

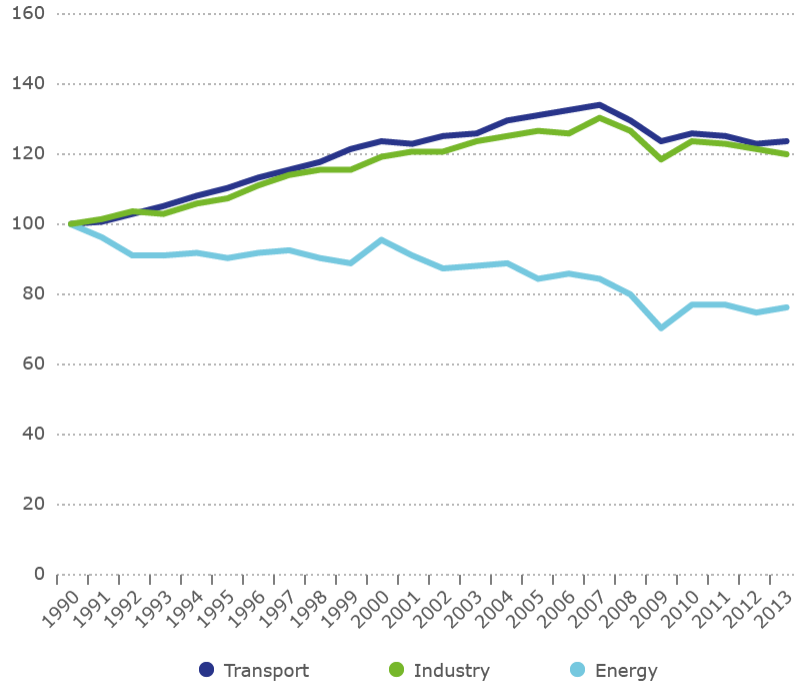
ITF Transport Outlook 2017

Launch Event

30 January 2017, Paris



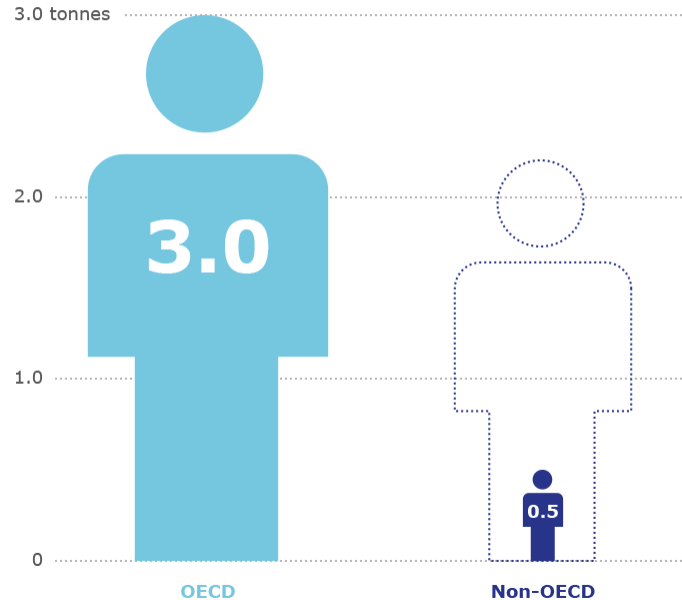
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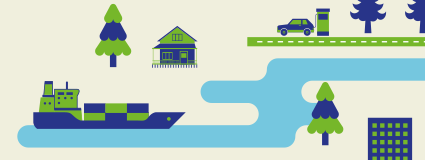
In OECD, transport remains the sector with the fastest-growing CO₂ emissions



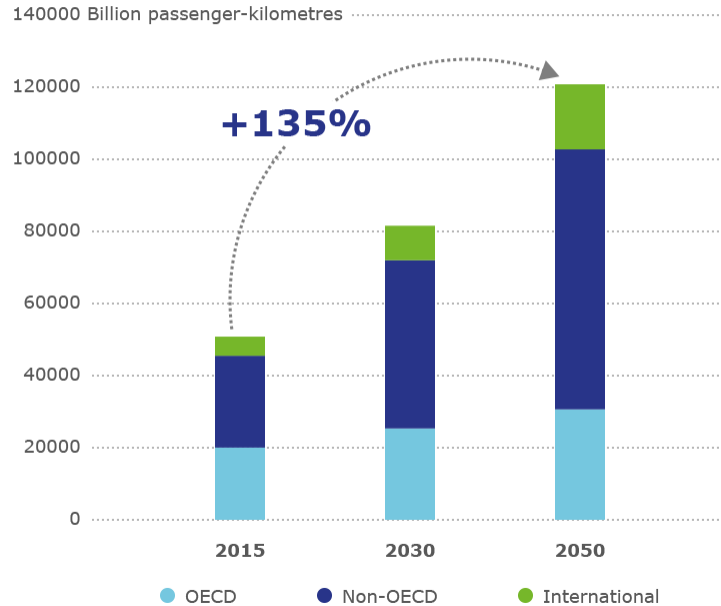
CO₂ emissions from domestic transport per capita



The per capita CO₂ emissions gap with OECD will close as non-OECD economies grow



Passenger transport volumes

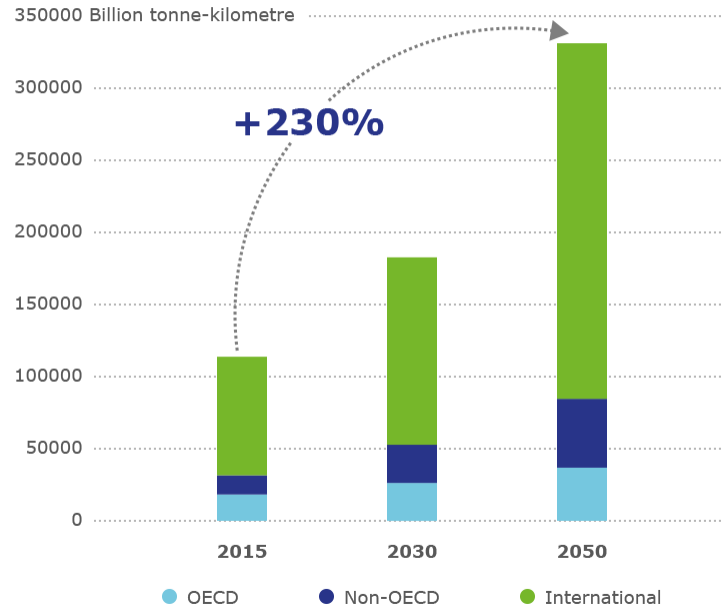


Global transport volumes will continue to expand

- ▶ 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



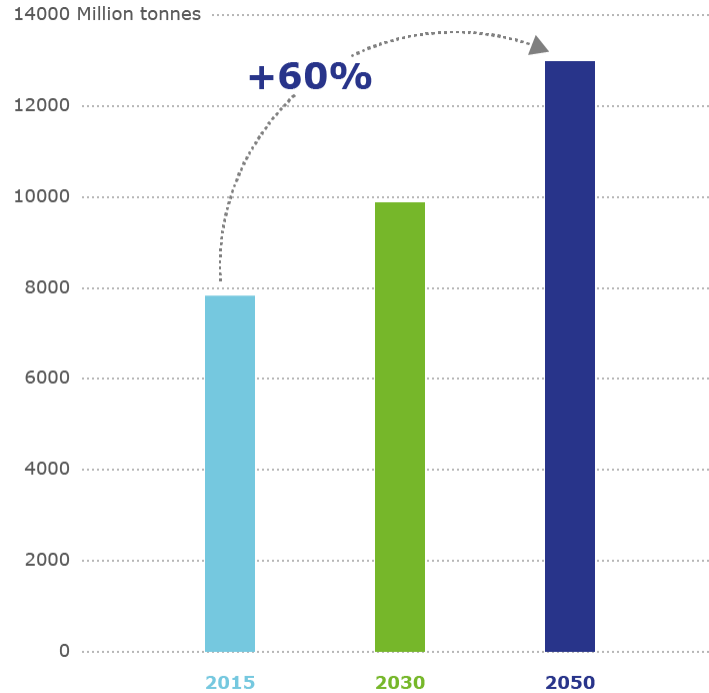
Freight transport volumes



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

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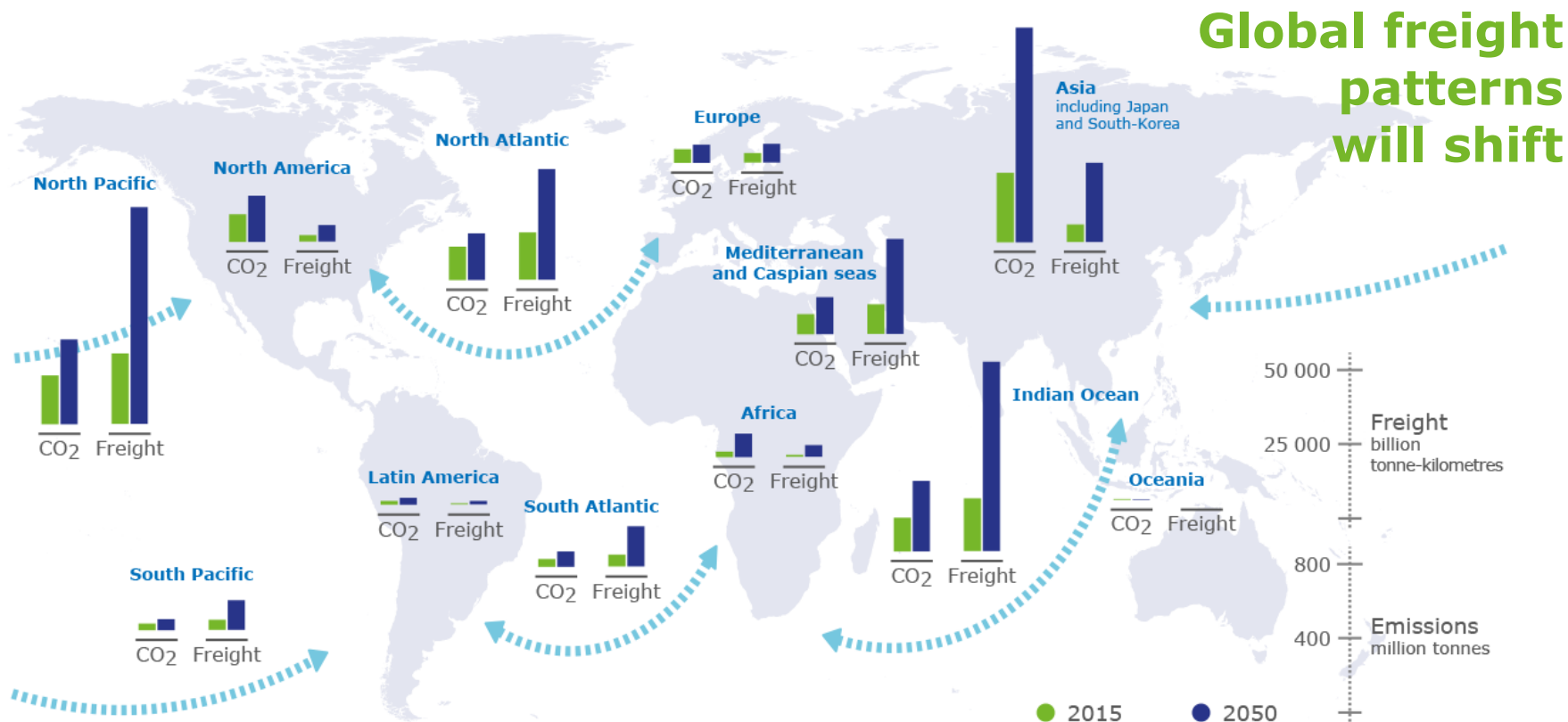


If unchecked, transport CO₂ emissions could increase 60% by 2050



International Freight

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

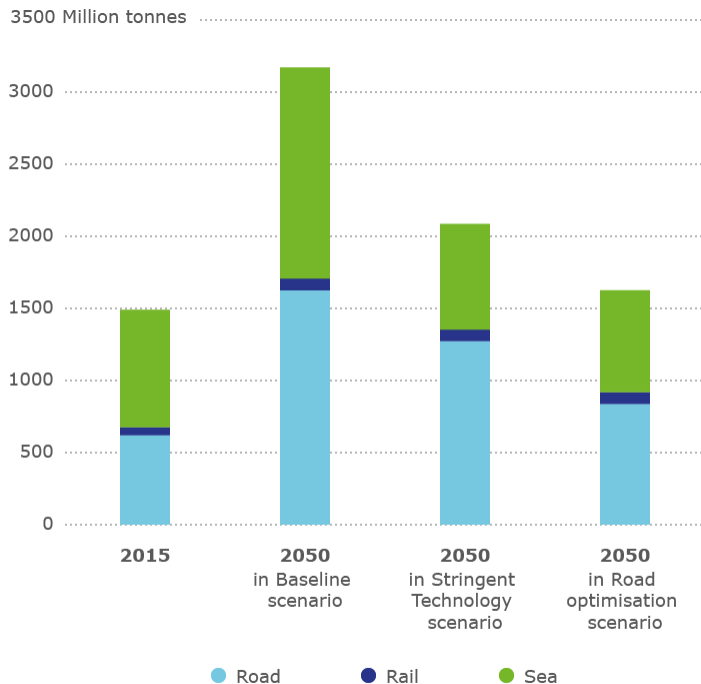
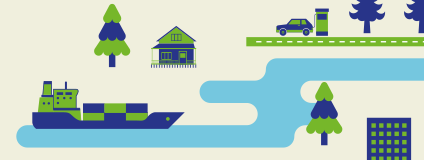
- ▶ Port-Hinterland connections represent 7% of international freight volume...
- ▶ ... but 30% of its CO₂ emissions and 80% of trade-related transport costs
- ▶ Hinterland links are subject to national policies not international agreements, so these emissions are easier to address

7%

of international freight
takes place within
domestic borders

30%

of total trade-related
CO₂ is emitted
here



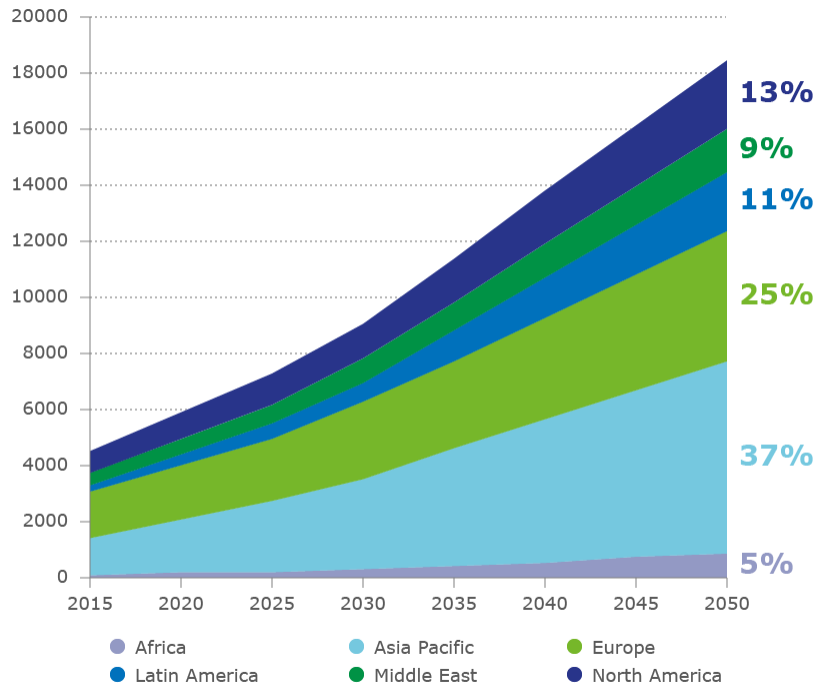
New technologies will not be enough to reduce freight CO₂ emissions

- ▶ Higher fuel efficiency and alternative fuels can reduce freight CO₂ 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**

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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

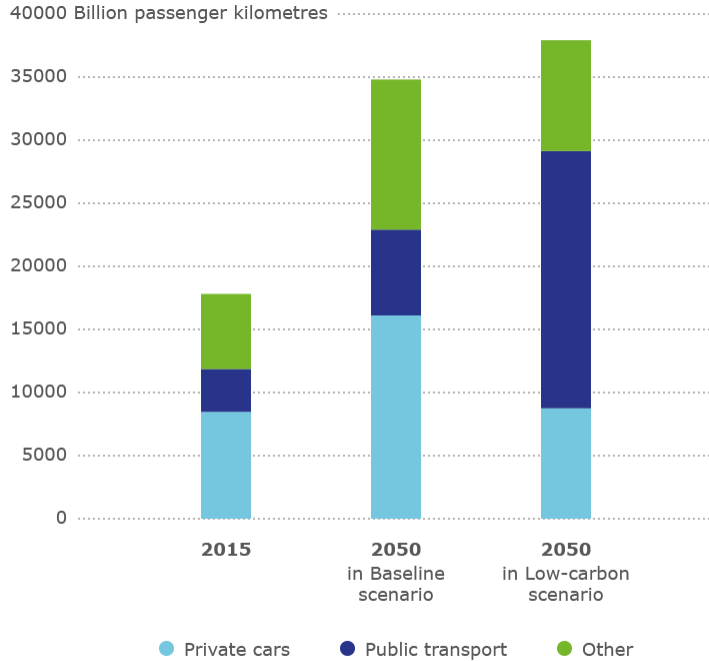


Long-term mitigation strategy for aviation rests on biofuels

- ▶ Industry commitment to bring aviation CO₂ emissions to half their 2005 level by 2050
- ▶ Requires 70-100% share of biofuel by 2050
- ▶ Uncertainties exist regarding sufficient availability and price of aviation biofuels

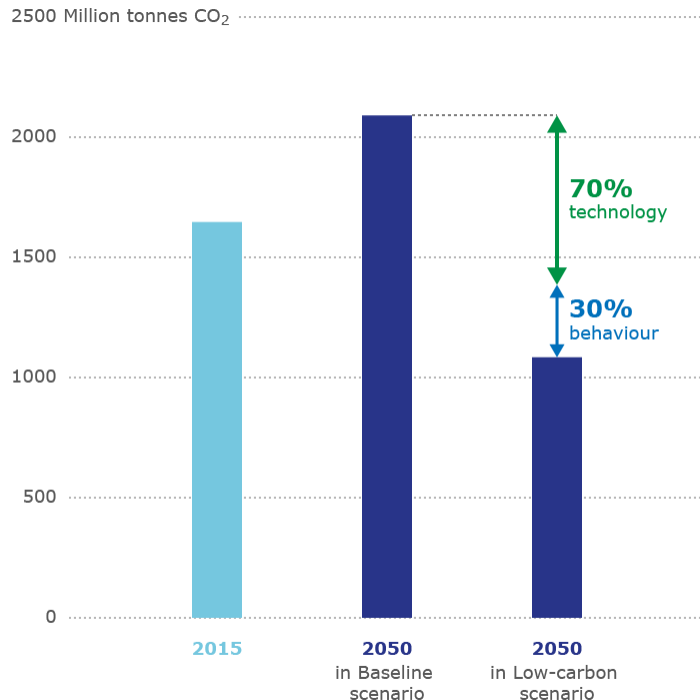


Mobility in Cities



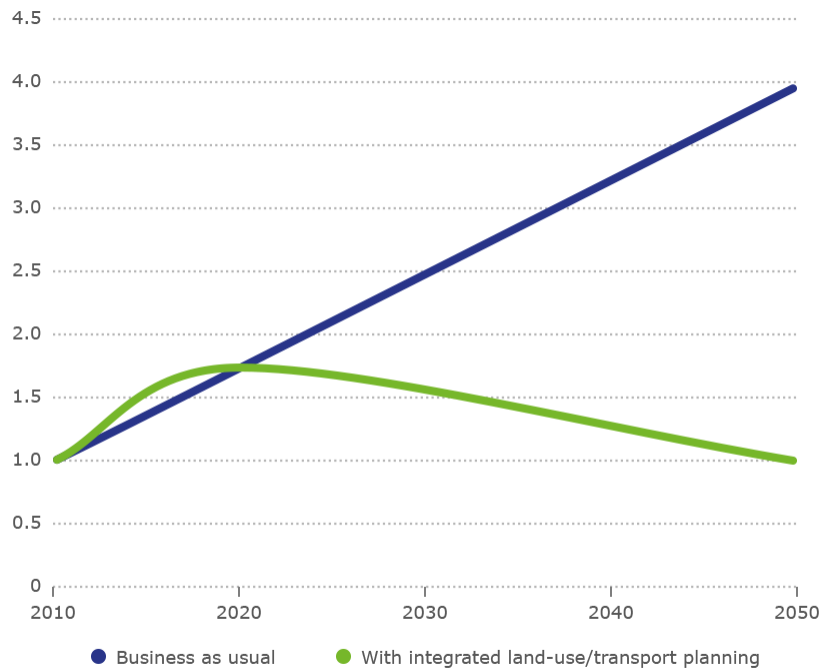
Cities need to make a choice now on how future mobility needs will be met

- ▶ 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 CO₂ 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.

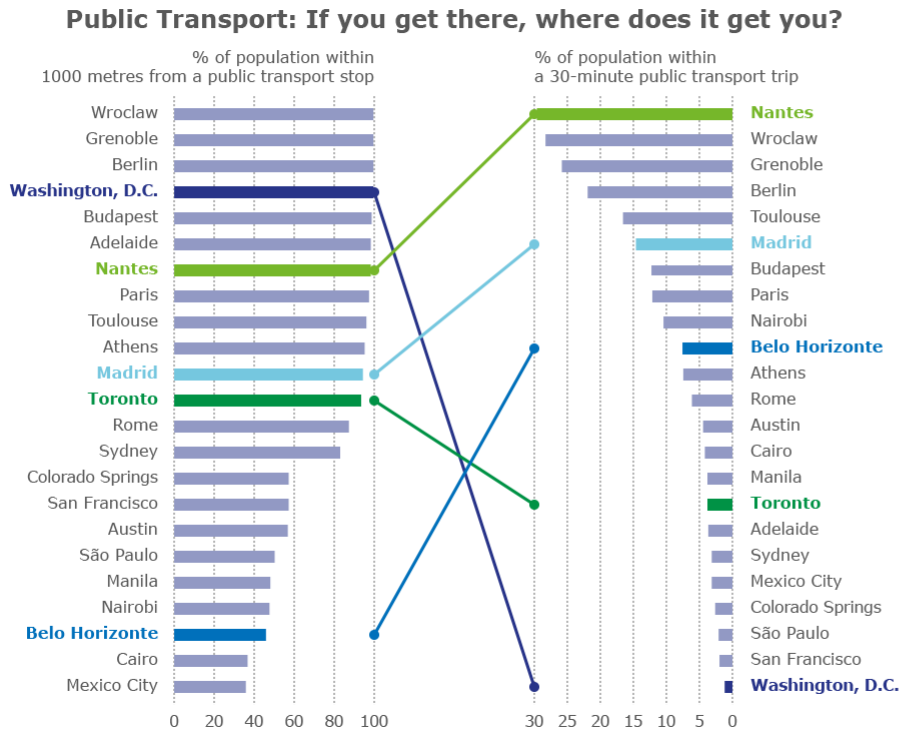


Trunk road needs in Asian cities to maintain accessibility levels

Relying on cars to provide accessibility in cities is not sustainable

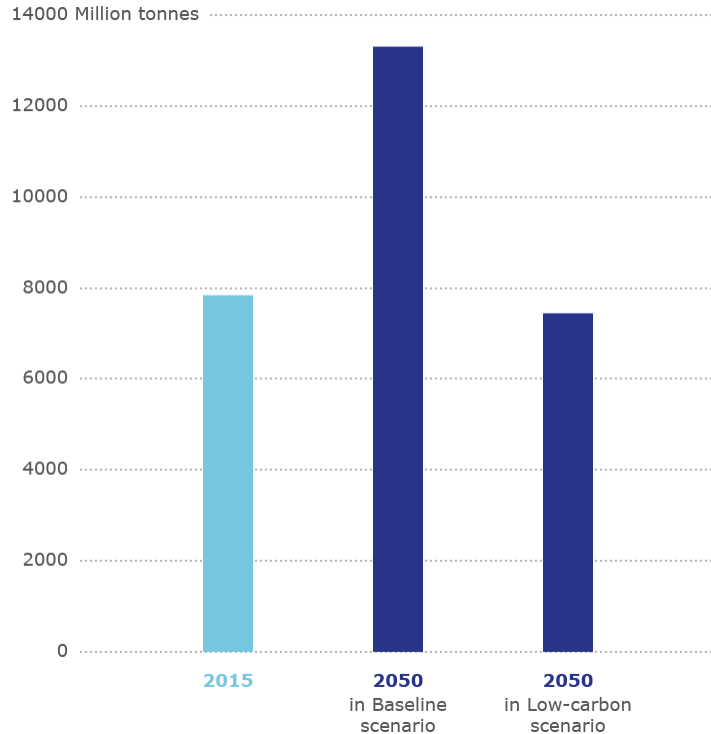
- ▶ Urban sprawl and reliance on cars will require large infrastructure investments
- ▶ Fast-growing cities need to change their model of development.

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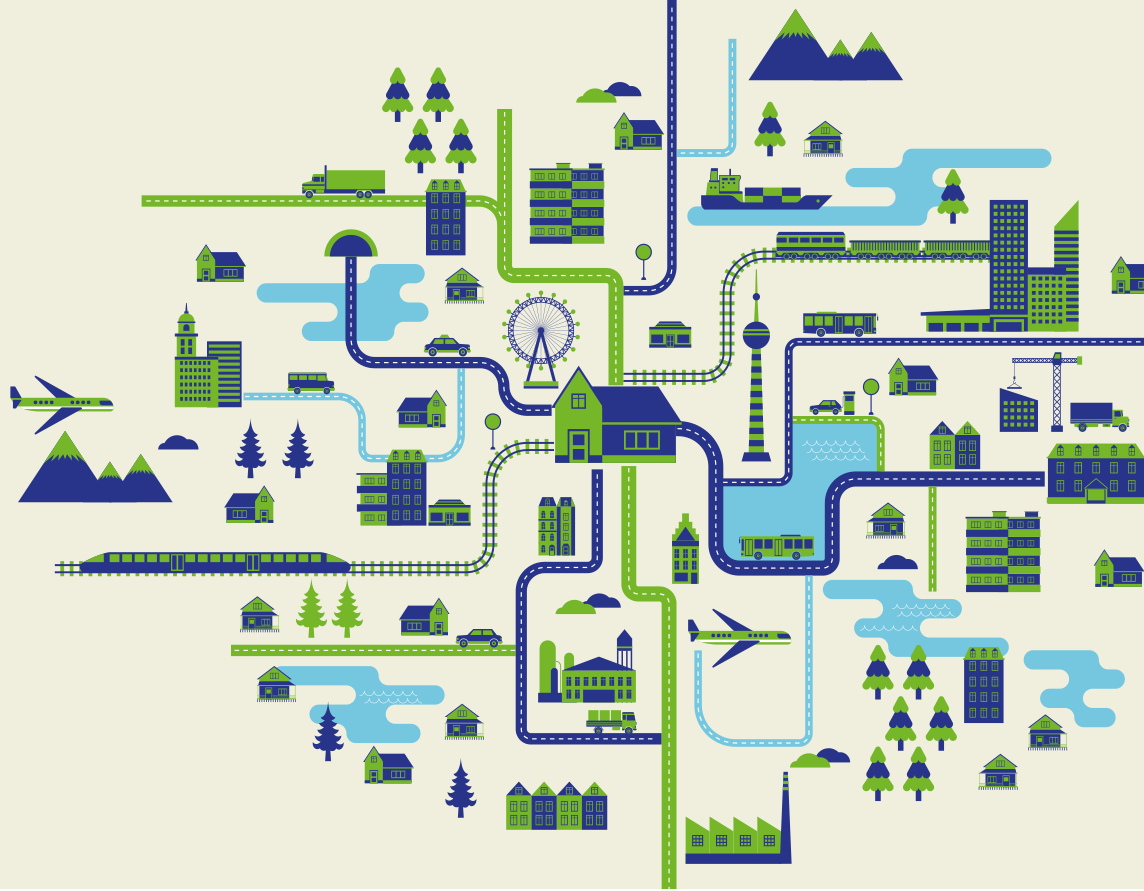
Urban mobility is about providing access to opportunities

- ▶ 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 CO₂ are not sufficient to achieve climate ambitions

- ▶ Transport will emit c. 7.5 giga-tonnes of CO₂ 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