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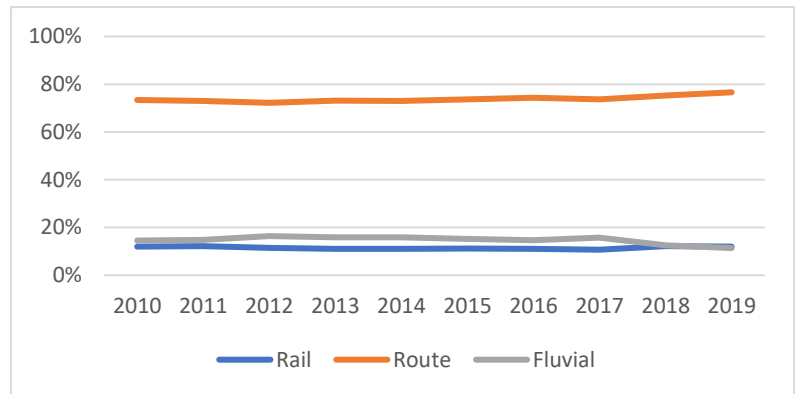


# 01 » THE RAIL FREIGHT TRANSPORT SECTOR

## Modal share

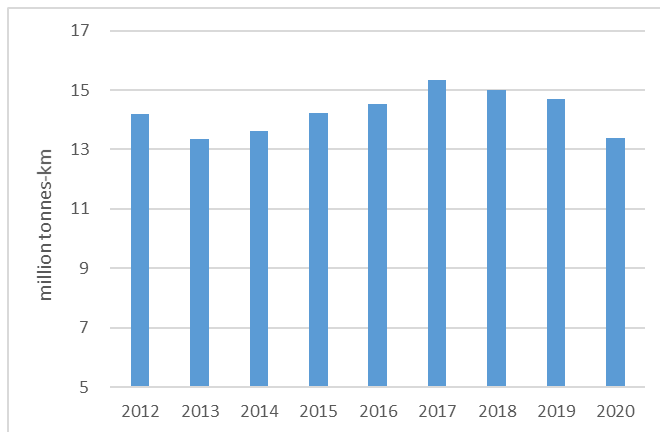
The modal share of **rail** is small and represents about **12%** of freight transport (2020 figures are not yet available).

The modal share of rail remained **stable** in recent years, although it slightly fell since 2008. Efforts to double the share of rail by 2030 will require voluntarist and coordinated action.



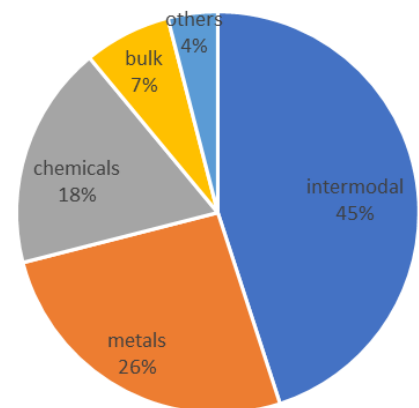
## Evolution in tons-km

The volume of goods transported by rail increased by 3.5% between 2012 and 2019, with some decline since 2017. In 2020, this volume fell sharply by just over 9% compared to 2019 (largely due to the Covid crisis) to reach **13,383,557 million tons-km**. In Europe, the average decline was 7%.



## Goods transported

Rail transport is particularly suitable for the transport of heavy goods over long distances. Intermodal transport (up by more than 10%), metal products, and chemicals account for the largest share of goods transported by rail.

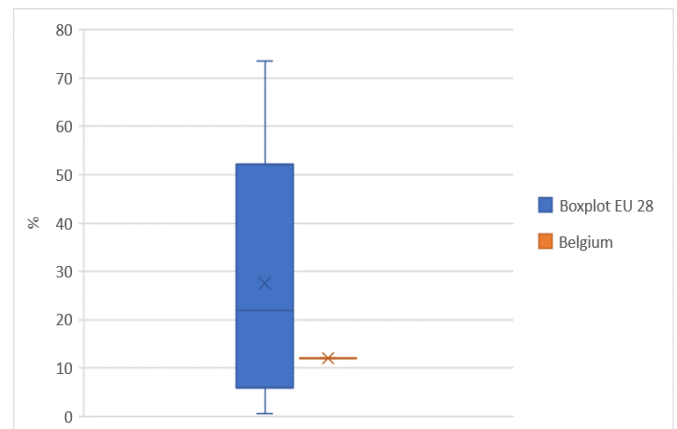


## Belgium's position in the modal share of rail

Compared to the EU average, the modal share of **rail** is small in **Belgium**. It represents only **12%** compared to **23%** at the European Union (**EU28**) level.

Latvia has the highest share of rail with 74%. Ireland's share of rail is the lowest in Europe with 0.6%, followed by Greece with 2.5% (2019 figure).

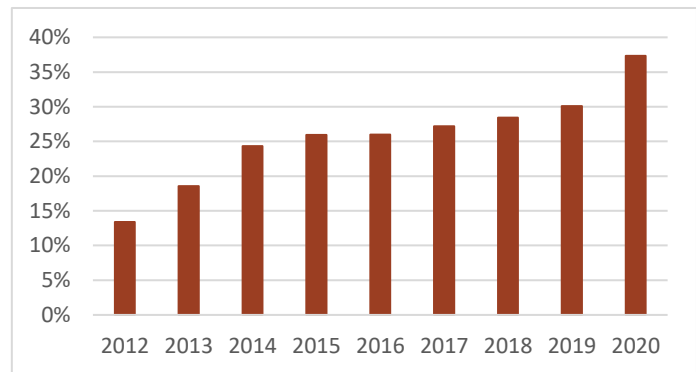
In neighbouring countries, the modal share of rail is only 6.3% for the Netherlands, 6.9% for Luxembourg, 9.7% for France, and 18.7% for Germany.



## 02 » COMPETITION IN RAIL TRANSPORT

### The market share of non-incumbents

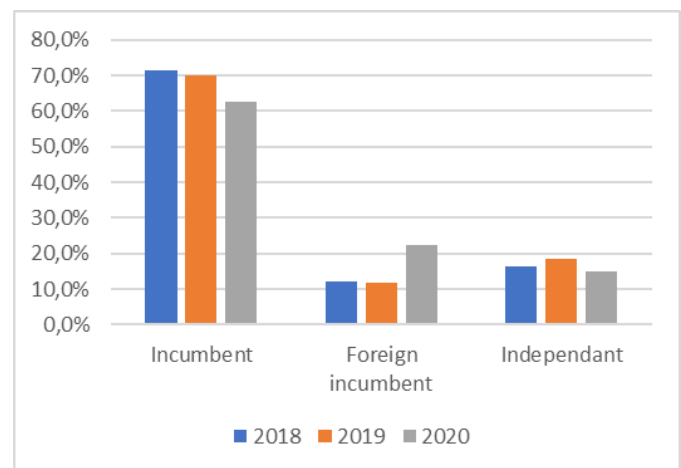
The share of the historical operator's competitors increased significantly compared to 2012. It is now over **37%** compared to less than 15% in 2012 (based on tons-km). It remains to be seen whether this trend will be confirmed in the coming years or whether this strong increase is due to more cyclical factors linked in particular to the Covid crisis.



### Overview of the operators' shareholding

Not all new entrants (see above) are independent operators. A number of them are subsidiaries of the major historical operators (SNCF Fret, DB Schenker, etc.).

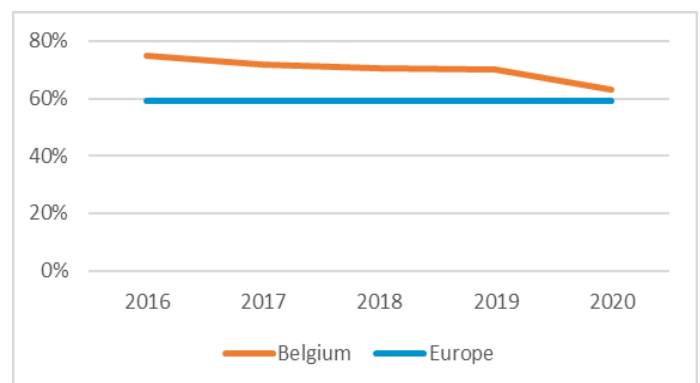
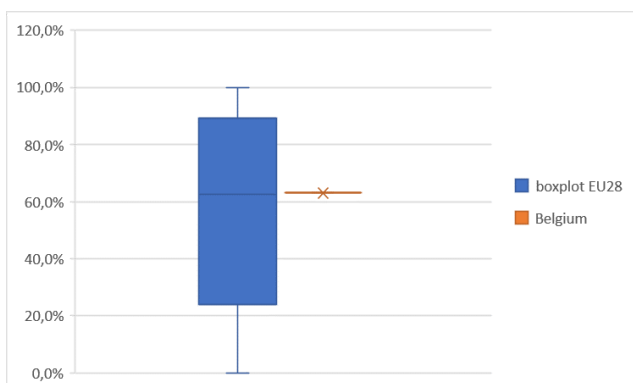
In 2020, the market share of **independent operators** represented **15.8%**, and that of subsidiaries of **foreign incumbents** **21.6%**. Here, it should be noted that Railtraxx was bought by SNCF and can now be considered as a *foreign incumbent*.



### Position of Belgium with regard to incumbents

If we compare Belgium with Europe, the incumbent's market share is slightly higher (63%) than the European average (59%) but **corresponds to the median**. In Germany, the incumbent's share is 47%, in France 71%, in Luxembourg 100%, and in the Netherlands 0%.

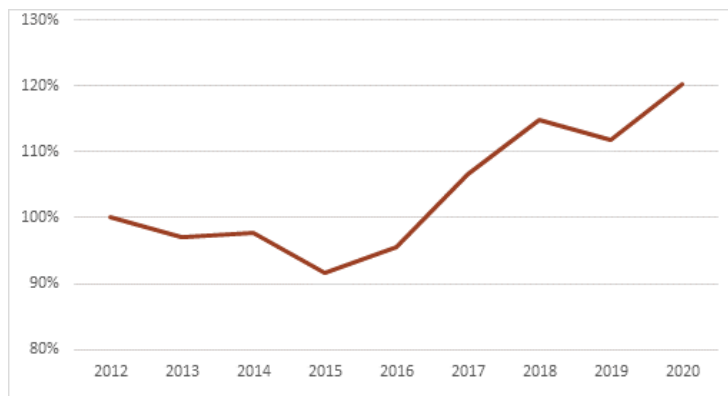
It will be interesting to see whether this downward trend in the incumbent's share will continue in 2021.



## 03 » OPERATIONAL FUNCTIONING OF RAIL TRANSPORT

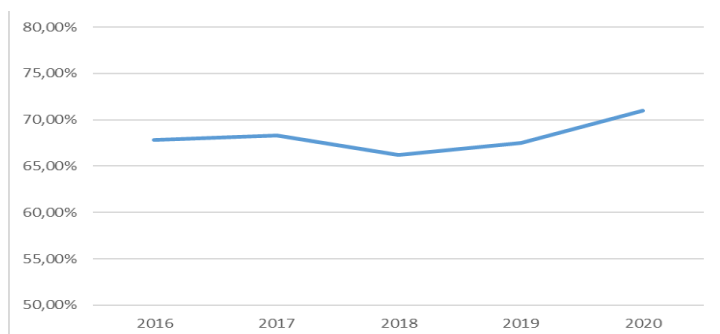
### Evolution of the loading rate

The loading rate (in tons per train-km) gives an indication of the efficiency of rail operators. Compared to 2012 (reference year), it can be seen that the increase towards an optimisation of the use of the rolling stock continues.



### Evolution of punctuality

Punctuality is fairly stable in the freight sector and **hovers around 70%**. It should be noted that in the context of COVID, the positive evolution of punctuality increased to over 70%. During the summer of 2020, punctuality reached 75%.



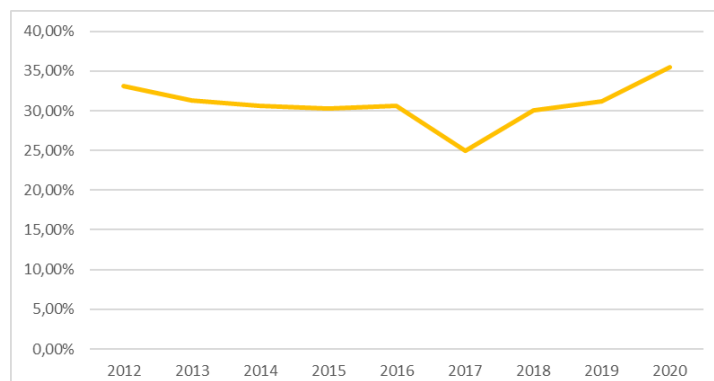
### Average speed

The average speed of goods trains is **53.4 km/hour**, up from 50 km/hour in 2019.



### The share of non-effective train-kms

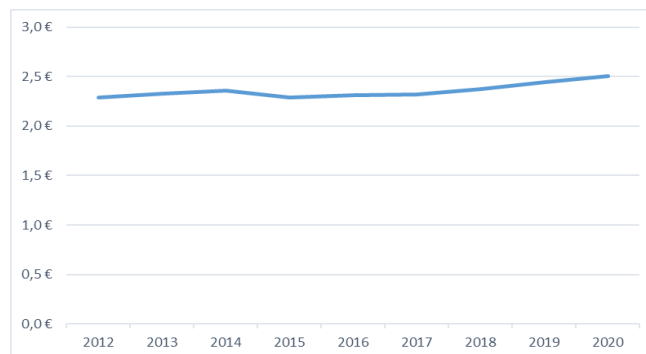
The share of non-effective train-kms rose sharply **from 30% in 2019 to 35% in 2020**. This increase can probably be (partly) attributed to the Covid crisis.



## 04 » TARIFFS FOR THE USE OF THE INFRASTRUCTURE

### Evolution of tariffs per train-km

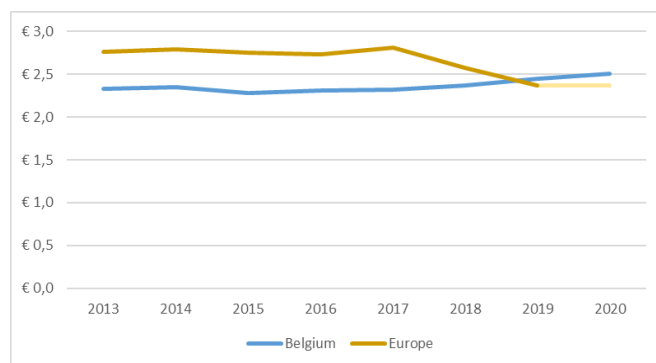
Freight operators contributed an **average of EUR 2.50 per train-km** in 2020 for the use of the network, which is a **slight increase**. We can expect a decrease in 2021 with the application of the new pricing system where Infrabel will charge for freight on the basis of direct costs without mark-up.



### Belgium's position with regard to charges

Rail freight operators pay on average **slightly more than the EU average** of EUR 2.37 (2019 figure).

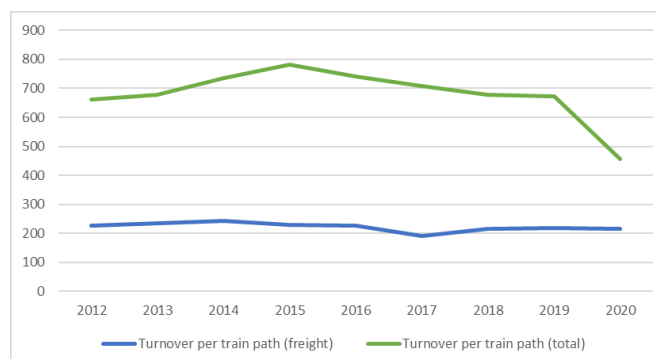
In the Netherlands, the charge amounts to EUR 2.77 per train-km. In France, it amounts to EUR 2.01 per train-km and in Germany EUR 1.64. France reduced the charge to 0 for freight operators in 2020 (and reduced it by 50% in 2021).



### The average charge

The average charge per train path is EUR 455 for passenger and freight trains.

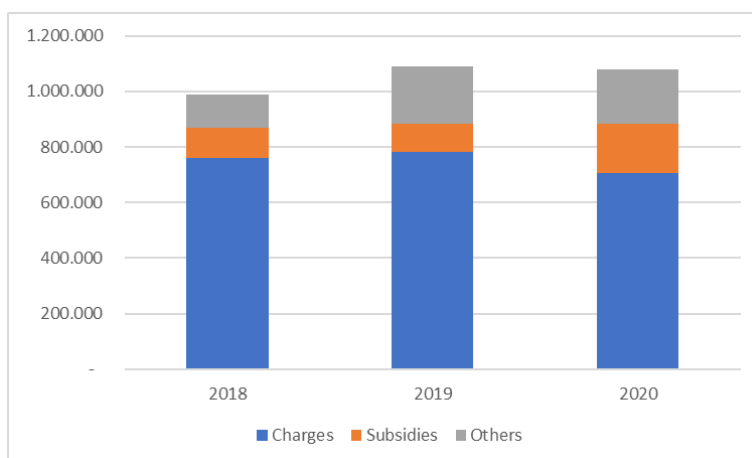
By comparison, freight operators pay **EUR 215 on average for a train path**.



### The share of charges in the income of the infrastructure manager

Infrabel derives **65% of its turnover from charges**. State subsidies represent 16% and other income 19%.

In 2020, the contribution of freight operators amounted to **EUR 29.6 million** in charges, or **4.2%** of total charges.

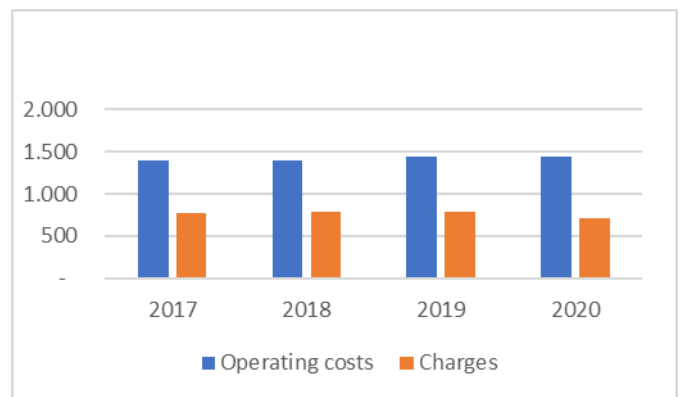


## 04 » TARIFFS FOR THE USE OF THE INFRASTRUCTURE

### Operating costs vs. charges

In 2020, charges covered **50%** of the operating costs. Of this 50%, just over 4% comes from freight operators.

In 2020, operating **subsidies covered 12.3% of the operating costs**, which is a significant increase compared to 2018 when they amounted to only 8%. This is probably due to the Covid crisis, explaining the drop in Infrabel's revenues.



### Investments of Infrabel

According to Infrabel, it invested EUR 894 million in 2020, of which EUR 591.4 million for safety and punctuality. The graph below shows the distribution of investments. This amount is comparable to 2019 but includes a significant change in the nature of investments. In 2019, the majority of investments (almost 60%) were allocated to capacity increases. In 2020, the majority of investments were allocated to improving punctuality and safety. In 2020, Infrabel invested EUR 24.7 million in the renovation of its sidings.

