

# PRESS RELEASE

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## 2022: the year when opening up to competition has its first positive effects for train users

*In a report published today, the French transport regulatory authority (ART) publishes the first rail market figures for 2022, a record year for passenger train use. The opening up of rail passenger services to competition has resulted in an improvement in the rail offer for open access services, already apparent in 2022, and still to come for regional public rail services. After a rebound in freight activity in 2021, a slight decline can be observed in 2022.*

*An updated comparison of the European rail markets in 2021, conducted by ART and also published today, shows that rail traffic in France recovers faster from the crisis than in neighbouring countries. However, France stands out for three reasons: its rail network remains old, is used less than the European average and is characterised by high tolls paid by passenger railway undertakings, reflecting the French government's decision to have the rail network financed mainly by its users, the railway undertakings, rather than by public subsidies.*

### **INCREASE IN THE NUMBER OF TRAINS RUNNING AND DECREASE IN TICKET PRICES: THE FIRST POSITIVE EFFECTS OF OPENING UP TO COMPETITION**

The entry into service in 2022 of two new open access services, provided by Trenitalia France and SNCF Voyageurs (Ouigo classic train), has led to an increase in rail services of almost 10% in daily traffic between Paris and Lyon since the end of 2021, as well as an increase in passenger numbers on the routes operated. There has also been a reduction of more than 10% in revenue per passenger-km between Paris and Lyon.

The first competitive tenders for regional rail public services (TER), which are compulsory from 25 December 2023, have resulted in an improved or significantly increased offer at a cost down by 20-25%, even though France stands out in Europe for its high level of public subsidies for public rail services (more than €20 per train.km in France in 2021, compared with nearly €11 in Germany and Italy).

### **A RECORD 100 BILLION PASSENGER-KILOMETRES TRANSPORTED**

In 2022, passenger rail transport has regained its pre-crisis dynamic, with passenger numbers 2% higher than in 2019, reaching a record level of 100 billion passenger-kilometres transported.

TER and Intercités public rail services have seen the biggest increase since 2019 (+12%). The resumption of several night train lines has been accompanied by a 77% increase in their ridership

compared with 2019. On the other hand, ridership on Transilien and RER services in the Île-de-France region remains below pre-crisis levels.

After being severely affected by the health crisis, passenger train occupancy rates are back to their 2019 levels, with a record 74% for high-speed trains. On the other hand, after an improvement in 2021, 2022 shows a deterioration in passenger punctuality.

### **A RELATIVELY OLD, LITTLE-USED FRENCH NETWORK WITH THE HIGHEST TOLLS IN EUROPE**

The age of track on the national rail network (28.4 years on average) has fallen in 2022 on conventional lines, while it has risen on high-speed lines. Overall, the age of track on the core network is 23.5 years, 1.5 years older than the comparable German network. The condition of the network, which appears to be below the optimum level - set by SNCF Réseau at 50% of the service life of track components - has remained stable since 2021.

While spending on maintenance and investment in rail networks has increased since 2019 for many European infrastructure managers, particularly in Germany (+23%), spending on track maintenance and renewal is lower in France than in Germany or Belgium.

Furthermore, while Europe's rail networks have recovered, by 2021, an average of 96% of their 2019 traffic levels (in terms of the number of train circulations), with a slower catch-up in the United Kingdom (84%) and Spain (81%), France is still characterised by a relatively low level of traffic in relation to the size of its network.

Lastly, France stands out for having a much higher level of tolls for open access services (€18 per train.km) than most other European countries, reflecting the French government's decision to have the rail network financed mainly by its users, the railway undertakings, rather than by public subsidies.

### **FREIGHT TRANSPORT SLOWING DOWN IN 2022, WITH 35 BILLION TONNE-KILOMETRES TRANSPORTED**

While the first half of 2022 was, in France as in Europe, a continuation of the rebound in freight observed in 2021 with, over the first three quarters of 2022, a 22% increase in freight traffic in Italy, 10% in Germany and 2% in France, the end of 2022 shows a decline in freight activity in France. As a result, the rail freight market contracted very slightly in 2022, with a modal share that remains low (11%) compared with Germany (19%) and Switzerland (34%).

Combined transport continues to grow, and now accounts for 41% of the global market.

#### **For further details (in French)**

- [The first rail market figures for 2022](#)
- [The European rail markets in 2021](#)
- [The press release](#)
- [The Open Data dataset](#)

### **About the French Transport Regulatory Authority (ART)**

Since 2010, the French railway sector has had an independent authority to accompany its gradual opening to competition: the Autorité de régulation des activités ferroviaires (Araf). Law 2015-990 of 6 August 2015 on growth, activity and equal economic opportunity extended the regulator's powers to road activities - coach transport and motorways. On 15 October 2015, Araf became the Autorité de régulation des activités ferroviaires et routières (Arafer), with the mission to contribute to the proper functioning of public service and competitive activities for the benefit of rail and road transport customers.

With competence for the regulation of airport charges since 1 October 2019, Arafer became the Transport Regulatory Authority (ART) on that date. Lastly, Law No. 2019-1428 of 24 December 2019 -mobility act- extended the Authority's powers and missions to the opening up of mobility and ticketing data, as well as to the regulation of infrastructure manager activities and security activities carried out by RATP in Île-de-France. Its opinions and decisions are adopted by a college of five independent members chosen for their economic, legal or technical skills in the field of digital services or transport, or for their expertise in competition matters. It is chaired since 4th August 2022 by Philippe Richert, Vice-President and Acting President.