Regulatory Body for Railway Transport and Brussels Airport Operations

RAIL FREIGHT TRANSPORT MONITORING – FIGURES 2022

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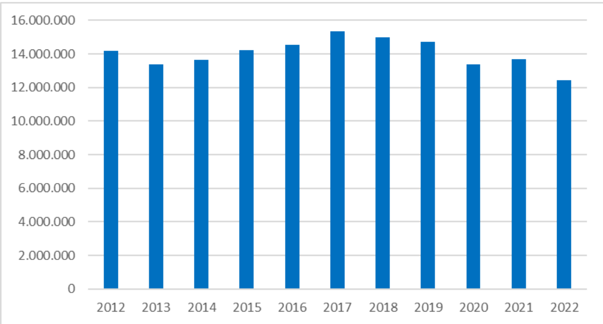
01 » EVOLUTION OF RAIL FREIGHT TRANSPORT

Evolution of gross ton-km

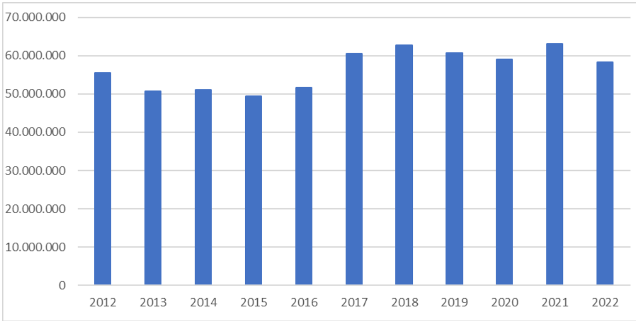
In 2022, **12,418,286.83 ton-km were transported.**

This represents a **9.4% decrease compared to 2021 and 15,5% compared to 2019**. This downward trend has been recorded since 2017.



Evolution of net tonnage

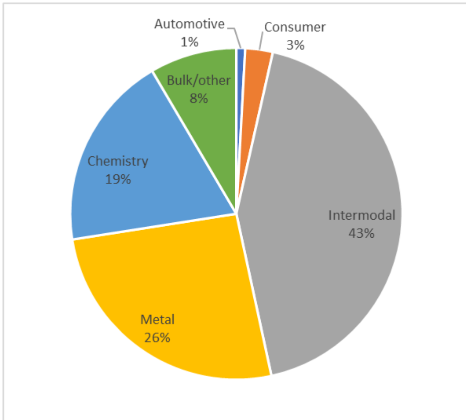
The net volume of tons transported amounted to **almost 58.3 million tons** of goods, i.e. a decrease of 7% compared to 2021. This figure fluctuates from year to year. The tonnage transported is at its lowest level since 2017.



Transported goods

In general, there was a decrease in transported goods over all sectors. With regard to market share, there was relative stability in the nature of the goods transported in 2022 compared to 2021. Most of the goods transported (88%) were associated with three sectors: chemical, metal and intermodal.

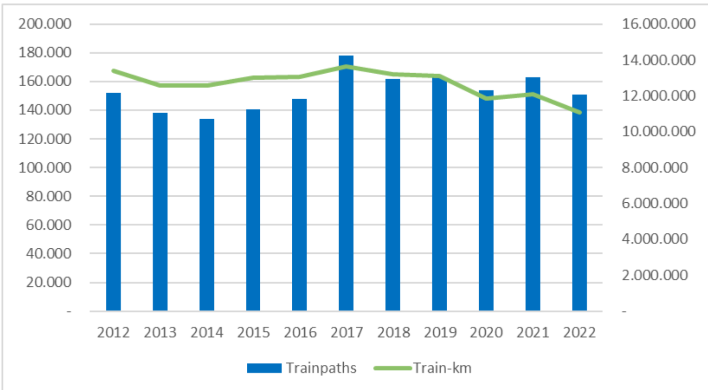
The share of intermodal transport fell slightly (from 46% to 43%). Products from the metal sector recorded a light increase from 25 to 26%, as well as the chemical sector (from 17 to 19%).



Evolution of train paths and train-km

In 2022, there were **151,078 train paths** for **11,069,062 train-kilometres**.

Compared to 2021, the 7% reduction in train paths is slightly smaller than the 9% decline in train-km, although the difference is not significant.

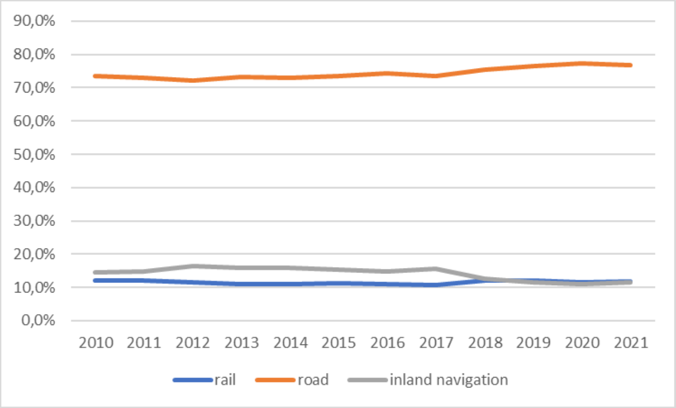


02 » COMPETITION IN RAIL TRANSPORT

Modal share of the rail sector

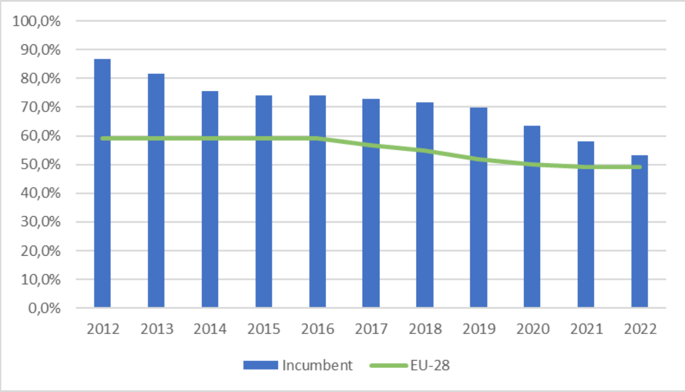
The modal share of rail in Belgium rose very slightly in 2021 to 11.8%. In Europe, the modal share of rail was 17.8%, up by about 1%. The modal share of rail has been relatively stable since 2010. If this trend continues, the objective of doubling the share of rail by 2030[1] will be difficult to achieve.

In neighbouring countries, the modal share of rail was 12.7% in France, 26.4% in Germany and 6.4% in the Netherlands.



Market share of the incumbent

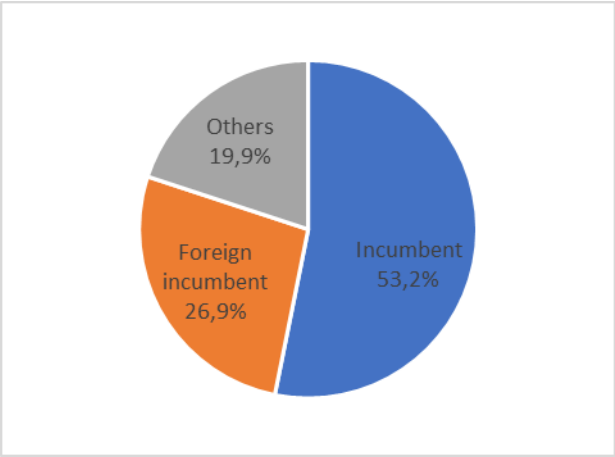
The market share of the incumbent, calculated on the basis of ton-km, fell further to 53.2%, compared to 58.2% in 2021. This percentage has been falling since 2012 and is getting closer to the European average.



Market shares

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

In 2022, "other" operators (i.e. not subsidiaries of an incumbent such as DB or SNCF) had a market share of 19.9% compared to 17.4% in 2021. Railway undertakings owned by a foreign incumbent operator had a market share of 26.9%, compared to 24.4% in 2021. Therefore, there is an increase in the share of both categories of competitors ("other" and foreign incumbents) compared to 2021.

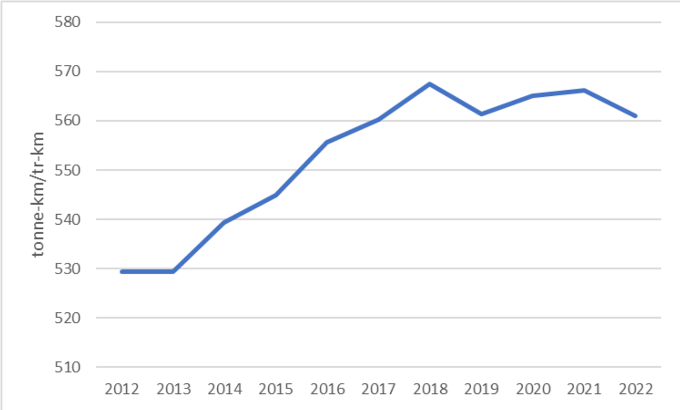


[1] Federal Government Agreement of 30 September 2020.

03 » A FEW INDICATORS IN THE FREIGHT SEGMENT

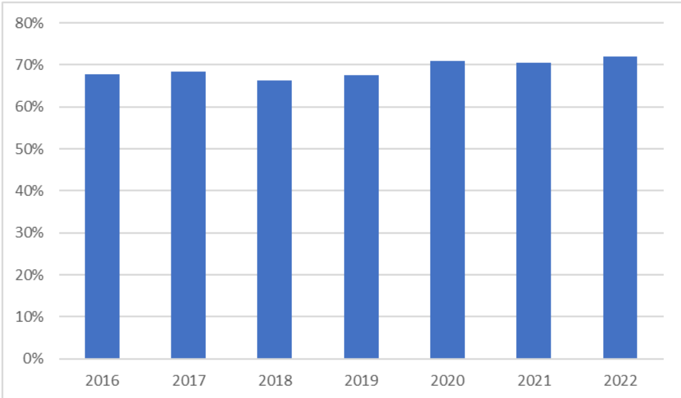
Freight load factor (ton-km/tr-km)

The freight load factor gives a first indication of the efficiency of rail transport. It decreased slightly compared to 2021, reflecting a fall in tonnages per train. Changes for this indicator are also linked to changes in the types of goods transported.



Punctuality

In 2022, the average train punctuality was **72%** (trains with a delay of less than 30 minutes). As a result, freight train punctuality was slightly better than in 2021. There has also been an upward trend in punctuality since 2018.

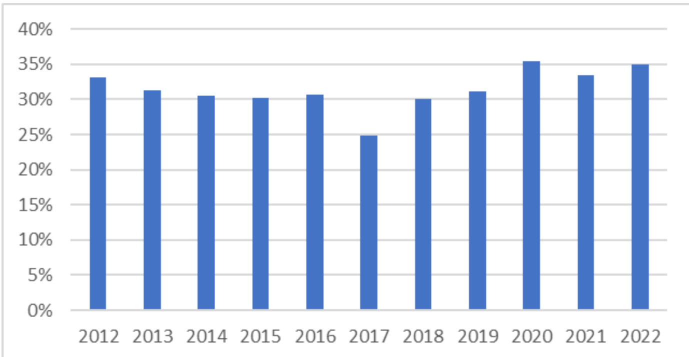


Speed

The average speed in 2022 was 50.8 km/h. This figure is slightly up from the previous year.

Share of non-effective train-km[2]

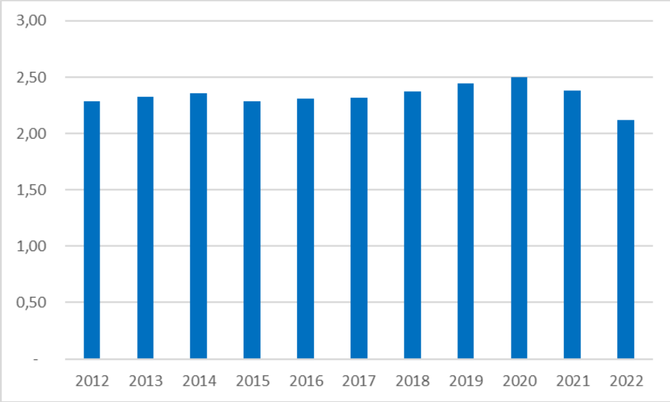
35% of train-km were not effective in 2022, compared to 33.5% in 2021. The share of non-effective train-km facing an upward trend since 2017.



[2] Trains for which a train path has been reserved but not used

04 » TARIFFS FOR THE USE OF THE INFRASTRUCTURE

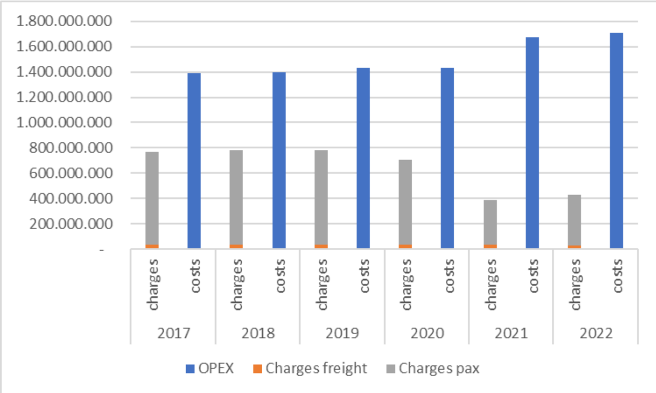
Evolution of tariffs per train-km



The average charge for a freight train in **Belgium was €2.12 per train-km**, i.e. a decrease by more than 10% compared to 2021. However, this trend is not (solely) due to a general fall in tariffs, but rather to a different distribution of traffic and associated factors (e.g. different distribution of empty trains, more diesel trains, etc.).

It should be noted that, overall, charges were lower in some countries. In France, for example, the level of the charge was €1.30 per train-km in 2022 and even lower in Germany (€0.2 per train-km).

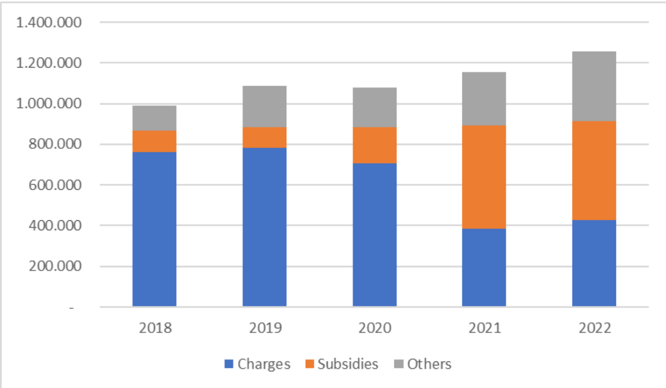
Share of charges in the operating costs



The total amount of charges accounted for 25% of the operating costs of Infrabel, i.e. a slight rise compared to the previous year (from 23 to 25%).

Freight charges amounted to **€28.5 million**, i.e. **6.5%** of the total amount of **infrastructure charges compared to 7.2% in 2021**. The amount of charges paid in the freight segment remained stable compared to 2021.

Distribution of operating income



Charges accounted for 34% of the operating income of Infrabel, operating subsidies for 38.6% and other income (energy, etc.) for 27.4%. "Other" income increased significantly, due to higher energy-related income.