Autorité DE RÉGULATION DES TRANSPORTS

Liberté • Égalité • Fraternité
RÉPUBLIQUE FRANÇAISE

PRESS RELEASE

Paris, 24 June, 2026

Record public transport passenger numbers: the success of rail calls for the expansion of rail services

Public transport passenger numbers in France have reached an all-time high. The latest figures from the French Transport Regulatory Authority (ART) show that this growth is driven primarily by the strong rise in rail transport, which is a key driver of decarbonising transport. They also highlight that this growth calls for an increase in services and investment in infrastructure, whilst markets open to competition are already demonstrating their ability to support the development of rail services.

FRENCH PEOPLE ARE USING PUBLIC TRANSPORT MORE THAN EVER, PARTICULARLY THE TRAIN, WHICH PLAYS A CENTRAL ROLE IN THE DECARBONISATION OF MOBILITY

Whilst travel volumes are rising in France (+1% in 2024), greenhouse gas emissions from transport continue to fall (-1.2% in 2024), reinforcing the trend observed over the last five years (-7.4% since 2019).

This trend is mainly the result of a shift by passengers towards public transport, with rail being the main beneficiary. Its modal share thus reaches 10.9% of all journeys in France by 2024. In 2025, rail passenger numbers set a new all-time record, with a 4% increase for high-speed services and a steady rise in regional transport services and Île-de-France services.

This growth trend is one of the strongest in Europe. Admittedly, Spain remains Europe's leading driver of growth in open access trains, with a 41% rise in passenger numbers over five years, but the volume of rail passenger numbers there is nearly three times lower than in France. The growth observed in France, however, exceeds that recorded since 2019 in Germany or Italy.

GROWING DEMAND CALLS FOR MORE SERVICES AND AN EFFICIENT RAIL NETWORK

The rise in demand is no longer reflected primarily in an increase in the number of services, but in higher train occupancy rates.

In 2025, average occupancy rates on high-speed trains are thus approaching 80%, reflecting a particularly high level of occupancy. This trend results from strong passenger growth, combined with a stable supply in terms of the number of seats on sale. Scheduled frequencies fell further in 2025 and remain nearly 10% below 2019 levels due to constraints on rolling stock availability.

Since 2019, the supply of public service obligation (PSO) services has also grown more slowly than passenger numbers, both in France and across the rest of Europe, leading to an increase in the average number of passengers carried per train (+ 6% in 2024 on average across Europe). Occupancy rates rose particularly sharply in 2025 for Transilien and RER services.

Maintaining an efficient and reliable transport service requires sustained investment in the regeneration and modernisation of the network, in order to prevent a decline in its capacity and quality of service. Several major European countries have embarked on such a process. The long-term scenarios for the rail network drawn up by ART in 2023[1] had already highlighted the need for such investment to meet the growing demand for rail travel and address the gradual ageing of the infrastructure.

This situation underscores the need not only to expand rail services but also to continue modernising and regenerating the infrastructure. The expansion of services, by encouraging an increase in traffic, helps to boost rail toll revenue, thereby strengthening the network's financing capacity. In turn, investment in the regeneration and modernisation of the network makes it possible to increase available capacity and sustainably support the growth in demand.

MARKETS WHERE COMPETITION IS EFFECTIVE ARE SEEING SHARP INCREASES IN SERVICE OFFERINGS AND PASSENGER NUMBERS

Routes on which SNCF Voyageurs' competitors operate are seeing sharp increases in train services, exceeding 20% on the Paris–Lyon and Paris–Marseille routes and nearly 100% on routes between France and Italy. Passenger numbers on these routes have risen by more than 25%, which is twice the national average.

The launch of the PSO services awarded following a competitive tender process is also having a visible impact: by 2025, the effective regional train capacity had increased by 21% (in terms of seat-kilometres sold) in the Provence-Alpes-Côte d'Azur region, driven by a sharp rise in service frequencies on the "Azur" and "Inter-Métropoles" lines. With 15 contracts, out of more than 50 expected, awarded by mid-2026, 23% of the PSO market has been subject to a competitive tendering process, making France one of Europe's leading test beds for opening up to competition of the PSO services.

These results show that competition is a practical means of meeting growing demand by encouraging an increase in supply, improving the attractiveness of services and expanding travel options for passengers.

INTERMODAL COMPETITION ALSO BENEFITS PASSENGERS

The dynamic observed in favour of public transport is not limited to rail.

Ten years after the market liberalisation for long-distance coach services, 112 million passengers had used this mode of transport, and passenger numbers reached a new record in 2025 with nearly 17 million passengers. These services help to serve nearly 960 routes where there is no alternative public transport and contribute to the decarbonisation of travel.

Furthermore, competition between modes of transport is particularly fierce in many mobility markets, pitting coaches, rail services (high speed trains, including low-cost options, intercity transport services and regional transport services), car-sharing and low-cost airlines against one another.

Maintaining such intermodal competition is therefore crucial to preserving the diversity of services and ensuring competitive prices for passengers. This is particularly important in the market for long-distance coach services, should this market become more concentrated following BlaBlaCar's announced withdrawal.

[1] ART – Long-term scenarios for the French rail network (2022–2042) – July 2023

Consult the four latest ART publications on transport market analysis: (in French):

- **The multimodal transport market in France in 2024**
- **The coach transport market and coach stations in 2025**
- **Initial 2025 figures for rail transport in France**
- **A comparison of rail markets in France and Europe in 2024**

Consult transport market monitoring indicators:

- **Digital dashboards**
- **Open data sets**

Press contact

Karine Léopold, Head of Communications: karine.leopold@autorite-transports.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.