ITF Transport Outlook 2017

Launch Event
30 January 2017, Paris
In OECD, transport remains the sector with the fastest-growing CO\(_2\) emissions.
The per capita CO₂ emissions gap with OECD will close as non-OECD economies grow.
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
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
If unchecked, transport CO$_2$ emissions could increase 60% by 2050
International Freight
Global freight patterns will shift
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
New technologies will not be enough to reduce freight CO$_2$ emissions

- Higher fuel efficiency and alternative fuels can reduce freight CO$_2$ 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
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$_2$ 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 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.
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.

Trunk road needs in Asian cities to maintain accessibility levels
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