

Transport performances, Quarter 3 2020

In the third quarter of 2020, freight transport fell by 13% year-on-year, with an even larger decline in international traffic. Covid 19 had a greater impact on passenger transport: long-distance public transport halved and local transport fell by 23% in performance. Compared to the second quarter of 2020, which was severely affected by the restrictive measures, freight transport performance increased by 3.5%, long-distance passenger transport by 75% and local public transport almost doubled.

Freight transport performance falls by more than a tenth

In the third quarter of 2020, mainly due to the emergency situation caused by the coronavirus pandemic, **the performance of goods transport** (12.7 billion freight tonne kilometres) **decreased by 13%** compared to the same period of the previous year. By direction of delivery, year-on-year performances measured in freight tonne kilometres

- fell by **6.7%** for **national** transport and
- decreased by **16%** for **international** transport.

Figure 1

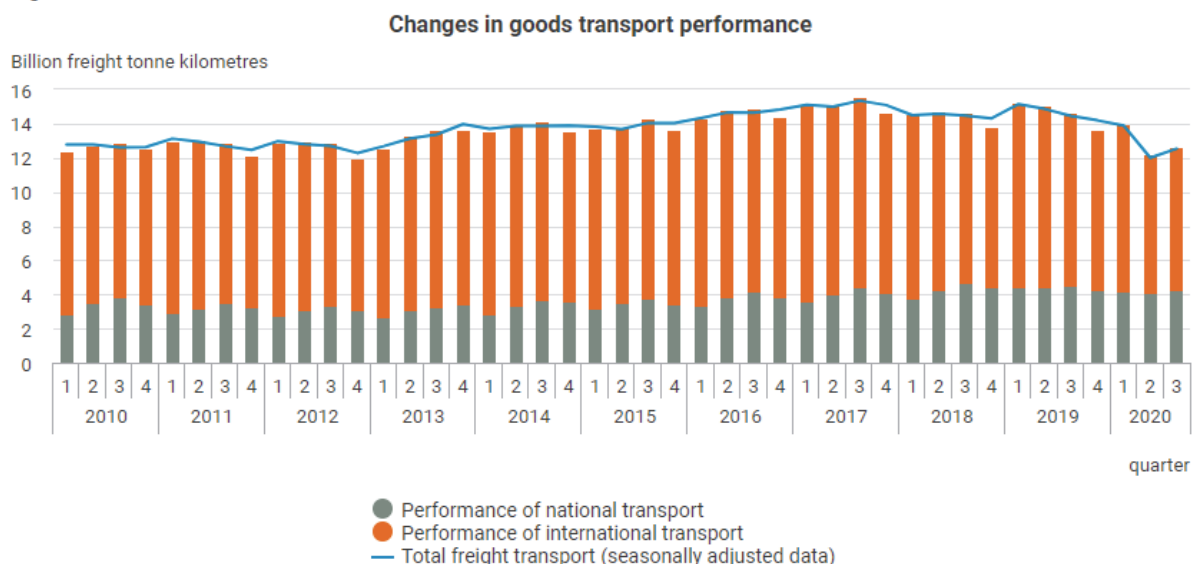
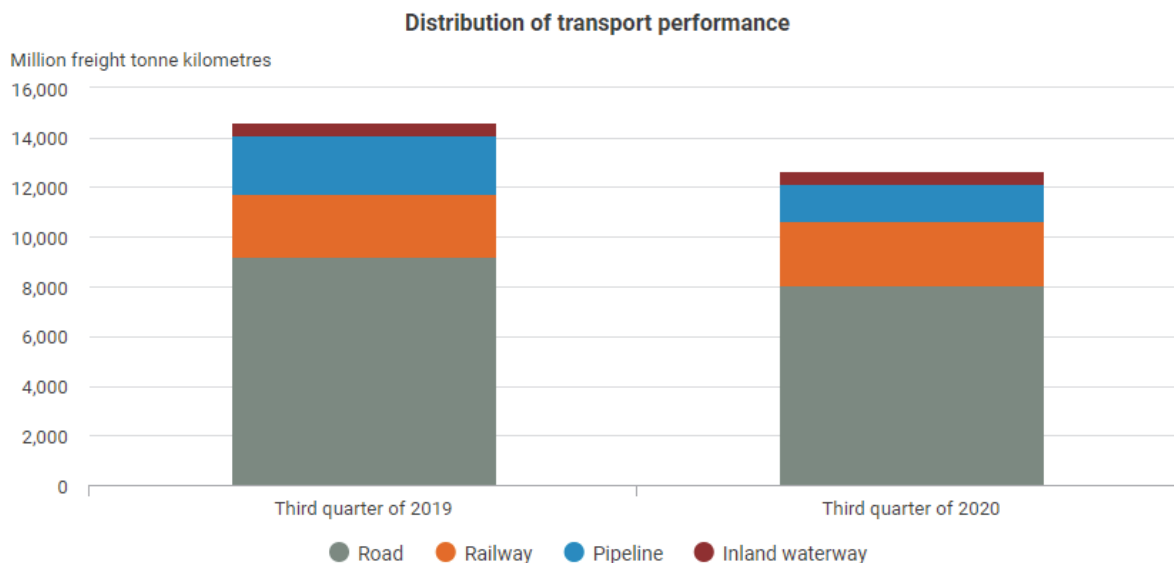


Figure 2



The **volume** of goods transported (73 million tonnes) **decreased by 11%** compared to the same period last year. The **volume of national goods transport** fell by **11%** and that of **international goods transport by 13%**. Almost all modes were affected by the epidemiological emergency and the domestic and international restrictions introduced. The volume of goods transported by pipeline decreased the most, by 33%, mainly due to last year's high base value.

Table 1

Volume of goods transported by mode of transport in the third quarter of 2020

Mode of transport	Volume of goods transported (%)	
	distribution %	change compared to same period of previous year, %
Rail	16.7	-2.6
Road	68.2	-9.2
Inland waterways	3.2	17.9
Pipeline	11.8	-32.7
Total	100.0	-11.2

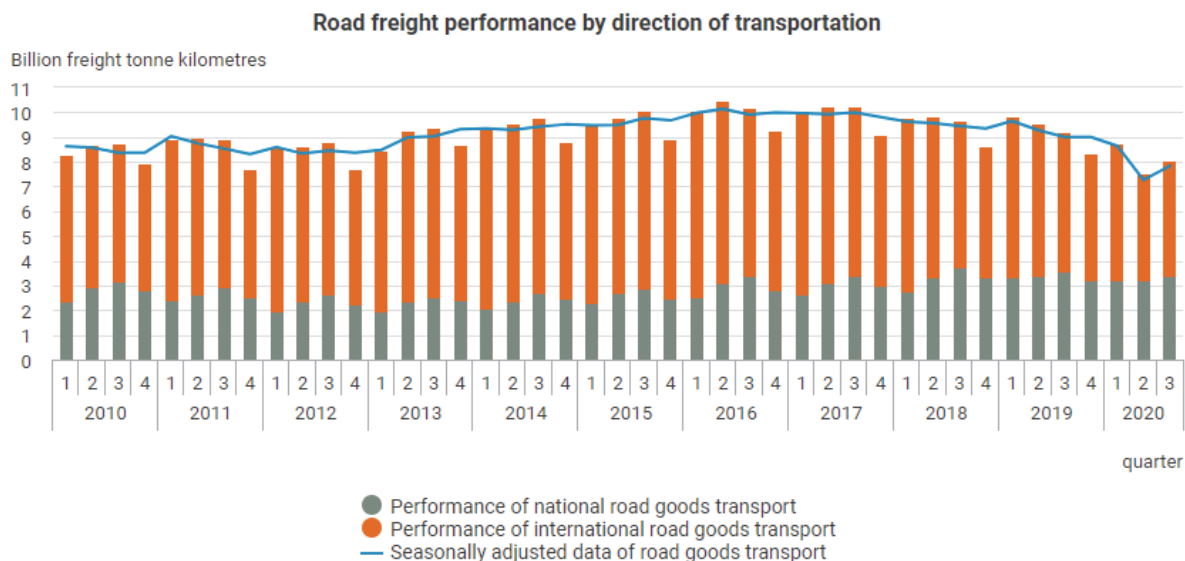
International road haulage falls by 17%

In the third quarter of 2020, road haulage of domestic carriers and freight forwarders **decreased year-on-year by 12% in performance** (8.1 billion freight tonne-kilometres) **and by 9.2% in volume** (49.8 million tonnes). **The average transport distance decreased** to 162 km, with **the proportion of empty mileage growing** to 23% due to increased competition from overcapacity in the freight market.

Breakdown by delivery direction:

- **national freight traffic fell by 8.8%** in volume and **by 5.2%** in freight tonne-kilometres,
- **international traffic declined by 17% in performance and by 11% in volume**, which is mainly related to the coronavirus epidemic as well as to stricter EU road freight transport regulations.

Figure 3



By sectoral classification of carrier:

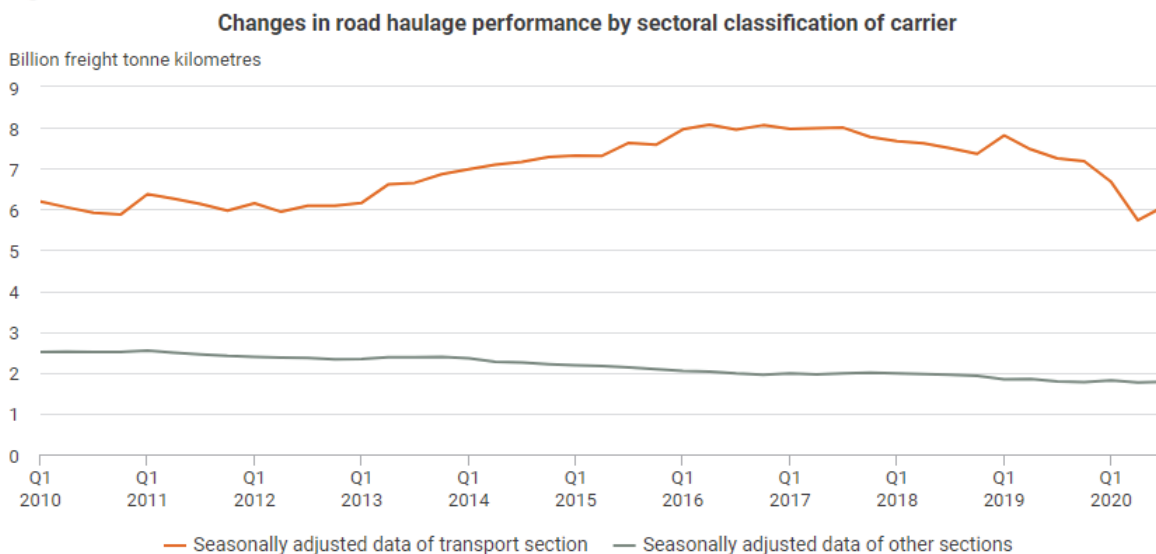
- both the volume of goods delivered by **enterprises grouped into the transport section** and their performance fell by 16%,
- goods transported by **enterprises grouped into other sectors** increased by 3.2% in volume and by 0.4% in performance.

Enterprises principally engaged in providing transportation services continued to have made better use of their vehicles than enterprises grouped into other sectors: the proportion of empty mileage was 21% for the former and 28% for the latter.

Based on customer grouping:

- **transport for hire or reward** decreased by 13% both in volume and in performance,
- although the volume of goods **transported on own account**, which is mainly for the domestic market, increased by 2.2%, the performance dropped by 9.9%.

Figure 4

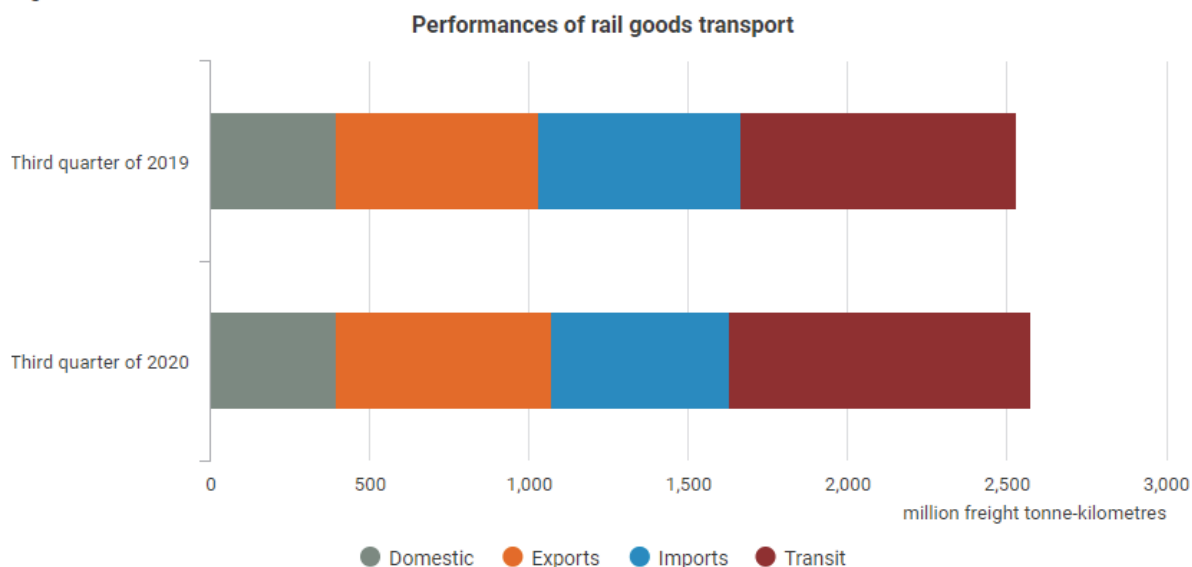


Rail freight transport performs slightly better

The performance of **rail freight transport** in tonne-kilometres **increased by 1.8%** to 2.6 billion, while the volume of goods transported **fell by 2.6%** to 12.2 million tonnes year-on-year. Shipments related to the automotive and steel industries as well as sand gravel and timber deliveries required for large construction investments declined significantly in the third quarter.

Rail freight traffic showed a mixed picture, with international transit and export volumes increasing by 5.6% and 14% respectively, while domestic and import volumes decreased by 16% and 8.7% respectively.

Figure 5



Inland waterway freight transport has increased significantly in volume

In the third quarter of 2020, inland waterway freight transport increased by 8.3% in freight tonne-kilometres and by 18% in total volume compared to the same period in 2019. In terms of year-on-year volume and performance, domestic waterborne freight transport declined (6.2% and 21%) and aggregate international freight traffic (loading/unloading and transit) increased (18% and 8.4%).

It can be said that in the third quarter of 2020, measures in response to the coronavirus epidemic did not have a significant impact in inland waterway freight transport.

The share of Hungarian flagged vessels in inland waterway transport was 7.7% in terms of the total weight of goods transported and 8.4% in the total performance expressed in tonne-kilometres.

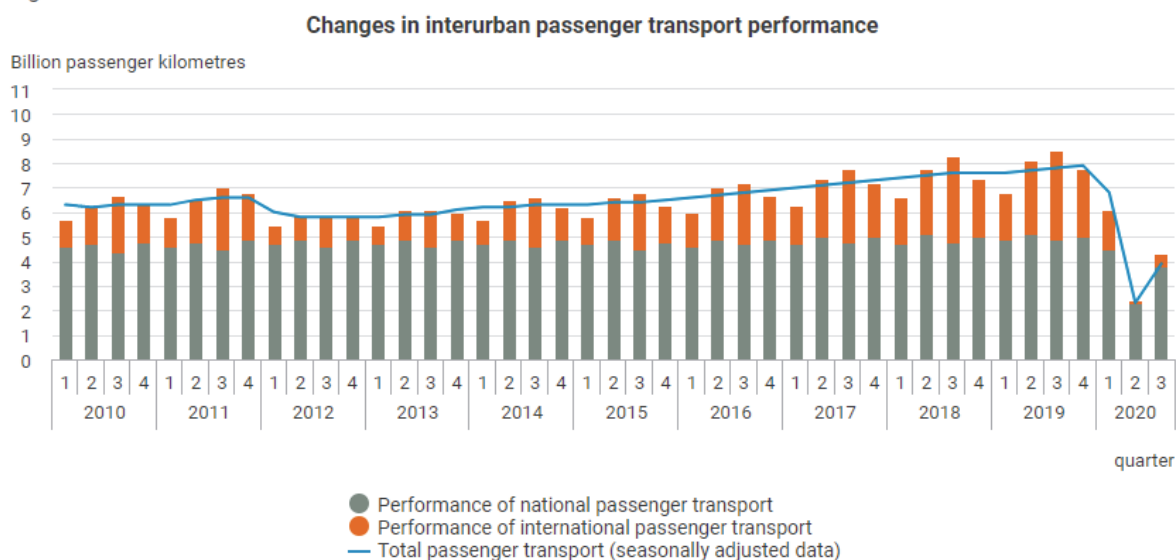
Interurban passenger transport fell less than in the previous quarter

The rate of decline in interurban passenger transport slowed down somewhat, but in July – September 2020, performance (4.3 billion passenger-kilometres) was still 50% lower and passenger traffic (116 million people) 19% lower than in the third quarter of 2019.

By direction of delivery:

- Domestic long-distance passenger transport was down by 24% in passenger kilometres and by 17% in passenger numbers.
- There have been more significant changes in international context: passenger traffic fell by 85% in passenger kilometres and by 83% in passenger numbers.

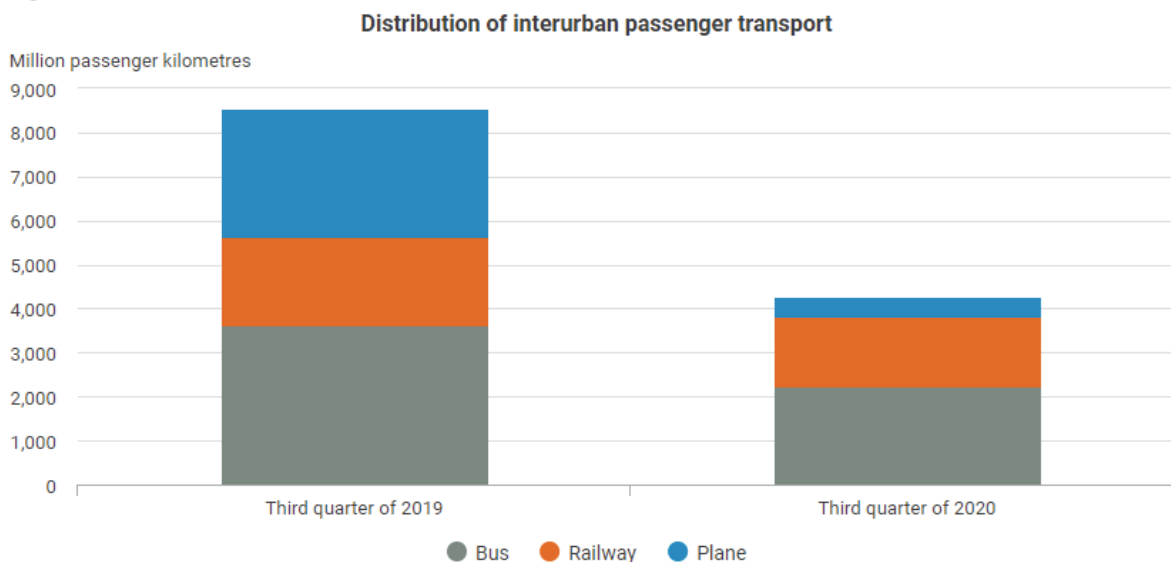
Figure 6



Bus transport accounts for the largest and water transport for the smallest share in passenger transport. Passenger transport fell by 38% by bus, by 22% by rail, by 84% by air and by 25% by water.

As a result of the above changes, the share of air passenger transport^[^1] in total performance fell from 34% in the same period of the previous year to 11%, while bus passenger transport increased by 9.7 percentage points to 52% and rail transport by 13 percentage points to 37%. **74% of passengers were carried by bus, 25% by rail and 0.3% by plane in the third quarter of 2020.**

Figure 7



Air passenger traffic at Budapest Ferenc Liszt International Airport falls to 16% compared to a year earlier

Passenger traffic at Budapest Ferenc Liszt International Airport, in relations of 49 countries, fell year-on-year by **83%** to 786.4 thousand persons **in the third quarter of 2020**. Passenger traffic was realised with 12.8 thousand flights, 63% less than in the same period of the previous year. After a positive start to the year, passenger numbers began to decline in March as a result of the introduction of travel restrictions. The low point (with only 7 thousandths of traffic of the same period of the previous year) was reported by the airport in April. In July-August, there was a slight increase compared to the previous months, however, the airport's passenger traffic still accounted for only 19% and 24%, respectively, of the previous year. In September, due to the border closures at the beginning of the month, passenger traffic decreased again very significantly, by 94% compared to the same period of the previous year.

In the third quarter the main air carriers were Wizzair, Ryanair and Lufthansa but their passenger traffic accounted for only 22% of the same period last year. 70% of passengers were carried by low-cost airlines, and their passenger traffic fell by 78% year-on-year.

Figure 8

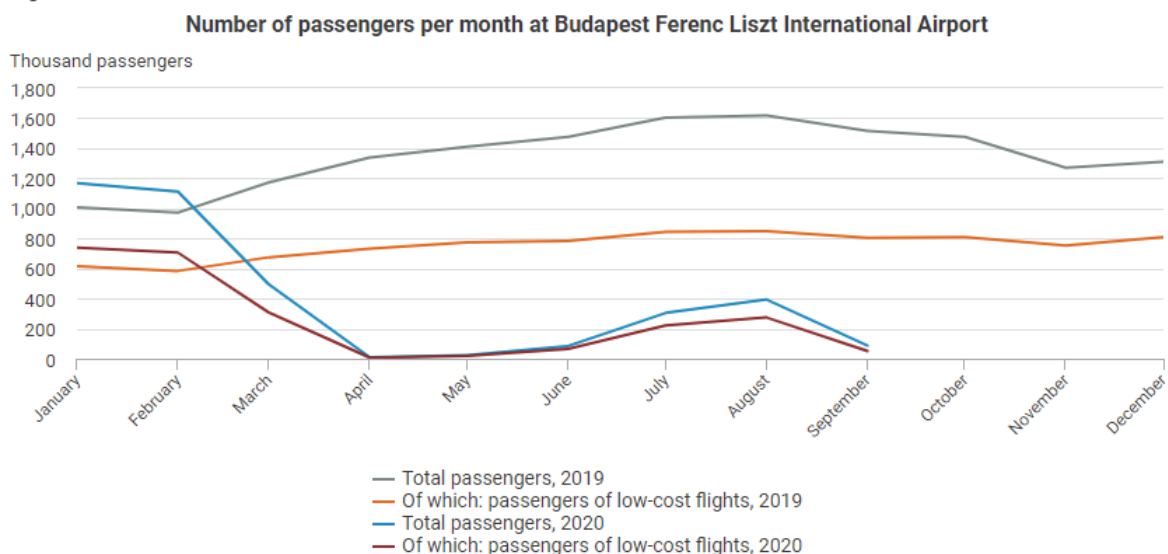
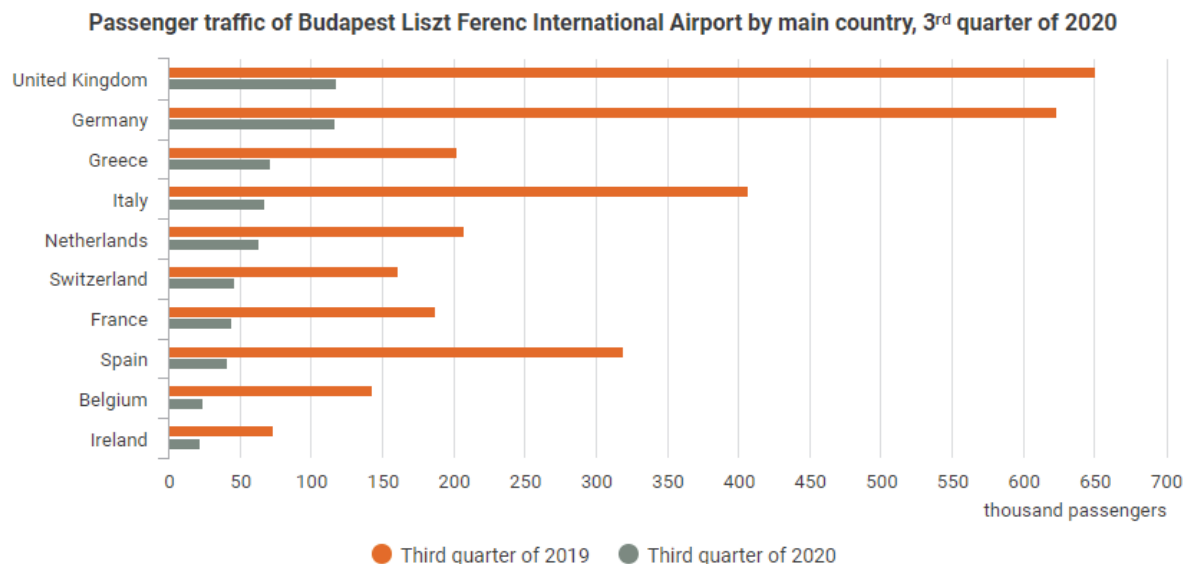


Figure 9



In the third quarter of 2020, **Debrecen Airport** saw an **86% fall** to 26.7 thousand in **passenger traffic** and a 53% decrease to 758 in the number of flights compared to the same period of the previous year.

Local passenger transport performs nearly a quarter worse

In the third quarter of 2020, due to the epidemiological emergency, **the number of passengers** using local passenger transport (391 million) and **passenger-kilometre performance** were **23% lower** than in the same period of the previous year. The decline was of a similar magnitude for each mode of transportation. Despite the fact that the reduction in bus passenger transport, which accounts for the largest share, was slightly lower than in the others, this mode of transport accounted for half of the total reduction in passenger numbers in local passenger transport (49%). Nearly three-quarters of passengers still used this service in Budapest.

The number of the first-time registered vehicles is still lower

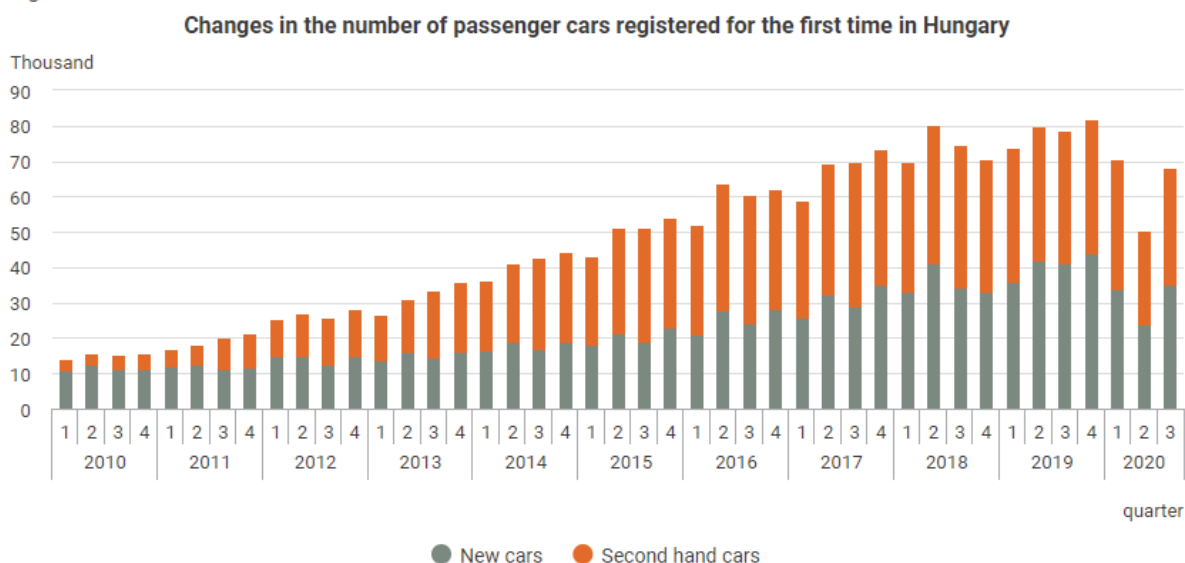
In the third quarter of 2020, the number of passenger cars registered for the first time in Hungary was 68 thousand, 13% lower than a year earlier. Ford, Volkswagen, Toyota and Suzuki brands together accounted for more than one third of passenger cars registered for the first time in Hungary.

The number of first time registrations fell by 15% for new cars and by 11% for used ones. 51% of first-time registered cars were new, their proportion increased compared to the previous quarter, but was still 21 percentage points lower than 10 years earlier.

Compared to the third quarter of 2019, 45% more electric cars (1,160 units) were registered for the first time.

The number of vehicles registered for the first time in Hungary increased by 18% for buses, by 11% for road tractors and decreased by 20% for lorries and by 6.4% for motorcycles in the third quarter of 2020. Most motorcycles were registered as second hand vehicles, while most road tractors, buses and lorries were registered as new ones.

Figure 10



[1]:↑ Figures contain data on the passenger transport of Hungarian air carriers passing through Hungary.