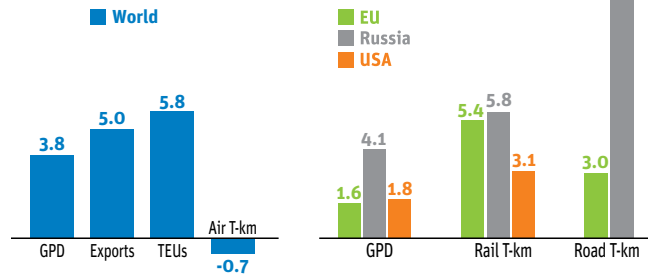


Slowdown in global exports and freight 2011

Weaker than expected growth in 2011 resulted with a downward revision of world GDP estimates. In 2011, world GDP grew by 3.8% (5.2% in 2010). World exports volume grew by 5.0%, a significant slowing down from the record expansion during the partial economic recovery of 2010 (13.8%). World container traffic (TEUs) rebounded strongly in 2010 (13%) but preliminary data for 2011 indicate a slowing down to 6%. Air freight tonne-km growth turned negative in 2011, compared with 20% growth in 2010. Preliminary estimates from the International Transport Forum's quarterly database indicate 5% rail freight growth in the EU (10% in 2010), 3% in the United States (6%) and 6% in Russia in 2011 (8% in 2010). Road tonne-km grew by a rate of 3% in the EU area (4% in 2010) and 12% in Russia (11% in 2010), according to preliminary estimates.

GDP, exports and freight transport in 2011 (% change from the previous year)

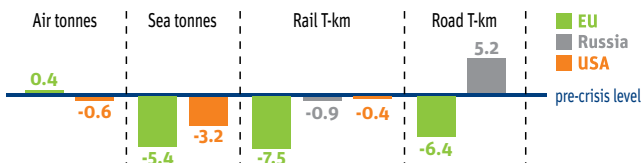


Sources: International Transport Forum, except world GDP (IMF), exports (WTO), Air T-km (IATA), TEUs (ITF estimate based on Containerization International, TEU coverage 75%). Note: EU rail T-km coverage 95% (BEL, LUX, NLD not included. AUT, IRL, ITA, ROU 3 quarters). Road T-km coverage 70% (BEL, GRC, IRL, ITA, MLT, NLD, GBR not included. AUT, DEU, LUX, PRT, ROU, SVN 3 quarters).

Freight volumes stagnate in developed economies

Freight volumes in developed economies continue to indicate economic stagnation in 2011. External trade by sea, when measured in tonnes transported, remained stagnant under their pre-crisis level, according to the preliminary data from the International Transport Forum through December 2011. By the end of 2011, total external trade by air fell back to the pre-crisis peak of June 2008 both in the USA and EU. Data on tonne-kilometres transported by rail and road in the EU for the last quarter of 2011 continue to reflect the sense of weak recovery in domestic demand. Rail freight in the USA and Russia have slowly recovered to pre-crisis levels.

External trade by sea and air (Dec-11) and rail and road freight transport (Q4/11), percentage change from pre-crisis peak Jun-08 (Monthly and quarterly trend, seasonally adjusted)

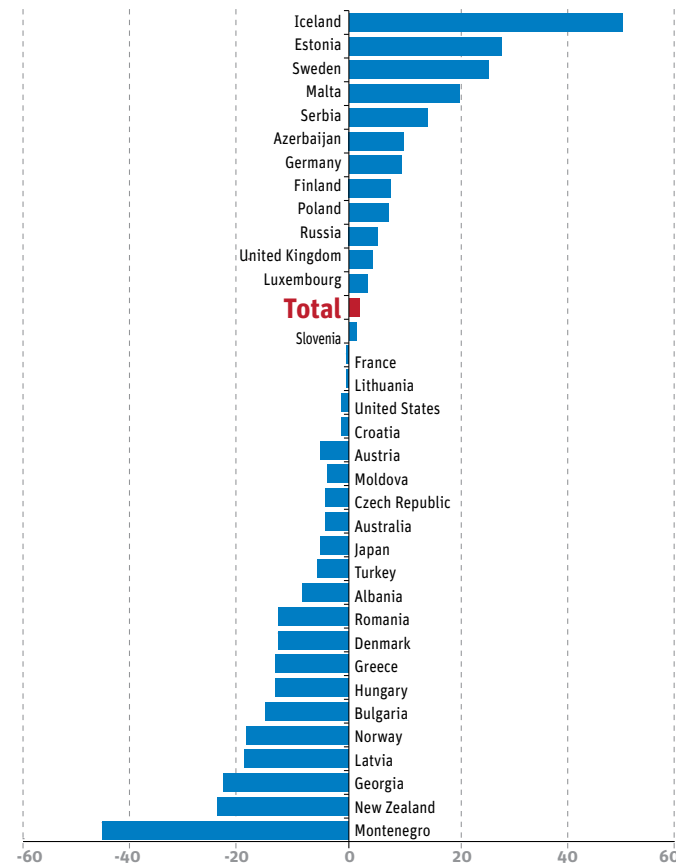


Source: International Transport Forum
Note: For EU coverage, see previous note

Partial change in road fatality trend 2011

The first decade of the 21st century saw the lowest levels of road deaths since systematic reporting began in most member countries of the International Transport Forum. Preliminary data for 2011 from the International Transport Forum's quarterly database indicate a slight departure from this trend. Nearly half of reporting countries show an increase in road fatalities in 2011. Overall, the number of people killed on the roads in 2011 increased by 1.3% in the 31 countries for which provisional data are available. However, these numbers need to be put in the context of very large improvements in the previous year.

Number of fatalities in 2011 (% change from the previous year)



Source: International Transport Forum. GBR, ROU and USA 3 quarters only and are not included in the total.

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Key Transport Statistics

2011 Data

2012

