

## High-speed train passengers increased by more than 21% on the Madrid-Andalusia and Madrid-Alicante lines last summer

- Competition between companies meant that the Madrid-Valencia, Madrid-Málaga/Granada and Madrid-Alicante connections carried more than 1.6, 1.4 and 1.1 million passengers, respectively.
- Prices for the Madrid-Seville, Madrid-Málaga and Madrid-Alicante lines fell by 17-18% year-on-year, according to data collected by the CNMC.
- Freight transport continued its downward trend (-3%).

**Madrid, 16 December 2024.** Commercial high-speed rail set a record number of passengers between June and September—this is the second consecutive quarter—, reaching 10.7 million, 24% more year-on-year compared to the summer of 2023, according to the Railway Sector Report ([INF/DTSP/032/24](#)).

The number of passengers increased in all lines, but notably in those recently opened to competition: Madrid-Málaga/Granada (1.4 million) (+25.6%), Madrid-Seville (1.2 million) (+21.4%) and Madrid-Alicante (1.1 million) (+23.6%). On the Madrid-Barcelona line, there were 3.6 million (+5.2%) and on the Madrid-Valencia line 1.6 million (+14.6%).

### Market shares

Renfe Viajeros remained the main High Speed operator, with market shares between 53% on the Madrid-Valencia line and 74% on the Madrid-Málaga/Granada line. Iryo obtained a market share of between 23 and 28% on all its lines except Madrid-Alicante (2.3%), and Ouigo maintained its share of almost 25% on the lines to Spain's east coast and 15% on the Madrid-Barcelona line.

The passenger load factor<sup>1</sup> on these lines varied between 84% on the Madrid-Barcelona line and 75% on the lines between Madrid and Spain's east coast. The 12 percentage-point improvement for the Madrid-Alicante line was particularly noteworthy.

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<sup>1</sup> A productivity indicator that measures how full each train is on average, defined as passengers.km/seats.km.

## Cheaper tickets

The prices collected by the CNMC<sup>2</sup> showed significant year-on-year decreases on routes where competition was introduced a year ago: Madrid-Seville (-17.3%), Madrid-Málaga (-18.2%) and Madrid-Alicante (-18.6%), while on the Madrid-Valencia and Madrid-Barcelona routes, the average revenue (approximation of the real average price) grew by 7%.

The average fare from Madrid to Barcelona was 52 euros, from Madrid to Valencia 30 euros, from Madrid to Alicante 37 euros, from Madrid to Málaga 48 euros and from Madrid to Seville 42 euros.

## Other passenger services

The number of travellers increased considerably in Conventional Medium Distance (13.4%) compared to the previous quarter. However, they decreased in Commuter Rail (-10.9%) and remained stable in High Speed Medium Distance. The growth in passengers in the latter service (19%) was especially noteworthy compared to the same quarter in 2023. Conventional Long-Distance passenger services saw year-on-year decreases of 7% in terms of the number of seats offered and 3% in terms of passengers.

## Freight transport

This service declined by 8 to 10% compared to the previous quarter in all indicators. On a year-on-year basis, the drop in net tonnes is 3%, while net t.km remain stable.

By company, Renfe Mercancías, the main operator in the market, has a net t.km share of 38%. Captrain remains the second-largest operator, with 21%, followed by Continental with 15%, Medway with 10% and Transfesa with 5%.

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<sup>2</sup> Ticket prices for travel during 3Q-2024, collected from operators' websites daily from 40 days before the date of travel.

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