

PRESS RELEASE

Paris, September 27th, 2023

The market for liberalised coach services, commonly known as "Macron coaches", continues its post-Covid recovery in the first half of 2023 despite high prices

The French Transport Regulatory Authority (ART) is publishing today its [report on the liberalised coach services market for the first half of 2023](#). It notes an increase in coach ridership over the period and an increase in revenue per kilometre compared with 2019, which could suggest less competitive pressure between operators. In addition, the announced closure of the Paris-Bercy coach station after the 2024 Olympic Games, which represents 30% of the liberalised coach services market, could jeopardise the long-term future of this market if no solution is found. The ART will study solutions with the concerned players to ensure that liberalised coach services can continue to operate in the capital under satisfactory conditions.

IN THE FIRST HALF OF 2023, PASSENGER NUMBERS ARE GROWING FASTER THAN CAPACITY

Although the number of routes and coach.km had caught up with the 2019 level by the end of the half-year, coach frequency (715 daily departures by the end of Q2 2023) was still 13% lower than in 2019.

Over 3.8 million domestic passengers were transported in the first half of 2023. As a result of dynamic international traffic, there were more than 6.5 million passengers in total, at least 5% more than in 2019. As a result, coach occupancy rates remain high. Although the proportion of passengers benefiting from a competing offer is high, the lower growth in the offer seems to be limiting the effects of competition for passengers.

REVENUE PER KILOMETRE RISING, WELL ABOVE THE INFLATION RATE

In line with the second half of 2022, average revenue remains above €6 per passenger per 100 km. In comparison with the same period in 2019, this represents a 55% increase in average revenue, well ahead of price trends in France (14.6%), which could indicate less competitive pressure between operators. In total, the sector's revenue exceeds €65 million, 20% more than its value in the first half of 2019.

THE EXISTENCE OF A PARIS COACH STATION IS ESSENTIAL FOR THE CONTINUED EXISTENCE OF LIBERALISED COACH SERVICES

Paris-Bercy is France's leading coach station, handling around 30% of liberalised coach services passengers every year. Although the services offered to passengers are inadequate, it is essential for transport operators as it is the only high-capacity coach station located within the city. If no alternative were proposed, the closure announced last September 7th could jeopardise the

competitiveness of liberalised coach services to Paris: several million users would then be deprived of a low-priced and environmentally friendly mode of transport. ART will work with the concerned players to find solutions to ensure that liberalised coach services can continue to operate to and from the capital under satisfactory conditions.

For further details (in French)

- [The report « Bilan sur le marché du transport par autocar librement organisé au premier semestre 2023 »](#)
- [The press release](#)

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.