

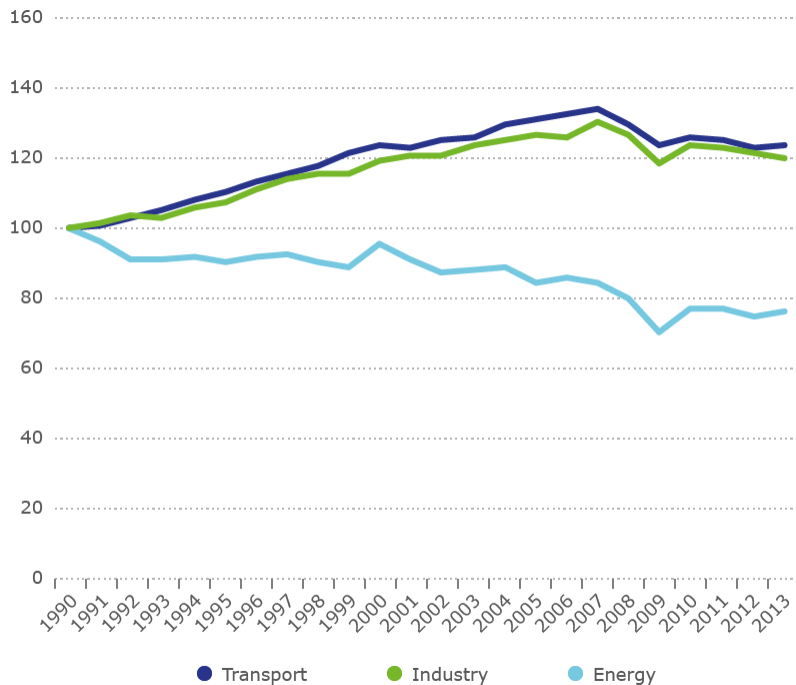
# ITF Transport Outlook 2017

Launch Event

30 January 2017, Paris



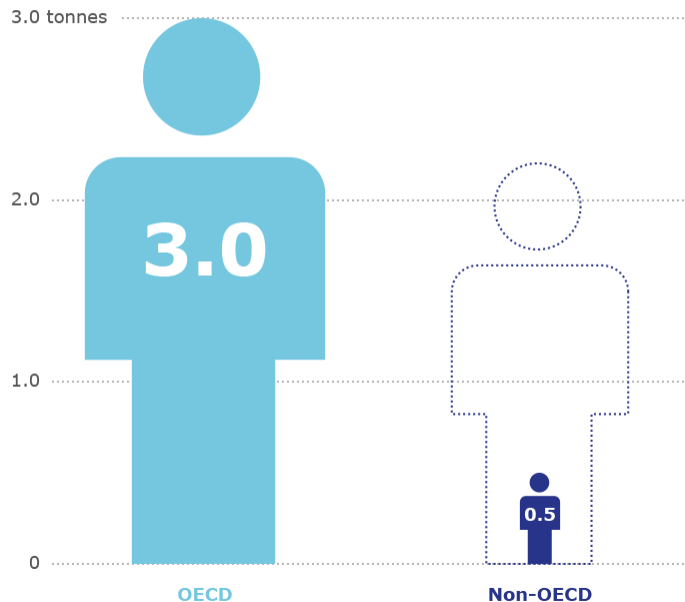
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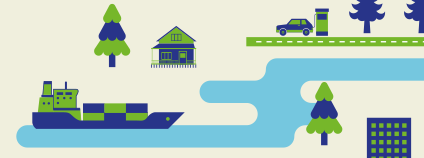
**In OECD, transport remains the sector with the fastest-growing CO<sub>2</sub> emissions**



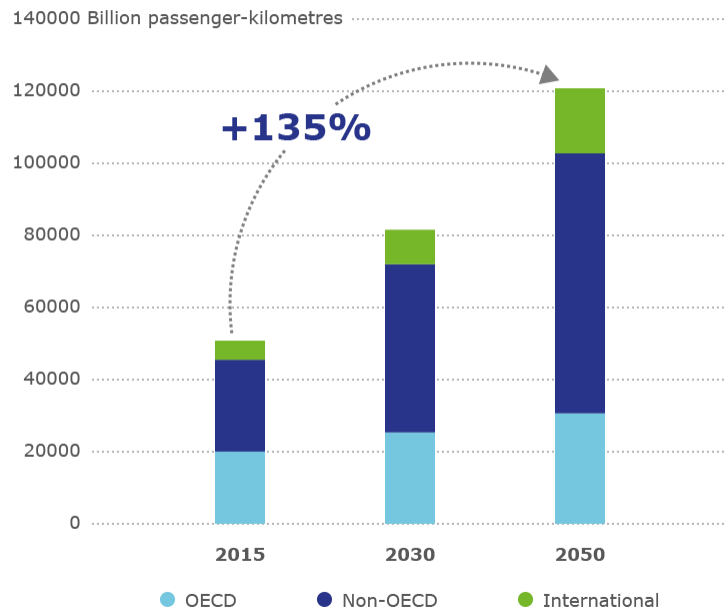
CO<sub>2</sub> emissions from domestic transport per capita



The per capita CO<sub>2</sub> emissions gap with OECD will close as non-OECD economies grow

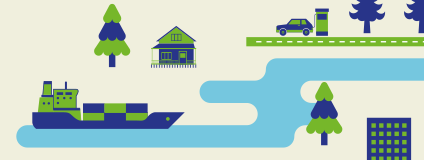


Passenger transport volumes

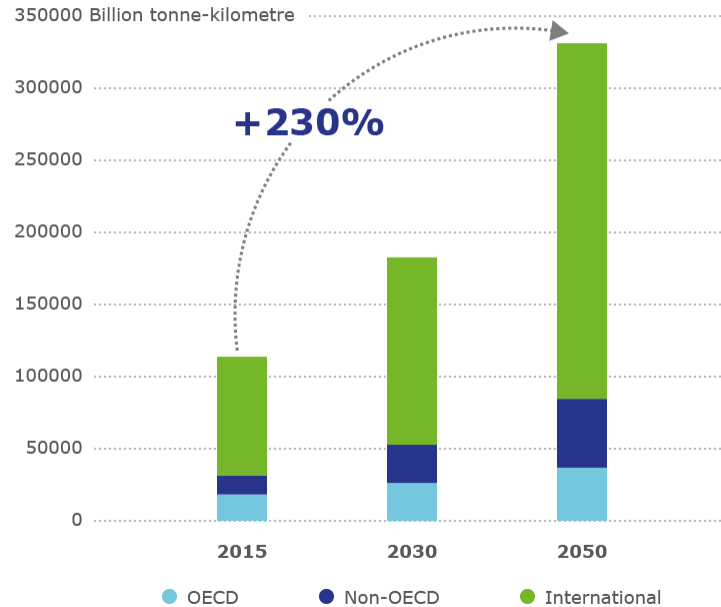


## Global transport volumes will continue to expand

- ▶ Passenger transport will more than double by 2050
- ▶ Global car stock: from 1 billion in 2015 to 2.4 billion in 2050
- ▶ Freight transport is projected to triple



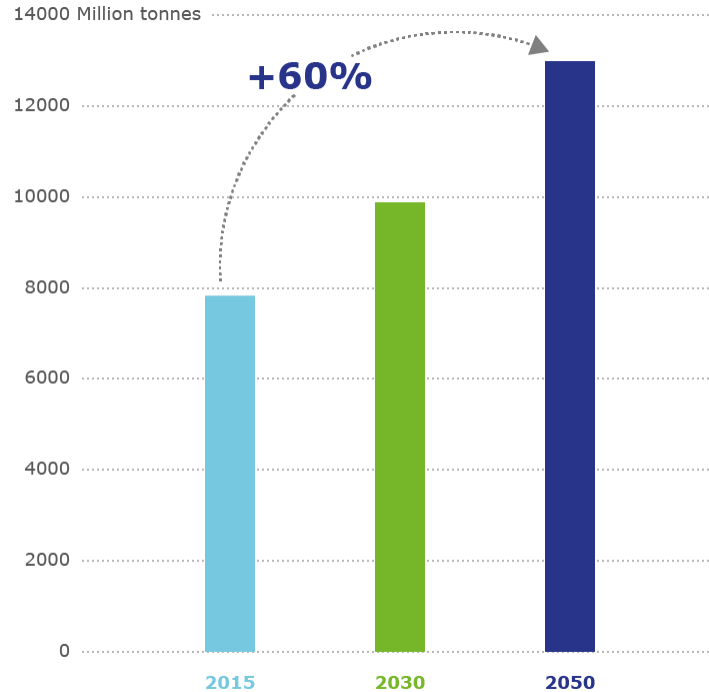
Freight transport volumes



## Global transport volumes will continue to expand

- ▶ Passenger transport will more than double by 2050
- ▶ Number of cars worldwide will grow to 2.4 billion in 2050, from 1 billion in 2015
- ▶ Freight transport is projected to triple

# ITF Transport Outlook 2017

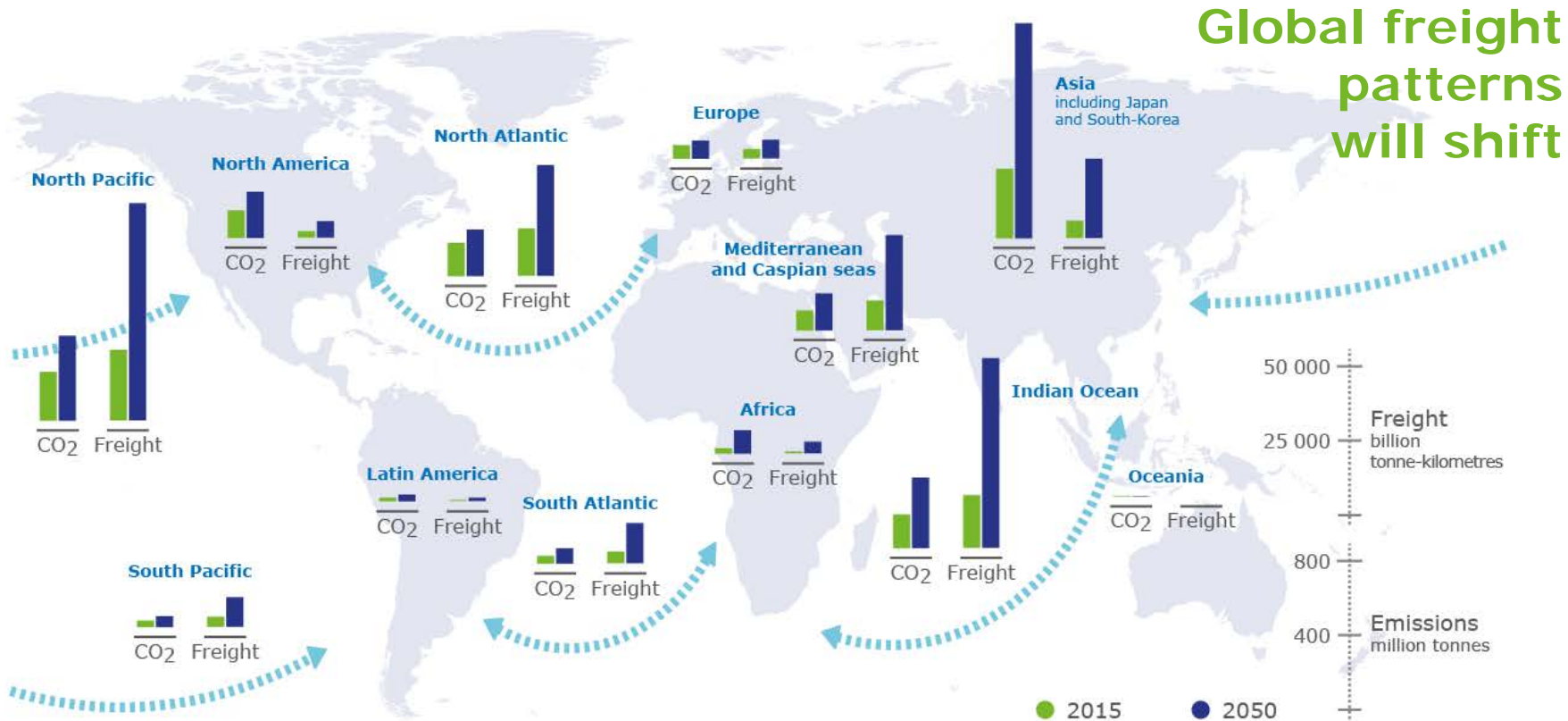


**If unchecked, transport CO<sub>2</sub> emissions could increase 60% by 2050**

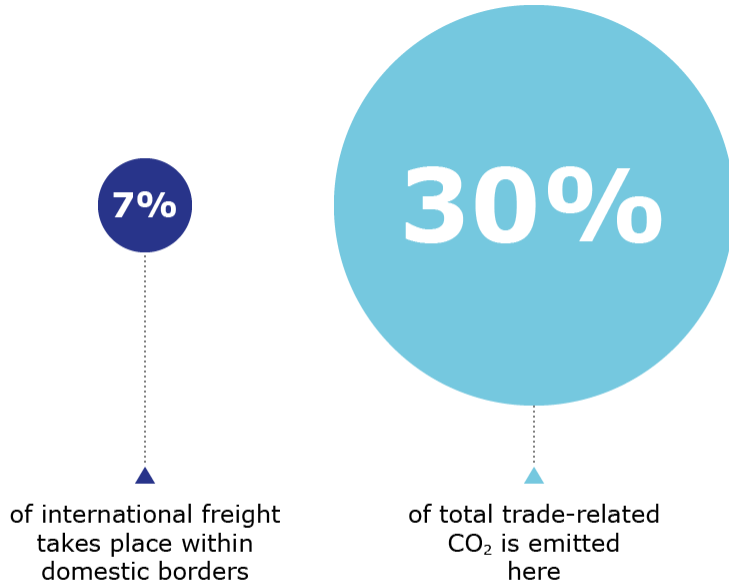
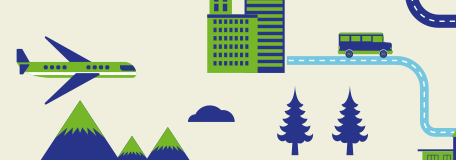


## International Freight

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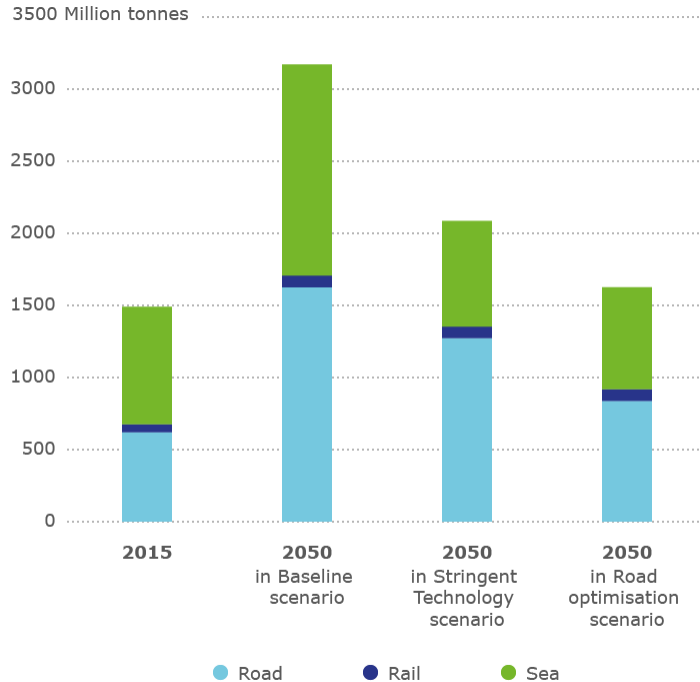
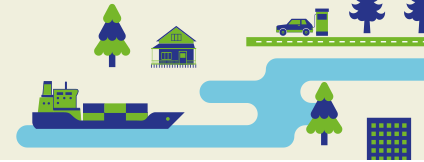






## Hinterland connections are high-emitting - but can be addressed by national policies

- ▶ Port-Hinterland connections represent 7% of international freight volume...
- ▶ ... but 30% of its CO<sub>2</sub> emissions and 80% of trade-related transport costs
- ▶ Hinterland links are subject to national policies not international agreements, so these emissions are easier to address



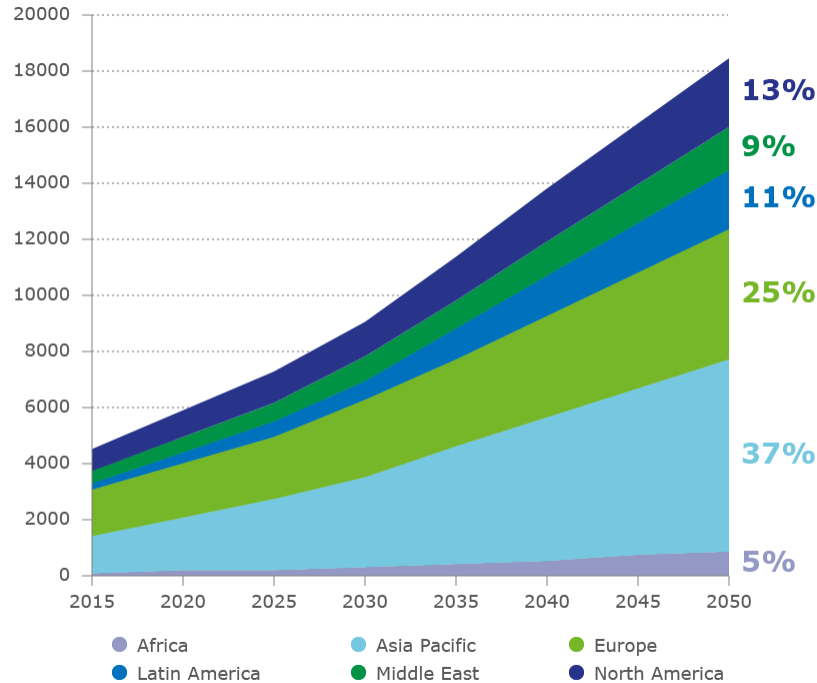
## New technologies will not be enough to reduce freight CO<sub>2</sub> emissions

- ▶ Higher fuel efficiency and alternative fuels can reduce freight CO<sub>2</sub> emissions by 40%
- ▶ But new technologies alone cannot curb the trend of growing freight emissions
- ▶ Truck sharing, route optimisation, relaxing of delivery windows and more operational efficiency generally can hold 2050 emissions at 2015 levels



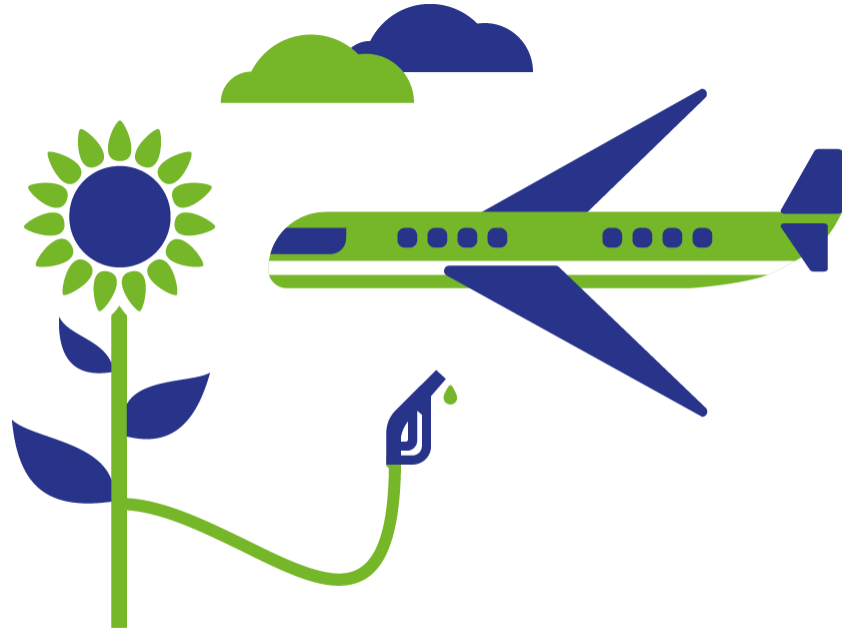
## International Passenger Aviation

# ITF Transport Outlook 2017



**Air passenger numbers will quadruple by 2050; strongest growth in Asia**

- ▶ Economic progress in developing countries
- ▶ Liberal air regulation facilitates strong expansion of air network
- ▶ More low-cost carriers boost intra-regional passenger numbers

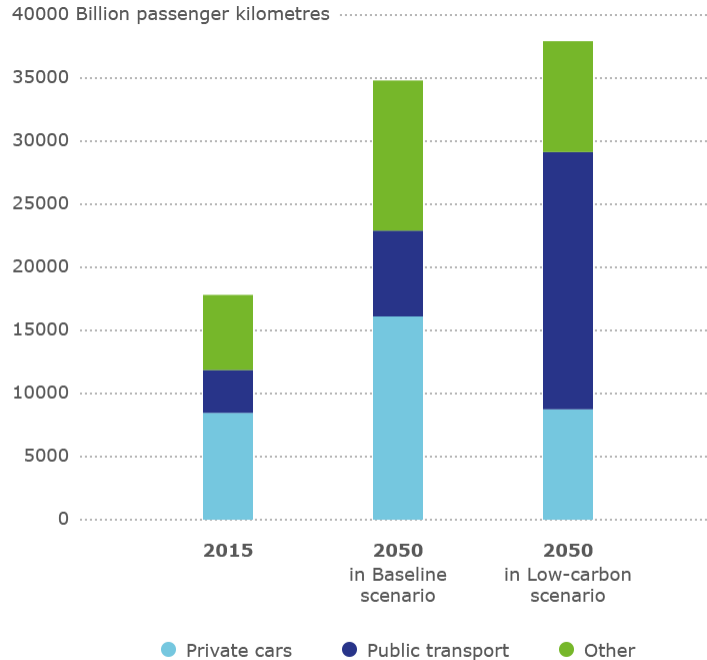


## Long-term mitigation strategy for aviation rests on biofuels

- ▶ Industry commitment to bring aviation CO<sub>2</sub> emissions to half their 2005 level by 2050
- ▶ Requires 70-100% share of biofuel by 2050
- ▶ Uncertainties exist regarding sufficient availability and price and of aviation biofuels

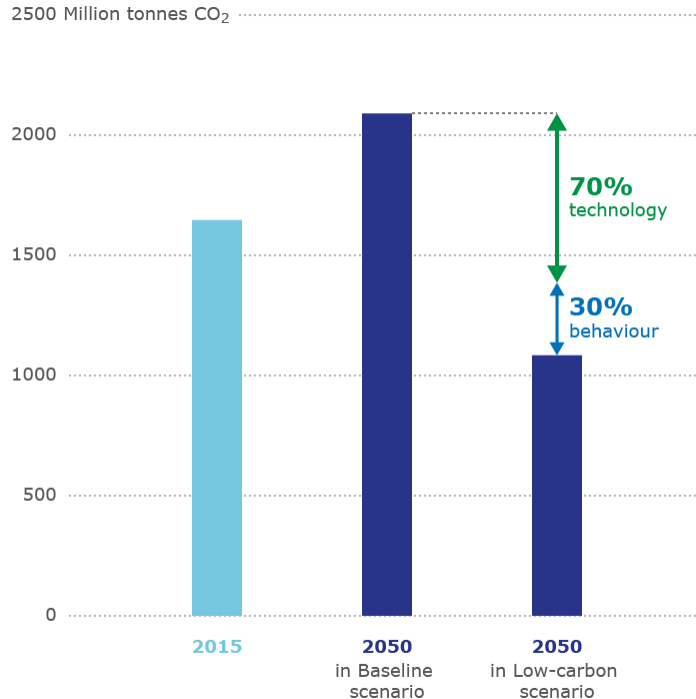


## Mobility in Cities



## Cities need to make a choice now on how future mobility needs will be met

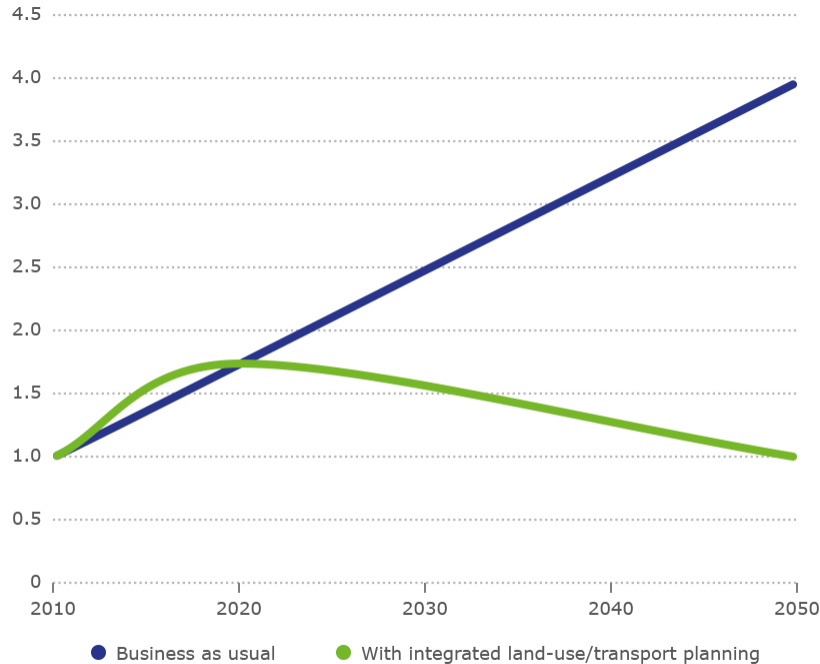
- ▶ Transport demand in cities to double by 2050...
- ▶ ... as will car use in the baseline scenario.
- ▶ Pricing, public transport supply, integrated land-use/transport planning can provide the same mobility in a more sustainable way
- ▶ Such policies could keep the level of private car use in cities at 2015 levels



## The right policies can significantly cut transport CO<sub>2</sub> emissions in cities

- ▶ 70% of reductions can come from new technologies: more efficient engines, electric mobility, other alternative fuels, etc.
- ▶ 30% of these require policies that change human behaviour: incentives for car sharing, pricing of fuel and parking, etc.





Trunk road needs in Asian cities to maintain accessibility levels

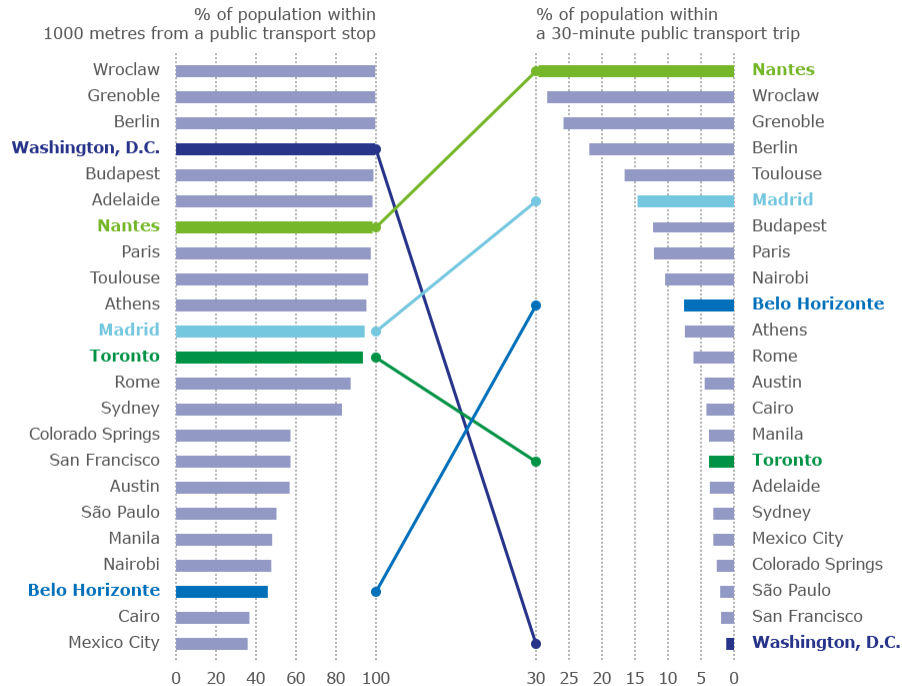
## Relying on cars to provide accessibility in cities is not sustainable

- ▶ Urban sprawl and reliance on cars will require large infrastructure investments
- ▶ Fast-growing cities need to change their model of development.

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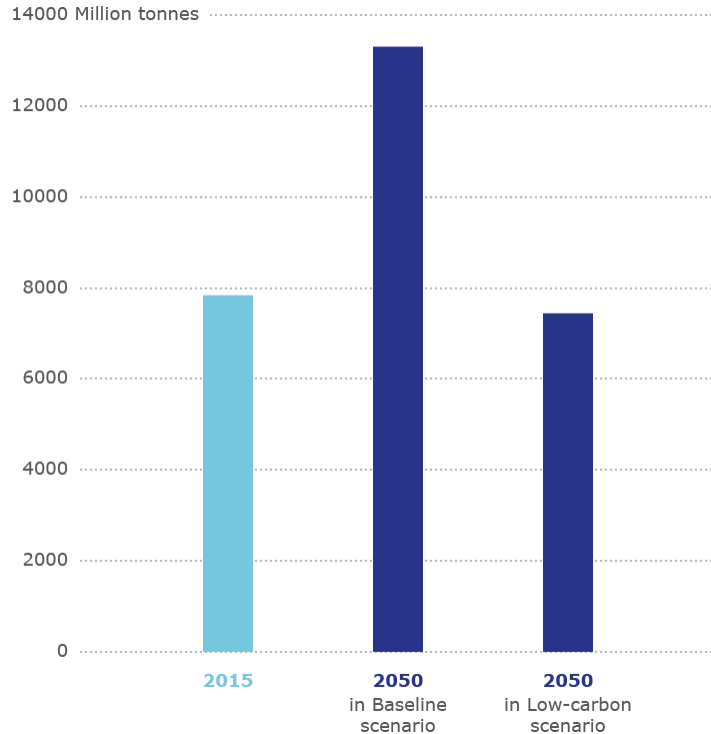


## Public Transport: If you get there, where does it get you?



## Urban mobility is about providing access to opportunities

- ▶ Good access to public transport is not necessarily the same as good access to jobs, schools, health services, leisure activities, friends
- ▶ Policy should shift from focusing on access to public transport to access of inhabitants to opportunities that improve their lives



## Currently foreseeable policies to mitigate transport CO<sub>2</sub> are not sufficient to achieve climate ambitions

- ▶ Transport will emit c. 7.5 giga-tonnes of CO<sub>2</sub> in 2050, roughly the same as in 2015
- ▶ Accelerated innovation and radical policy choices on issues such as shared mobility, changes in supply chains, new transport modes are required.



# Transport policy matters!

[www.transportpolicymatters.org](http://www.transportpolicymatters.org)