Traffic trends among UIC member companies in 2022

Provisional results

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https://uic.org/com/enews/article/traffic-trends-among-uic-member-companies-in-2022

1. Summary

Much like the first half of 2022, traffic trends in the third and fourth quarters of 2022 varied considerably from region to region and between passenger and freight transport. Provisional data provided by several UIC members (rail operators) shows that the recovery in passenger traffic is continuing at a sustained pace, with several European companies even reporting traffic volumes equal to or exceeding pre-COVID levels. Nevertheless, for some rail operators based in Africa, Asia, and Oceania, the growth (measured in passenger-kilometres) has been slower or even negative, such as is the case for China, in comparison to 2021 (Figure 1).

Freight traffic trends for most companies based in Africa, Europe, and the United States remained more or less stable, although some saw a negative trend, compared to 2021, with the tonne-kilometres transported staying below 2019 levels. However, for many Asian freight operators, growth has been continuous and the volume of goods transported in 2022 was significantly higher than the figures recorded in previous years (Figure 2).

Note: Not all railways took part in the survey. The overview of the railway market presented here is therefore limited.

2. Passenger traffic trends

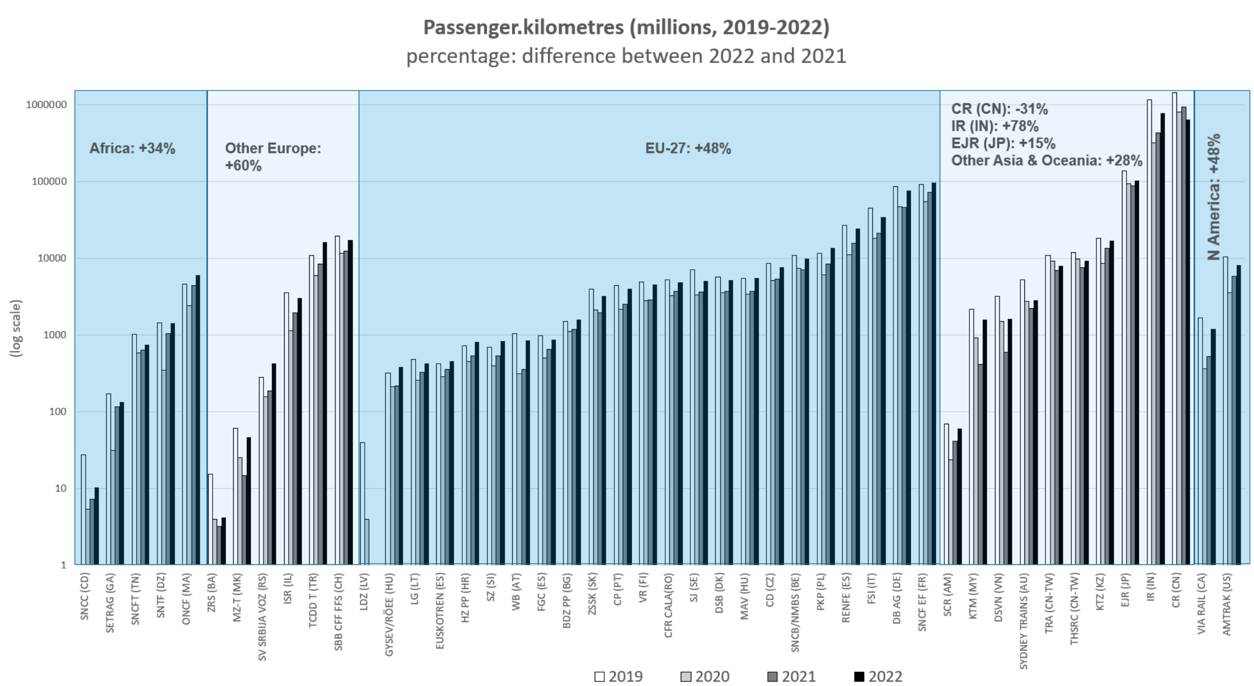

Figure 1: Passenger-kilometres (millions) for 2019 (white bar), 2020 (light grey bar), 2021 (dark grey bar) and 2022 (black bar). The y axis is a logarithmic scale. Railway companies are grouped by region, with percentage values showing the average change between 2021 and 2022.

After traffic volumes plunged due to the pandemic at the beginning of 2020, passenger traffic resumed at different rates depending on the region and company (Figure 3). Recovery has generally been gradual with intra-annual variations due to seasonal effects on demand. In general, growth has been positive and sustained, so that by 2022, a certain number of companies, in particular those operating in Europe, showed average results exceeding 2019 levels. For example, SNCF (France) showed +5% in 2022 when compared to 2019, PKP (Poland) had +19%, BDZ PP (Bulgaria) had an increase of 5%, SV SRBIJA VOZ (Serbia) saw +50% and TCDD (Turkey) had +47%. The Moroccan company ONCF also obtained good results with +30% in 2022 when compared to 2019.

For other companies recovery was slower, but the second half of 2022 showed encouraging signs with traffic more or less returning to 2019 levels. These included DB (Germany), FSI (Italy), RENFE (Spain), SNCB (Belgium), SBB (Switzerland), ISR (Israel) and also SNTF (Algeria) and the North American companies, VIA RAIL (Canada), and AMTRAK (US).

While everything remained on track for many operators in Asia and Oceania (e.g. for IR in India, EJR in Japan, KTM in Malaysia, Sydney Trains in Australia and for companies in Chinese Taipei), traffic was still significantly below 2019 levels. Additionally, issues persisted for CR in China throughout 2022. Since the large majority of global passenger traffic is operated by Asian companies, it is estimated that global passenger-kilometres in 2022 remained well below 2019 volumes (Figure 3, blue bars).

3. Freight traffic trends

Growth in freight traffic recorded by rail operators in Asia remained stable throughout 2022, for example with +7% tonne-kilometres for CR (China) when compared to 2021, +4% for IR (India), +5% for KTZ (Kazakhstan), +11% for DSVN (Vietnam), +16% for KTM (Malaysia) and +54% for SCR (Armenia). For African companies, results varied, with good performance for SETRAG (Gabon) and SNTF (Algeria) and for others, the volume of goods transported was stable or slightly below 2021 levels, a trend which was also mirrored by AAR (the Association of American Railroads - Class 1) in the United-States.

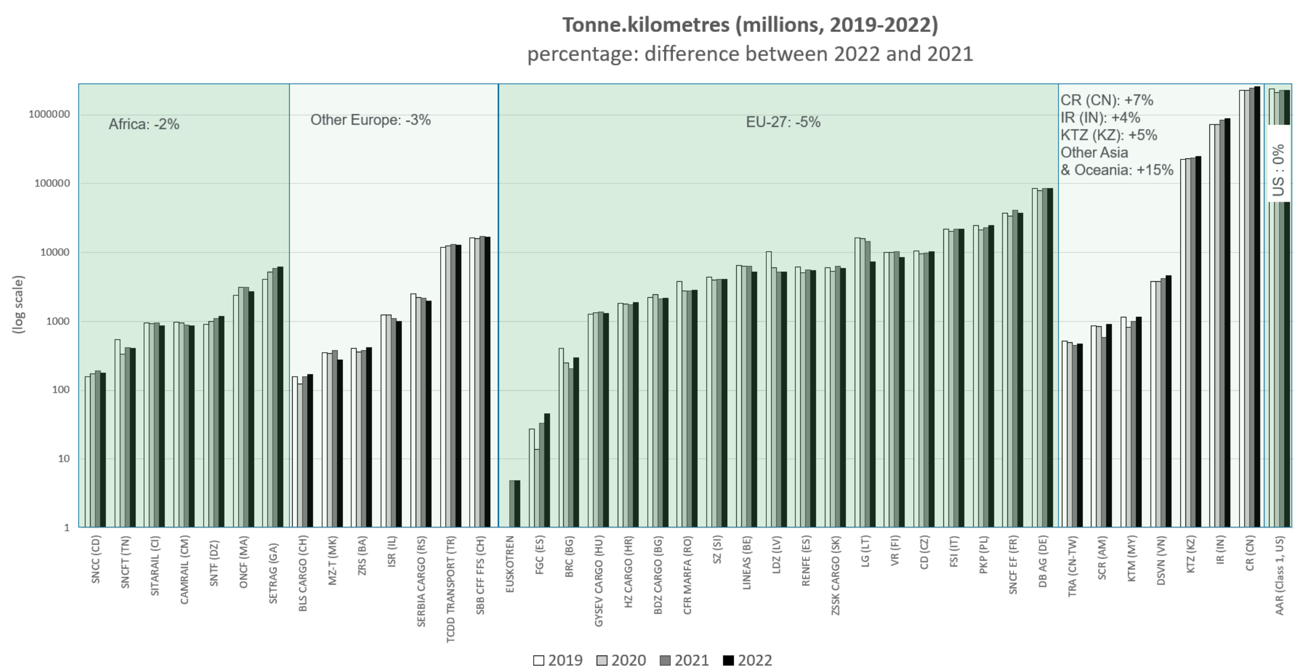

Figure 2: Freight traffic (tonne-kilometres in millions), with the key being the same as for Figure 1. The y axis is also a logarithmic scale. AAR data only relates to traffic carried by Class 1 companies in the United States.

Concerning the EU-27 region, after a pick-up in freight traffic in 2021, estimated to be approximately +7% for UIC members [1] or +8.7% according to Eurostat (for the entire EU-27) [2], the trend reverted in 2022 (especially during the second half of the year), with an estimated contraction of approximately 5% in tonne-kilometres transported. Baltic companies, and VR in Finland, mainly recorded a downward trend due to the Russian-Ukrainian war [3]. SNCF (France) also had a worse year in 2022 after a particularly good performance in 2021. The same, but less marked, pattern was observed for SBB (Switzerland) [4] and TCDD (Turkey). However, it is also worth noting that PKP (Poland), FSI (Italy), HZ Cargo (Croatia) and FGC (Spain) saw growth, with tonne-kilometres transported equalling or exceeded those of 2019.

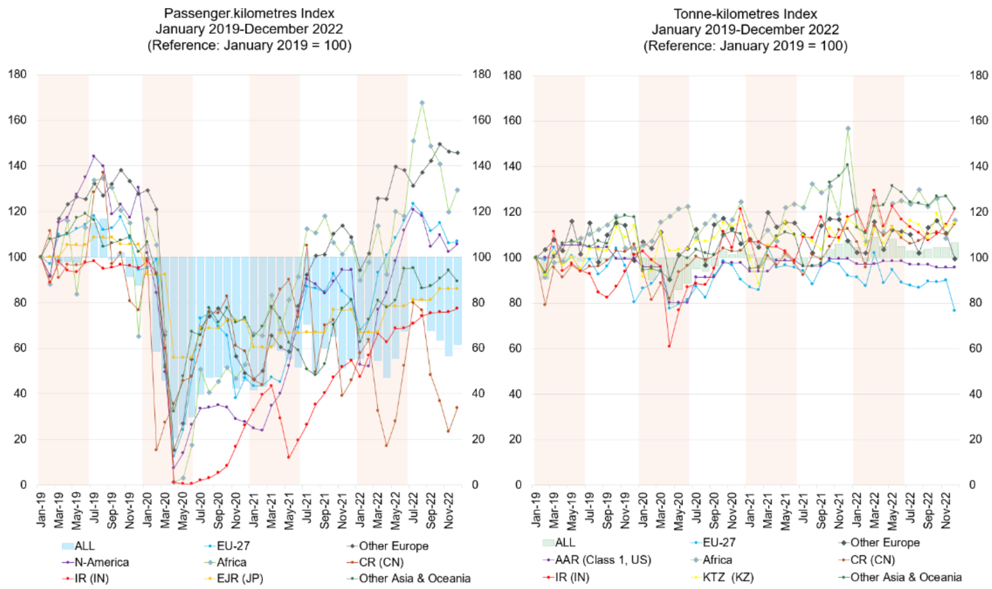

Figure 3: The left-hand graph shows the monthly passenger traffic index for the January 2019 to December 2022 period. The base reference (100) for the index is January 2019. Data available for some UIC railway members has been combined and is presented by region: “EU-27”, “Other Europe”, “Africa”, “N-America”, “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.

For more information on this data, please read 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

or on the Extranet:

https://extranet.uic.org/en/node/13343/

Annual data is available from Railisa:

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

References:

[1] https://uic.org/com/enews/article/traffic-trends-among-uic-member-companies-in-2021

[2]https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Railway_freight_transport_statistics#Rebound_for_EU_rail_transport_performance_in_2021

[3] https://bnn-news.com/railway-freight-volumes-going-to-baltic-states-will-continue-going-down-estonian-millionaire-predicts-243438

[4] https://company.sbb.ch/de/medien/publikationen/geschaefts-nachhaltigkeitsbericht.html

Acknowledgments:

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