

### **Statistics Brief**

### Passenger and freight transport trends compared around the world

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Increasing road freight puts climate targets at risk

### Increasing road freight puts climate targets at risk

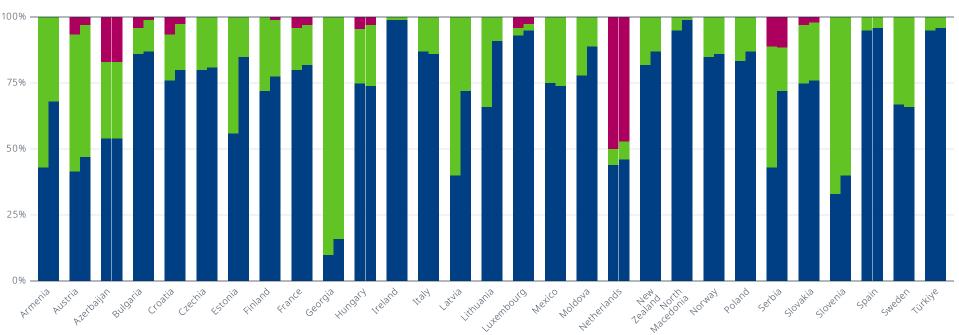
Freight transport share by mode, 2013 and 2023

Road freight transport has been steadily gaining ground on other inland transport modes in most countries, based on the latest update of ITF's Annual Trends in the Transport Sector data. A tenyear comparison reveals that 24 of the 27 countries reporting data saw a relative increase in road transport between 2013 and 2023. Moving goods by road remains relatively more carbon-intensive than rail.

Only Italy, Hungary and Sweden recorded an increase in the share of rail freight transport, although these countries still rely most heavily on road freight. Georgia (84%), Slovenia (60%), and Austria (50%) reported the biggest rail shares in 2023, maintaining stable levels since 2013. In contrast, Ireland (99%), North Macedonia (99%), and Türkiye (96%) 5 reported the highest shares of road freight transport, all of which have maintained similar levels since 2013. This stability differs from the trends in the Baltic countries. Estonia, Latvia, and Lithuania have seen significant increases in road transport, with shares rising by 29, 32, and 26 percentage points, respectively, from 2013 to 2023.

#### Shifting modes: 10-year snapshot of how goods are moved by country





Go to the dataset

### Spotlight: Connectivity in the Baltics



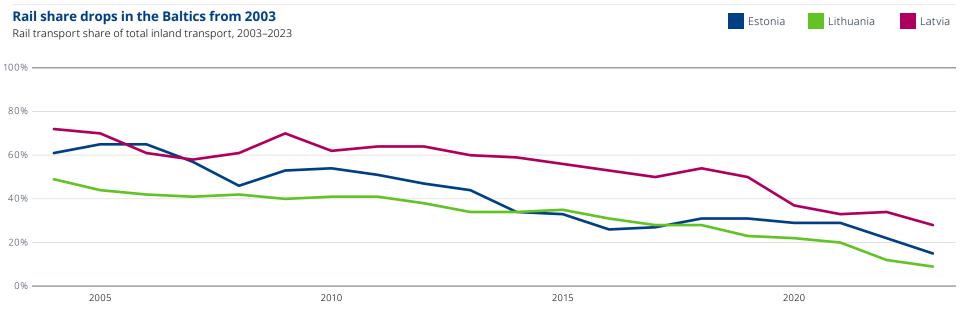
#### Spotlight: Connectivity in the Baltics

The Baltic countries are strategically located between Central Europe, the Nordic countries and Russia. Prior to their independence from the Soviet Union in 1991, rail infrastructure connected Estonia, Latvia and Lithuania to Russia.

From 1991, the Baltics resumed trade with other European countries, mostly by sea and road transport. Rail transport lagged behind road as the existing rail infrastructure was primarily designed to connect these countries with Russia and efficient rail connections with the rest of Europe are missing due to track gauge differences.

According to data collected by the ITF, rail's share in freight inland transport has been steadily decreasing since 2003. This trend has been reinforced through major road projects, like the modernisation and expansion of the European Motorway E67, also known as Via Baltica. More recently, the war in Ukraine and subsequent sanctions against Russia have contributed to an additional downturn in rail transport in the Baltics. Investments in rail infrastructure, particularly through the Rail Baltica project, offer a promising outlook for the region's rail connectivity. As the missing rail link in the EU's North Sea-Baltic TEN-T corridor, Rail Baltica is set to transform transport in the Baltic countries by better connecting them with the rest of Europe.

The project, expected to be completed by 2030, will include both high-speed passenger trains and freight services with a multimodal connection to Helsinki, Finland. This development should boost regional GDP, create a new North-East Europe economic corridor, and play a pivotal role in advancing transport decarbonisation efforts.



# Is passenger transport recovery just around the corner?



### Is passenger transport recovery just around the corner?

Passenger transport in 2023 shows signs of improvement compared to last year's <u>ITF Statistics Brief</u> which showed countries struggling to return to pre-Covid passenger levels.

Rail transport slowly recovered from the pandemic, given the strong negative impact Covid-19 had on public transport use. By 2023, 15 of 34 countries are now above 2019 levels, up from only nine countries

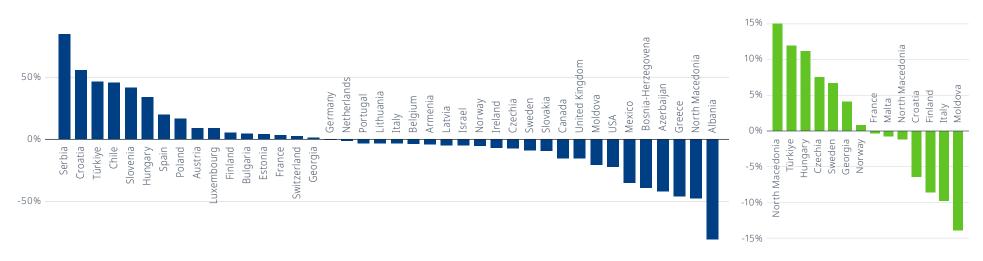
Passenger rail transport - 2023 compared to pre-pandemic levels

in our previous analysis. The recovery appears to be countryspecific; there are no clear trends on which regions are recovering faster than others.

The three countries leading the recovery - Serbia (85% above pre-Covid levels), Croatia (56%) and Türkiye (47%) - have shown sustained growth since 2021. These numbers also reflect efforts to invest more in railway infrastructure in the past years, according to data reported to the ITF. Half of the countries that reported data on road passenger transport have seen transport recovery to pre-pandemic levels. As with rail, road passenger recovery shows mixed results by region, meaning that trends are country-specific. Half of the countries reporting data on road passenger transport already show improvements compared to pre-pandemic. This group of countries is led by North Macedonia (15% above pre-Covid levels), Türkiye (12%), and Hungary (11%).

#### Bouncing back? Country-by-country data on the return to pre-pandemic transport levels

Passenger road transport – 2023 compared to pre-pandemic levels



Spotlight: UK rail transport lags behind Europe

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The United Kingdom, once the champion of steam locomotives and railways, is facing difficulties recovering after the pandemic. In 2023, passenger kilometres were 15% below the levels recorded before the pandemic in 2019, based on data collected by ITF. Annual transport trends point to a sluggish recovery since 2021, lagging behind other Western European countries that are back on track.

A change in working patterns underlies the drop in rail passenger-kilometres following the pandemic. Many people have adopted more flexible working arrangements, with companies increasingly allowing remote or hybrid work. As a result, commutes have dropped significantly, leading to poor performance even after the pandemic.

In addition to teleworking, a slow tourism recovery in the UK compared to other European countries, reduced EU labour supply and strike actions throughout 2022 and 2023 also contributed to a slow post-pandemic recovery.

#### UK rail recovery lags behind European neighbours

UK rail passenger volumes: evolution from 2013



Go to the dataset 🔨

Road safety improves in ITF countries

#### **Road safety improves in ITF countries**

The most recent road safety data indicate a moderate improvement in 2023 compared to 2013. Road fatalities have decreased by 3.6% in ITF member countries on average over the past decade.

Road safety in North America has recently shown signs of stabilisation and even a decline in fatalities over the last two years driven by a contraction in fatalities in the United States. In 2023, fatalities in North America remained 23% higher than in 2013, however.

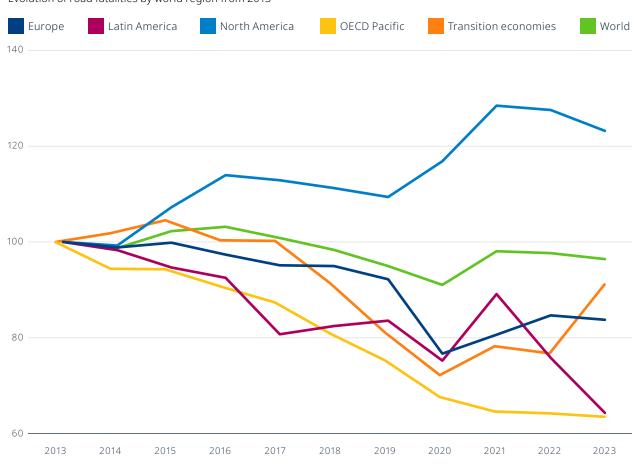
OECD Pacific region and Latin America countries achieved significant progress, reducing fatalities by 37% in both regions. Mexico records the most substantial improvement, with a 52% reduction in fatalities, followed by Korea, with a 50% decrease.

Get the full picture with the <u>ITF Road Safety Annual</u> <u>Report 2024</u>. The report features a review of road safety performance for 43 countries, recent road safety developments, and a comparison of performance against the main road safety indicators.

Europe: Austria, Belgium, Bulgaria, Bosnia and Herzegovina, Switzerland, Czechia, Germany, Spain, Denmark, Estonia, Finland, France, Grece, Croatia, Hungary, Irland, Iceland, Italy, Liechtenstein, Lithuania, Luxembourg, Latvia, Netherlands, Norway, Poland, Portugal, Serbia, Slovakia, Slovenia, Sweden. Latin America: Chile, Mexico. North America: Canada, USA. OECD Pacific: Australia, Japan, Korea, New Zealand. Transition economies: Albania, Armenia, Azerbaijan, Georgia, Israel, Moldova, North Macedonia, Türkiye.

#### Road safety trends across the globe

Evolution of road fatalities by world region from 2013



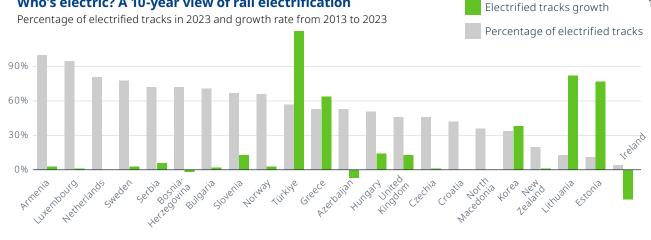
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Rail electrification vs motorway build: who takes the lead?

#### **Rail electrification vs motorway** build: who takes the lead?

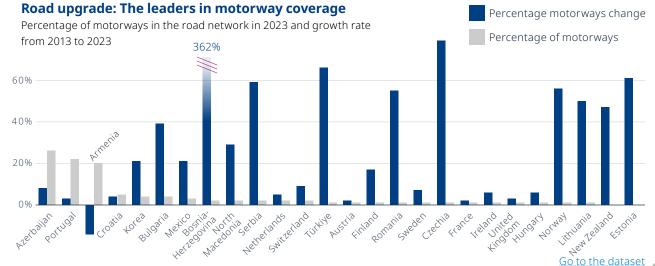
Trends in rail electrification show that, over the past decade, few reporting countries have made significant efforts to electrify rail transport. The four countries that most increased their share of electrified railways since 2013 -Türkiye (121%), Lithuania (82%), Estonia (77%), and Greece (64%) - still lag behind those with the highest levels of rail electrification. They are Armenia, Luxembourg and the Netherlands, where more than 80% of tracks are electrified.

In contrast to rail, motorway construction has seen a sharp rise during the same period. Half of the reporting countries saw at least a 10% increase in their motorway coverage, with eight countries increasing their motorway share of all road by more than 50%. The countries leading this trend are Bosnia and Herzegovina (362%), Czechia (79%), and Türkiye (66%).



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Who's electric? A 10-year view of rail electrification



## Spotlight: Bosnia Herzegovina

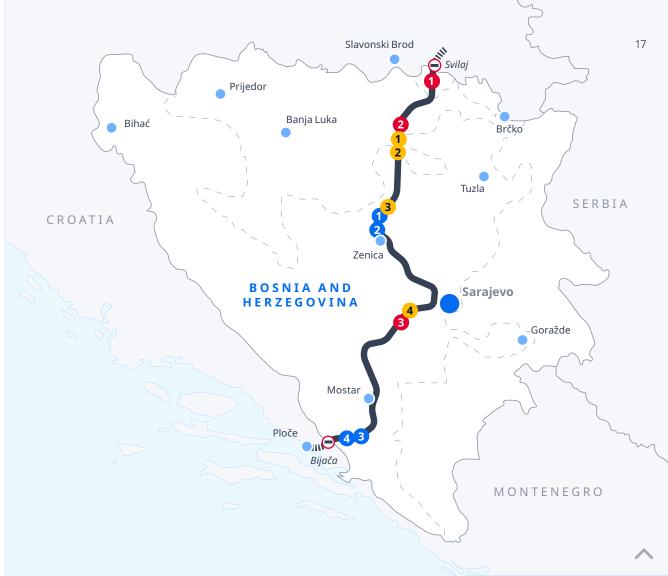
#### Spotlight: Bosnia Herzegovina

Bosnia and Herzegovina's outstanding increase in its share of motorways is explained by the Corridor Vc (CVc) motorway construction. This new corridor aims to strengthen the country's connections with the EU and global markets.

CVc is part of the EU TEN-T Mediterranean Corridor extension from Hungary, passing through Croatia and connecting Bosnia and Herzegovina with the Croatian port of Ploče.

In total, more than 325 km of CVc runs through the country, making it Bosnia and Herzegovina's road transport backbone. According to the Western Balkans Investment Framework, the corridor will increase accessibility for more than 1.5 million people, increase speeds from 60 to 130 km/h, lower road crash rates and vehicle operating costs, and improve trade flows.

Source: Western Balkans Investment Framework, (2020). Bosnia and Herzegovina: Works on Corridor Vc progress despite COVID-19 disruptions. https://www.wbif.eu/storage/app/media/Library/10.Projects/Corridor%20 Vc%20BiH%20July%202020/ENG%20Corridor%20Vc%20spreads%20small.pdf (Accessed on 20 November 2024)



# The connectivity network

#### The connectivity network

Connectivity is a critical element of transport infrastructure. It directly impacts the efficiency and costs of moving freight and passengers between locations. The degree of connectivity can be assessed using network-specific

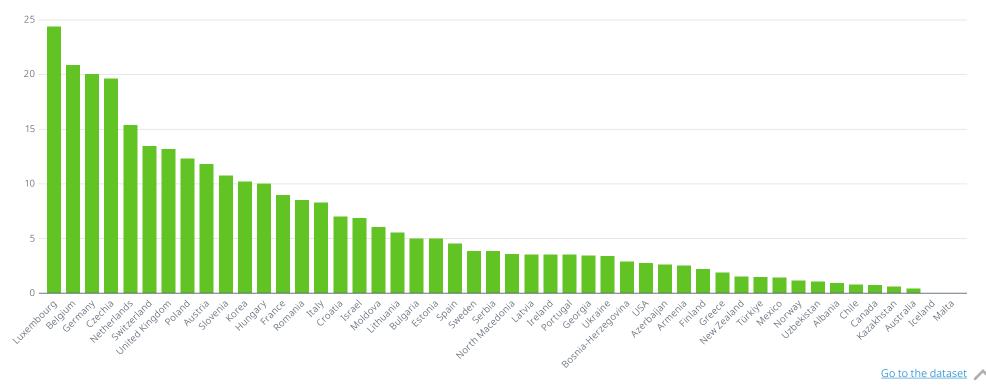
#### Spatial analysis reveals the best-connected

Rail infrastructure density (track kilometres per sq. kilometre)

attributes, like infrastructure density. <u>See more in a recent</u> <u>ITF study here</u> (PDF).

ITF data reveal that rail and road infrastructure density is positively correlated to population density.

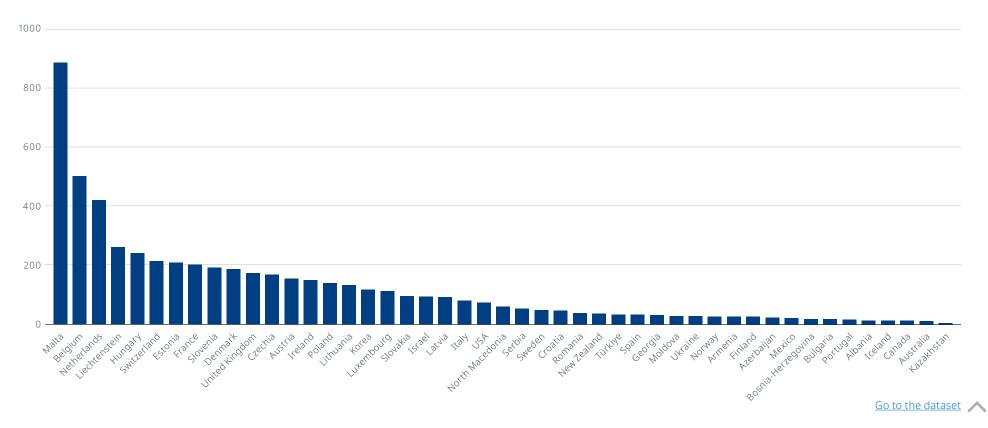
For example, rail density is notably higher in smaller, densely populated countries like Luxembourg (24 km per km<sup>2</sup>), Belgium (21 km per km<sup>2</sup>), and Germany (20 km per km<sup>2</sup>). Larger, sparsely populated nations show much lower densities like Canada (0.7 km per km<sup>2</sup>), Kazakhstan (0.6 km per km<sup>2</sup>), and Australia (0.4 km per km<sup>2</sup>).



Similarly, countries like Malta (888 km per km<sup>2</sup>), Belgium (503 km per km<sup>2</sup>), and the Netherlands (422 km per km<sup>2</sup>) have the highest road infrastructure density, while Canada (13 km per

#### Spatial analysis reveals the best-connected

Road infrastructure density (road kilometres per sq. kilometre)

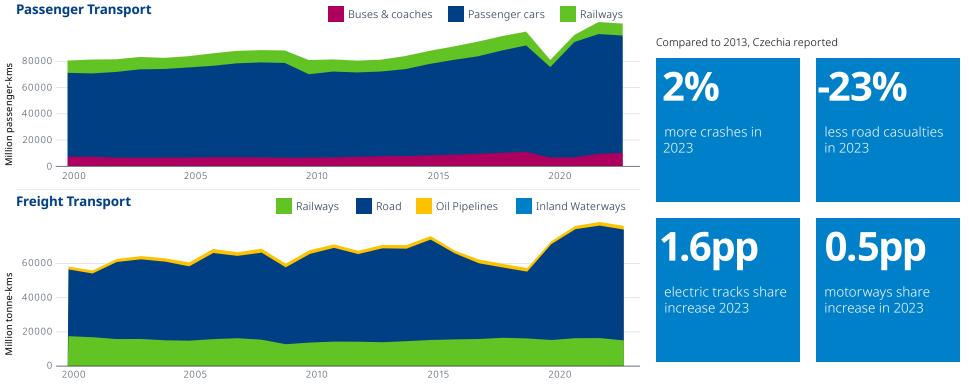


# Data snapshot: Czechia

#### Data snapshot: Czechia

ITF data offer a wealth of information on our member countries' transport trends. Czechia's transport trends show steady growth in transport activity and a fast recovery from the pandemic. Passenger transport growth has mostly been led by cars, whose share has slowly increased since 2000. Freight transport shows similar trends as road transport drives growth in transport activities.

Czechia has significantly reduced the numbers killed on roads. Although the country registered 2% more crashes in 2023 compared to 2013, road casualties dropped by 23% in the same period. Finally, infrastructure upgrades remained modest in the country. The share of electric rail tracks increased by only 1.6 percentage points since 2013. Czechia's rail electrification stands below average at 46%. The country increased the motorway network length by 78%, raising motorway's share of road infrastructure by 0.5 percentage points since 2013.



Go to the dataset

#### **About the statistics**

The data presented in this Statistics Brief are from the ITF survey "Trends in the Transport Sector", which includes freight transport, passenger transport and road safety variables. Road safety data include the number of road crashes, injured persons and fatalities (30 days).

The data series starts in 1970 and continues until the current year-1, or the most recent year for which data is available. The survey is completed by ITF member countries, processed by ITF statisticians and published each year on 31 October.

Although there are clear definitions for all the terms used in this survey, individual countries may have different methodologies for calculating tonne-kilometres and passenger-kilometres. These methods could be based on transport or mobility surveys and may use very different sampling methods and estimating techniques, which can affect the comparability of the statistics.

ITF recommends reading the metadata to check the data coverage for each country.

Detailed data descriptions and notes on the methodologies are available at: <u>Annual Transport Trends</u>

The data in this Statistics Brief are as of 31 October 2024. Online datasets can be updated following countries' revisions.

**The International Transport Forum** at the OECD is an intergovernmental organisation with 69 member countries. It acts as a think tank for transport policy and organises the Annual Summit of transport ministers. The ITF is the only global body that covers all transport modes. It is administratively integrated with the OECD, yet politically autonomous.

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