of 2019

- Renfe's market share fell to 57%, while Ouigo's reached 29% and AVLO's remained stable at 14%.
- Avant and conventional middle-distance services recovered their pre-pandemic occupancy levels, boosted by ticket discounts.
- Freight transport fell during the quarter, with 8.6% fewer tonnes transported.

Madrid, December 30, 2022.- Most of the high-speed corridors exceeded pre-pandemic occupancy levels at the end of the third quarter of 2022, according to the latest quarterly activity data published by the CNMC.

The Madrid-Barcelona line saw 43% more passengers than in the same period in 2019, and the Madrid-Valencia line had 11% more. In contrast, the Spanish capital's connection with Seville once again failed to reach pre-pandemic levels, with 11% fewer passengers.

High-speed market share

In the third quarter of 2022, Ouigo's market share reached 29% on the Madrid-Barcelona route (six points higher than in the previous quarter), driven by the two extra daily runs of its trains during the summer and the increased use of double trains. As for Renfe Viajeros services, the AVE's market share dropped to 57% and the AVLO (low-cost line) remained stable at 14%.

The 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. A month later, Renfe Viajeros launched its service (AVLO) along that same route.

In October 2022, Ouigo launched a Madrid-Valencia service. Iryo began operating along the Madrid-Barcelona corridor on 26 November and along the Madrid-Valencia corridor on 16 December.

Other passenger services

Commuter services fell between July and September, less than they usually do in the third quarter of each year. Commuter trains continue to account for the greatest volume of travellers, 83% of all rail passengers.

The free local and middle-distance tickets provided by Renfe Viajeros with public service obligations, and the 50% discount on AVANT season tickets had a positive effect on the results for the quarter, even though they only covered the last month of the period.

Commercial services, despite not benefiting from the discounts of Royal Decree-Law 14/2022, also recorded positive results. For instance, conventional long-distance trains had almost 12% more passengers than in the previous quarter, although they have not yet reached pre-pandemic levels. Long-distance high-speed trains had 1.6% more passengers, surpassing the figures from before the 2020 health crisis.

Freight transport

As is usually the case in the third quarter of each year, freight transport activity contracted, by 8.6% compared to the previous quarter, although revenues were only down by 2%. The loss of activity was basically seen in the full wagon mode, while intermodal wagon activity remained at similar levels to the previous quarter.

Renfe Mercancías continued to be the company with the most activity (with 52% of total tonne-km), followed by Captrain (17%), Continental (13%), and Transfesa (7%). Only Captrain transported more net tonnes than in the same quarter of 2021 (+10.1%).

Quarterly data publication

The National Markets and Competition Commission (CNMC) has published, for the first time, quarterly reports on the rail transport of passengers and freight. These reports deal with the performance of the two business sectors in the third quarter of 2022. To date, sectoral reports had been published on an annual basis, the last one [corresponding to the year 2021](#).

Related content:

- Press release: [The Madrid-Barcelona corridor registers 20% more passengers in the second quarter of 2022 compared to the same period in 2019](#)
- Quarterly report on passenger rail transport (3T2022).
- Quarterly report on freight rail transport (3Q2022).
- [Royal Decree-Law 14/2022](#).