

PRESS RELEASE

Paris, June 16th 2025

A dynamic long-distance coach market, with passenger traffic in 2024 well above 2019 levels

The French Transport Regulatory Authority (ART) has published its 10th annual report on the coach transport market and coach stations. Since the market was opened up in 2015, more than 100 million passengers have benefited from this economical mode of transport. The coach market remains very dynamic: 2024 marks a record year in terms of passenger numbers, with 18 million passengers, erasing the impact of the COVID-19 health crisis. This increase in passenger numbers is also reflected in coach stations, where ART again points to the inadequate quality of service, which could undermine the sector's attractiveness, given its essential role in the sector's development. The sector's attractiveness is based in particular on low prices and a low environmental impact.

LONG-DISTANCE COACH TRAVEL HAS INCREASED SIGNIFICANTLY SINCE 2015, BUT THE POOR QUALITY OF SERVICE AT STATIONS IS HARMING THE ATTRACTIVENESS OF THE SECTOR

Coach stations traffic

On average, road transport facilities welcomed nearly 100,000 passengers on independently organised long-distance coaches in 2024, an increase of 40% since 2019. However, some large coach stations have facilities that fall well below expected standards. Poor service quality at stations leads to a deterioration in the user experience and may discourage people from using long-distance coaches. The Lille-Europe and Nantes-Haluchère stations, whose facilities remain very limited, are the only ones among the top ten coach stations that have not returned to their 2019 passenger numbers.

Future of Bercy station

In addition to monitoring market developments, one of major projects for 2024 for ART, as the sector regulator, was to actively contribute to the search for alternative solutions for Bercy-Seine station, following the announcement of its closure by the city of Paris. Stations and road infrastructure play a vital role in the development of the sector, with Bercy station in particular now an essential piece of infrastructure.

OVER 100 MILLION PASSENGERS TRANSPORTED SINCE THE MARKET OPENED AND RECORD ANNUAL TRAFFIC IN 2024

Growth in coach transport services

Long-distance coach transport services exceeds 2023 levels by 10%, with a record number of departures (830 daily departures) and coach-km (120 million). On the demand side, with 11 million domestic passengers and 18 million passengers in total, passenger traffic is higher than in 2019, including for domestic travel (+5%). The latter even increased more sharply over the year (+14%) than international travel (+6%).

The rate of delays of more than 15 minutes has deteriorated significantly over the year, reaching 24% of coaches in operation in 2024, which is significantly higher than the rate for TGV and Intercités trains (which stood at 10% and 16% respectively for the same 15-minute threshold in 2024).

10 years of regulating new services

The 10th report on coach transport also provides an opportunity to take stock of ART's work in regulating new freely organised routes of less than 100 km. Since 2015, only 7% of these 2,000 new routes have been referred to ART by a mobility organising authority for examination of their impact on existing contracted routes. In the vast majority of cases, after analysis by ART, the new routes were authorised. These had only a minor impact (less than 3%) on the economy of contracted transport services.

COACH TRANSPORT IS ONE OF THE MOST ECONOMICAL MODES OF TRANSPORT, WHILE ALSO HAVING A LOW ENVIRONMENTAL IMPACT

In 2024, average revenue from domestic routes stands at 6 euros per passenger per 100 km, a 5% decrease over one year, while inflation remains positive at 2% in France. Coach transport is therefore one of the cheapest modes of public transport. Despite this decline in unit prices, commercial revenue from domestic routes will reach a new record of 181 million euros in 2024, thanks to increased passenger traffic.

Beyond analysing the strictly financial effects of opening new coach routes, ART is committed to documenting the social and environmental benefits. Coach transport saves 15,000 tonnes of CO₂ per year compared to private cars, and its emissions are 20 g of CO₂ per passenger-kilometre lower than those of Intercités trains.

In the last quarter of 2024, competing domestic routes – i.e. those operated by both operators at the same time – accounted for 94% of passengers carried, an increase on previous years, indicating greater competition.

Consult:

- [The 2024 annual report on passenger road transport and bus stations](#) (in French)

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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.