

## MARKET MONITORING PASSENGER RAIL

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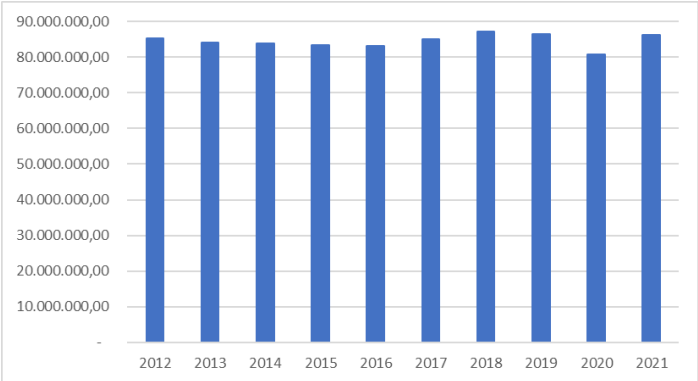


# 01 » THE EVOLUTION OF PASSENGER TRANSPORT BY RAIL

## The evolution of train kilometres

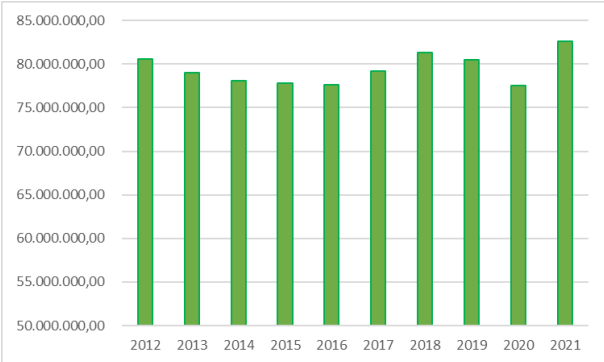
In 2021, 86.3 million train kms were travelled. This represents a 6.8% increase over 2020 and 3% compared with 2019.

The graphs below show the difference in the evolution of national and international train kms.



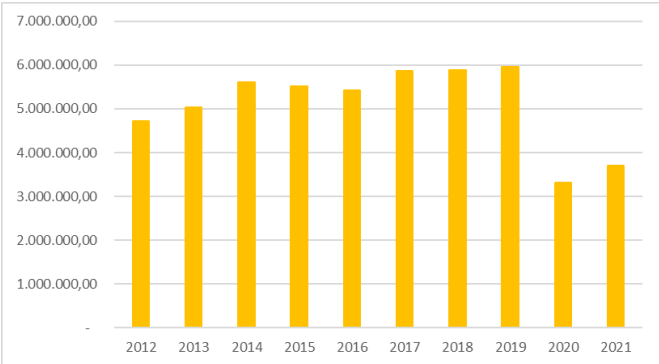
## National train-km

The evolution of national train kilometres was similar to the overall performance and we observe a sharp increase in 2021 with the highest level since 2012. The increase in national traffic was 8% towards 2020.



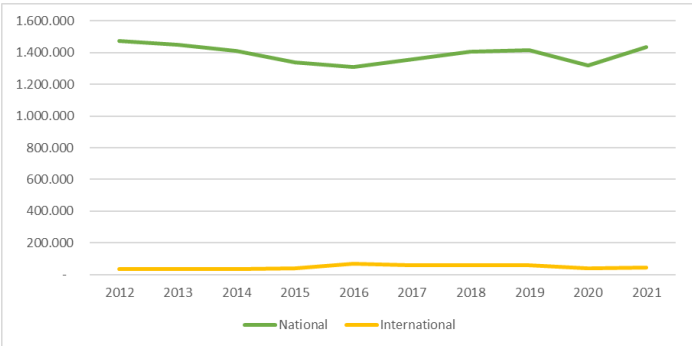
## International train-km

International traffic also recovered, with a 12% increase compared to 2020. This increase can be explained by the lifting of travel restrictions in 2021. Nevertheless, the number of international train-km was a long way from the 2019 level.



## Evolution of the number of effective train paths

The graph opposite shows the expansion of the number of national and international train paths. The increase in national train paths was similar to the increase in train-km. This was also the case for the evolution of international train paths, where there was a 12% increase in international connections, comparable to the increase in international train kilometres.

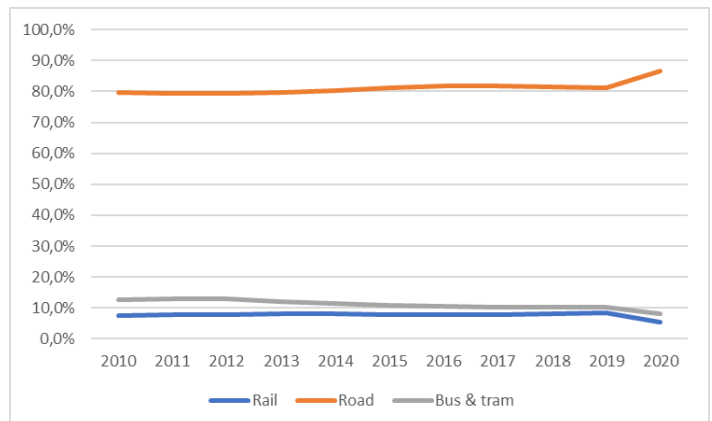


## 02 » COMPETITION OF AND IN THE RAIL SECTOR

### The modal share of the rail sector

The modal share of rail fell sharply to 5.4% in 2020, while the modal share of the car rose sharply to 87%. The European average for rail fell similarly, also to 5.4%. In Germany, the share of rail fell from 9.3% to 6.3%, in France from 10.3% to 7.8% and in the Netherlands from 11.2% to 7.8%.

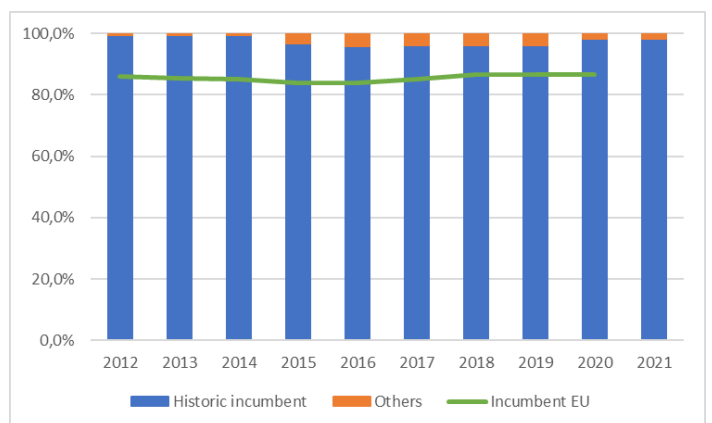
The COVID crisis certainly explains this sharp drop in the modal share of rail. It will be interesting to see if there is a recovery in rail's share in 2021 and 2022.



### Market shares in the railway sector

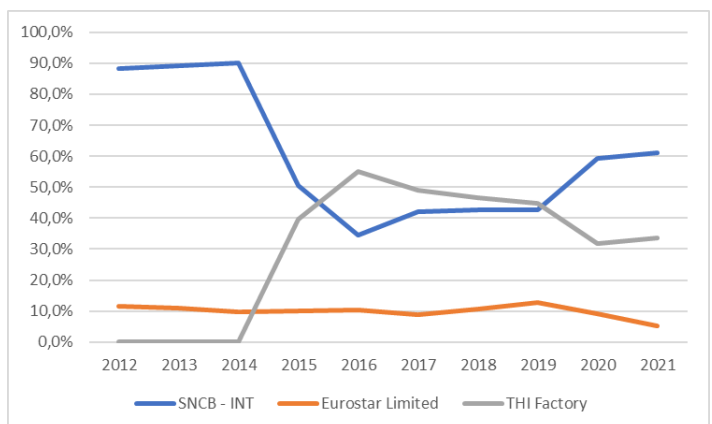
The incumbent's market share remained at over 98%. This is easily explained, as in 2021 the competition was only in practice effective in the international transport segment. International transport recovered in 2021 but remained far from the 2019 level.

The incumbent's market share in Europe was 78% on average (2020 figures) compared to 75% in 2019.



### Market shares in the international railway sector

Competition in passenger transport was limited, in practice, to the international segment. There was a slight increase in the shares of the SNCB and an increase in the shares of Thalys. The increase for SNCB International and Thalys is explained by the fact that the travel restrictions in continental Europe were greatly reduced in 2021.

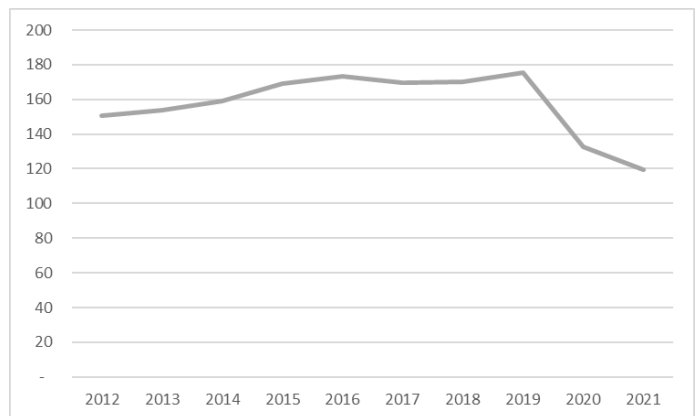


On the other hand, Eurostar continues to lose significant market share due to the very strict travel restrictions imposed in the UK in 2021.

## 03 » A FEW INDICATORS IN THE PASSENGER SEGMENT

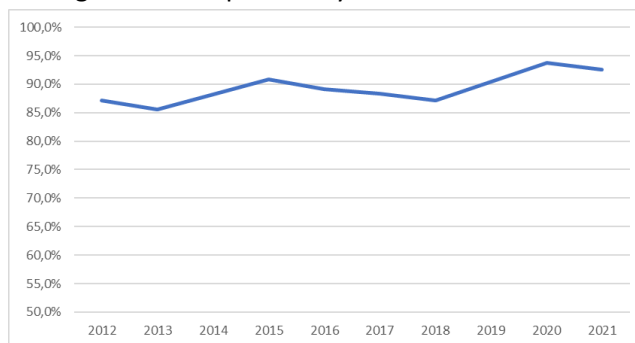
### Passengers per train

The COVID crisis naturally affected the number of passengers (national segment) per train. Overall, this figure dropped further in 2021, as shown in the graph opposite for the domestic passenger segment. The decrease was probably due to remote working imposed by sanitary measures.



### Punctuality

Train punctuality was 92.62% (trains with a delay of less than 6 minutes). This punctuality was down slightly from 2020. In 2020, punctuality was higher than in previous years.

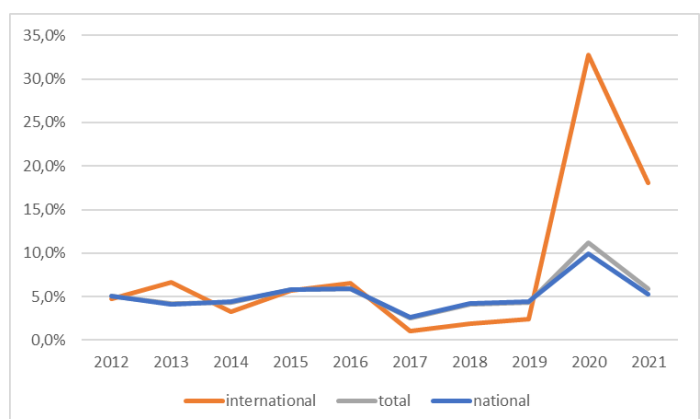


### Speed

The average speed was 70 km/hour, down slightly from 2020 but almost at the same level as 2019. The increased train service probably had a slight impact on the average speed on the network.

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

The share of non-effective train kilometres fell sharply to about the same level as in 2019 for national transport. On the other hand, the share of non-effective international train-km remained high, although it was falling sharply. This is due to the fact that international passenger traffic had not fully recovered in 2021 as a result of travel restrictions continuing for part of the year.

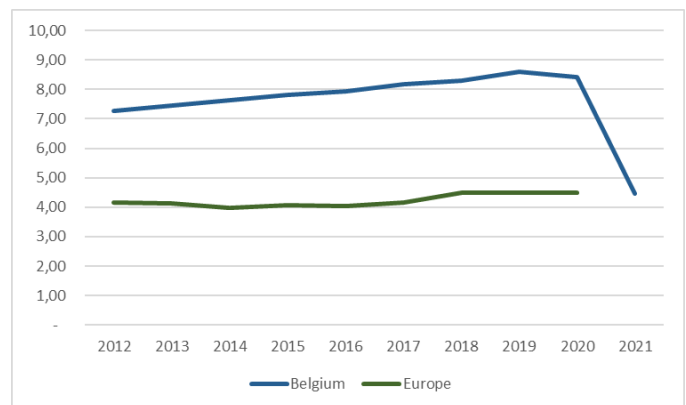


## 04 » TARIFFS FOR THE USE OF THE INFRASTRUCTURE

### Belgium's position on charges

The track access charges per train-km for passenger transport was **€4.46**. This amount was **down 45% from 2020**.

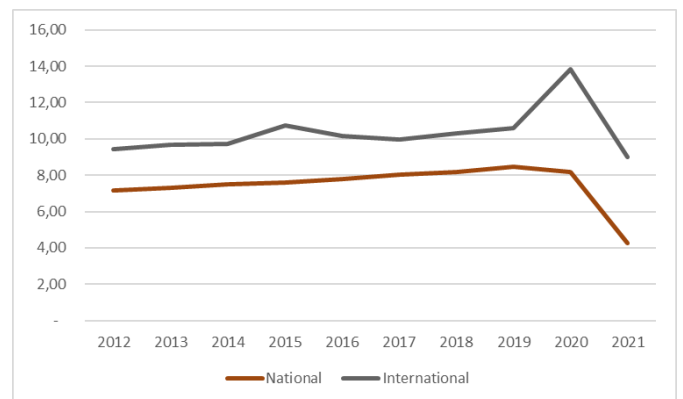
In 2020, the **European average was €4.34 per train km**. The charge was €2.12 per train-km in the Netherlands, €2.24 per train-km in Luxembourg, €5.50 in Germany but €9.17 in France.



### The evolution of tariffs per train-km

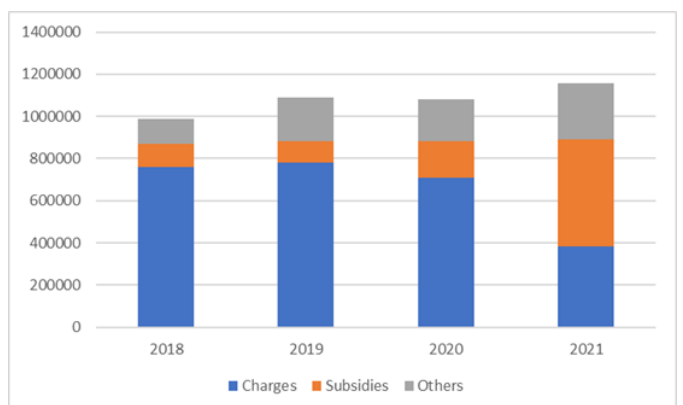
The track access charges for trains in the national segment amounted to **€4.25 per train-km**. Charges in the domestic segment dropped by almost 50%. This decrease in 2021 was due to the new charge structure in the context of support to the railway sector.

For the high-speed train segment, the charges amounted to €11 per train-km (down 12%, they returned to the 2019 level). More generally, the charges for the **international segment amounted to €9 per train-km, down 35% from 2020 and 15% from 2019**.



### The share of charges in the infrastructure manager's income.

In 2021, passenger charges **totalled €383.7 million**, or 92.8% (down in percentage terms from 2020). This share of passenger charges in total charges was slightly higher than the share of train paths allocated to the passenger segment, which amounted to 87%. The graph opposite shows the evolution of the distribution of turnover with a very significant increase in the share of subsidies.



The amount of the charges represented **33% of Infrabel's turnover**.