

MONTHLY BAROMETER

# TRENDS IN ROAD FREIGHT PRICES IN FRANCE



November 2025 | 

**upply**



# FRANCE:

## TRANSPORT PRICES REMAIN STAGNANT IN NOVEMBER

**In November, road transport in France experienced a period of fragile stabilisation, marked by rising costs and sluggish demand for the season.**

France recorded GDP growth of +0.5% in the third quarter of 2025, exceeding expectations (+0.3% initially forecast). This performance suggests annual growth exceeding the government's forecast of 0.7% for 2025. Economic activity remained strong, especially in services, and a rebound in construction was even observed. Inflation remained stable at 0.9% in November. The slowdown in service prices (+2.2% after +2.4%) and, to a lesser extent, in manufactured goods prices, is somewhat offset by a smaller decline in energy prices and a slight increase in food prices.

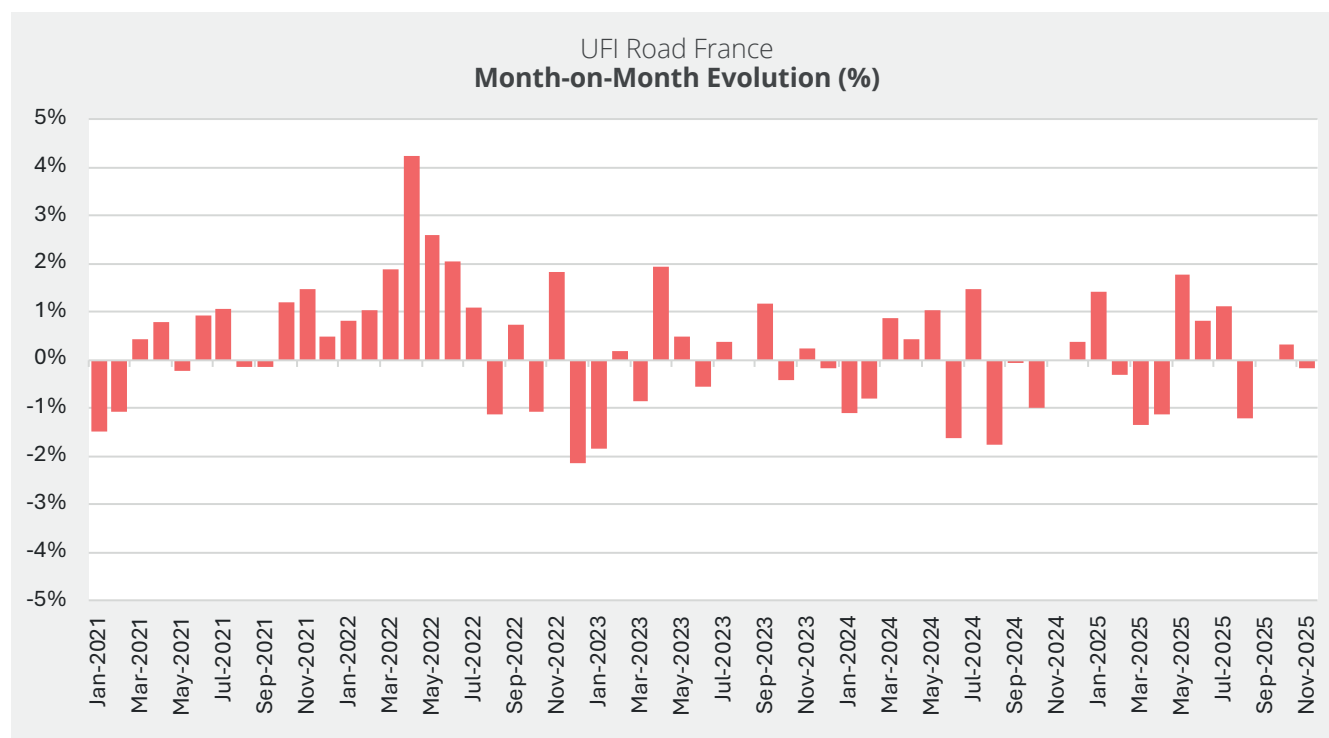
One should be careful though as this French growth is misleading, because during the summer, the French economy mainly benefited from a rebound in the aeronautics sector, which had been penalised since Covid by supply problems: Airbus increased its delivery pace in September, a production increase perceived as "a lasting phenomenon" that could be transformed, "in a full year, into 0.3 or 0.4 points of growth".

The business climate continued its improvement that began last month. It rose another point and is approaching 100, the long-term average. It is driven mainly by the services sector which gained 3 points, while industry, on the contrary, fell by 3 points. The automotive sector, in particular, is generally doing poorly, from production to repair and distribution. For those who want to purchase a vehicle, now is the time for great deals!

**“ This French growth  
is misleading ”**

# Price stagnation for the past 3 months

Under these conditions, road transport prices in France fell very slightly in November, losing 0.2% compared to October. Overall, for the past three months, the trend has been fairly flat.

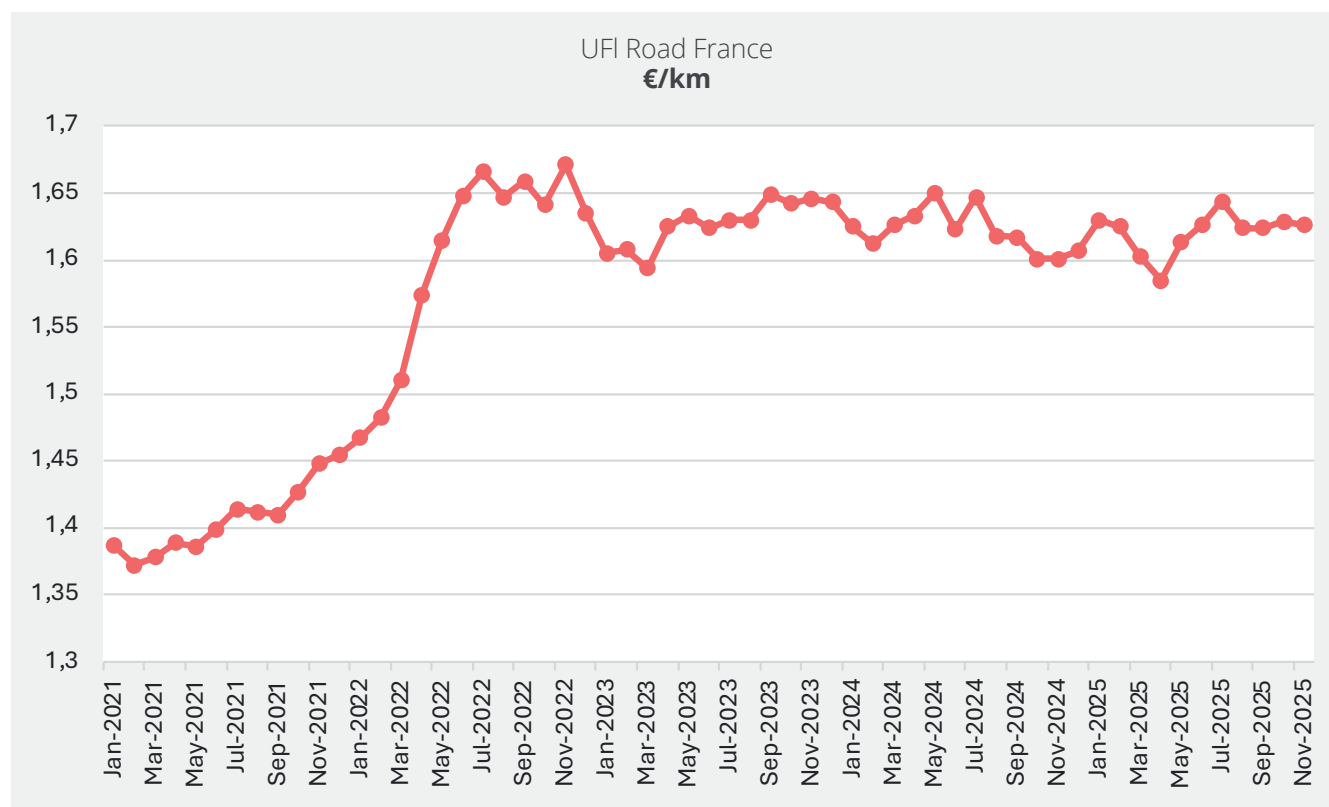


Source | [UFI Road France](#) – Road France

We cannot help but recall the age-old refrain: political instability weighs heavily on the economic world, which inevitably impacts the activity of road transport. Uncertainties related to reforms, budgets and political orientations (including pension reform, budget discussions and social tensions) create a climate of apprehension and caution for shippers as well as for road freight transport companies, which have often postponed their investment decisions.

# Drop in relation to fuel prices

The average transport price in France in November was €1.63 per kilometre driven. Road freight transport continues its stabilisation phase above €1.62 per kilometre driven since the end of the summer.

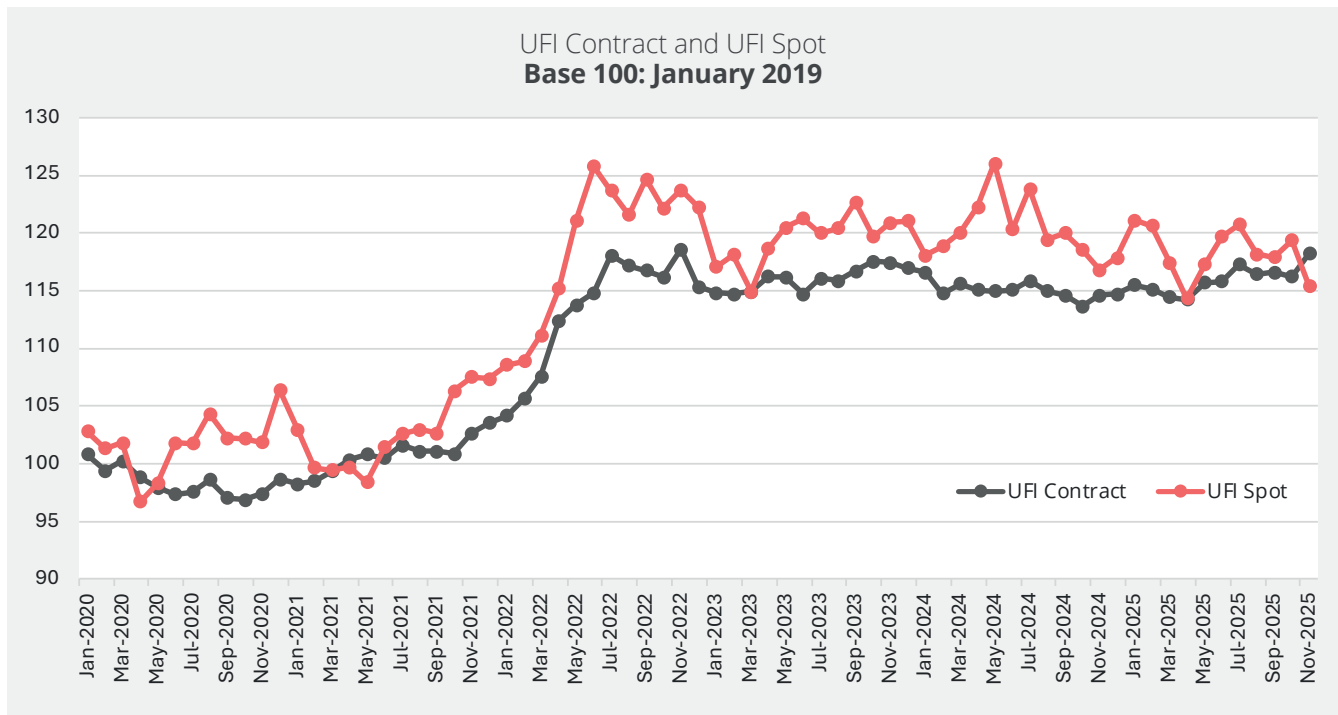


Source | [Upply Freight Index](#) – Road France

However, the disparity between the evolution of professional diesel prices and those of road transport is concerning. Road transport costs are closely correlated with fuel costs. However, professional diesel increased by 0.7% and 0.3% respectively in September and October, before jumping by 4.5% in November (see indicators p.8). At the same time, the Long Distance Combined Articulated LD EA index published by the National Road Committee (CNR) increased by 0.2% in September, remained stable in October but increased by +1.1% in November.

To summarise, over 3 months, transport costs increased by 1.4%, while prices remained stable. There is indeed a significant drop-off.

# Scissors effect between the contract market and the spot market



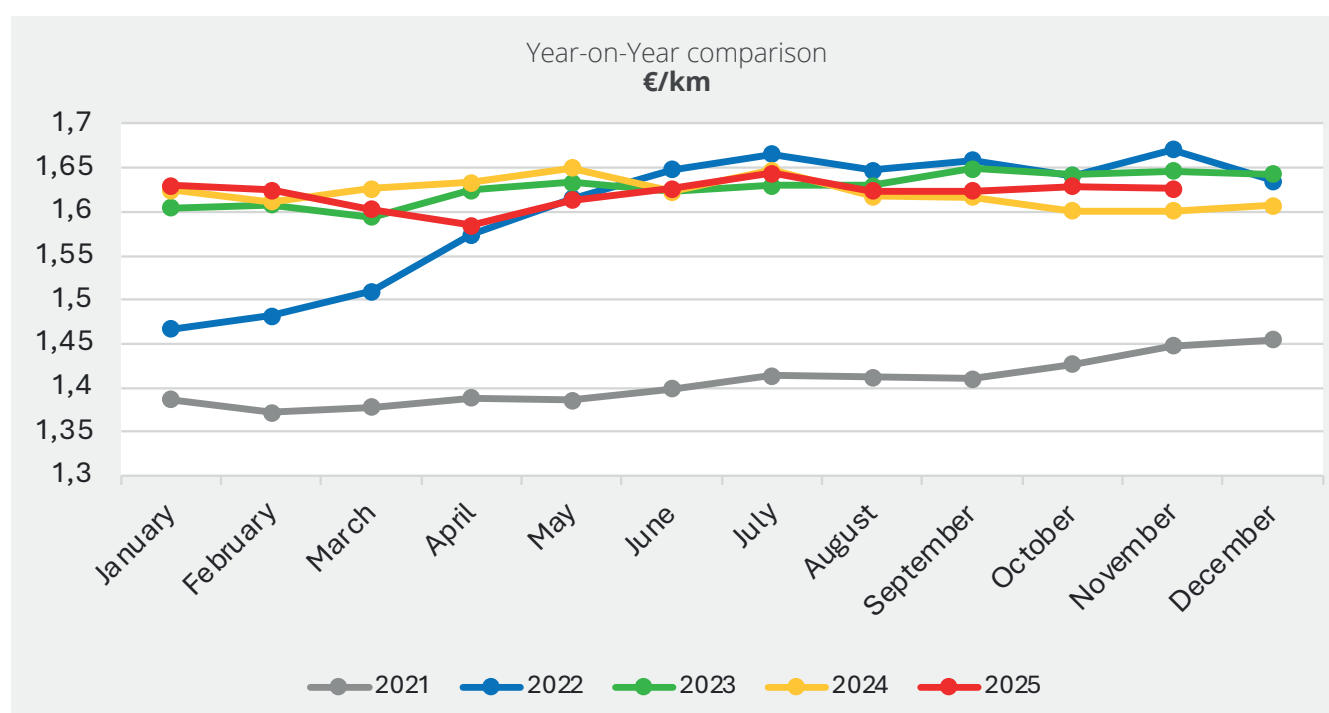
Comparison of changes in contract prices and spot prices -Source | [UFI Freight Index](#) – Road France

- The Contract index, which represents contract prices between shippers and carriers on the French market, has resumed its upward trend. After falling by a surprising 0.3% in October, it rose by 1.7% in November. This seems to indicate that last month's decline was some sort of anomaly, and that the indicator appears to be roughly following the progression of energy costs. The indicator also shows its highest level ever recorded at 118.20, i.e. +3.1% compared to November 2024 and +2.3% compared to the 12-month moving average. It is therefore progressing well, and is following at a slightly higher level, the increase in transport costs over 1 year.
- The evolution of the Spot index, which represents the reference price index in France for non-regular transport, tells a completely different story. The Spot index fell by 3.4% in November, which is the biggest drop of the year. The drop in non-regular prices is generally a sign of transport supply exceeding demand.

The crossover of the Spot and Contract curves at this time of year is even more symptomatic of a difficult period. In November, the gap between the two curves reached almost 3 points. This level has only been observed during the Covid crisis, first in April 2020 and then in April 2021 and in any case never during a last quarter. We are theoretically in the middle of peak season. Indeed, the end-of-year holidays, with Black Friday in November and Christmas in December, traditionally correspond to a period of peak activity for commerce, resulting in an increase in orders and transport demand over a fairly short period of time, which puts pressure on logistics and on prices. This year, 77% of French people took advantage of Black Friday offers, mainly to get ahead on Christmas gift shopping (62%) and to save money (57%). But purchase intentions and the average basket size remained stable. In a constrained economic context, consumers were active but selective, which limited the inflationary effect exerted by the level of demand on transport prices.

Another key factor in explaining the evolution of the spot market was the strong competition from foreign fleets positioned on intra-European flows. These fleets are suffering from the overall decline in volumes in Europe and are therefore deploying aggressive commercial practices. As France is both an important market and a European logistics hub serving several countries, carriers from Eastern European countries, and in particular Polish carriers, are increasing their presence on French territory during peak periods, with a negative effect on the spot market when demand is sluggish.

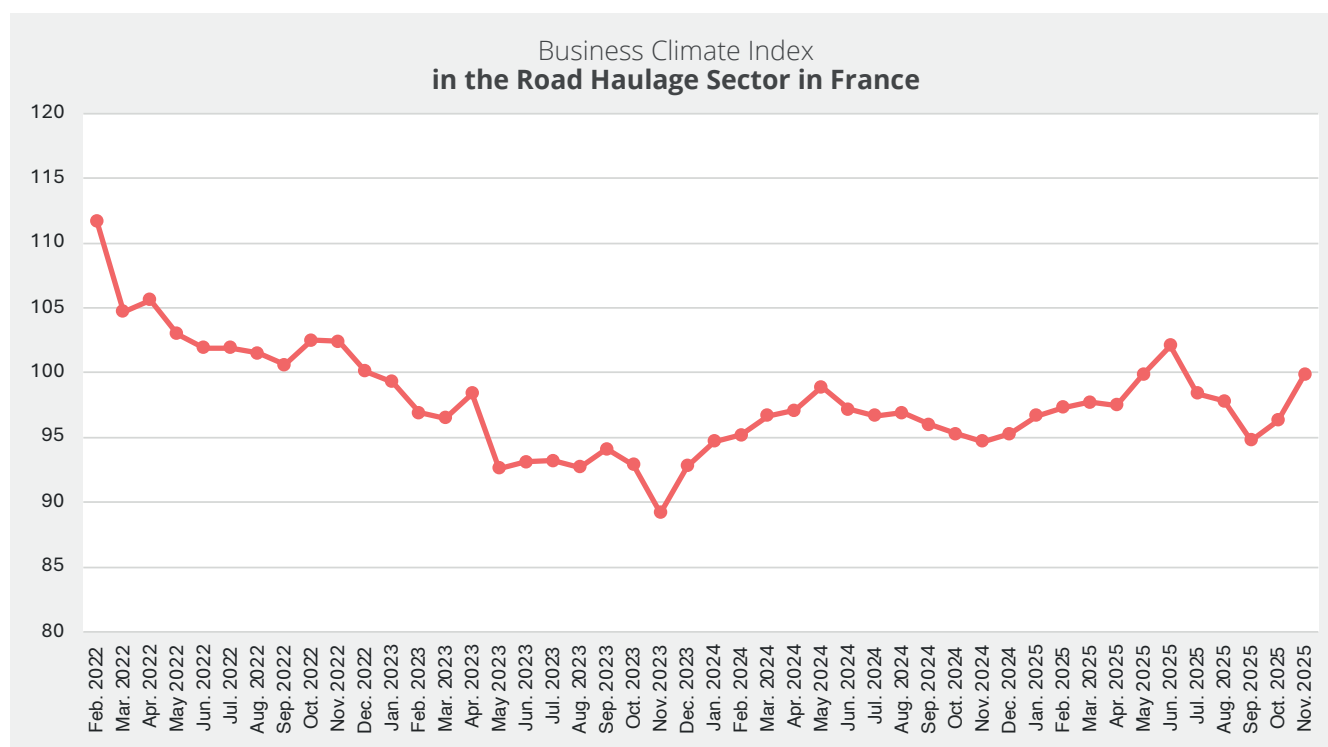
It is also interesting to note that over the years, since Covid, the end-of-year peak in transport prices is no longer an intangible trend. In 2021, the rise in prices in the last quarter corresponded to a period of strong post-lockdown demand, which continued into the following year, leading to an atypical upward trend at the beginning of the year. In 2022, a slight year-end peak was also observed. On the other hand, over the last three years, under the influence of sluggish demand, the curves remain desperately flat for carriers who have little hope during this period of replenishing the cash levels needed to face leaner periods.



Source | [Upplify Freight Index](#) – Road France

# Professional organisations are ready on the front line

Road freight transport in France entered a stabilisation phase during the third and fourth quarters of 2025, but without showing real recovery. Business confidence in road freight transport has been rising for two months, but it barely reached its long-term average in November.



Source | Insee

The sector remains marked by rising costs and falling demand, which maintains a precarious balance. According to the annual study on cost trends in 2025 and the outlook for 2026 presented on November 19, road freight transport companies will have suffered this year an average annual inflation of 2.4% in their non-fuel costs, higher than the general inflation rate (approximately 1%). The increase in driving personnel costs was limited to 2.0%. On the other hand, maintenance costs increased by 2.5% and fixed equipment costs by 4.3% (ownership and insurance). "The cumulative inflation of non-fuel costs over the past two years has thus reached +7.7%", the CNR specifies.

For 2026, the forecast inflation of the cost price excluding fuel of heavy goods vehicles operated in road freight transport reaches an annual average of +2.4%. "The uncertain legislative and political context complicates the task," the CNR warns. Since the start of discussions on France's next budget, employers' organisations, whose representativeness has just been updated by a decree dated November 6, 2025, fought to reject certain tax measures that would have burdened the accounts of carriers. The threat has been, in principle, averted for the time being.

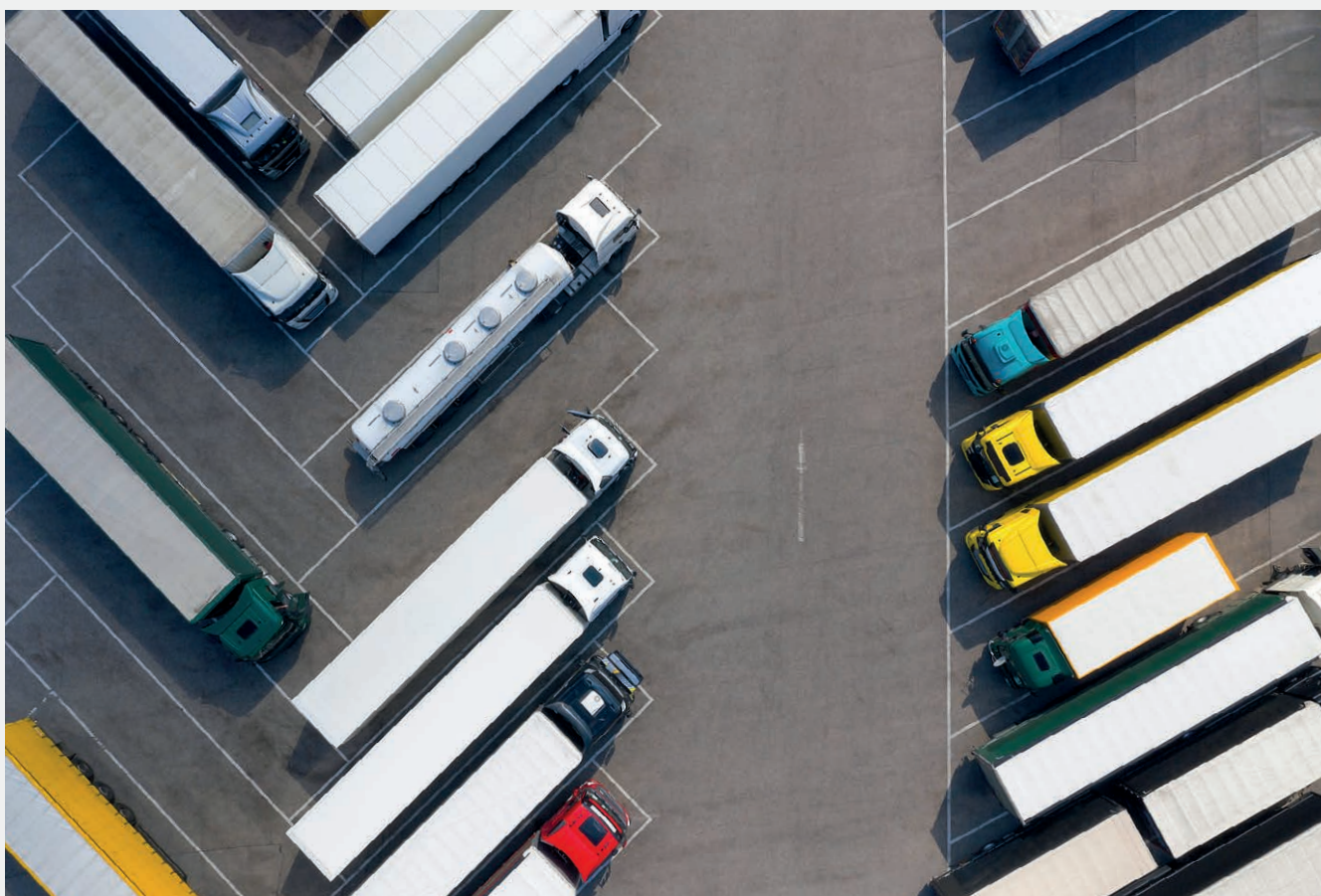
Furthermore, professional organisations are at the forefront of joint negotiations on increases in collectively agreed wages and travel expenses. The latest proposals put forward include a 1% increase in salaries and a 1% increase in travel expenses.

Having just taken stock of their growing membership, employers' organisations will need all their combined energy to confront the future challenges facing French road transport.

## KEY INDICATORS

Sources | INSEE (base 100 = long-term average), CNR (base 100: December 2000)

INDICATORS	November 2025	October 2025	Evolution M / M-1	November 2024	Evolution over 12 months
Insee Business climate Index	97.6	96.5	+1.1%	96.1	+1.6%
CNR Commercial Diesel Index	192.03	183.84	+4.45%	187.41	+2.5%
CNR's Long Haul semi trailer truck Index	165.29	163.47	+1.1%	161.88	+2.1%







**William Béguerie**

Road Transport Expert for Upply



## THE TECHNOLOGICAL SOLUTIONS PLATFORM THAT BOOSTS SUPPLY CHAIN ACTORS' EFFICIENCY

**Upply**, the Tech Platform serving freight transport professionals, **designs and develops digital solutions** to assist supply chain professionals in leveraging the full potential of digitalization for their business.

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