

MARKET MONITORING RAIL PASSENGER TRANSPORT – FIGURES 2022

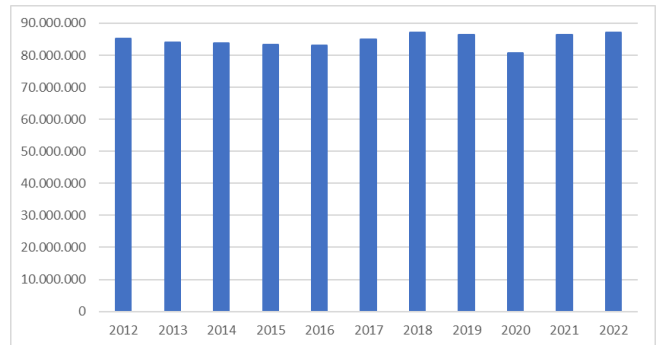
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01 » EVOLUTION OF RAIL PASSENGER TRANSPORT

Evolution of train-kilometres

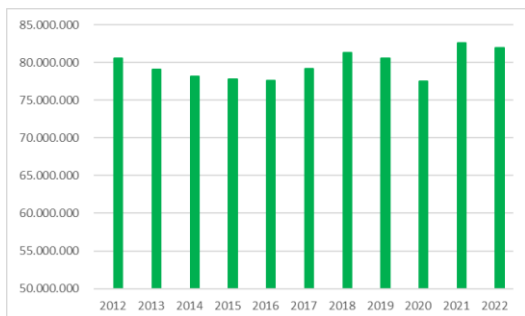
In 2022, 87.15 million train-km were travelled. This represents a 1% growth compared to 2021. This increase is largely attributable to the recovery in the international segment. The pre-Covid level was reached and even exceeded (+0.75%).

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



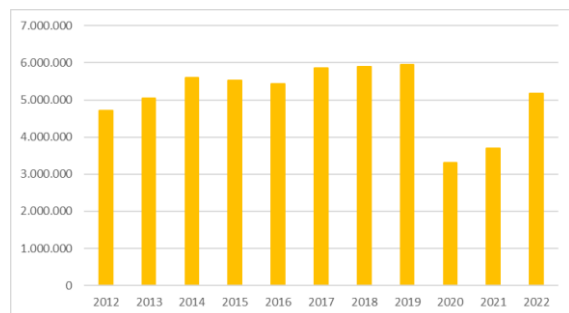
National train-km

The evolution of national train-km slowed down compared to 2021, with a slight decline of 0.8% after a peak in 2021. Even so, 2022 remains at a very high level compared to what has been observed since 2012. In addition, there was a sharp increase in the number of SNCB/NMBS passengers.



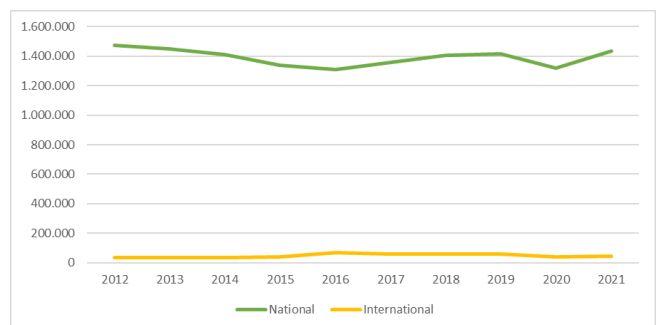
International train-km

International traffic also recovered strongly, with a 40% increase compared to 2021. It is noted this upward trend in international traffic continues in 2023 (first half of the year). The 2022 figures are still below pre-Covid level (-13%).



Evolution of the number of effective train paths

The graph opposite shows the evolution of the number of national and international effective train paths. While the national train paths knew a drop (2.3%), there was a sharp 26% increase in the number of international train paths. Overall, there was a slight fall of 1.5% in the number of train paths.

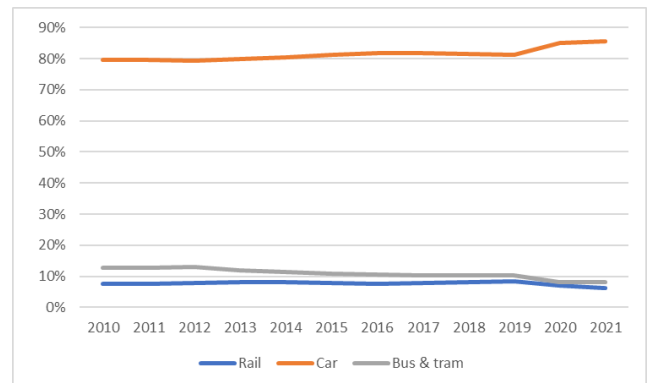


02 » COMPETITION OF AND IN THE RAIL SECTOR

The modal share of the rail sector

The modal share of rail declined slightly in 2021 to **6.2%**. It is still a long way off the 2019 level. The modal share of cars, on the other hand, rose slightly to 85.6%. The European average for rail increased slightly to 6%.

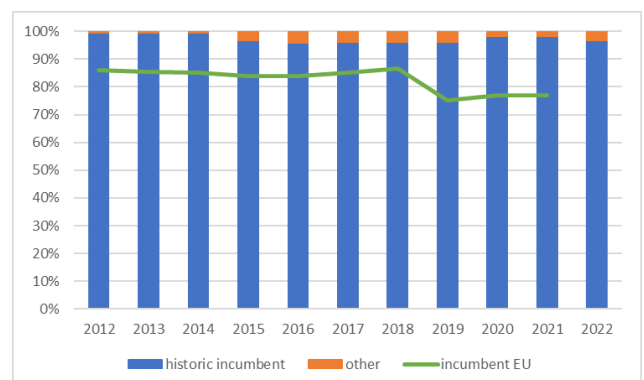
Trends are more favourable to rail in neighbouring countries than in Belgium: in Germany, the share of rail grew from 6.3% to 6.5%, in France from 7.8% to 9.1% and in the Netherlands from 7.8% to 8.4%.



Market shares in the rail sector

The incumbent's market share declined slightly to 96.8%. This is attributable to a relative recovery of Eurostar and Thalys in the international sector. Thalys multiplied its train-kms by 1.8 and Eurostar by 2.7.

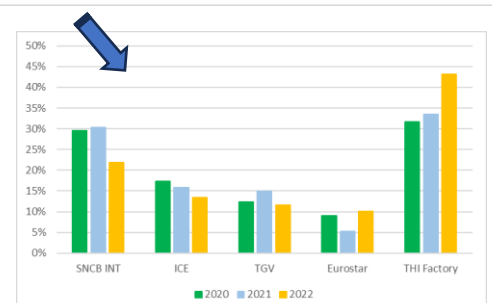
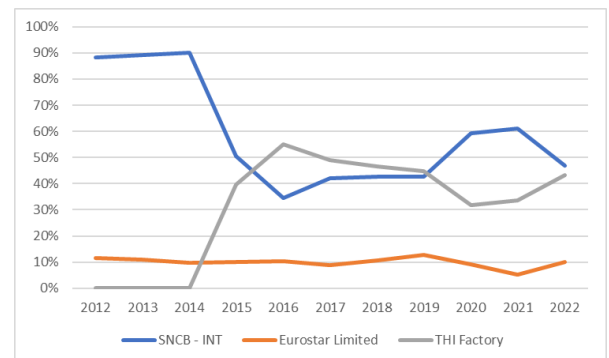
The incumbent's market share in Europe was 77% on average (2021 figures).



Market shares in international traffic

Competition in passenger transport was limited, in practice, to the international segment. Eurostar recovered and doubled its market share compared to 2021, and Thalys continued to recover. These turnarounds automatically led to a fall in the market share of SNCB/NMBS to well below 50%.

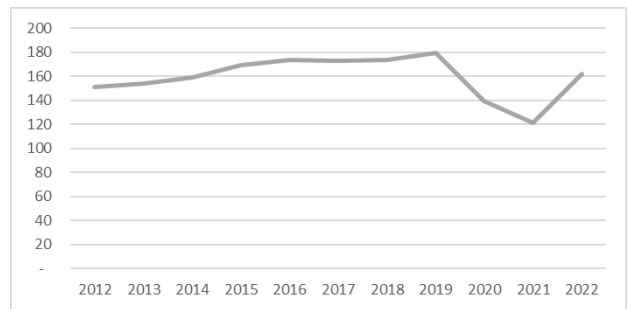
It should be noted that the share of SNCB/NMBS includes various offers. It includes traffic operated directly by SNCB/NMBS (incl. ÖBB services operated under SNCB/NMBS licence), as well as ICE and TGV France services. Purely SNCB/NMBS trains (excluding ICE and TGV) account for only 47% of the trains recorded in the SNCB/NMBS section. The market share of SNCB/NMBS in the strict sense fell significantly from 30% to 22%.



03 » A FEW INDICATORS IN THE PASSENGER SEGMENT

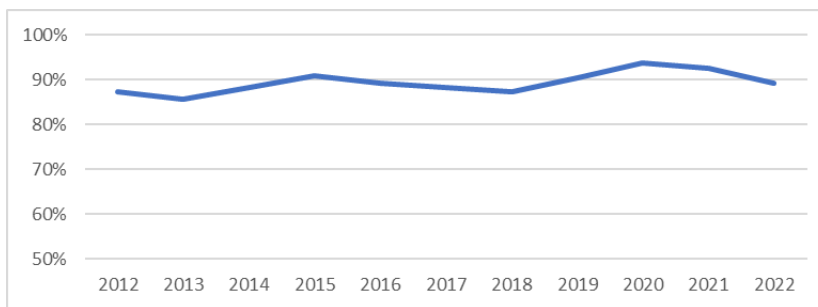
Passengers per train

The number of national train passengers recorded a very significant upturn. However, this level is still 10% lower than in 2019. This lower level can be explained, among other things, by a change in working habits, with the continued use of teleworking, albeit less systematically than during the health crisis.



Punctuality

Punctuality for national trains was 89.22% (trains with a delay of less than 6 minutes), compared to 92.62% in 2021. This punctuality has been declining since 2020.

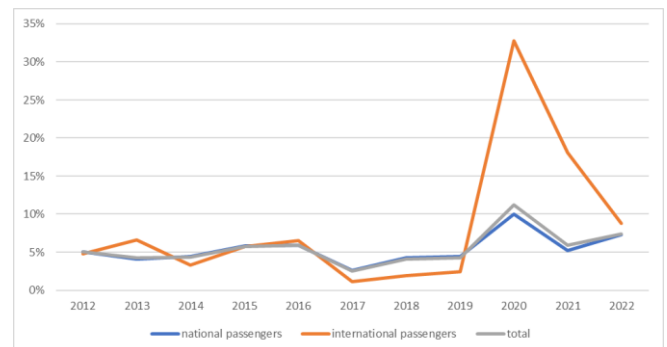


Speed

The average speed was 70 km/hour, which is stable compared to 2021 and almost at the same level as in 2019.

Share of non-effective train-km

Overall, the share of non-effective train-km grew from 5.9 to 7.4%. This rise is due to the increase in the share of non-effective train-km in the national segment, attributable to the higher number of cancelled trains. These cancelled trains are mainly due to an increase in absenteeism, weather circumstances (storm), and an increase in the number of strike days (5 days in 2022 compared to 1 in 2021). In the international segment, on the other hand, the percentage fell sharply but is still a long way from pre-Covid levels (2,4%).

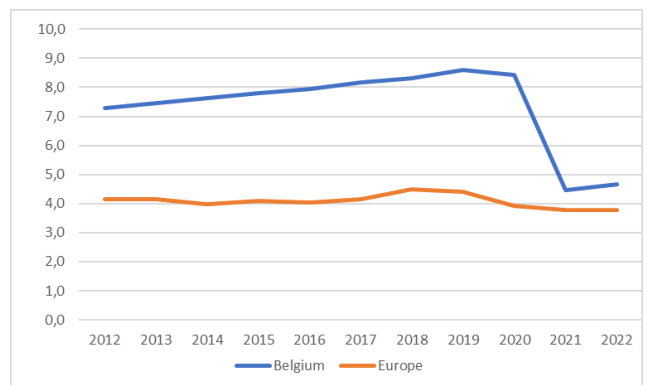


04 » TARIFFS FOR THE USE OF THE INFRASTRUCTURE

Position of Belgium with regard to charges

The average charge per train-km for passenger transport was **€4.7**. This amount is **slightly higher than in 2021, due to inflation**. It should also be noted, as highlighted below, that the increase was even greater in the international sector.

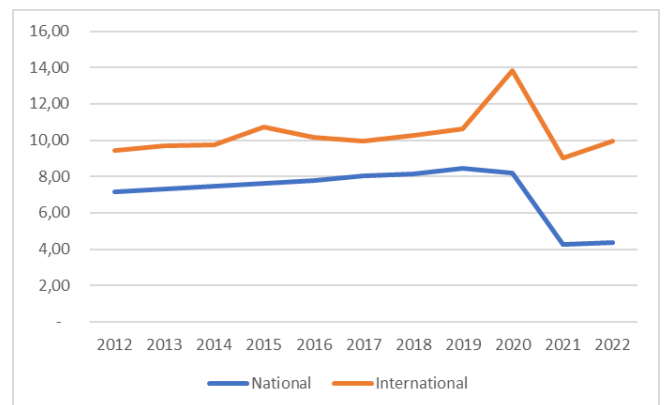
In 2021, **the European average was €3.8 per train-km**. The charge amounted to €2.00 per train-km in the Netherlands, €2.4 in Luxembourg, €5.2 in Germany and €5.7 in France (PSO segment).



Evolution of tariffs per train-km

Charges for trains in the national segment amounted to €4.34 per train-km, i.e. a rise of 2% compared to 2021. They are attributable to inflation and to some shifts in time slots, some of which are subject to higher mark-ups.

Charges for the **international traffic amounted to €9.97 per train-km, i.e. an increase of 11% compared to 2021.** For the high-speed train (HST) segment, charges amounted to €11.51 per train-km (an increase of 5%).



Share of charges in the turnover of the infrastructure manager

In 2022, passenger charges **amounted to €407.4 million**, i.e. 94.6% of the total amount of charges. It is worth noting the significant rise in the revenues of Infrabel in the “others” category, mainly in the energy sector. **The amount of charges represented 33% of the turnover of Infrabel.**

