

## High-Speed Rail Between Madrid and Valencia Recorded 12% Fewer Passengers Until December Due to the Effects of the DANA flooding

- In the fourth quarter of 2024, the route saw 1.16 million passengers (-12% year-on-year), with 1.75 million seats available (-9%).
- Overall, commercial high-speed rail recorded 10.1 million passengers (+17%), driven by the Madrid/Barcelona and Madrid/Andalusia routes.
- Ticket prices for the Madrid-Seville and Madrid-Alicante routes dropped by 10%, those for Madrid-Málaga fell by 5%, while fares for Madrid/Barcelona increased by 8%.
- Freight transport continued its downward trend, with 3.5% fewer net tons moved.

**Madrid, 28 March 2025.** The suspension of rail services due to the DANA flooding resulted in a 12% year-on-year decline in the number of high-speed passengers between Madrid and Valencia in the fourth quarter of 2024, reaching 1.16 million. In conventional services on the Mediterranean Corridor, the decline was 24%, while Valencia's commuter rail services saw a 5% drop, according to data from the CNMC ([INF/DTSP/032/24](#)).

Overall, commercial high-speed rail passengers increased by 17% compared to the same period the previous year, reaching 10.1 million. However, this figure represents a 5% decrease compared to the third quarter of 2024.

The number of passengers increased across all corridors—except for Madrid-Valencia—particularly on recently liberalised routes, such as Madrid-Alicante (+32%), which reached one million passengers. Ouigo doubled its number of passengers on this route following the launch of its Murcia services.

On the Madrid-Seville line, there were 1.3 million passengers (+19%) and on the Madrid-Málaga/Granada line saw 1.2 million (+18%). On the Madrid-Barcelona line, there were 3.8 million (+4%) and on the Madrid-Valencia line 1.16 million (-12%).

### Market shares

Renfe Viajeros remained the main High-Speed operator, with market shares between 52% 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%), and Ouigo maintained a 15% share on

Madrid-Barcelona and 25% on Madrid-Valencia, while improving to 33% on Madrid-Alicante.

Train occupancy<sup>1</sup> improved across all corridors compared to last year. On the Madrid-Barcelona and Madrid-Seville lines, it reached nearly 80% and on the Madrid-Málaga/Granada line 73%. In the eastern routes (Levante), it did not exceed 66%. Madrid-Alicante saw a 4-percentage-point increase, while Madrid-Valencia dropped by 3 points due to the effects of the DANA storm.

### **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 (-10.4%), Madrid-Málaga (-5.2%) and Madrid-Alicante (-10.7%). Average revenue (an estimate of the actual average price) increased on the Madrid-Barcelona route (+11.7%) and decreased on the Madrid-Valencia route (-8.4%).

The average ticket price was €56 for Madrid-Barcelona, €49 for Madrid-Seville, €48 for Madrid-Málaga, €35 for Madrid-Alicante and €27 for Madrid-Valencia.

### **Commuter and Medium-Distance Rail**

Passengers on Commuter and Conventional Medium-Distance Rail, which have been fully subsidised since summer 2022, increased by 2% year-on-year. High-Speed Medium-Distance Rail, subsidised at 50%, remained stable. Conventional Long-Distance Rail reduced its seat availability by 7% and saw a 13% decline in passengers.

### **Freight transport**

Freight transport recorded a 4.7% drop in net ton-kilometres and a 3.5% decrease in net tons transported. Market shares in net ton-kilometres were 41% for Renfe Mercancías, 22% for Captrain, 13% for Continental, 10% for Medway and 5% for Transfesa.

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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.

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

**Related content:**

- [INF/DTSP/032/24](#)
- [Press release 3Q-2024 \(16/12/2024\): High-speed train passengers increased by more than 21% on the Madrid-Andalusia and Madrid-Alicante lines last summer](#)
- [CNMC Data](#)