

Spanish high-speed rail beat its all-time passenger record in the second quarter, boosted by competition between companies

- The corridors between Madrid and Andalusia registered two million passengers, 28 % more than in the same quarter of 2022.
- The Madrid-Alicante route, following the entry of Iryo and Ouigo, reached 750,000 passengers (+32.1 %).
- Travelling between Madrid and Barcelona and between Madrid and Valencia now costs 25 and 16 euros less, respectively, than before liberalisation.
- Freight traffic improved compared to the previous quarter.

Madrid, 2 October 2023.- Spanish high-speed rail¹ set an all-time record with a total of 8.32 million passengers (+33 % year-on-year) during the second quarter of the year in all corridors where two or more companies compete in prices and services (Renfe, Avlo, Ouigo and Iryo), according to the latest data from the CNMC ([INF/DTSP/111/23](#)).

Between April and June, one million passengers used the Madrid-Sevilla corridor (+ 30.3 % year-on-year) and the Madrid-Málaga/Granada corridor² (+25.8 % year-on-year), respectively. The Madrid-Alicante corridor exceeded 750,000 passengers (+32.1 % year-on-year)³, and the Madrid-Valencia corridor almost doubled the number of passengers in the same quarter of 2022 (+86 %), to 1.3 million passengers. Madrid-Barcelona recorded 3.6 million passengers (+36 % year-on-year).

Occupancy (passengers/seats offered) on the Madrid-Barcelona corridor was close to 95 % and exceeded 85 % on the corridors to Andalusia. In the case of routes to Levante, it did not reach 70 %.

¹Avant services (high-speed medium distance) are excluded, as only Renfe operates these services, which transported 3.3 million passengers (+57% year-on-year).

²Iryo has been operating on both corridors since 31 March.

³In the Madrid-Alicante corridor, Ouigo has been operating since 27 April and Iryo since 2 June.

High-speed market shares

On the corridors to Andalusia, Iryo attracted 20 % of passengers in its first quarter of operation. Renfe continued to dominate on all corridors. On the Madrid-Barcelona corridor, Renfe had a 55 % share (Ave and Avlo products combined), compared with 24 % for Iryo and 21% for Ouigo. On the Madrid-Valencia corridor, Renfe had a 49 % share and on the Madrid-Alicante it reached a 76 % share.

High-Speed Prices

In the corridors where competition was introduced earlier and where there are already three competitors (Madrid-Barcelona and Madrid-Valencia), average prices are between 7 and 8 euro cents/passenger-km, whereas before liberalisation they were between 11 and 13 euro cents/passenger-km. This means that, with liberalisation, the average price of Madrid-Barcelona tickets has fallen by around 25 euros and that of Madrid-Valencia by around 16 euros.

According to the average prices collected by the CNMC⁴, between April and June, Iryo, Ouigo and Renfe's Avlo offered the cheapest tickets, with prices between 22 and 26 euros on the Madrid-Valencia service, between 22 and 32 euros on the Madrid-Alicante service and between 40 and 47 euros on the Madrid - Barcelona service. On the Madrid-Sevilla and Madrid-Malaga routes, with only two competitors, the lowest average prices are over 55 euros.

Other passenger services

Medium-distance, with free tickets (conventional) or a 50 % discount (high-speed) for frequent travellers, continued to attract new demand. Cercanías (commuter trains) passengers, on the other hand, remained stable since the last quarter of 2022 at levels similar to those of 2019.

Conventional long-distance passengers stabilised at slightly lower levels than in pre-pandemic years.

⁴Prices collected daily on the operators' *websites* for journeys from the following day, every day, until 40 days later, i.e. those shown in 23Q2 include ticket prices for journeys up to the beginning of August.

Freight transport

Freight transport activity improved compared to the previous quarter, but was worse than in the same quarter of 2022, with the indicators for net tonnes transported and net t-km decreasing by around 12-13 %.

Renfe Mercancías' market share (in tonnes-km) was 46 %, after losing 4 pp this quarter. Captrain and Continental registered shares of 19 % and 15 %, respectively.

The CNMC has published for the first time freight data in an open and reusable format through its [data portal](#).

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- [Press release](#) (26/05/2023): The Madrid-Valencia corridor doubled the number of passengers in the first quarter of the year and reached one million users.
- [Press release](#) (22/03/2023): The entry of Ouigo and Iryo into 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 of 2019.
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