

France Rail Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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Report description:

The France Rail Freight Transport Market size is estimated at USD 1.50 billion in 2025, and is expected to reach USD 1.81 billion by 2030, at a CAGR of 3.93% during the forecast period (2025-2030).

Ambitious sustainability goals and strategic policy initiatives are driving significant developments in the French rail freight transport market. In 2023, rail freight accounted for approximately 10% of the nation's total freight transport, underscoring the sector's growth potential. The government has set an ambitious target to double this share by 2030. Recent months have witnessed key infrastructure investments and policy shifts aimed at modernizing the system. For instance, in October 2024, a fund worth EUR 1.5 billion (USD 1.58 billion) was launched to enhance rail freight competitiveness and promote multimodal transport integration.

A pivotal move is the introduction of the National Master Plan for combined transport. This blueprint focuses on expanding multimodal terminal capacity and upgrading crucial rail corridors. The overarching goal is to seamlessly integrate rail and road logistics, thereby reducing dependence on road transport and minimizing emissions. In June 2024, a regional study in Ile-de-France has identified sites for new multimodal hubs, underscoring the push for eco-friendly logistics. At the same time, Fret SNCF's restructuring, in accordance with EU regulations, opens up both challenges and opportunities for private operators.

With a growing alignment to EU green transport policies and accompanying financial incentives, the future looks bright. As modernization and sustainability efforts continue, the French rail freight market is poised to be a cornerstone of the nation's logistics and environmental strategy in the coming years.

Overall, the French rail freight market has experienced fluctuations influenced by various economic and environmental factors.

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Despite recent declines, strategic investments and policy support suggest a positive outlook for the sector. The emphasis on sustainability and efficiency highlights the critical role of rail transport in the future of logistics and environmental stewardship.

France Rail Freight Transport Market Trends

Focus on Combined Transport and Sustainability in French Rail Freight

In 2024, France's rail freight market is increasingly leaning towards combined transport, which merges rail with road and maritime logistics, aiming to boost sustainability and efficiency. Highlighting this trend, the National Master Plan for Combined Transport, unveiled in October 2024, emphasizes upgrading multimodal terminals and broadening strategic rail corridors. Major hubs, particularly Ile-de-France, are spearheading these initiatives, with new terminal projects emerging to cater to the rising demand for eco-friendly freight solutions. Moreover, the EUR 1.5 billion (USD 1.58 billion) rail freight competitiveness fund, introduced in July 2024, has played a crucial role in bolstering investments in combined transport infrastructure. This fund aims to enhance the competitiveness of rail freight by providing financial support for infrastructure development, technological advancements, and operational improvements.

This trend is significant as it dovetails with France's ambition to double the modal share of rail freight by 2030, all while meeting EU carbon emission reduction mandates. By leveraging rail for long hauls and road for final deliveries, combined transport not only presents a cost-effective logistics model but also alleviates road congestion and curbs emissions. These advancements respond to the rising customer demand for sustainable and dependable freight services, cementing combined transport's role as a foundational element of France's contemporary logistics framework. The integration of different transport modes ensures a seamless transition of goods, optimizing the supply chain and reducing transit times. Additionally, the focus on multimodal terminals facilitates the efficient transfer of cargo between different transport modes, enhancing overall logistics efficiency.

Restructuring and Privatization of Fret SNCF

In 2024, the French rail freight market is being significantly shaped by the ongoing restructuring of Fret SNCF, the state-owned rail freight operator. This move comes in response to a European Commission mandate aimed at addressing competition concerns and ensuring compliance with EU state aid regulations. Unveiled in January 2024, the restructuring plan entails transferring Fret SNCF's lucrative operations to private entities. Simultaneously, the operator's market share will be curtailed to foster heightened competition. These strategic shifts are set to reshape the competitive landscape, driving innovation and efficiency within the rail freight sector.

The restructuring has paved the way for private operators to bolster their foothold in the market. Notably, companies like DB Cargo and Euro Cargo Rail are capitalizing on the voids created by Fret SNCF's scaling back. This evolution not only cultivates a more diverse and competitive ecosystem but also propels service modernization through private investments. Yet, the reforms haven't been without contention; unions have voiced concerns over potential workforce cuts and operational upheavals, introducing challenges to the market's equilibrium.

Nonetheless, this transition marks a pivotal move towards bolstering competitiveness and weaving French rail freight more intricately into the expansive European logistics tapestry. With private players spearheading service enhancements and aligning with EU regulations, the market stands on the brink of a transformative journey, promising heightened efficiency and customer satisfaction in the foreseeable future.

France Rail Freight Transport Industry Overview

The France Rail Freight Transport Market is partially fragmented and highly competitive with the presence of major international

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players. Major players include SNCF Logistics, NVO Consolidation SAS, Martin Bencher Group, Ace-Trans Transportation and Logistics, Med Europe Terminal, and many others. The market is mainly dominated by regional and global players providing maximum services to their customers. The shifting of transporters towards rail freight in European countries due to fuel price surge is driving the market and attracting new players to enter the market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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