Autorité de Régulation des Transports

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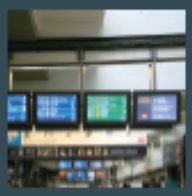
RAIL TRANSPORT MARKET IN FRANCE








- Key figures of the market in 2020
- Comparison of the impacts of the Covid-19 crisis in European countries
- Rail and other transport traffic during the first quarter of 2021

June 2021

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USAGE OF THE FRENCH RAIL NETWORK (RFN)

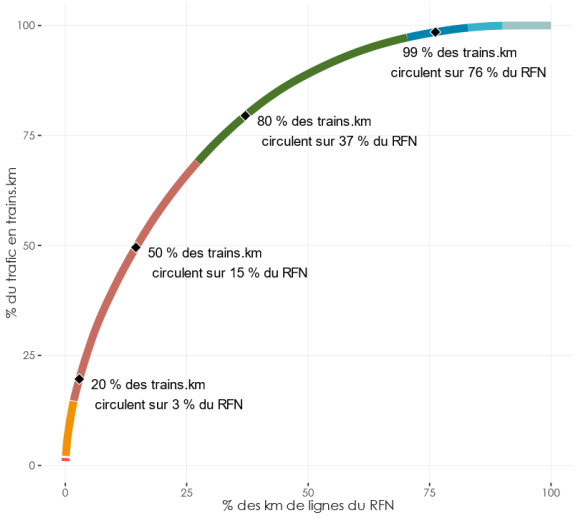
On a relatively stable network, rail traffic decreased by 21% in 2020

The French rail network (RFN) was shortened by around 200 km of track in 2020. Since 2015, nearly 1,000 km of track of groups 7 to 9 (« petites lignes »)[1] have been closed. However, the network remained more or less stable compared to 2015. This is due to the extension of 1,300 km of high-speed (HS) track and the stability of conventional lines from groups 2 to 6.

The average track age of the RFN has been progressively reduced, from nearly 31 years in 2015 to 29 years at the end of 2020. This is true for all track categories except for HS ones which aged by one year in 2020.

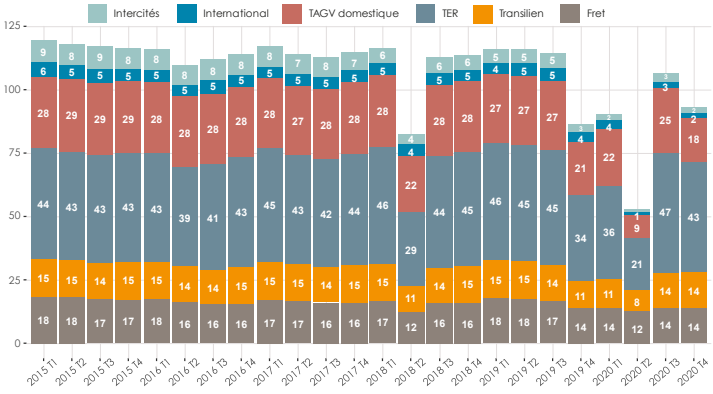
[1] Conventional tracks are categorized into 9 groups according to their usage intensity (from 1 for the most used to 9 for the least used ones)

Breakdown of traffic by its share in the RFN



Source : ART based on SNCF Réseau data collection

Train-km operated per quarter on the RFN (in million)



Source : ART based on SNCF Réseau data collection

In 2020, the share of traffic running on the most used parts of the RFN remains unchanged (99% of traffic on 76% of the network).

The lockdown periods have had a significant impact on long-distance services (HST and international trains). Their traffic contraction amounts to 30% compared to 2019 while it amounts to an average of 21% for all considered services.

Key figures

RFN at Dec 31, 2020

- **28 000 km of routes**
  - 59% electrified
  - 2 800 HS[2] km of routes
- **49 300 km of tracks**
- **Average age of tracks 29 years**
  - 30 years excl. HS lines
- **80% of traffic over 37% of the network**
- **370 m train-km**
  - 82% passenger
  - 15% freight and construction
  - 3% other
- **2 800 stations in regular service[3]**
  - 3 017 stations referenced by the main infrastructure manager in 2020, including:
    - 113 of category A
    - 1 017 of category B
    - 1 887 of category C

[2] high-speed
[3] at least 50 trains per year

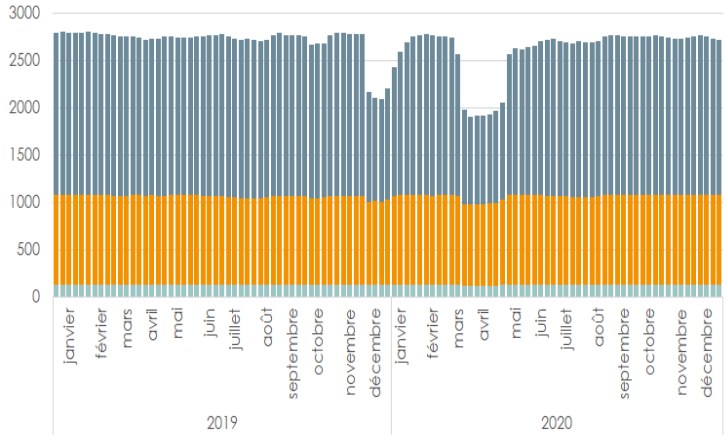
Less than 2,000 passenger stations in service per week during the lockdown of spring 2020

470 stations of category C and 25 of category B were completely closed during the spring lockdown. During the most impacted days, less than 1,200 stations were serviced against over 2,600 under normal circumstances.

Besides the spring lockdown, the number of stations in service remained almost stable despite the drop in passenger traffic.

Category A : stations of « national interest », which serve only national or international passengers, or at least 250,000 national and international passengers per year.
Category B : stations of « regional interest », which serve at least 100,000 passengers per year
Category C : stations of « local interest »

Number of stations serviced per week by category



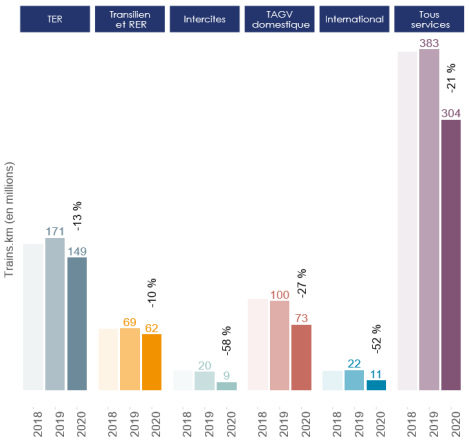
Source : ART based on SNCF Réseau data collection

RAIL PASSENGER MARKET

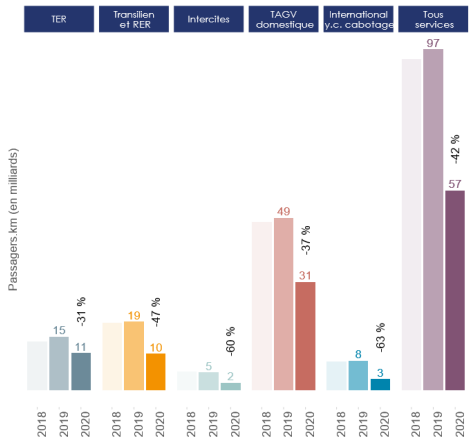
The number of passengers is twice as affected by the health crisis as the number of train-km

In 2020, the traffic plummeted by 42% in terms of passenger-km, twice as much as in terms of train-km (21% fall). This is due to the relatively steady level of regional PSO services as the train-km decreased by only 13% for TER and 10% for Transilien. International services were the most affected, with a drop of 63% for passenger-km.

Number of train-km

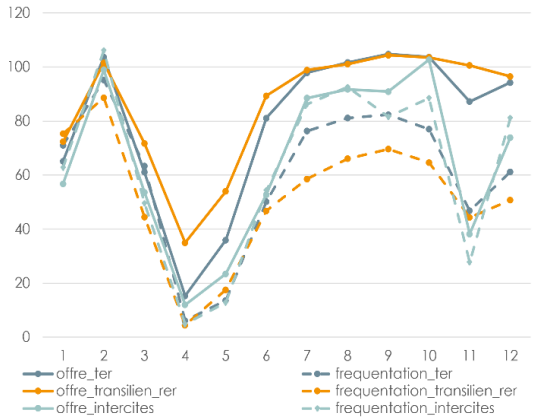


Number of passenger-km



Source : ART based on SNCF Voyageurs data collection

Monthly index of PSO traffic[2] (2019 = 100)



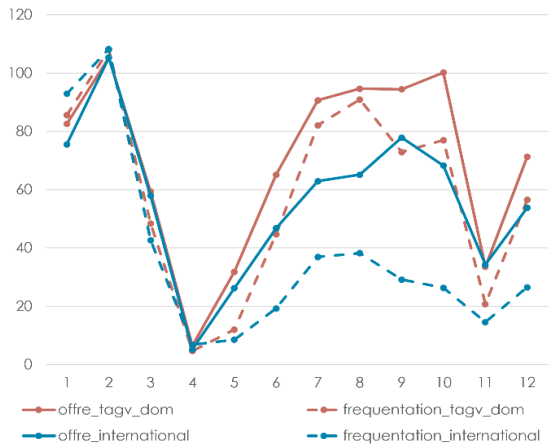
Source : ART according to SNCF Voyageurs

April 2020 was the most affected month by Covid-19, with a contraction of over 93% in total passenger-km compared to April 2019. TER and Transilien train-km were respectively maintained at 15% and 35% of their 2019 value, well above their passenger-km numbers. In the second half of the year, despite traffic recovery between the two lockdowns and a lesser impact of the second one, TER and Transilien passenger-km still remained far below their 2019 level.

Compared to other activities, the offer of long-distance services (Intercités and HST) was more closely correlated to the demand throughout the year, exception made for September and October 2020.

The demand for international rail transport did not recover after the spring lockdown, unlike domestic long-distance services. The latter even reached 80% of their 2019 level during the summer. For these services, the impact of the second lockdown period appears to have been lower and shorter than that of the first lockdown.

Monthly index of Non-PSO traffic (2019 = 100)



Source : ART according to SNCF Voyageurs

Key figures

Rail passenger market[1]

▶ 304 m train-km

including

Domestic HST	73 m
TER	149 m
Transilien	62 m

▶ 57 bn passenger-km

including

Domestic HST	31 bn
TER	11 bn
Transilien	10 bn

▶ April 2020/2019

	train-km / passenger-km
Transilien	-65% / -96%
TER	-85% / -94%
Intercités	-88% / -95%
Domestic HST	-94% / -95%
International	-95% / -93%

▶ November 2020/2019

	train-km / passenger-km
Transilien	+1% / -56%
TER	-13% / -53%
Intercités	-62% / -72%
Domestic HST	-66% / -79%
International	-66% / -86%

[1] Passenger rail activities in France: Intercités (long-distance PSO), TER (regional PSO, except Paris region), Transilien and RER (Paris region's suburban PSO) and high-speed services.

[2] Excluding TER and Intercités services in Normandie region, due to the integration of Intercités lines into the TER services; December 2020 is compared to November 2019 because the traffic was severely impacted by the strikes in December 2019.

RAIL PASSENGER MARKET

Punctuality is improved for the most used services

The share of trains arriving with a delay of less than 5 minutes 0 second increased for all services. More specifically, the punctuality rate of high-speed trains gained 3 pp. again in 2020 to reach 81%. The exception goes for Intercités and international trains services which only represent a tiny part of the total traffic.

2020 is characterised by three periods of massive train descheduling: the strikes at the beginning of the year, the spring lockdown and, to a lesser extent, the autumn lockdown.

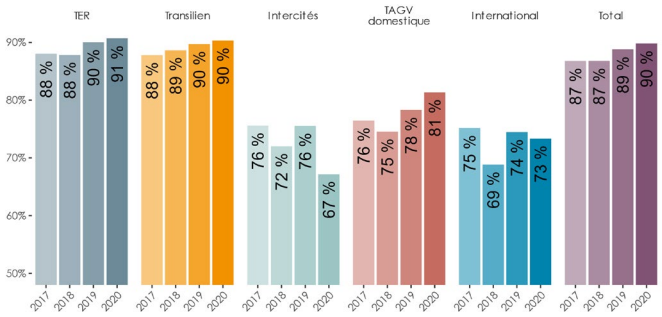
Key figures

Rail passenger market

- **90% of trains behind schedule by less than 5min00sec**

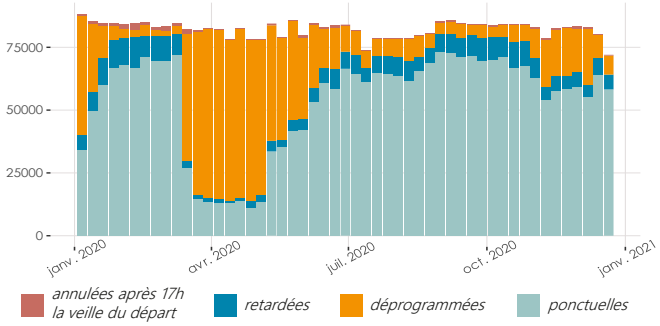
Transilien	90%
TER	91%
Domestic HST	81%

Share of trains delayed by less than 5 min 0 sec at their last stop



Source : ART based on SNCF Réseau data collection

Breakdown of weekly traffic by quality of service criteria

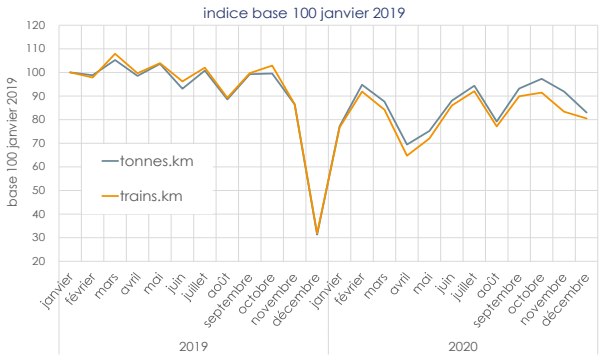


Source : ART based on SNCF Réseau data collection

RAIL FREIGHT MARKET

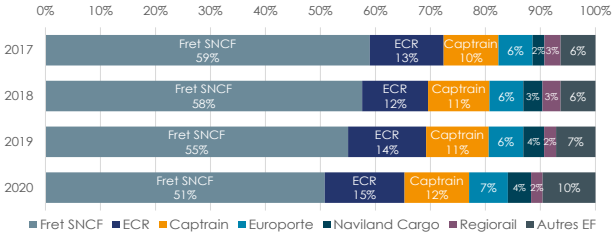
Traffic has remained on a downward trend

Freight traffic in train-km and tonne-km from 2019 to 2020



Source : ART based on railway undertakings data

Breakdown of freight train-km by railway undertaking



Source : ART based on railway undertakings data

After being deeply affected by the strikes at the end of 2019 and early-2020, rail freight transport has withstood the Covid-19 pandemic so far. Indeed, a traffic equivalent to more than 70% of its 2019 level was operated during the spring lockdown. The traffic volume was even close to normal during the autumn lockdown.

For the full year, freight traffic decreased by 11% in train-km and 7% in tonne-km. Moreover, the load factor (tonne per train) rose again this year. The concentration degree in the rail freight market was also reduced in 2020. The market share of SNCF group* declined by 3 pp. in 2020 from 70% in 2019.

The share of freight trains behind schedule by less than 60 and 30 minutes was respectively 92% and 85%, remaining unchanged from 2019.

Key figures

Rail freight market

- **31 bn tonne-km**
- **53 m train-km**
- **24 railway undertakings operating freight traffic**
  - 9 authorised applicants
- **85% of the train-km behind schedule by less than 30 minutes**

** SNCF group: Fret SNCF (incumbent), Ecorail Transport, Naviland Cargo, Normandie Rail Service et Captrain France (VFLI until 2020)*

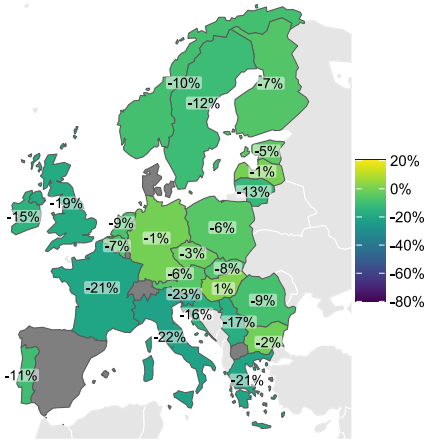
COMPARISON OF RAIL MARKET IN FRANCE AND EUROPE IN 2020*

Relatively moderate impact on passenger train-km in Europe

For all European countries, the transport sector and in particular the rail market has been affected by the Covid-19 pandemic.

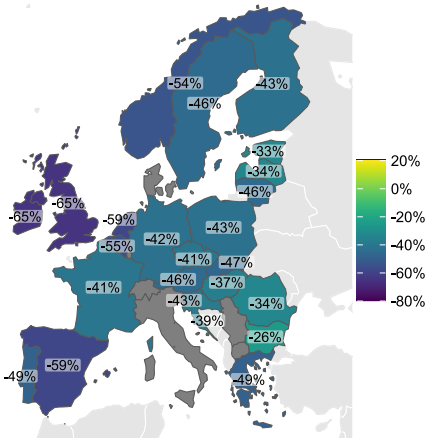
Over the full year 2020, the passenger train-km decreased by 11% on average. The decrease varies significantly between countries, ranging from around 20% in France, UK and Italy, to less than 10% in Eastern Europe and even only 1% in Germany.

Change in passenger train-km, comparison 2020/2019



Source : IRG-Rail

Change in passenger-km, comparison 2020/2019



Source : IRG-Rail

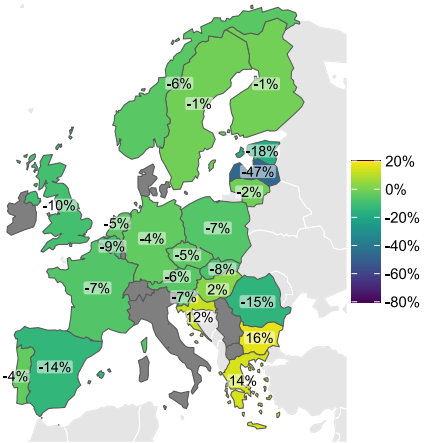
Demand for rail transport suffered more from the crisis, without obvious correlation with the offer

For most countries, the contraction in passenger-km was much stronger than the reduction in passenger train-km. The passenger-km fell by nearly 40% in France and Germany for instance, and up to 60%-65% in Spain, Benelux and UK. The decrease was lower for PSO services (-48% in passenger-km) than for non-PSO services. However, this is not the case in France where commercial services recorded a more moderate downturn than PSO ones (down 41% against 47% in Germany and 66% in Spain).

Rail freight is globally less affected by the pandemic

In most countries, the fall in freight traffic was more restricted than in passenger traffic. The average European shortfall in tonne-km was 7% compared with the previous year, which is also the rate of change for France and Poland. Meanwhile, Belgium, UK and Spain, for instance, reported a slightly higher decrease (-9%, -10% and -14% respectively).

Change in tonne-km, comparison 2020/2019

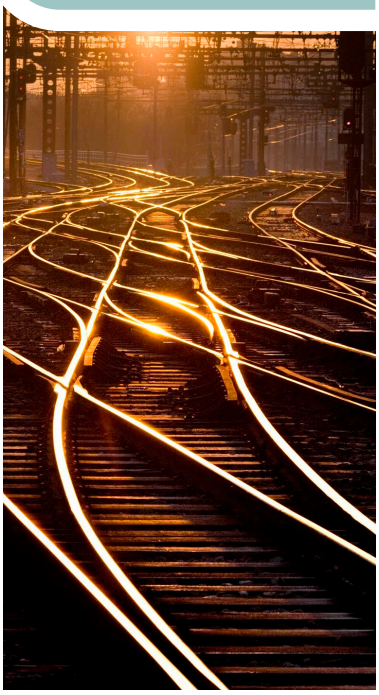


Source : IRG-Rail

Key figures

Rail market in Europe

- **-11% passenger train-km in Europe in 2020**
- **Traffic contraction of around 20% in 5 countries (France, Italy, UK, Slovenia, Greece)**
- **-48% passenger-km**
  - -48% for PSO services
  - -49% for non-PSO services
- **-7% tonne-km transported in Europe**



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** IRG-Rail data related to France does not cover Paris region's PSO services running on the Parisian urban network (only those on RFN are included), unlike the indicators presented in the previous pages.*

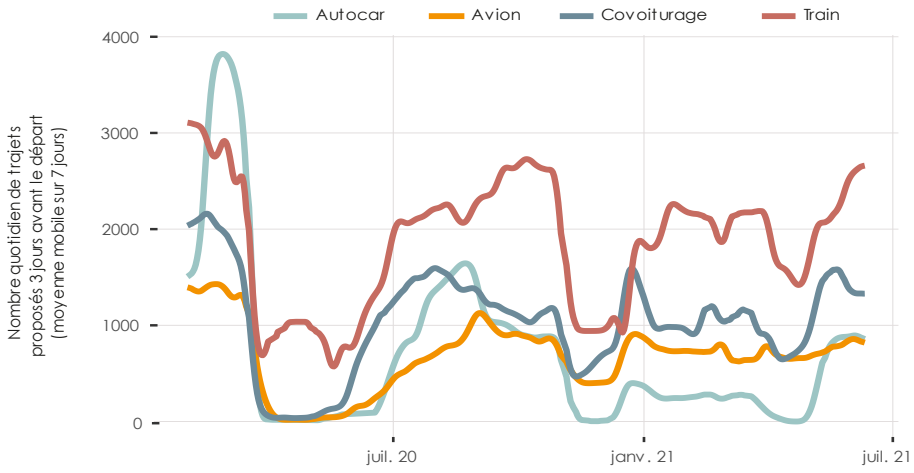
UPDATE ON THE RAIL MARKET IN THE FIRST HALF OF 2021

The rail traffic seems to have reached its normal level by the end of June 2021

The continuous monitoring of the long-distance rail market in 2020 confirms the major trends emerging from the data collected by ART: a strong and long downturn during the first lockdown (from March 17, 2020) and more moderate effects of the second lockdown (from October 29, 2020).

The beginning of 2021 sees a swift recovery in traffic related to the holiday season at end-2020. This is followed by a stabilisation of traffic to a lower-than-normal level and then by a limited shortfall during the third lockdown (from April 3rd, 2021). The traffic recovery was sharper than the one after the year-end holidays. At the end of June 2021, the rail traffic seems to have reached its normal level.

Number of departures per mode of transport for a selected panel of domestic routes before and after the lockdown periods
(Observation period from February 1st, 2020 to June 30, 2021)



Source : ART according to internet-based information on transport service offering

The traffic recovery after each lockdown was stronger and faster for rail transport than for the other modes

Looking at the whole domestic transport market, the two lockdowns in 2020 had similar effects for all modes. However, it should be noted, that only air and coach transport were completely closed during these periods.

Rail transport is the only mode that could nearly reach its pre-crisis level during the first half of 2021 or after the last lockdown. Thus, its recovery has been stronger and faster than the other modes so far. Meanwhile, coach transport is the only mode that experienced three complete service interruptions. Besides, we can observe the simultaneous developments in the coach and carpooling markets, which might reflect the close link of the demand in these two markets.

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