PRESS RELEASE

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THE STRONG GROWTH IN RAIL DEMAND CONTINUED IN 2024

The French Transport Regulatory Authority (ART) publishes its first figures for the 2024 passenger and freight rail markets in France, together with an updated comparison of France with other European countries. In 2024, rail transport in France saw record passenger numbers, confirming the strong growth seen in France and Europe in 2023. The opening up of the Paris-Lyon line to competition has had significant positive effects on services and prices, confirmed by the Spanish and Italian examples in Europe, as well as for regional trains. Occupancy rates have been very high for high-speed trains and rising for conventional trains. The quality of train service has improved significantly, in the absence of any major social movements. Freight transport also rebounded in 2024 thanks to combined transport activity. Finally, unlike other European countries, France has seen a reduction in investment in rail infrastructure.

IN 2024, PASSENGER RAIL TRANSPORT EXPERIENCED ITS DYNAMICS IN EUROPE AS IN FRANCE

Passenger train use in France increased again by 6% in 2024, both for high-speed trains (+4%) and for conventional TER and Intercités trains (+11%). The latter are experiencing particularly strong growth, with a 35% increase in passenger traffic since 2019, especially on local TER lines (daily transport). With capacity increasing at half the rate of passenger traffic over the period 2019-2024, occupancy rates are at record levels, averaging 51% in 2024 and rising to over 75% for high-speed services.

The number of passengers on contracted trains significantly increased during the summer period, both for the Transilien and RER services in Île-de-France due to the influx related to the Paris 2024 Olympic and Paralympic Games (JOP), and for the TER and Intercités services due to the effect of the Rail Pass.

In Europe, the initial figures for 2024 also confirm the strong appeal of rail travel, which has exceeded its 2019 patronage levels by an average of 9%, with increased dynamic in Spain: traffic there has surpassed its 2019 levels by nearly a third, largely thanks to the development of competition for commercial services.

In France, the positive effects of competition between SNCF Voyageurs, Trenitalia and Renfe can be seen in 2024. Passenger traffic has increased by almost 20% on the Paris-Lyon route, and by 30% on France-Spain routes since 2019, i.e. two and three times respectively the national average for high-speed routes. In addition, prices on the Paris-Lyon route remain, on average, more than 10% below their 2019 level. For services operated under contract, the first tender awards (10 lots by mid-2025, out of nearly 50 lots expected) have also shown that substantial reductions in operating costs are expected (at constant or even increased supply) for the new agreements.

THE YEAR 2024 WAS CHARACTERISED BY A SIGNIFICANT IMPROVEMENT IN TRAIN REGULARITY AND PUNCTUALITY, BUT A FUTHER DROP IN THE PROGRAMMED SUPPLY OF HIGH-SPEED TRAINS

In 2024, the train cancellation rate was at a historically low level due to the absence of any major social movement for 7 years. This made it possible to ensure growth in effective service despite the downward trend in scheduled high-speed services since 2019.

The frequency of effective station services for commercial services has increased by 4% in 2024, without returning to its 2017 level, and appears to have fallen sharply for intermediate stations on the high-speed network. This trend, which began well before the effective opening up to competition, can be seen even though the market share of new entrants remains below 2% today.

Train punctuality has also improved for most services, with actual and punctual running rates in excess of 80% for all conventional services.

RAIL FREIGHT TRANSPORT REBOUNDS IN 2024, AGAINST A BACKDROP OF RESTRUCTURING

After a year of sharp decline in 2023 in both France and Europe, freight transport has started to rise again, mainly due to 20% growth in the combined transport market, driven by alternative operators. However, the overall volume of traffic remains below its 2021 and 2022 levels. The implementation of the discontinuity plan for Fret SNCF has led to a drop of more than 20% in Fret SNCF's traffic and a recovery by alternative operators. The market share of the historic operator (whose own business is operated since the beginning of 2025 by the new entity Hexafret) has therefore fallen by 6 points in one year, to a level of 42%.

WHILE NEIGHBOURING COUNTRIES ARE INVESTING IN THEIR RAIL INFRASTRUCTURE, FRANCE APPEARS TO BE LAGGING BEHIND THIS TREND

Unlike France, European expenses on rail infrastructure have grown strongly since 2019, by 36% in current euros, outstripping inflation (19%). Germany, Italy and Spain are making a major contribution to this increase through their investment in the network. Although investment in France has risen by around 12%, this is less than inflation (+14.9% between 2019 and 2023), reflecting a fall in real terms.

WHILE THE DEPLOYMENT OF THE EUROPEAN ERTMS SIGNALLING SYSTEM REMAINS WELL BELOW TARGET IN EUROPE (8%), IT IS STAGNATING AT HALF THE LEVEL (4%) IN FRANCE

Finally, France still stands out for its high level of tolls for passenger services, particularly for commercial services. In 2023, France collected 28% of European rail tolls for just 12% of the network, and the rail tolls applicable to commercial services (€21 per train.km) were three times higher than the tolls paid by rail companies in Germany (€7.2) and Spain (€7.5), which are among the highest in Europe after France. This situation illustrates France's historic decision to make the users bear a large proportion of its infrastructure costs.

Consult:

- The first figures for 2024 rail results in France (in French)
- Rail markets France-Europe results in 2023 (in French)
- Digitalized dashboards on the French market of passenger and freight rail transport
- The open data datasets

Press contact

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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.

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