Ministry of Infrastructure and the Environment

A look at the OECD Transport Outlook 2012

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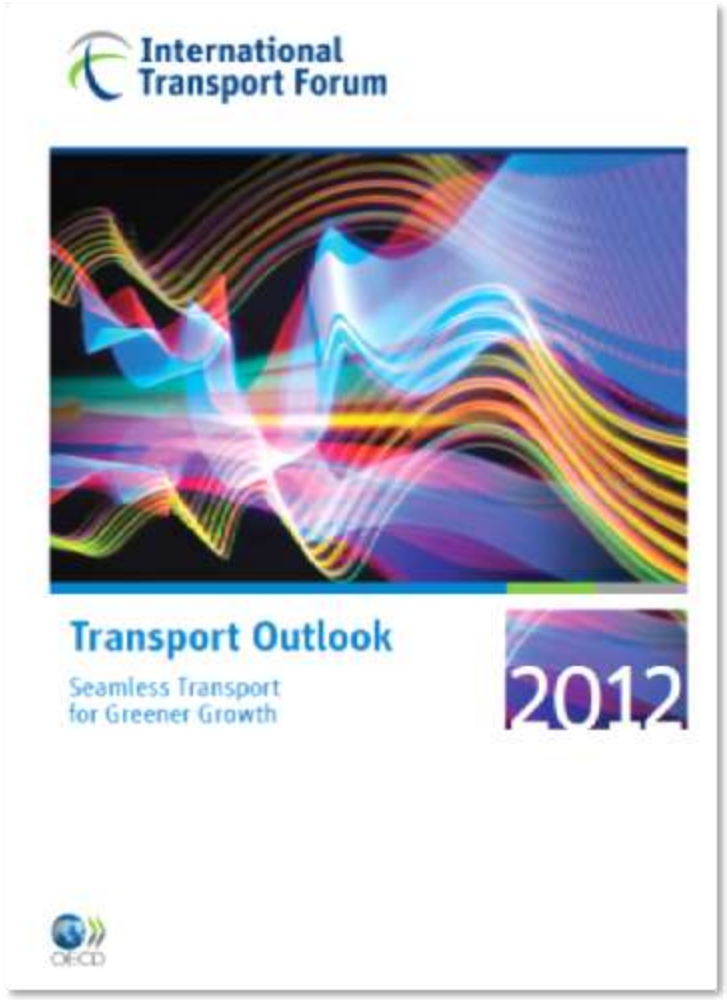
OECD Transport Outlook 2012

- Near term prospect for transport
- Mobility projections for 2050



www.internationaltransportforum.org

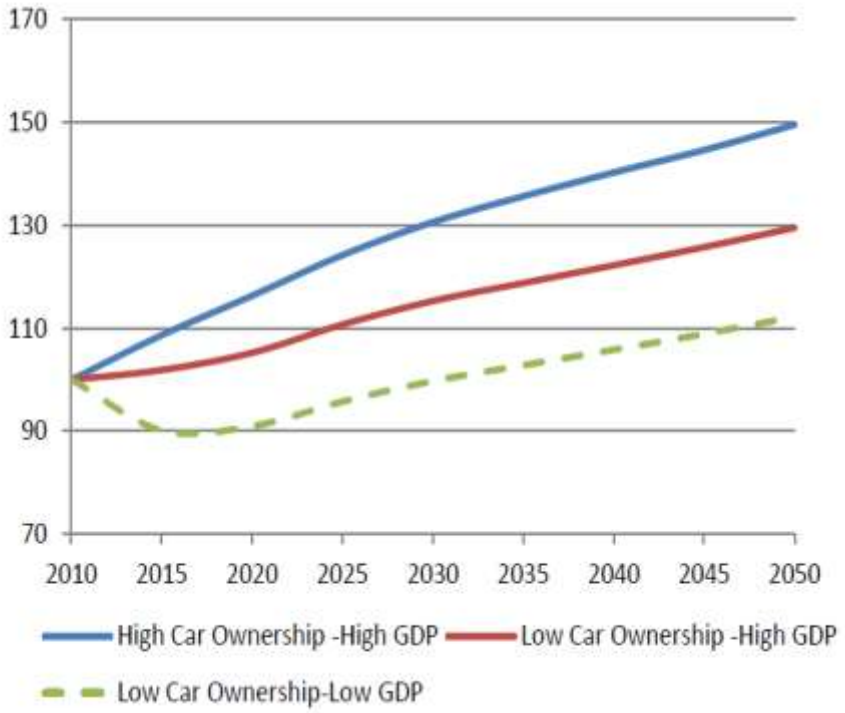
2050 Scenario assumptions

index - 2010 base

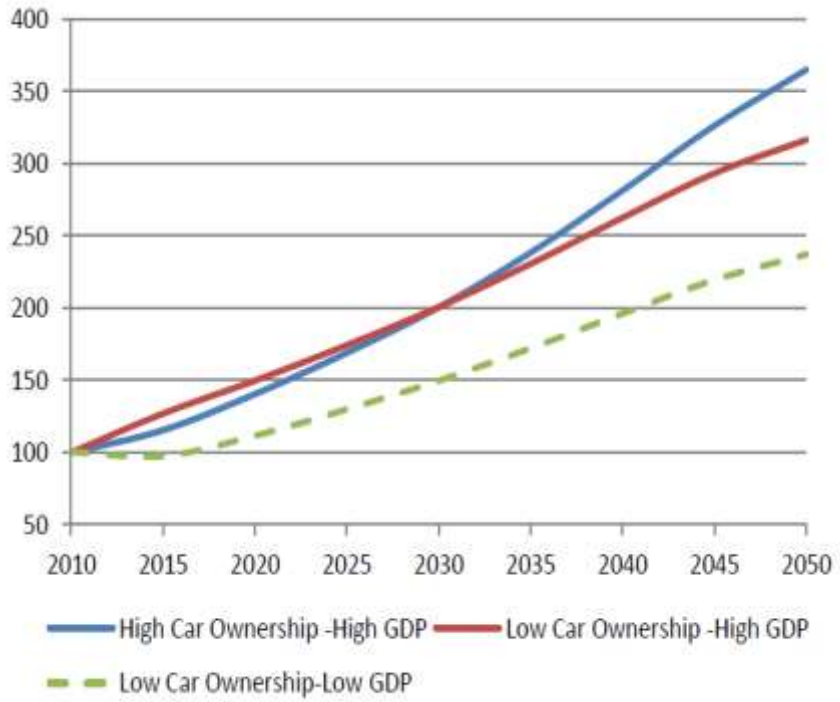
		2010	2030	2050
OECD				
Population		100	109.7	113.7
Population density		100	103.9	104.5
Urbanisation		100	105.7	109.9
GDP	high	100	159.1	231.2
	low	100	144.2	209.9
GDP/cap.	high	100	149.0	208.8
	low	100	131.5	184.6
non-OECD				
Population		100	122.9	139.3
Population density		100	122.2	137.3
Urbanisation		100	120.5	141.9
GDP	high	100	242.4	516.4
	low	100	206.6	442.5
GDP/cap.	high	100	197.0	370.3
	low	100	167.9	317.3

- High/low car ownership levels (private)
- Yes/no 'decoupling' (freight)
- Application of IEA Mobility Model (MoMo)

Index of total private mobility OECD 2010-2050
(passenger-km, all modes)

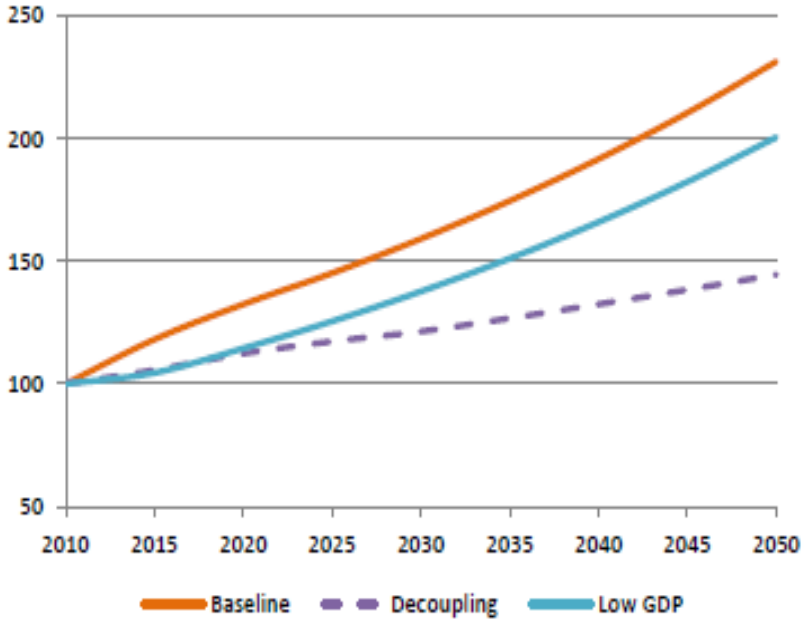


OECD countries

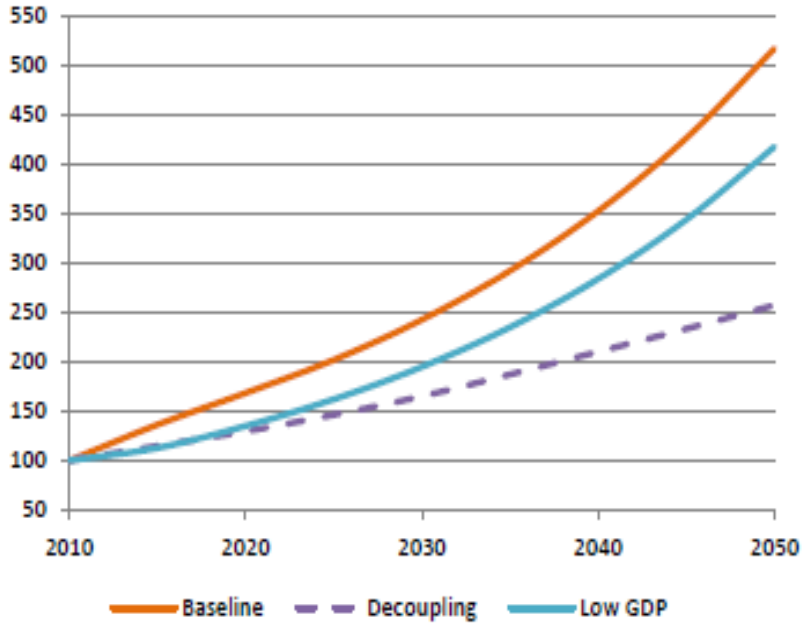


Non-OECD countries

Index of total freight mobility OECD 2010-2050
(tonne-km, all modes)



OECD countries



Non-OECD countries

High and low estimates for index of GDP, Transport volumes and CO2-emissions in 2050 (2010=100)

High = high GDP growth and high car ownership rates
Low = low GDP growth and lower car ownership rates

	Passenger transport			Freight transport		
	OECD	Non-OECD	World	OECD	Non-OECD	World
GDP	210-230	440-520	300-350	210-230	440-520	300-350
GDP per capita	185-210	320-370	230-270	185-210	320-370	230-270
Transport volume	110-150	240-360	170-260	150-230	250-550	200-380

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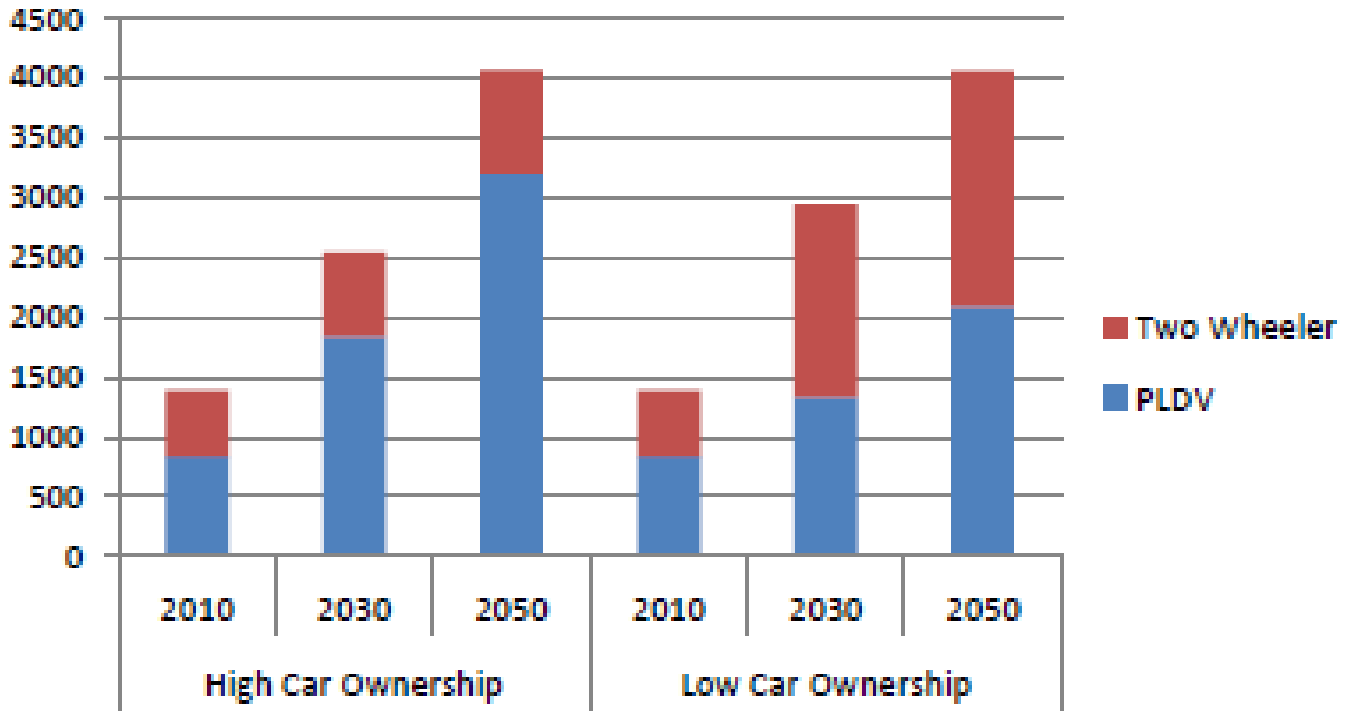
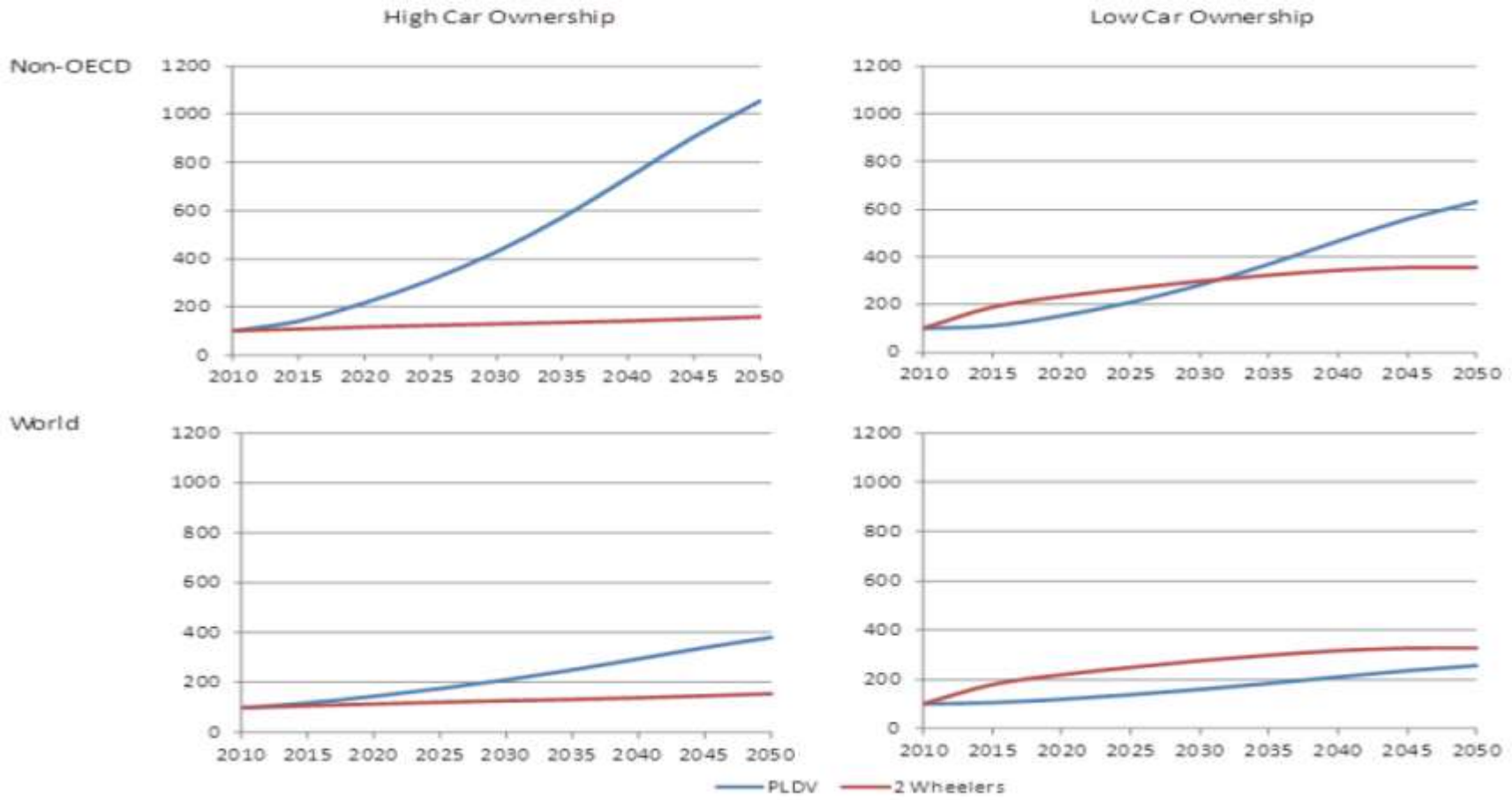
Transport volume	110-150	240-360	170-260	150-230	250-550	200-380
CO2 emissions	**80-110**	**240-450**	**130-220**	**100-165**	**260-450**	**170-300**

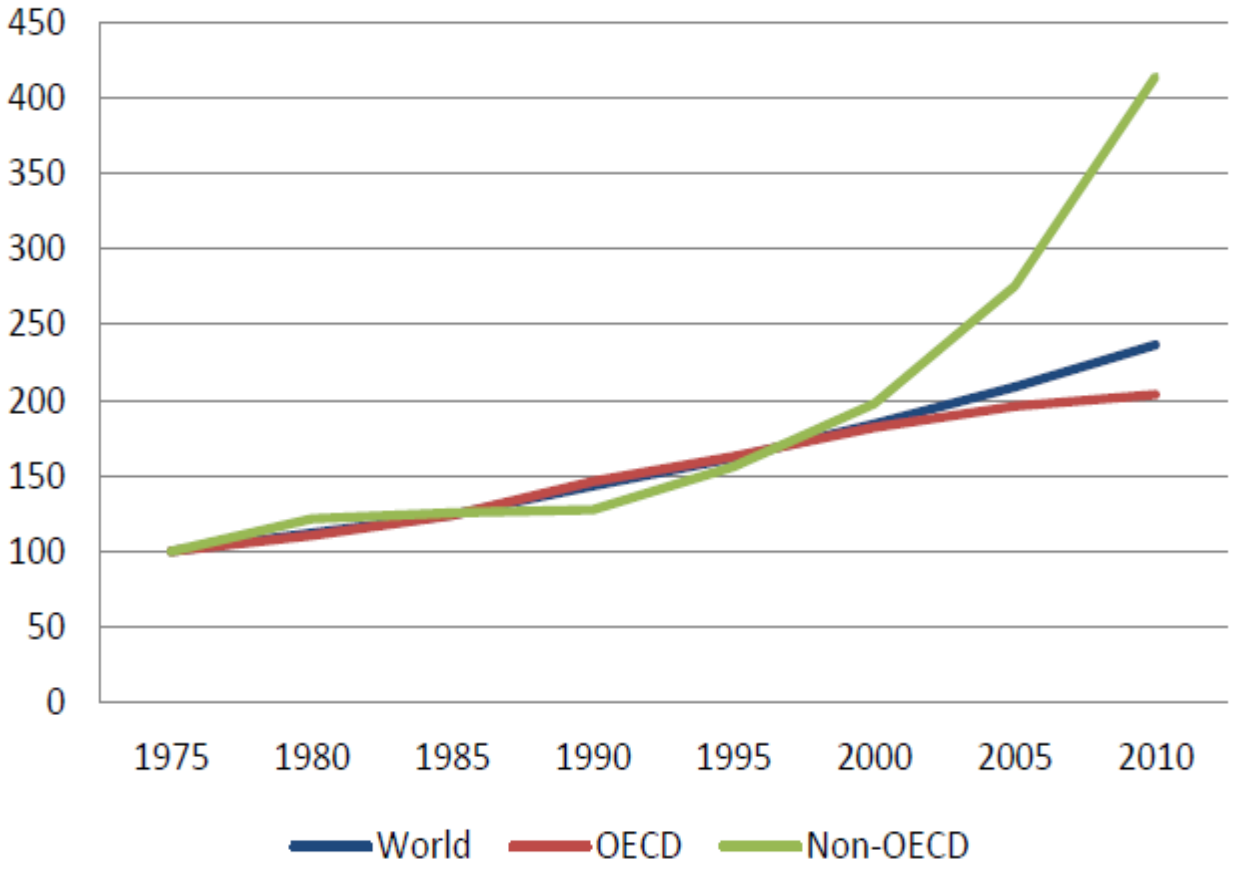
Global private vehicle stock, light duty vehicles and two-wheelers, 2010-2050 (millions)



Index of private mobility for private light-duty vehicles and two-wheelers, 2010-2050 (2010 = 100)

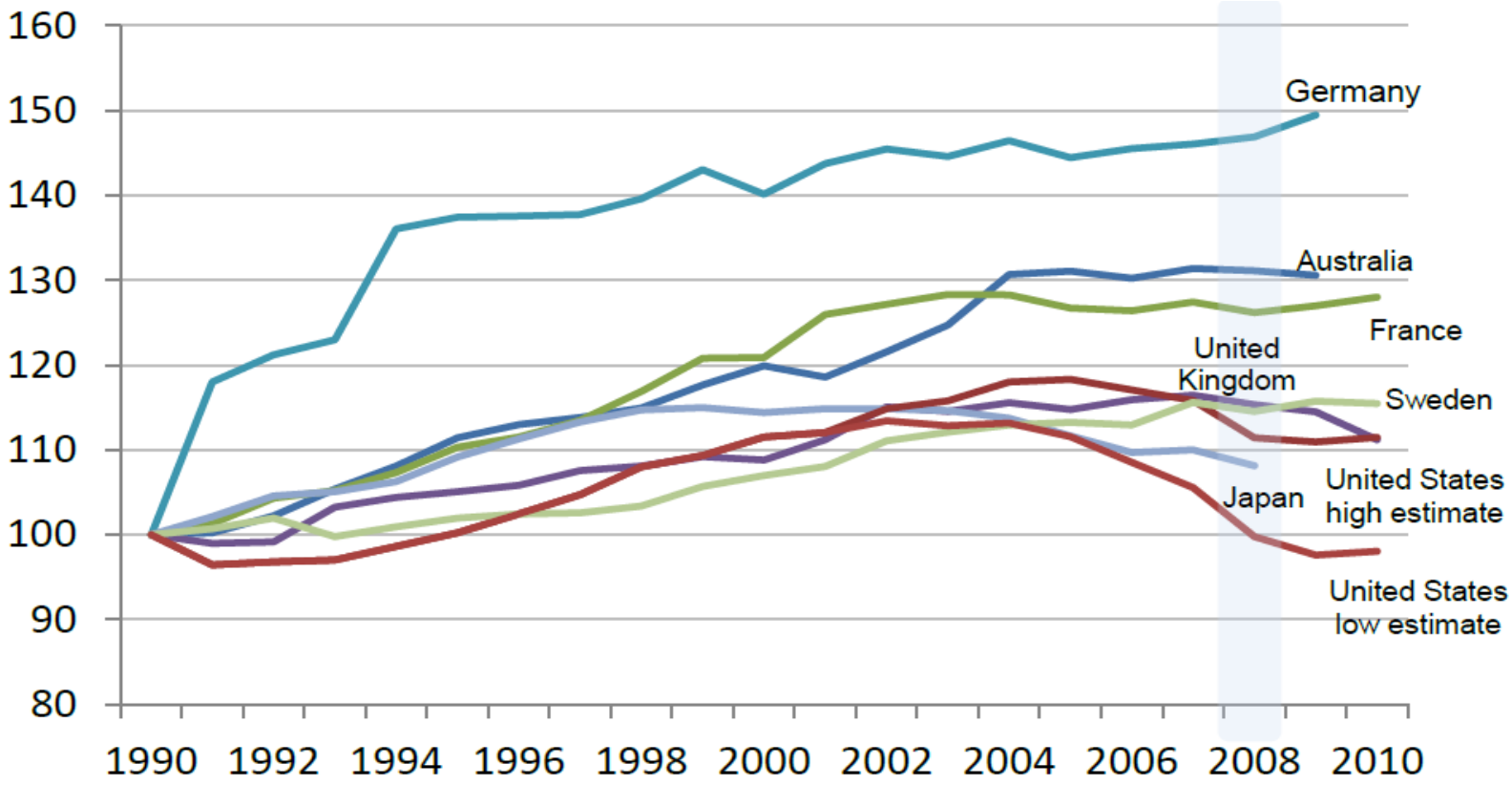


Growth in car use levelling off in OECD-countries



Car use (driver and pass.) in other western countries

Personkilometres car and light trucks (Index: 1990=100)



Transport Outlook 2012 – Overall conclusions

- Global passenger transport volumes in 2050 could be up to 2.5 times as large as in 2010; Freight volumes could grow by a factor 4
- CO2-emissions grow more slowly because of increasing energy efficiency, but may still more than double
- Future growth of global mobility and CO2 emissions depends strongly on the development of urban mobility
- Two-wheeler use could contribute significantly to mobility growth in non-OECD regions
- Low car ownership with increased two-wheeler use results in much lower emissions of CO2
- Mobility policies can slow down CO2 emission growth but cannot by themselves stop it
- Energy technology is the key to actually reducing the transport sector's global carbon footprint
- Adopting a seamless transport system view helps to identify investment options that provide good value for money

Thank you