https://uic.org/com/enews/article/traffic-trends-among-uic-member-companies-in-the-first-half-of-2021

Traffic trends among UIC member companies in the first half of 2021

Provisional results

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Monthly data for 2019, 2020 and 2021 provided by passenger and freight operators, all members of UIC, shows a general improvement in rail transport conditions, but with contrasting results depending on the activity, region and company. Despite the signs of recovery shown by some companies, passenger traffic has not yet returned to 2019 levels (Figure 1) while for freight, Asia is recording higher traffic than during the pre-crisis period (Figure 2), boosted by China Railways and Indian Railways.

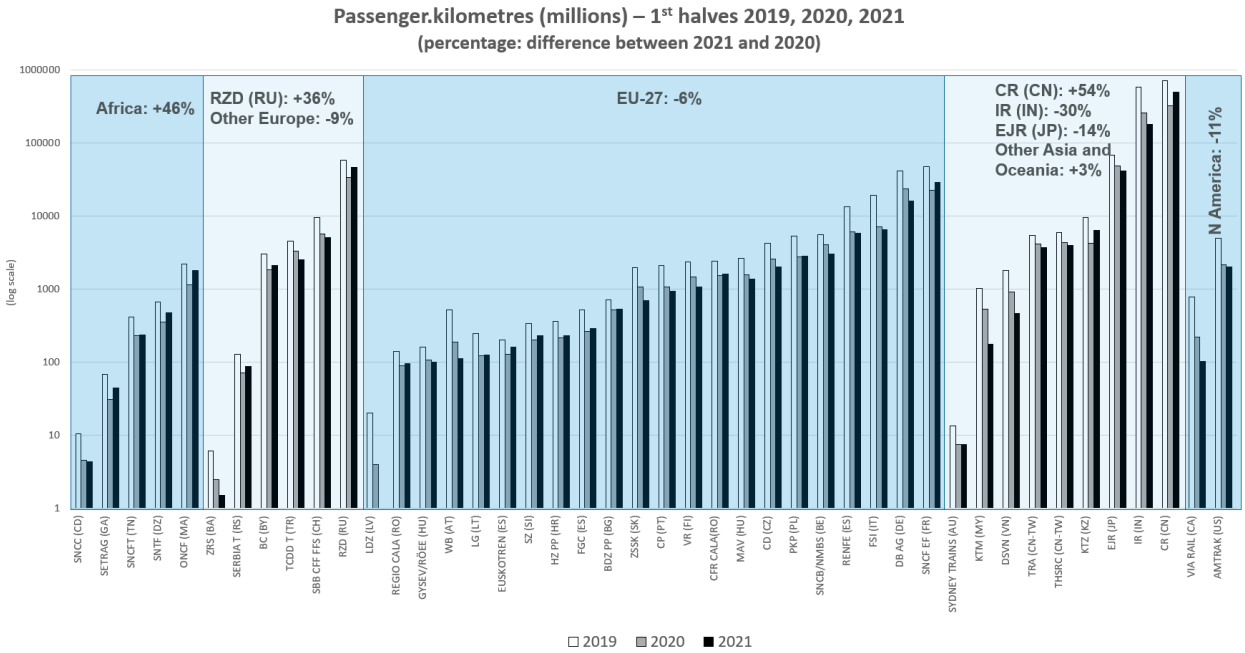

Figure 1. Passenger-kilometres (millions) for the first halves of 2019 (white bar), 2020 (grey bar) and 2021 (black bar). The y axis is a logarithmic scale. Railway companies are grouped by region, with values in percentages showing the average change between 2020 and 2021. Please note that not all railways took part in the survey. The overview of the railway market presented here is thus a partial one.

Rail passenger traffic (passenger-kilometres, Figure 3) has shown a slow recovery since the end of 2020, with phases of growth and slowdown. Traffic increased for the majority of companies from May 2020 but

decreased again from October 2020 to March 2021 and increased again during the second quarter of 2021, except in the case of Indian Railways, which bucked this trend.

Focusing on the first half of 2021, 19 companies (out of 44) showed a recovery in traffic of between +1 and +60% compared to 2020, examples being CR (China, +54%), RZD (Russia, +36%), ONCF (Morocco, +59%) and SNCF (France, +28%). Unfortunately, for most passenger operators (i.e. 25 out of 44), traffic was lower than during the first half of 2020, especially for East Japan Railways at -14%, companies in North America at -11% on average, the EU-27 at -6%, and -9% for other companies based in Europe. However, it should be noted that recovery begins from the second quarter of 2021 in most such cases (see Figure 3).

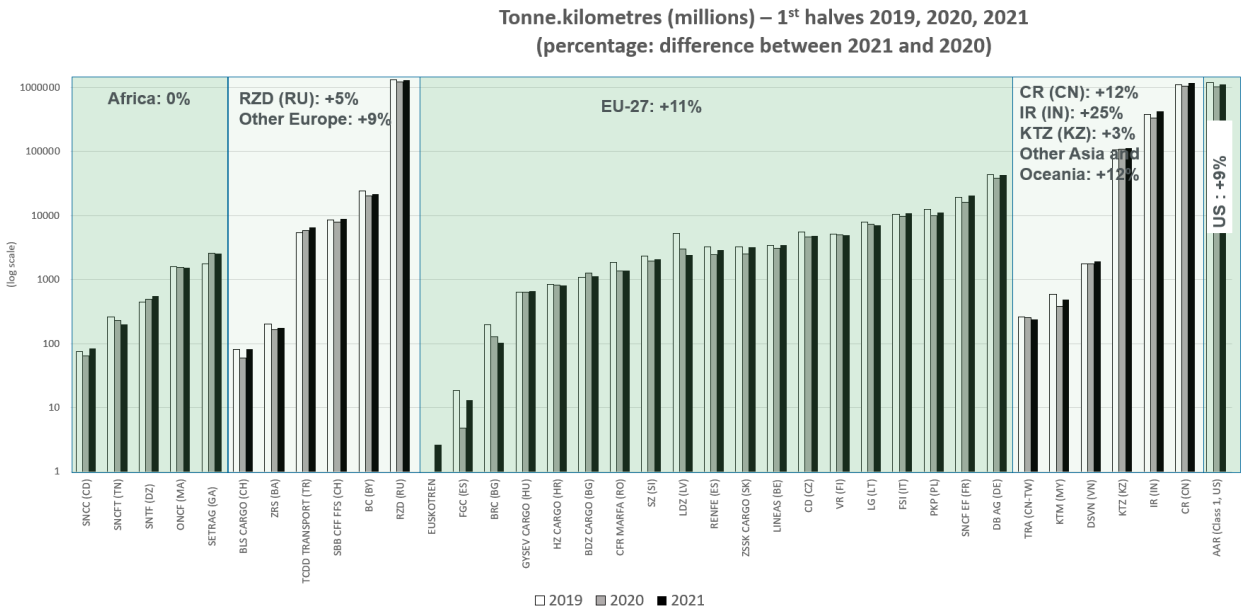

Figure 2. As with Figure 1 but for freight traffic, i.e. tkm in millions. The y axis is a logarithmic scale. Again, please note that some European railways did not take part in the survey. The overview of the European railway market presented here is thus a partial one. AAR data relates only to traffic carried by Class 1 companies in the United States.

Transport of goods by rail (Figure 2) shows a more significant recovery, with almost all companies showing better results in the first half of 2021 in comparison with 2020. This is the case for the Class 1 companies in the US at +9% and also for RZD (Russia, +5%), companies based in the EU-27, at +11% on average, and +9% for companies based in other countries in Europe. Freight traffic generally returned to pre-crisis levels for these companies during the second quarter of 2021 (Figure 3).

It is noted that some companies, such as SNCC (Democratic Republic of Congo), SNTF (Algeria), SETRAG (Gabon), TCDD (Turkey), companies based in Switzerland (i.e. SBB and BLS), FSI (Italy), SNCF (France), DSVN (Vietnam), KTZ (Kazakhstan), IR (India) and CR (China), recorded even higher freight traffic than during the first half of 2019.

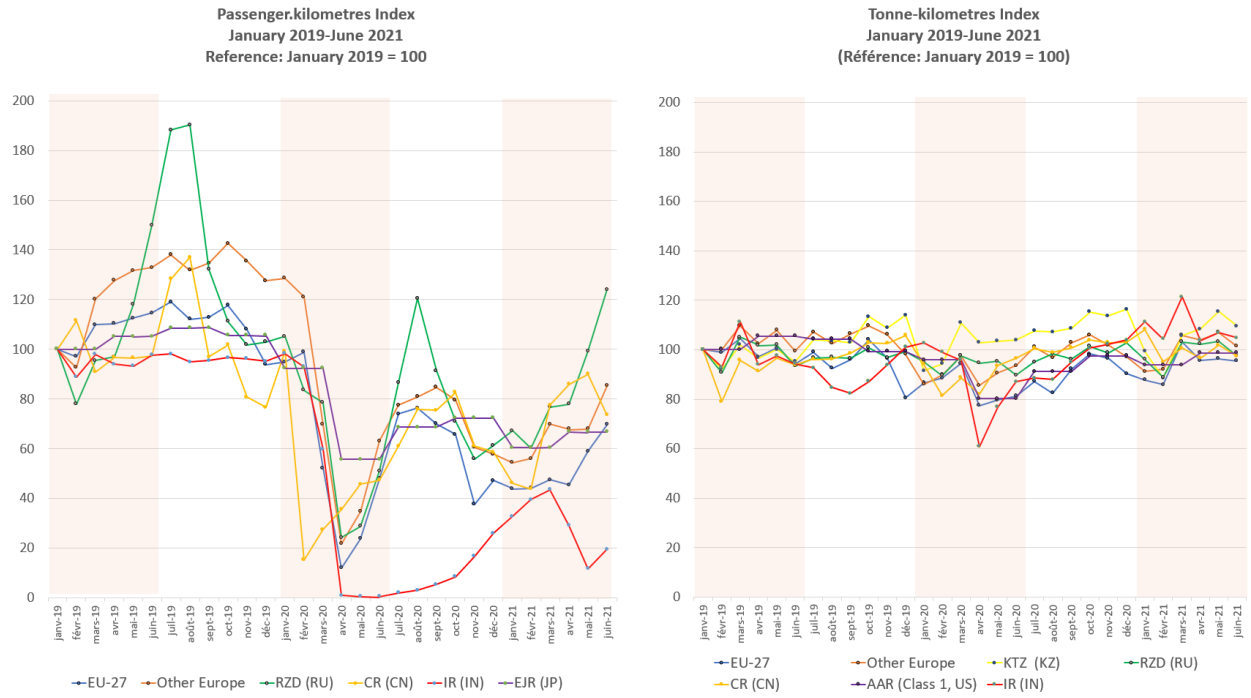

Figure 3. The left-hand graph shows the monthly passenger traffic index for the period from January 2019 to June 2021. The reference for the index is January 2019, equal to 100. Aggregates of UIC railway members for which data is available are represented by region: "EU-27" and "Other Europe", plus Russian Railways (RZD), China Railways (CR), Indian Railways (IR) and East Japan Railways (EJR). The list of railways included in the "EU-27" and "Other Europe" aggregates is shown in Figure 1. The right-hand graph shows the same data but for freight traffic. Aggregates of UIC railway members for which data is available are represented by region: "EU-27" and "Other Europe" (see Figure 2 for the list of railways), plus Russian Railways (RZD), China Railways (CR), Indian Railways (IR), Kazakhstan Railways (KTZ) and Class 1 companies from the Association of American Railroads in the US. EJR and AAR data was originally provided by quarter and has been adjusted monthly in the left- and right-hand graphs, respectively. Data from Indian Railways has been calculated using monthly passengers/tonnes carried multiplied by the mean distance covered by one passenger/tonne.

To conclude, the Covid-19 pandemic has had less impact on rail freight transport than on passenger transport; therefore, recovery has been more rapid in the freight sector. However, no company in the passenger transport sector has yet returned to pre-crisis levels.

Further information is provided in monthly and quarterly reports on passenger, freight and train traffic, available online via the UIC web application for UIC statistics correspondents:

https://stats.uic.org/login.aspx

or on the Extranet:

https://extranet.uic.org/en/file/190513

Annual data is available from Railisa:

https://uic-stats.uic.org/select/

More information on revenue losses in the EU-27 is published by the Community of European Railway and Infrastructure Companies:

https://www.cer.be/media/press-releases/latest-cer-covid-impact-tracker-partial-improvement-over-summer-months

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