

Traffic trends among UIC member companies in 2023

Provisional results

<https://uic.org/com/enews/article/traffic-trends-among-uic-member-companies-in-2023>

1. Summary

In 2023, the volume of passengers transported by rail continued to progress compared to previous years, but the magnitude of trends remained varied across regions. Indeed, sustained growth was observed for companies based in Europe, Africa and North America, while many Asian companies have not regained their pre-COVID passenger volumes, with the exception of China Railways, which finally reached its 2019 level.

Regarding rail freight transport, regional contrasts in trends became more pronounced in 2023 compared to 2022. For companies based in Europe, there was a general decline in the volume of goods transported, while major Asian companies maintained a level similar to 2022. Freight traffic slightly decreased for North American companies, as well as for some African companies.

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

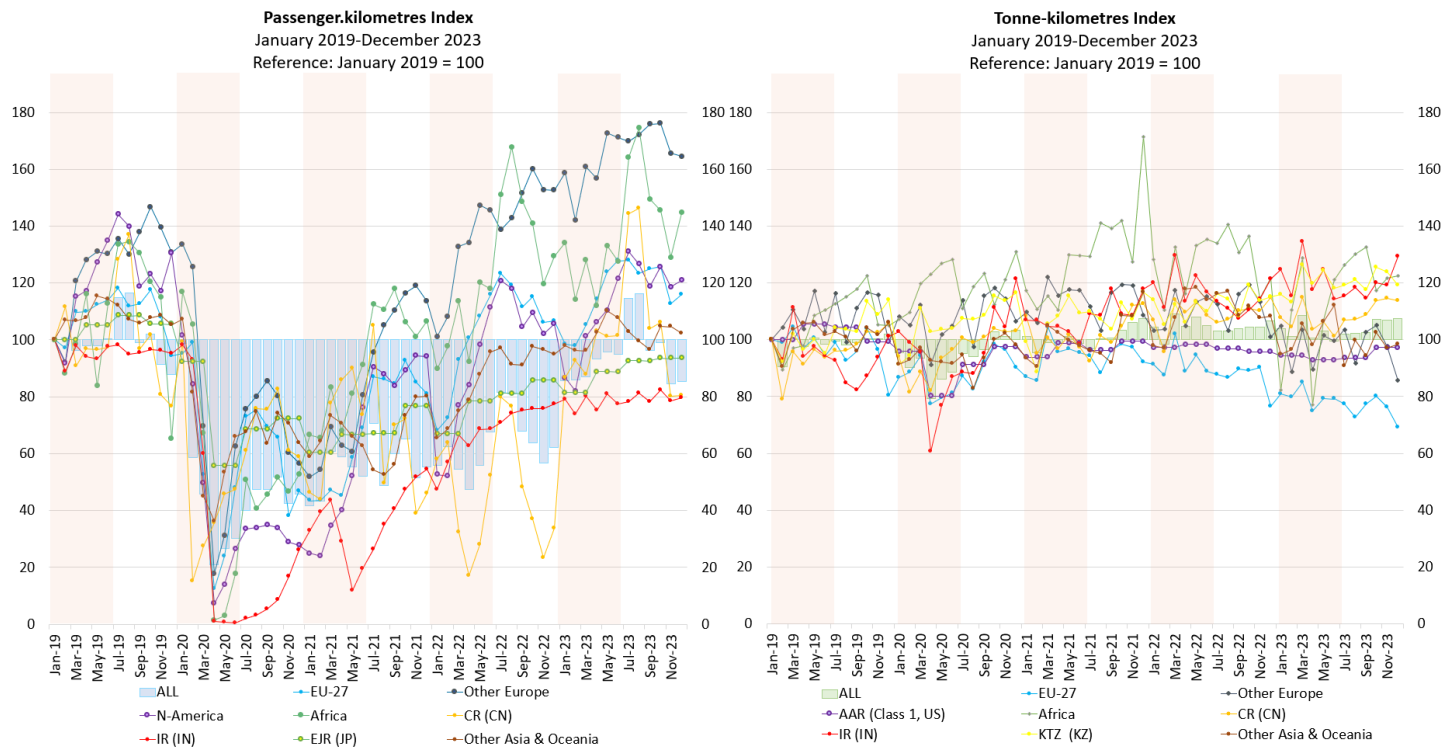


Figure 1: The left-hand graph shows the monthly passenger traffic index for the January 2019 to December 2023 period. The base reference (100) for the index is January 2019. Data available for some UIC railway members has been combined and is presented by region: "EU-27", "Other Europe", "Africa", "N-America", "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 2. 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 3 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.

2. Passenger traffic trends

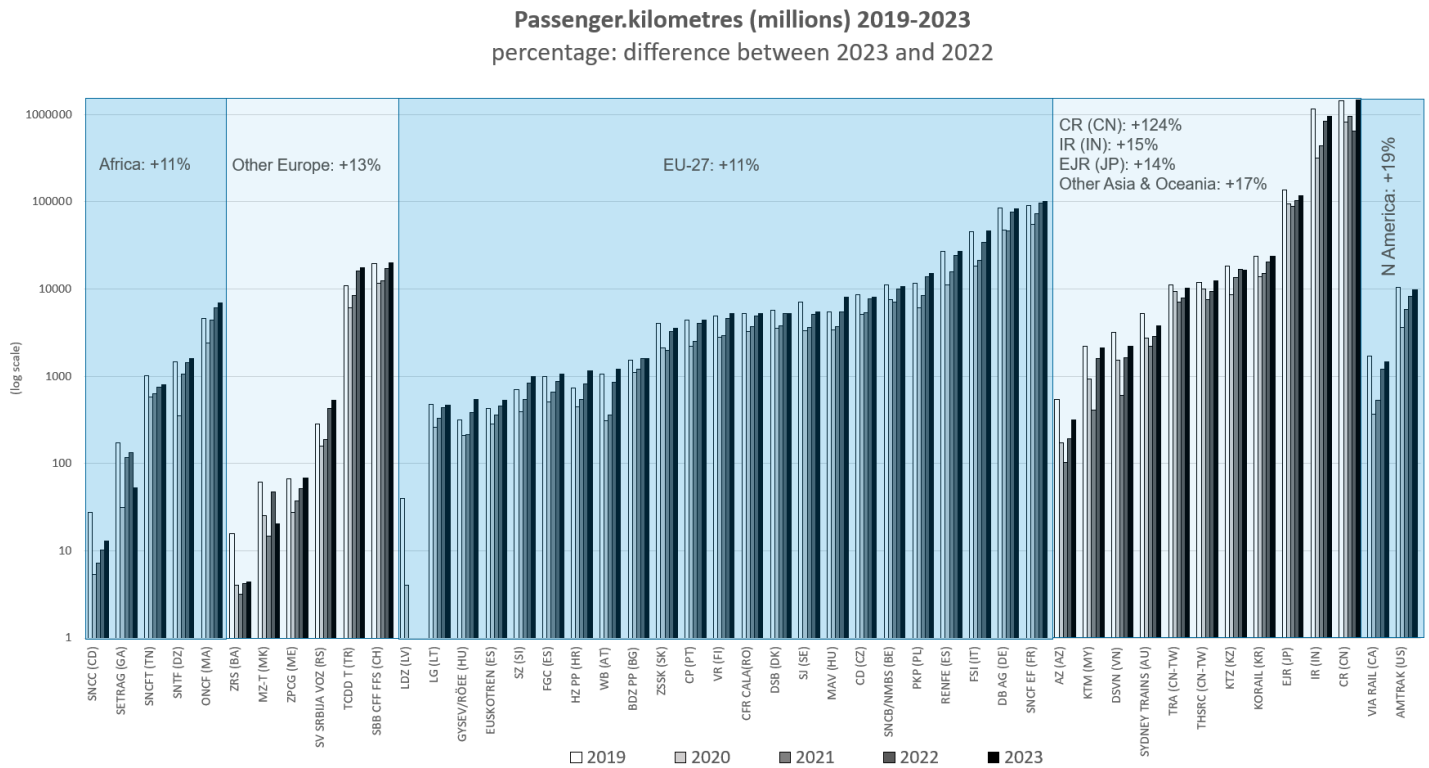


Figure 2: Passenger-kilometres (millions) for 2019 (white bar), 2020, 2021, 2022 (grey bars) and 2023 (black bar). The y axis is a logarithmic scale. Railway companies are grouped by region, with percentage values showing the average change between 2022 and 2023.

Since 2021, passenger traffic has gradually continued to progress in all regions, but growth has been most sustained in Europe up until the end of 2023. Indeed, the majority of European companies recorded higher passenger volumes in 2023 compared to 2019 (Figure 2) with an average of +3.5% in 2023 compared to 2019 for companies operating in the EU-27 region. This is particularly true for SNCF (France) [1], PKP (Poland), MAV (Hungary), HŽPP (Croatia), SI (Slovenia), SV Srbija Voz (Serbia) and TCDD (Turkey). For SNCF (France) [1], this growth has been encouraged by an attractive portfolio of high-speed and intercity services, including subscription cards and low-cost high-speed services, as well as a renewal of the regional train fleet and strong agreements with regional public authorities. For MAV (Hungary), regional services also showed significant growth, while for TCDD (Turkey) high-speed train services have driven growth upwards.

In Africa, ONCF (Morocco) also achieved very good results in 2023 with the development of the high-speed train service. SNTF (Algeria) also recorded good results in 2023 for passenger transport, above those of 2019.

For North American companies, despite passenger traffic growth over the past four years, volumes in 2023 remained below 2019 levels. The same observation applies to Asian companies, with EJR (Japan) and IR (India) not reaching 2019 volumes. Although CR (China), THSRC (Chinese Taipei) and KORAIL (South Korea) have returned to 2019 levels, the overall trend for passenger traffic in 2023, for all companies in all regions combined, remained slightly below that of 2019 (Figure 1, blue bars).

3. Freight traffic trends

Regarding freight transport by rail, except for some Asian companies, traffic decreased in 2023 compared to 2022. The contraction was most pronounced for European companies, with a reduction in freight volumes for all the companies surveyed. For the EU-27 region, the decline is estimated at around -13% in 2023 compared to 2022. For other European companies outside the EU-27 region, the drop in freight volumes was also significant, except for the Swiss company SBB, which managed to maintain freight traffic comparable to 2022 levels.

For African companies and smaller Asian freight companies, rail freight traffic also declined significantly in 2023, as it did for RZD (Russia, not shown in graphics) [2]. For CR (China), the trend was slightly downward with -0.4% in 2023 compared to 2022. However, KTZ (Kazakhstan) and IR (India) showed an increase of +7% and +5% respectively.

For North American companies, the decline was relatively mild in 2023 compared to 2022, and an improvement was recorded in the last quarter. [3]

The decrease in rail freight transport recorded by the large majority of companies is part of a global freight recession [4] [5].

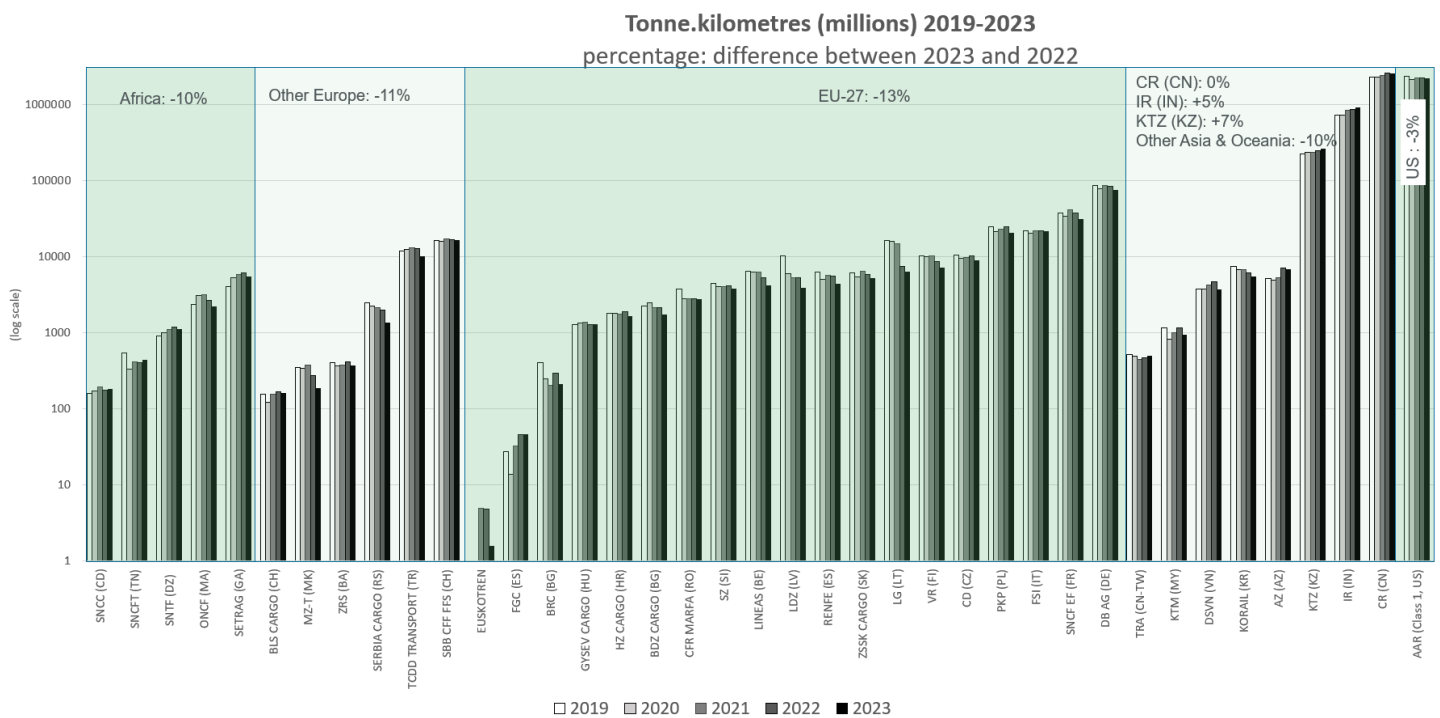


Figure 3: Freight traffic (tonne-kilometres in millions), with the key being the same as for Figure 2. The y axis is also a logarithmic scale. AAR data only relates to traffic carried by Class 1 companies in the United States.

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>

Quarterly reports are also available on the extranet:

<https://extranet.uic.org/en/files?grp=670>

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/275831>

Annual data is available from Railisa:

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

References:

[1] <https://www.businesstravelnewseurope.com/Ground-Transport/SNCF-Passenger-traffic-hits-record-levels-in-2023>

[2] <https://ble-t.org/news/aar-reports-final-rail-traffic-volumes-for-2023/>

[3] <https://www.railfreight.com/railfreight/2024/05/24/low-freight-volumes-russian-railways-loses-up-to-50-billion-rubles/>

[4] <https://www.morethanshipping.com/the-great-freight-recession-of-2023-causes-effects-and-what-to-expect/>

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

Acknowledgments:

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