

PRESS RELEASE

Paris, the 23rd of October 2025

As of mid-2025, the long-distance coaches commercial market continues to grow, but at a more moderate pace

After experiencing a strong growth at the end of the Covid-19 health crisis, the long-distance coach market (freely organised) rose at a more moderate pace during the first half of 2025. The market continues to be driven by domestic ridership, which grew compared to early 2024, despite an increase in the average price paid by domestic passengers.

Updated data on the coach market review can be found on ART's [datavisualisation portal](#).

TRAFFIC SLIGHTLY INCREASES OVER THE YEAR

As of mid-2025, 5.3 million passengers had travelled on domestic routes, representing a 5% increase in one year. The growth in the total number of passengers was however slowed down by a slight 3% decrease on international liaisons¹. As a result, the total number of passengers who travelled through or within France reached 7.7 million, a moderate increase of 2% compared to mid-2024.

On the supply side, the distances travelled by freely organised coaches continued to increase during the first half of 2025 (up 2% year-on-year to reach 57 million coaches-kilometre). Meanwhile, the frequency of freely organised coaches fell by 3% over the same period, settling at around 780 daily departures.

¹ Revisions have been made to total attendance figures due to corrections to data on international attendance in France since 2015. Find the updated data at <https://opendata.autorite-transport.fr/>
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REVENUES PER KILOMETRE ARE ON THE RISE AND RETURN TO ITS 2023 LEVEL

By mid-2025, the revenue per domestic passenger per 100km had risen by 10% year-on-year to return to just over 6 euros, even though the occupancy rate remained stable over the same period (up by only 1 point to 64%).

FIND OUT MORE ON ART'S DATAVISUALISATION PORTAL

ART's [datavisualisation portal](#) displays interactive sector-specific dashboards. Data for freely organised coaches are gathered in four categories: ridership, supply, quality of service and economic, environmental and social results. These "Coaches" dashboards are updated mid-year, or annually, depending on available data.

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.