

MONITORING RAIL FREIGHT TRANSPORT

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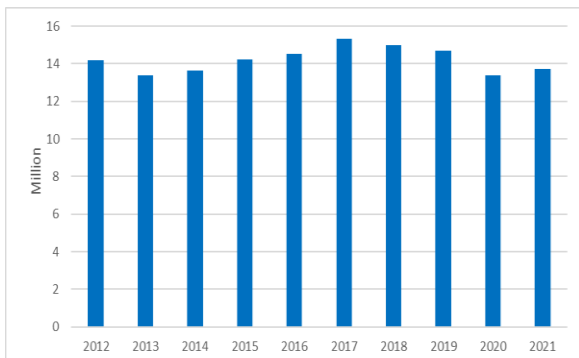


01 » THE EVOLUTION OF RAIL FREIGHT TRANSPORT

Evolution of gross tonne-km

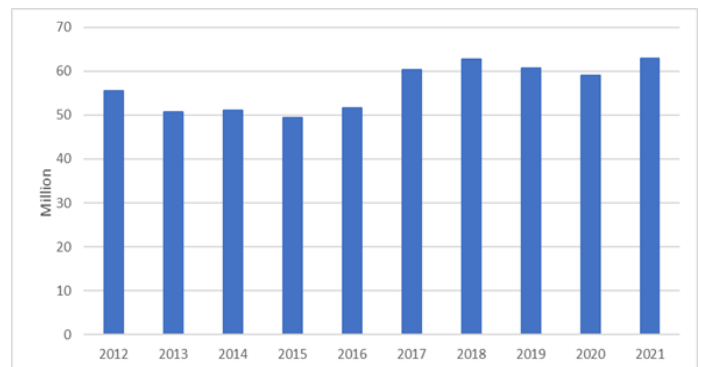
In 2021, there were **13,707,721.15 tonne-km transported**.

This represents **2.4% growth over 2020**. However, this figure was still down 7% from 2019.



Evolution of net tonnage

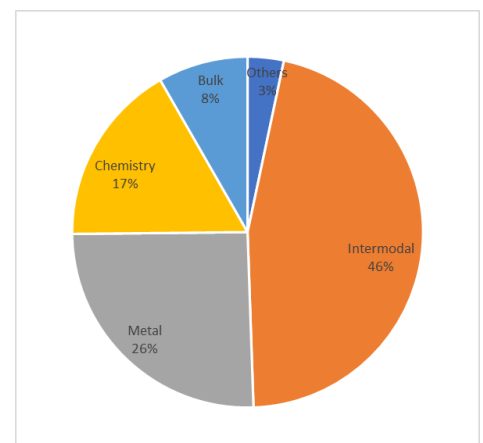
The net volume of tonnes transported amounted to **almost 63 million tonnes** of goods, representing growth of 6.7% compared to 2020 and 3.7% compared to 2019. This growth was slightly higher than the economic growth of 6.2% in 2021. GDP shrank by 5.7% in 2020.



Transported goods

Most of the goods transported (88%) were associated with three sectors: chemicals, metallurgy and intermodal. There was relative stability in the nature of the goods transported in 2021 compared to 2020.

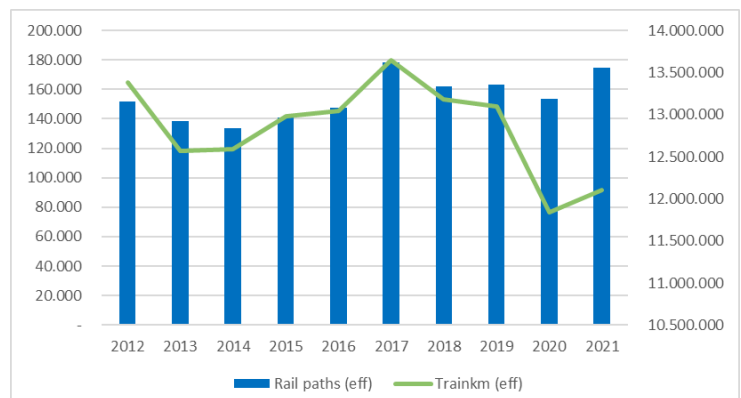
The percentage of intermodal transport therefore increased slightly (from 45% to 46%) as did bulk products from 7% to 8%. On the other hand, there was a slight decrease in products from the metallurgy (26 to 25%) and chemical industries (18 to 17%) sectors.



The evolution of train paths and train-km

In 2021, there were **163,694 train paths** for **12,106,547 train kilometres**.

Compared to 2020, the 14% increase in train paths was higher than the 2% increase in tonne-km. This may reflect a decrease in the average path distance. It could also show a lesser performance of rail.



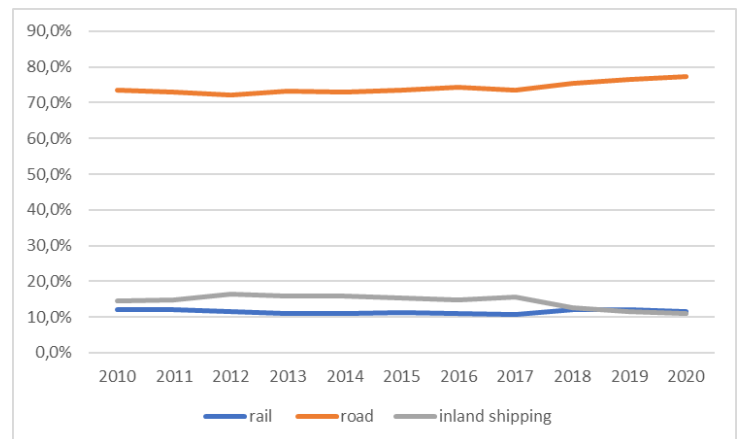
02 » COMPETITION IN RAIL TRANSPORT

The modal share of the rail sector

The modal share of rail declined very slightly in 2020 to 11.6%. It should be noted that the tonnage of goods transported fell by 3.4% overall in 2020, but this drop was smaller for rail.

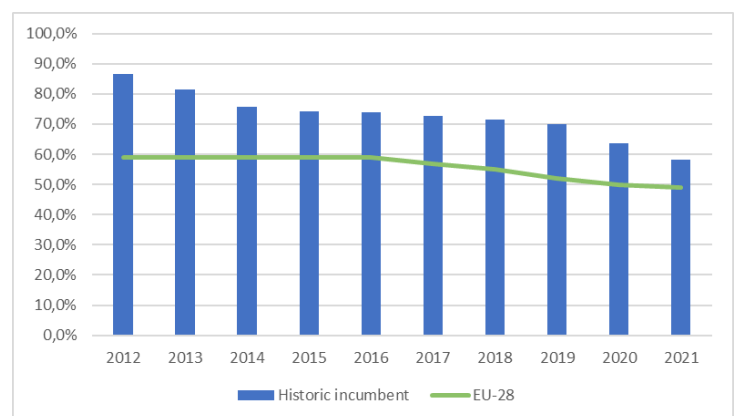
In Europe, the modal share of rail was 16.8%, which was also down by about 1%.

In neighbouring countries, the modal share of rail was 9.9% in France, 17.6% in Germany and 6.6% in the Netherlands. The modal share of rail has been stable since 2010. If we follow this trend, the objective of doubling the share of rail by 2030¹ will not be achieved without very strong actions that must be implemented very quickly.



Market share "dominant operator"

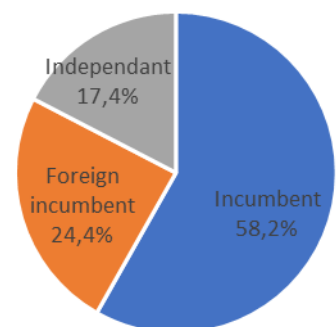
The market share of the dominant operator fell further in 2021 to **58.2%**. This decline has been steady since 2012. The dominant operator has lost 40% market share since 2012 and its share is close to the incumbents' share in Europe, which has also been declining for several years.



"Other operators" market shares

Most of the other railway undertakings operating in Belgium have links with or are subsidiaries of foreign incumbents.

In 2021, independent operators (i.e., not subsidiaries of an incumbent operator such as DB or SNCF) had a market share of 17.4% compared to 13% in 2020. Railway undertakings owned by a foreign incumbent operator had a market share of 24.4%, compared to 23.9% in 2020. We can therefore observe an increase in the share of both categories of competitors (independent and foreign incumbents) compared to 2020.

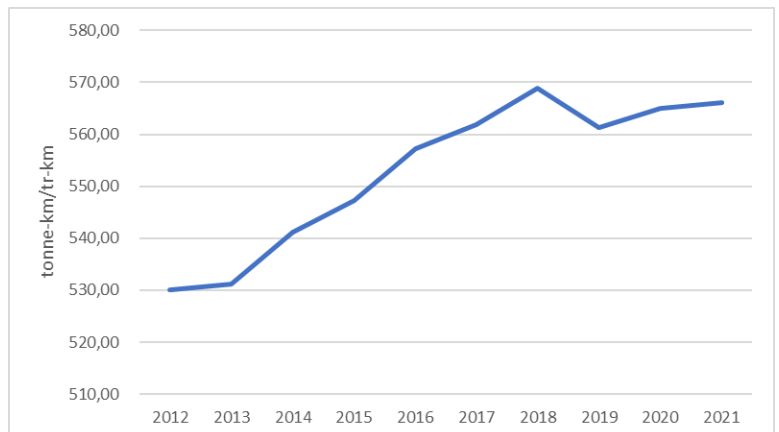


¹ Federal Government Agreement of 30 September 2020.

03 » A FEW INDICATORS IN THE FREIGHT SEGMENT

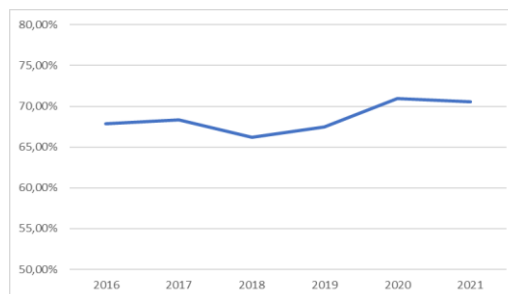
Freight load factor (tonne-km/tr-km)

The freight load factor was slightly up compared to 2020. This factor gives a first indication of the efficiency of rail transport.



Punctuality

In 2021, the average train punctuality was **70.59%** (trains with a delay of less than 30 minutes). As a result, freight train punctuality remained nearly identical to 2020. Punctuality deteriorated slightly, while the tonnage transported and the number of paths increased.



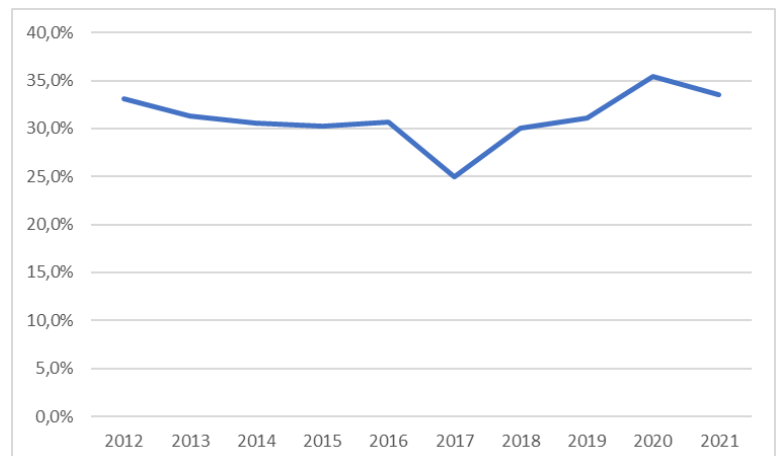
Speed

The average speed in 2021 was 50 km/h. This figure is down 6% from the previous year.

The share of non-effective train-km

33.5% of train km were not effective in 2021, compared to 35.5% in 2020 and 31.1% in 2019.

This drop in the shares of non-effective train-km can be explained by various factors. It may be related to better utilisation of requested train paths. This would indicate that the traffic prospects for which train paths had been reserved were achieved more than in the previous year. We note, however, that the level of non-effective paths remained at a significantly higher level than in 2017 (lowest level of non-effective paths since 2012).

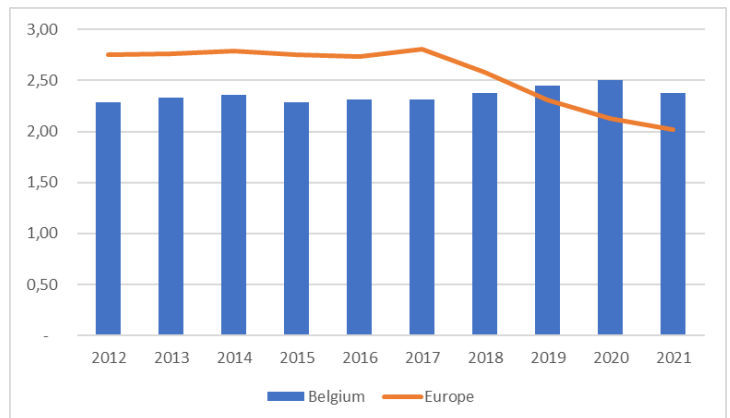


04 » TARIFFS FOR THE USE OF THE INFRASTRUCTURE

The evolution of tariffs per train-km

The average track access charge in Belgium was **€2.03/tr-km**, **19% lower** than in 2020 and **11% lower** than in 2012.

This decrease was due to the application of the new charging structure in place since 15 December 2020. For the transport of goods, it was established on the basis of direct costs without mark-up. Railway undertakings also received support in 2020 and 2021 due to the sanitary crisis.

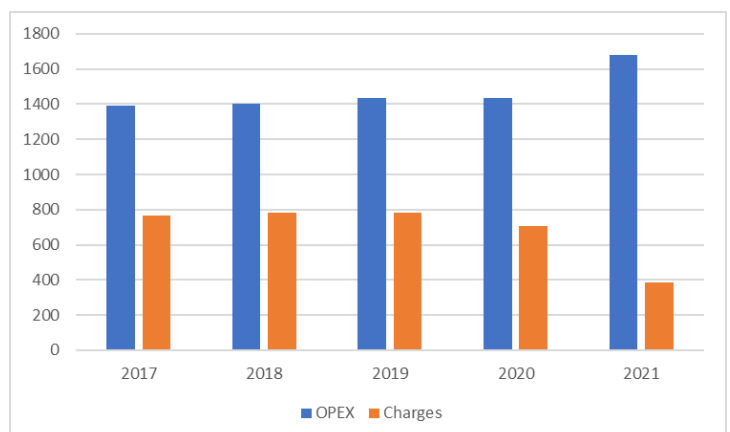


It should be noted that charges were significantly reduced in some countries, to counter the COVID crisis. In France, for example, they were reduced to 0 in 2020 and reduced by 50% from the 2019 level in 2021. Other countries in Europe have taken similar survival measures.

The share of charges

The amount of the track access charges represented 25.6% of Infrabel's operating costs, a sharp drop compared to the previous year. There was also a significant decrease in the level of charges compared to 2020 (offset, as explained below, by an increase in grants).

Freight charges amounted to **29.6 million euros**. This represented **7%** of the total amount of **infrastructure charges compared to 4% in 2020**. The share of the freight companies' charges in Infrabel's total charges increased significantly. However, the volume of the charges paid by Infrabel decreased, but to a lesser extent than the overall amount of charges collected by Infrabel; this explains the increase in the share of freight charges.



The distribution of revenues

Charges represented 33% of Infrabel's turnover, operating subsidies 43.7% and other income (energy, etc.) 23%. The charges share was down significantly from 2020 when it was 65%. This led to a near tripling of the share of subsidies, which represented only 16% of Infrabel's revenues in 2020. It was compensation, through an increase in subsidies, from the government to generate a decrease in charges to support the sector.

