Autorité de Régulation des Transports

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The French railway market confirms its growth and quality service improvement dynamics, while investment challenges remain

The French Transport Regulatory Authority (ART) has published today its comprehensive report on the 2024 French railway transport market, which complements the "Essential" of the railway transport market, published in December 2025. It offers thematic analyses focusing especially on the organisation of railway services in France and quality of service. Three lessons in particular emerge from this overview on the developments in the railway sector. Firstly, the railway market growth dynamic, supported by the development of competition, benefits users and facilitates the financing of regional contract services. Secondly, punctuality is improving on average for all rail services: in this regard, ART is launching its "Préviseo" application, designed to help inform all users about the reliability of rail services in France. Thirdly, despite this positive dynamic in terms of services, the level of investment in network renewal remains insufficient to counteract the ageing of the infrastructure.

THE RAILWAY MARKET GROWTH DYNAMIC, SUPPORTED BY THE DEVELOPMENT OF COMPETITION, BENEFITS USERS AND FACILITATES THE FINANCING OF REGIONAL CONTRACT SERVICES

The year 2024 witnessed record passenger numbers for both freely organised (non-PSO) and public service obligation (PSO) services. Passenger numbers exceeded 2019 levels by more than a third (25%) for contractually agreed intercity services and by 12% for high-speed services.

The record ridership for non-PSO services was supported by a restructuring and a diversification of the offer, both by the incumbent operator and new entrants, in a context of opening up to competition.

- **In 2024, Ouigo services accounted for 21% of passenger traffic on non-PSO services in France**, largely explaining the increase in high-speed rail services in terms of seats. Low-cost services, which initially focused on serving large urban areas in the South-East when they were launched more than ten years ago, have diversified across all radial routes and inter-sector connections, accounting for more than a third of services in 2024. Ouigo has thus contributed to the overall growth in the number of seats sold, reaching between 3% and

8% depending on the route. Ouigo services also serve smaller urban areas, operating 7% of services to stations in urban areas with fewer than 50,000 inhabitants in 2024.

- **New entrants Trenitalia and Renfe have also helped to increase and diversify the non-PSO service offering**, operating 11% of the train service offering on the Paris-Lyon route and 47% of the service offering between France and Spain in 2024, respectively.

For regional trains services, the increase in occupancy rates between 2019 and 2024 has improved, for all regions, the share of fare revenue in their overall financing, reaching a level close to 25% in the Occitanie, Nouvelle-Aquitaine and Hauts-de-France regions, and up to nearly 40% for half of the regions.

This change has taken place without any increase in the prices of PSO services, which have not reflected inflation and have even fallen sharply as a result of attractive pricing policies. However, this moderation in the prices of PSO services is not enough to explain recent trends in passenger numbers: other factors appear to be decisive in mobility choices, in particular the quality of transport services.

PUNCTUALITY IS IMPROVING ON AVERAGE FOR ALL RAIL SERVICES

The punctuality and regularity of rail services improved significantly in 2024, both for PSO and non-PSO services. The most marked improvement in punctuality was seen in Intercités services (+4 points in 2024), which nevertheless still had the lowest passenger punctuality rates. The rate of effective and punctual TER services improved in almost all regions, due to a general decline in cancellation rates. Transilien-RER services in Île-de-France also saw a marked improvement in their performance rate (+5 points, reaching 89%).

Concerning non-PSO services, the Paris-Lyon route in particular, where competing services have coexisted since the end of 2021, has above-average punctuality. While punctuality rates can vary significantly depending on the time of day, the causes attributable to station infrastructure and passenger traffic are relatively minor (less than 5%).

In order to provide additional insight into train punctuality, **ART provides a freely accessible tool (https://previseo.autorite-transports.fr/)** for monitoring, on a route-by-route basis, the delay rate indicators for all passenger trains operating in France.

THE LEVEL OF INVESTMENT IN NETWORK RENEWAL REMAINS INSUFFICIENT TO COUNTERACT THE AGEING OF THE INFRASTRUCTURE

Track renewal on the national rail network increased on conventional lines but decreased on high-speed lines. Overall, nearly 1,200 km of track was renewed in 2024, an increase of 16% compared to the average observed over the 2015-2021 period, driven by the successful implementation of SNCF Réseau's investment programme. However, investment in high-speed rail renewal fell significantly in 2024 (-17%). The level of investment expenditure devoted to rail network renewal thus remains below the level observed in 2019 (excluding inflation) over the last few years.

These efforts remain insufficient to counteract the ageing of the infrastructure. By the end of 2023, nearly 2,600 km of track on the core network had already reached the end of its theoretical lifespan, and nearly 300 to 400 km of additional national rail network track will reach the same milestone each year between now and 2029.

The unavailability of the national rail network due to works continues to increase despite partial utilisation of the capacity mobilised. In 2024, nearly 14% of the network's reservation capacity was neutralised due to the scheduling of works, double the figure for 2019. This figure rises to 54% on the network used by night trains. In addition, between 21% and 26% of scheduled works windows are neither used by SNCF Réseau nor returned, thus limiting the capacity actually available to railway companies. The infrastructure manager has committed to reducing the rate of non-use to 10% by 2030 as part of the implementation of the incentive mechanism for the return of unused works capacity, which ART had ordered it to introduce in a dispute settlement decision.

Consult (in French):

- The French railway transport market in 2024 – Comprehensive report
- Digital dashboards on the French passenger and freight rail transport market
- Open data sets
- The Préviséo application

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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.