

# PRESS RELEASE

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## Despite a slight decline in the rail transport offer, passenger number increased in 2023

*The French Transport Regulatory Authority (ART) publishes its report on the “First figures on rail markets in France for 2023”, which looks at the main trends in the passenger and freight rail markets in 2023, and its France-Europe rail review for 2022<sup>1</sup>, which provides an updated comparison of France with the trends observed in Europe in 2022. Despite a decline in the offer, passenger rail transport observed a further sharp rise in number of passengers and train occupancy in France in 2023. On the other hand, freight transport has been experiencing a significant decline since 2022 in France and in several European countries.*

### **RAIL TRANSPORT DEMAND HAS PARTIALLY RECOVERED IN EUROPE, AND HAS CONTINUED TO GROW STRONGLY IN FRANCE SINCE 2022**

**In 2022, rail passenger transport in France saw record passenger numbers and occupancy rates, which were confirmed in 2023.** The 2022 levels were once again exceeded in 2023 (by 6 % in terms of passengers.kilometre transported), despite a slight drop in rail transport offer (-1 %), leading to record occupancy rates (77 %, particularly on domestic high-speed routes). In Europe,

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<sup>1</sup> This report covers the year 2022. The delay in publishing the document is due to the time required to collect data from the various European regulatory bodies.

the first figures for 2023 also confirm a catch-up with pre-crisis levels, and even an increase in passenger numbers in Spain (+30 % in one year), due, in particular, to the opening up of competition in the country in 2021.

**Passenger number for public service obligation (PSO) has recovered in most regions of France, with the notable exception of Transilien and RER services in the Île-de-France region** (6 % below 2019 levels). However, even more marked withdrawals were observed in 2022 in Europe, reaching more than 20 % overall for public service obligation in the United Kingdom and Italy.

**An overall reduction in the number of trains in operation has been observed in France.** However, on the routes concerned by competition between the operators SNCF Voyageurs, Trenitalia and Renfe, rail transport offer increased by more than 10 %.

**In terms of quality of service, the reliability of the operators' rail transport offer (trains that have actually run) remains stable, while punctuality is deteriorating.** The train cancellation rate has thus remained at its 2022 level. On the other hand, train punctuality deteriorated again in 2023, particularly for TER services in 9 out of 11 regions.

#### **THE "AVERAGE PRICE" OF HIGH-SPEED TRAINS ROSE BY 7 % IN 2023, FASTER THAN THE RATE OF INFLATION**

**Although the "average prices" of high-speed trains have risen by 7 % in France, and more strongly for Ouigo services (with an annual increase of almost 10 %, compared with 5 % for other services), they remain lower in real terms than in 2019.** The level and dynamics of train fares vary greatly according to fare class and route. **Competition has had a noticeable effect on prices**, which have fallen by 10 % on the Paris-Lyon route. In Spain, the trend is even more pronounced, with prices falling by almost 40 % on routes that have been subject to competition since 2021, and an "average price" for all high-speed services that has also fallen in current euros.

**The average price paid by users of public service obligation in France is close to the one observed in neighbouring countries.** What sets France apart, however, is the much higher overall cost of these services (almost €30 per train.km in 2022, compared with less than €20 in Germany, Italy and close to Spain or Belgium). 33 % of this cost is covered by commercial revenues and requires a high level of public funding. However, the first contracts awarded following tenders for regional services (5 in 2024, out of almost 50 expected) have led to substantial cost reductions compared to current agreements.

#### **RAIL FREIGHT TRANSPORT DECLINES FURTHER, BOTH IN FRANCE AND IN EUROPE**

**In 2022, in the context of the economic crisis and inflation, the volume of freight transported by rail in Europe fell to its 2019 level.** This decline was confirmed in 2023 in Germany and France (-17 %), where the social movement in March and the landslide in the Maurienne region exacerbated the fall. The virtual stability of road freight traffic should therefore lead to a further decline in the modal share of rail freight, which is already low in France (11 %) compared with the European average (17 %).

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

- [Les premiers chiffres du bilan ferroviaire - France 2023](#)
- [Le bilan France-Europe des marchés ferroviaires en 2022](#)
- Les [tableaux de bord digitalisés](#) sur le marché français du transport ferroviaire de voyageurs et de fret
- Les [jeux de données en open data](#)

### **Press contact**

Karine Léopold, Head of Communications: [karine.leopold@autorite-transport.fr](mailto:karine.leopold@autorite-transport.fr)

### **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 ART'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 29 December 2023 by Thierry Guimbaud.