

Traffic Trends Among UIC Member Companies in 2024

Provisional Results

UIC Statistics Platform

<https://uic.org/com/enews/article/traffic-trends-among-uic-member-companies-in-2024>

1. Summary

In 2024, rail passenger volumes continued to grow across all UIC regions, resulting in an overall increase of 7% compared to 2023. For the first time since the pandemic, annual global passenger traffic returned to pre-COVID-19 levels seen in 2019.

On the other hand, rail freight transport in 2024 remained flat compared to 2023, with 0% overall growth. This global stagnation results of opposite trends with widespread declines in many companies, particularly in Europe, where freight volumes fell by an estimated -8% in the EU-27, partially offset by significant growth in India, where Indian Railways recorded a 6% increase.

Note: Not all railway companies participated in the survey. As such, the market overview presented here is partial and should be interpreted with this limitation in mind.

2. Passenger Traffic Trends

Global rail passenger traffic dropped sharply in 2020 due to the pandemic, by more than 50% (Figures 1 and 3). Recovery was gradual through 2021 and 2022, then accelerated markedly in 2023 and culminated in a full return to pre-crisis levels by 2024.

Asia continues to dominate the sector, with Indian Railways and China Railways together accounting for over 2.6 trillion passenger-kilometres in 2024. China Railways recovered more quickly, surpassing pre-COVID levels by 2023 and maintaining growth since. Indian Railways is still slightly below 2019 levels but shows a strong upward trend. In Europe, recovery since 2020 has also been robust, driven by major players such as SNCF (FR), DB (DE), FSI (IT), and RENFE (ES). Notably strong growth was also recorded by PKP (PL), MÁV (HU), and TCDD (TR). Passenger volumes remain comparatively low in Africa, but modest growth is evident, especially for SETRAG (GA) and ONCF (MA). In the Americas, passenger traffic continues to recover at a slower pace. However, Amtrak (US) has now exceeded its 2019 ridership levels.

3. Freight Traffic Trends

Since 2019, freight rail transport has shown diverging patterns across regions and operators (Figures 2 and 3).

Asia, led by China Railways, Indian Railways, and KTZ (KZ), maintains a dominant position, supported by sustained growth. Europe, by contrast, is facing widespread declines, with notable drops in 2023 and 2024 for operators such as PKP (PL), SNCF (FR), DB (DE), and LG (LT). Nonetheless, some companies, like FSI (IT), have managed to reverse this trend. In Africa, volumes remain modest but are gradually increasing, particularly for ONCF (MA). In the United States, according to AAR reported trend [1], rail freight volumes remain high but have stagnated since the 2020 downturn.

Overall, 2024 marks a plateau in global rail freight activity. From 2023 to 2024, China Railways saw a 1% decline, while KTZ (KZ) and AAR (US) reported stable volumes. Only Indian Railways stood out with +6% growth.

For more detailed information, please consult the 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>

Quarterly reports are also available on the extranet: <https://extranet.uic.org/en/file/287261>

The list of companies participating in monthly data collections and presented in the graphs can be found on extranet: <https://extranet.uic.org/en/file/288862>

Annual data is available from Railisa: <https://uic-stats.uic.org/select/>

References:

[1] <https://www.aar.org/rail-industry-overview/>

Acknowledgments:

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For more general information, please contact the UIC Statistics Unit at stat@uic.org.

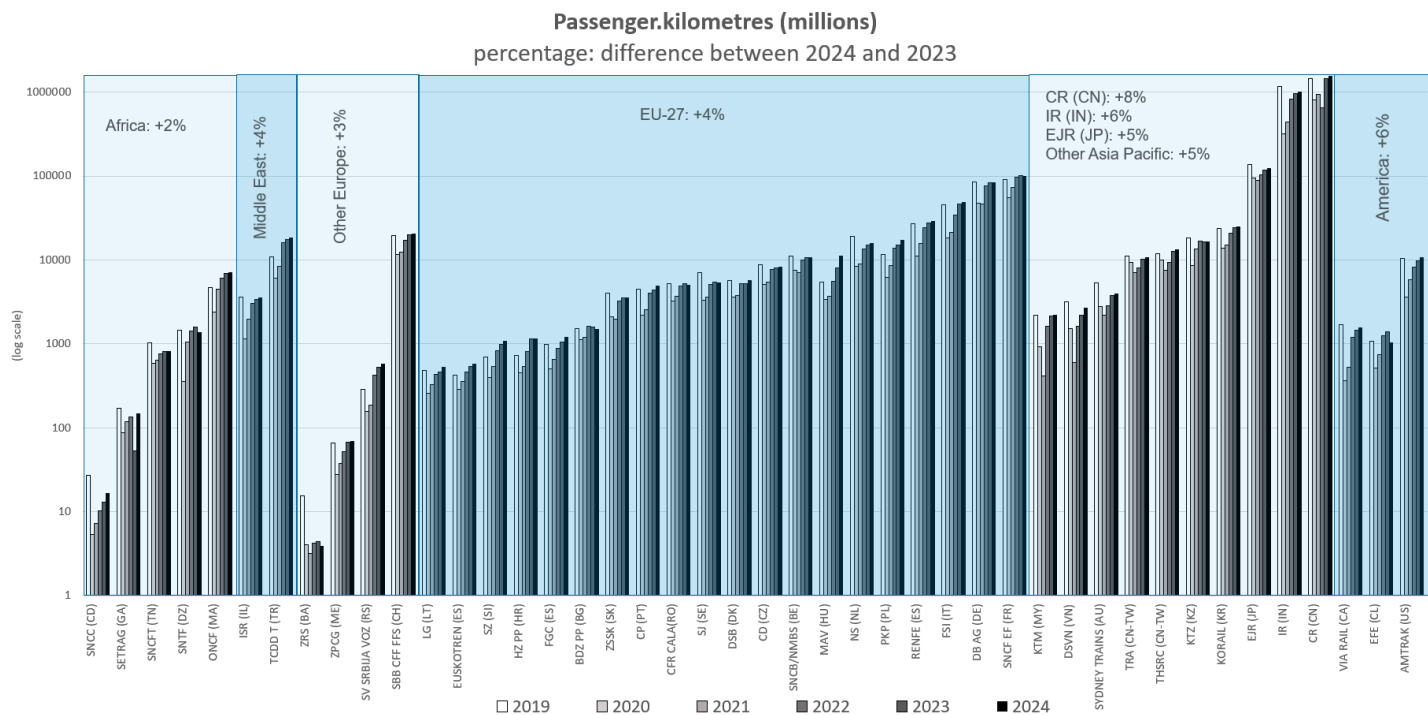


Figure 1: Passenger-kilometres (millions) for 2019 (white bar), 2020, 2021, 2022, 2023 (grey bars) and 2024 (black bar). The y axis is a logarithmic scale. Railway companies are grouped by region, with percentage values showing the average change between 2023 and 2024.

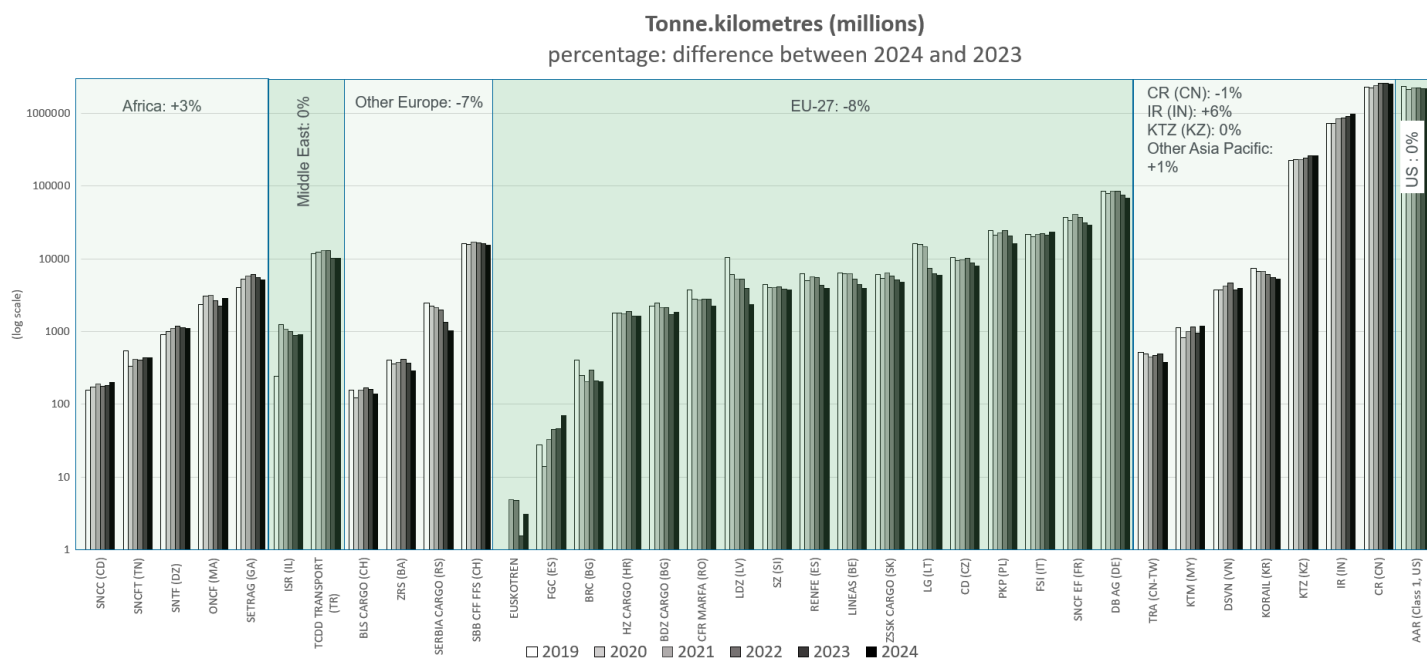


Figure 2: Freight traffic (tonne-kilometres in millions), with the key being the same as for Figure 2. The y axis is also a logarithmic scale. AAR data only relates to traffic carried by Class 1 companies in the United States.

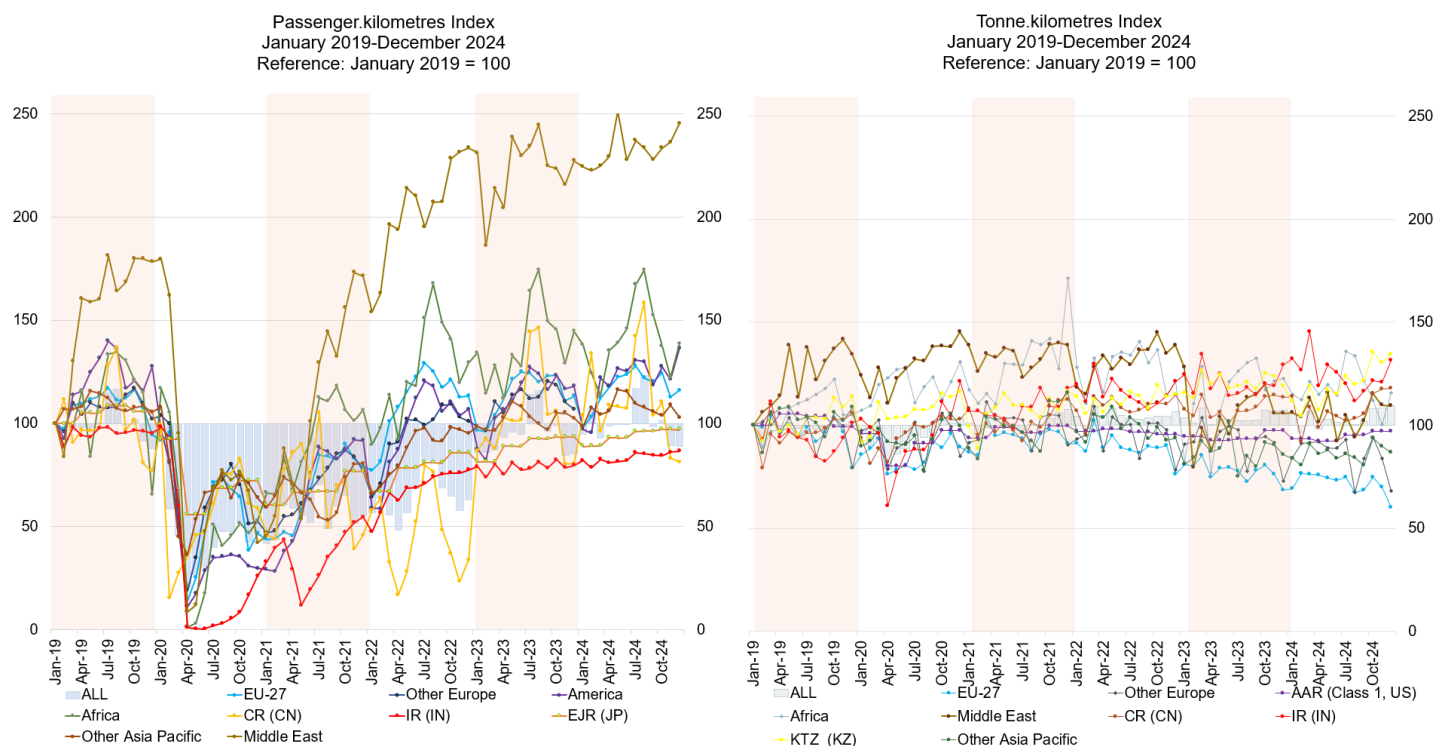


Figure 3: The left-hand graph shows the monthly passenger traffic index for the January 2019 to December 2024 period. The base reference (100) for the index is January 2019. Data available for some UIC railway members has been combined and is presented by region: “EU-27”, “Other Europe”, “Africa”, “America”, “Middle East”, “Other Asia & Oceania” plus China Railways (CR), Indian Railways (IR) and East Japan Railways (EJR). The list of railways included in the aggregates, e.g. “EU-27”, is shown in Figure 1. The right-hand graph shows the same data but for freight traffic. The aggregates of UIC railway members, for which data is available, are represented by region: “EU-27”, “Other Europe”, “Africa” and “Other Asia and Oceania” (see Figure 2 for the list of railways), plus 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 therefore been adjusted to the month by month scale used in both graphs. Data from Indian Railways has been calculated using monthly passengers/tonnes carried, multiplied by the mean distance covered by one passenger/tonne.