Traffic trends among UIC member companies in the first half of 2023

Provisional results

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1. Summary

The first half of 2023 revealed a significant improvement in passenger traffic compared to 2022 (see Figures 1 and 3). However, more than half of the passenger operators represented in this study have not yet reached 2019 levels in terms of passenger-kilometres. This results in the overall volume remaining below 2019 by approximately -9%, despite some European or African passenger operators confirming a return to growth for their companies.

Conversely, for freight, the first half of 2023 indicated a slight slowdown in tonne-kilometres transported compared to 2022 (see Figures 2 and 3), but remained above 2019 levels (+5%) in terms of overall volume. This is attributed to the performance of Asian freight operators, which have maintained a robust traffic performance. Unfortunately, companies based in other regions (Europe, Africa and USA) experienced a significant decline in tonne-kilometres throughout 2022, accelerating during the first half of 2023.

NB Not all railways participated in the survey. Consequently, the overview of the railway market presented here is limited.
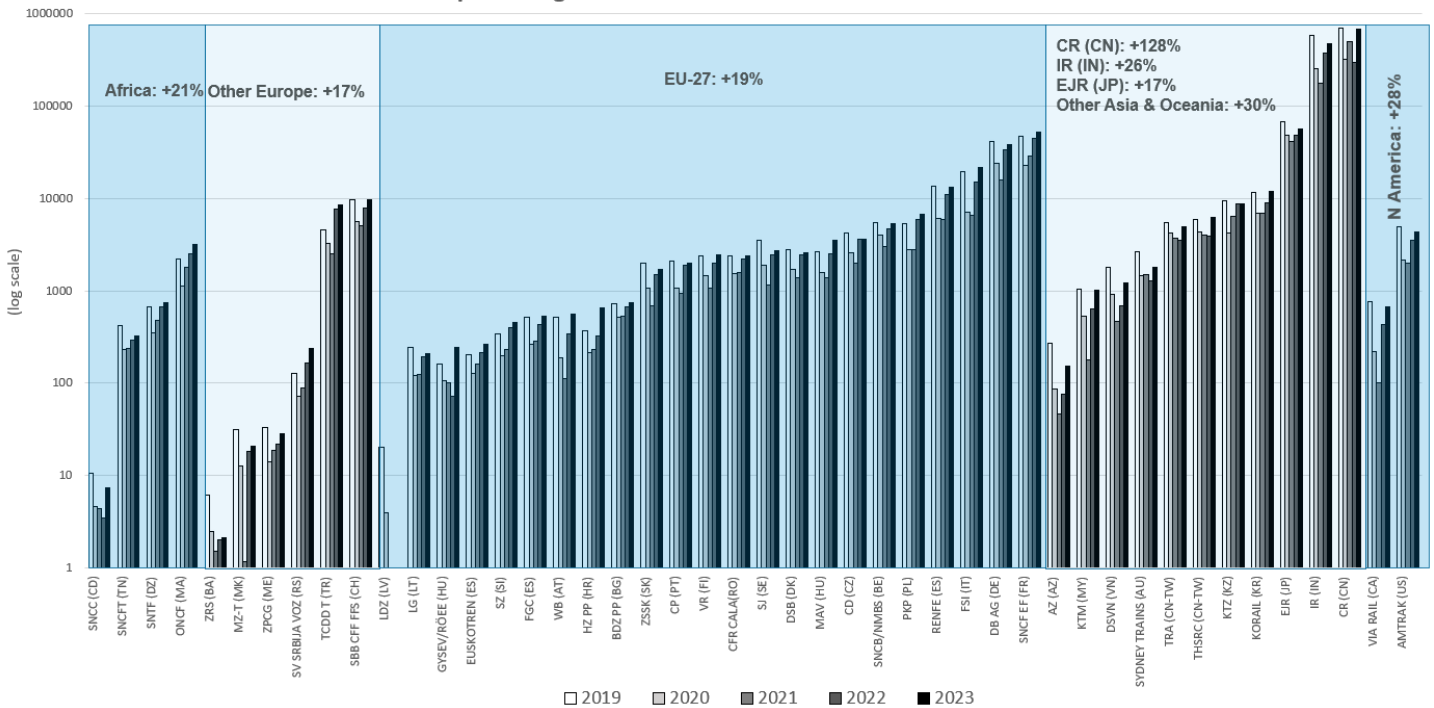
2. Passenger traffic trends

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

All the companies included in this study demonstrated an improvement in passenger transport during the first half of 2023 compared to 2022. Particularly noteworthy are Asian companies, for which 2022 remained challenging due to the COVID-19 pandemic. The recorded increases include +17% for East Japan Railways, +25% for Indian Railways, +31% for Korail (South Korea), and an impressive +128% for China Railways, which had the worst year of the COVID-19 epidemic period in terms of rail traffic in 2022.

North American companies also exhibited a robust recovery, with +25% for Amtrak (USA) and +53% for Via Rail (Canada).

African companies, such as SNCFT (Tunisia) with +11%, SNTF (Algeria) +12%, ONCF (Morocco) +23% and SNCC (Democratic Republic of the Congo) +110%, similarly showed positive trends, and some of them recorded better performances than in 2019.

European companies indicated significantly better performances in passenger traffic compared to 2022. For example, SBB-CFF-FFS (Switzerland) +22% [1], MAV (Hungary) +40%, FSI (Italy) +45%, Serbia Transport +45% and HZ-Passenger (Croatia) +101%.

When comparing 2023 trends with 2019, companies in the EU-27 region and in other European countries showed, on average, an increase in passenger traffic. Notably, TCDD Transport (Turkey) [2] and Serbia Transport showed robust growth with better results in 2023 than in 2019, with +86% each. In the EU-27 region, results included +13% for FSI (Italy) and for SNCF (France) [3], +27% for PKP (Poland) [4], +33% for SZ (Slovenia) and for MAV (Hungary), +52% for GYSEV ROEE (Hungary) and +78% for HZ Passenger (Croatia).

Despite this general improvement in passenger transport and the return to a robust growth for some companies, for the first half of 2023, the global passenger-kilometres volume remained approximately -9% below 2019 levels, particularly for major Asian companies.

3. Freight traffic trends

Tonne.kilometres (millions) – First halves 2019-2023
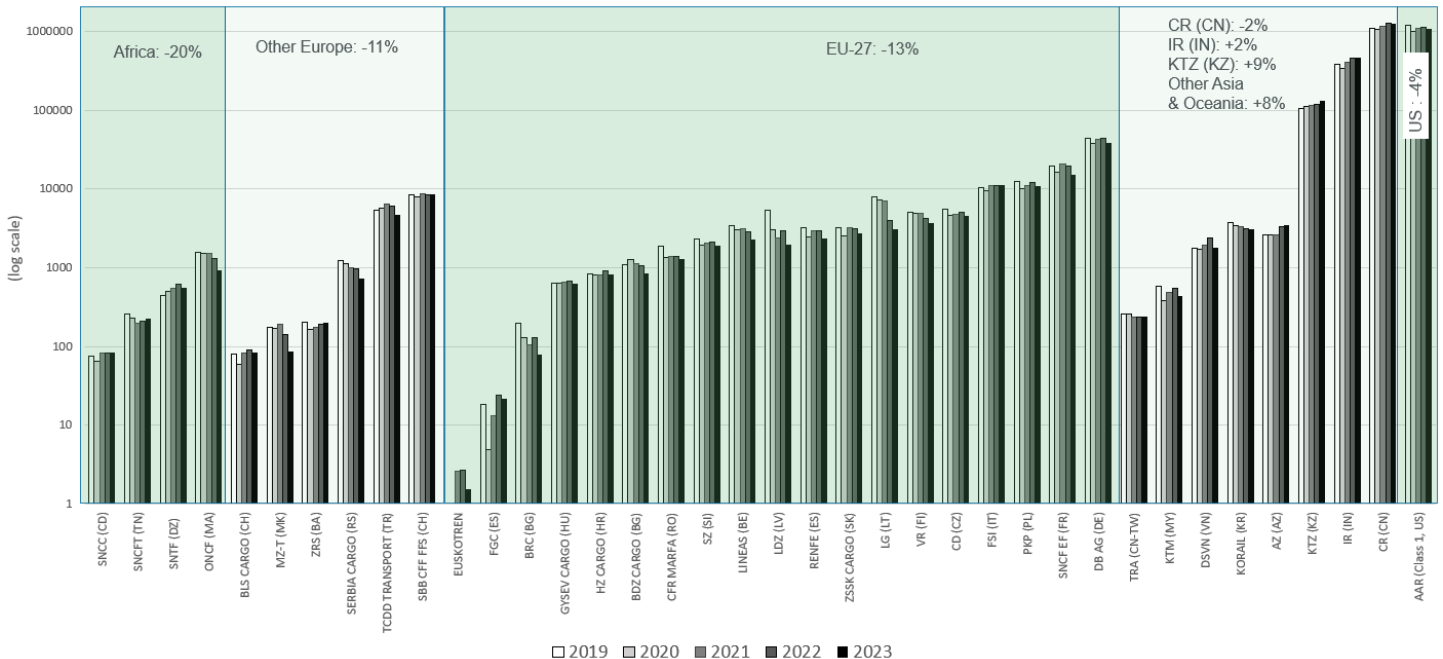**percentage: difference between 2023 and 2022**

Figure 2: Freight traffic (tonne-kilometres in millions), with the same key 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.

The trends in freight transport were negative for most operators in the first half of 2023 compared to 2022. Only a few companies, primarily located in Asia, reported growth, such as +2% tonne-kilometres for Indian Railways, +4% for TRA (Taiwan), +4% for AZ (Azerbaijan) and +9% for KTZ (Kazakhstan). However, China Railways recorded a slight negative trend (-2%). Although growth persists in the overall Asian region, it is tending to decelerate.

Unfortunately, for companies in other regions, the trend has been downward since the beginning of 2022, especially for African, European and North American [5] companies, and this accelerated during the first half of 2023. High inventories and a pullback in consumer spending are cited as the main reasons behind these negative trends [6].
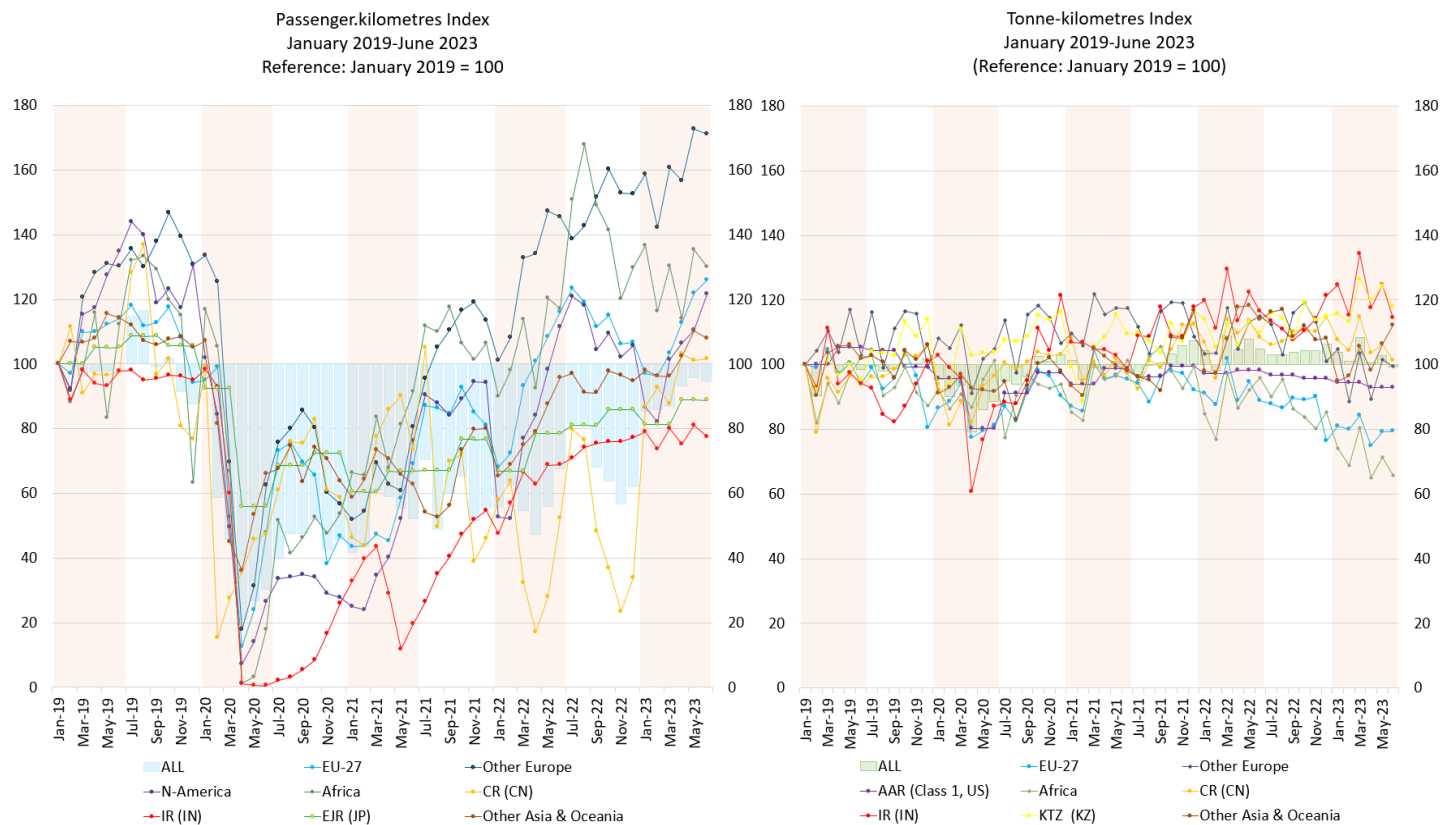

Figure 3: The left-hand graph shows the monthly passenger traffic index for January 2019 to June 2023. The base reference (100) for the index is January 2019. Data available for some UIC railway members has been combined and is presented by region: "EU-27", "Other Europe", "Africa", "N-America", "Other 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 at:

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

or on the Extranet:

https://extranet.uic.org/.

Annual data is available from Railisa at:

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

References:

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[2] https://ftnnews.com/news-from-turkey/47006-turkey-s-railways-to-transport-12-5-million-passengers-in-2023

[3] https://www.railtech.com/policy/2023/08/01/figures-a-good-first-half-of-2023-for-sncf/?gdpr=accept

[4] https://www.railway.supply/en/more-than-a-million-passengers-pkp-intercity-summed-up-the-holidays/

[5] https://www.aar.org/news/reports-weekly-rail-traffic-for-march-and-the-week-ending-april-1-2023/

[6] https://www.cnbc.com/2023/11/07/freight-recession-will-continue-in-2024-cnbc-supply-chain-survey.html

Documentation centre

Raildoc Portal: https://raildoc.uic.org/

Acknowledgments