

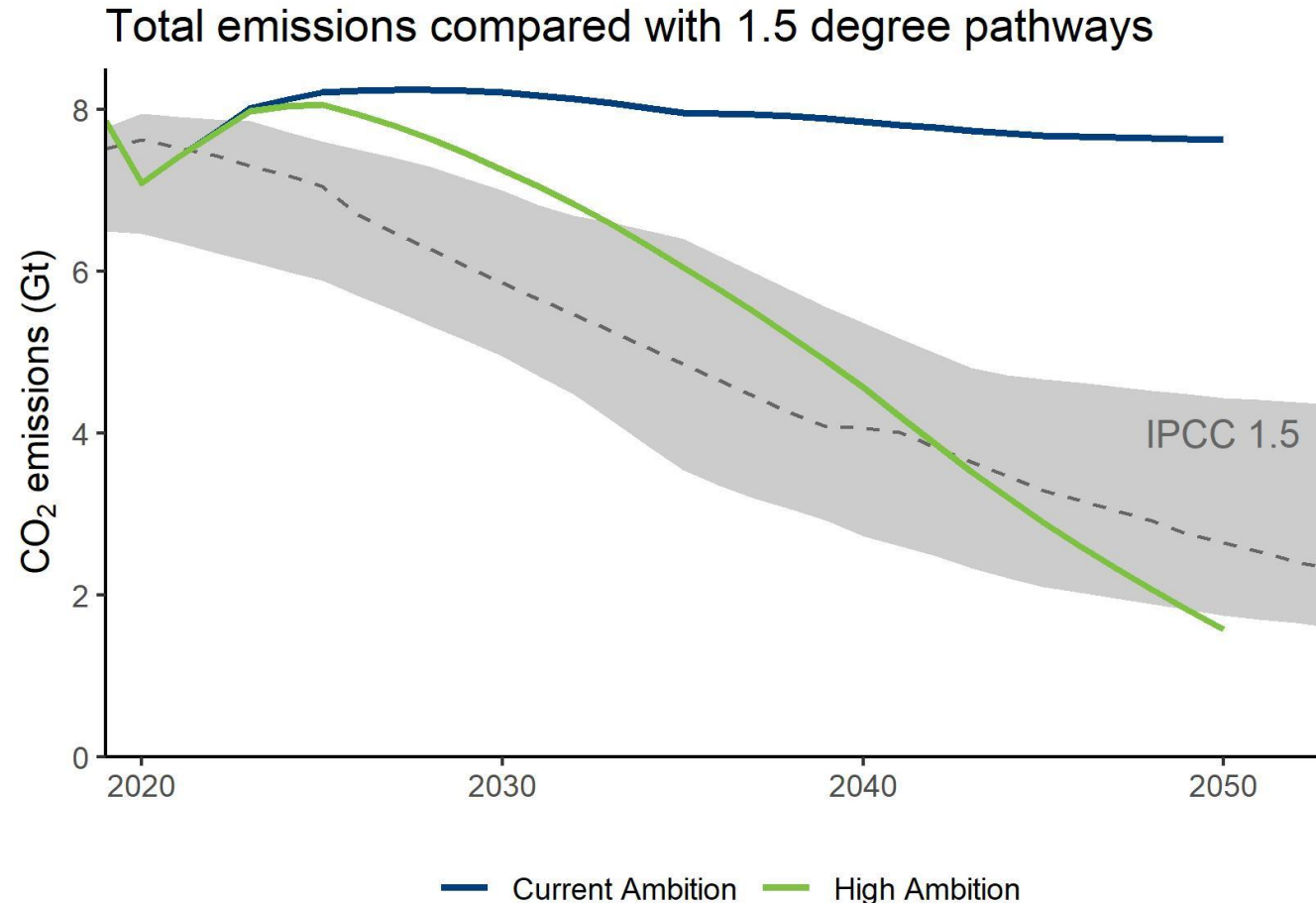


ITF Transport Outlook 2023

Energía y Movilidad Sostenible

Dr. Matteo Craglia

As time runs out, accelerated action is needed



Key point: We are not on track to meet Paris climate targets of well below 2 degrees and aiming for 1.5

Two scenarios

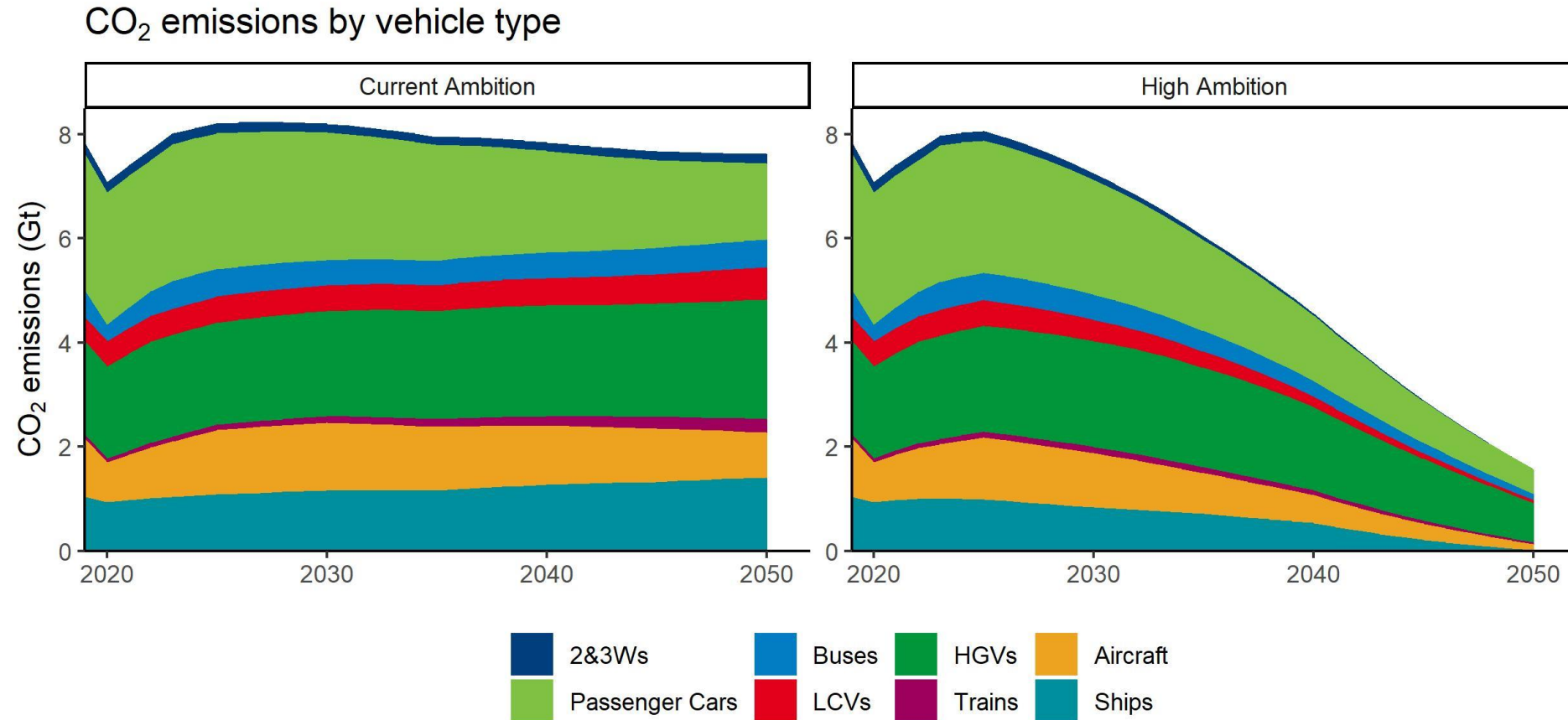
Current Ambition

- Existing policies
- National commitments and aspirations, modellable NDCs
- Regional directives

High Ambition

- Mainly Current Ambition policies but faster and bigger
- Reflects 2030 Breakthrough goals for most sectors

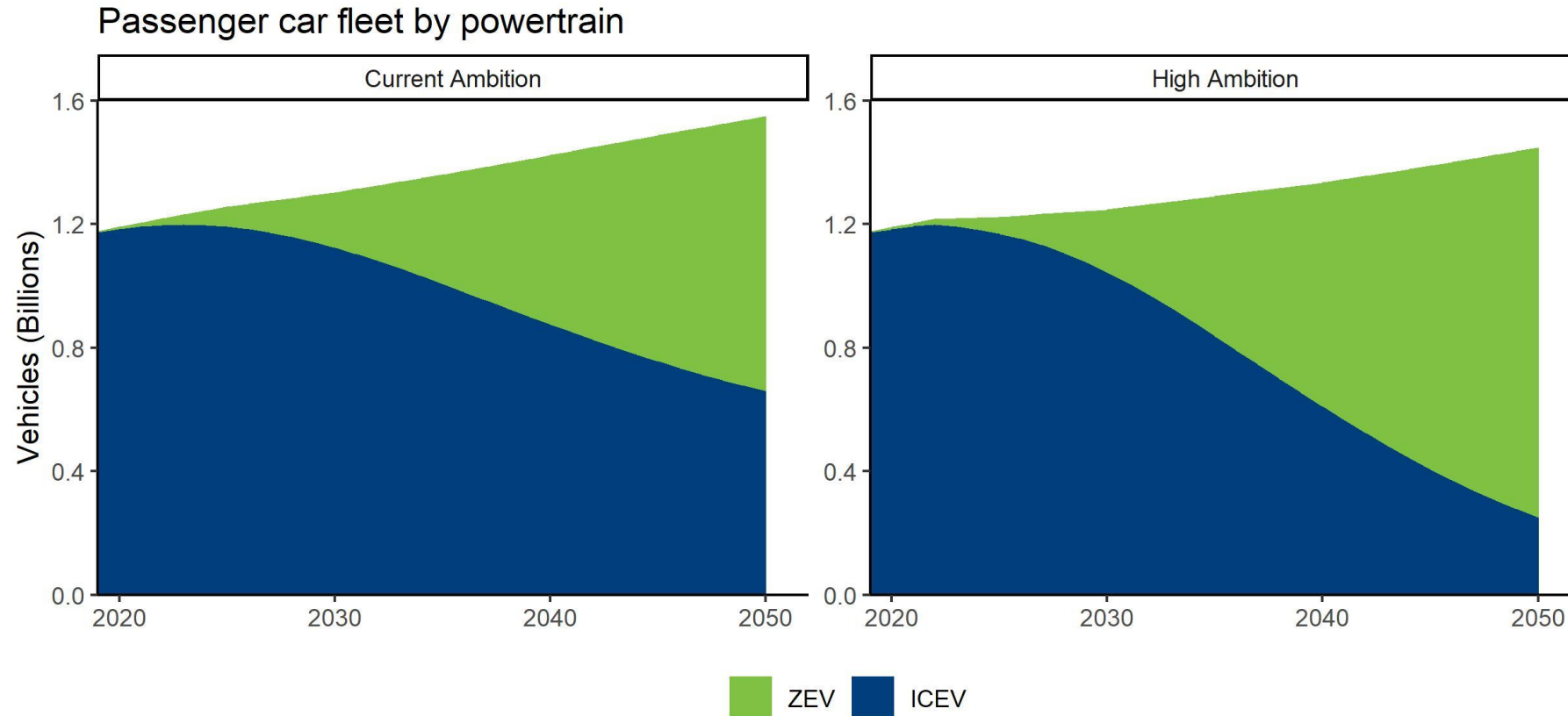
Cleaner fleets and fuels are essential



Key point:

- Emissions from passenger cars are expected to decrease.
- Greater focus is needed on hard-to-abate modes: Heavy road freight, Aviation, Shipping

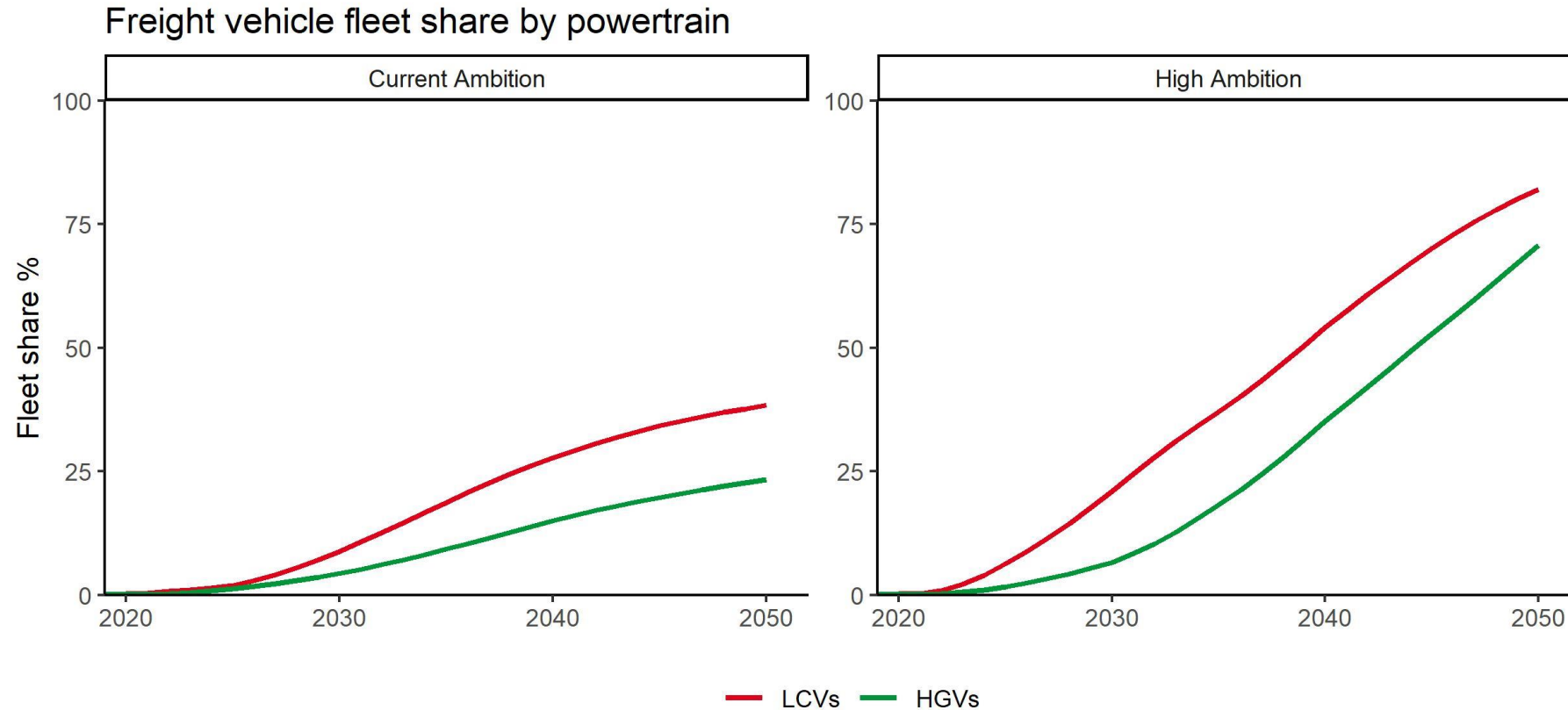
ZEVs are essential to decarbonise road transport



Key point:

- With current ambitions we have already reached peak ICE car fleet, but even more is needed.

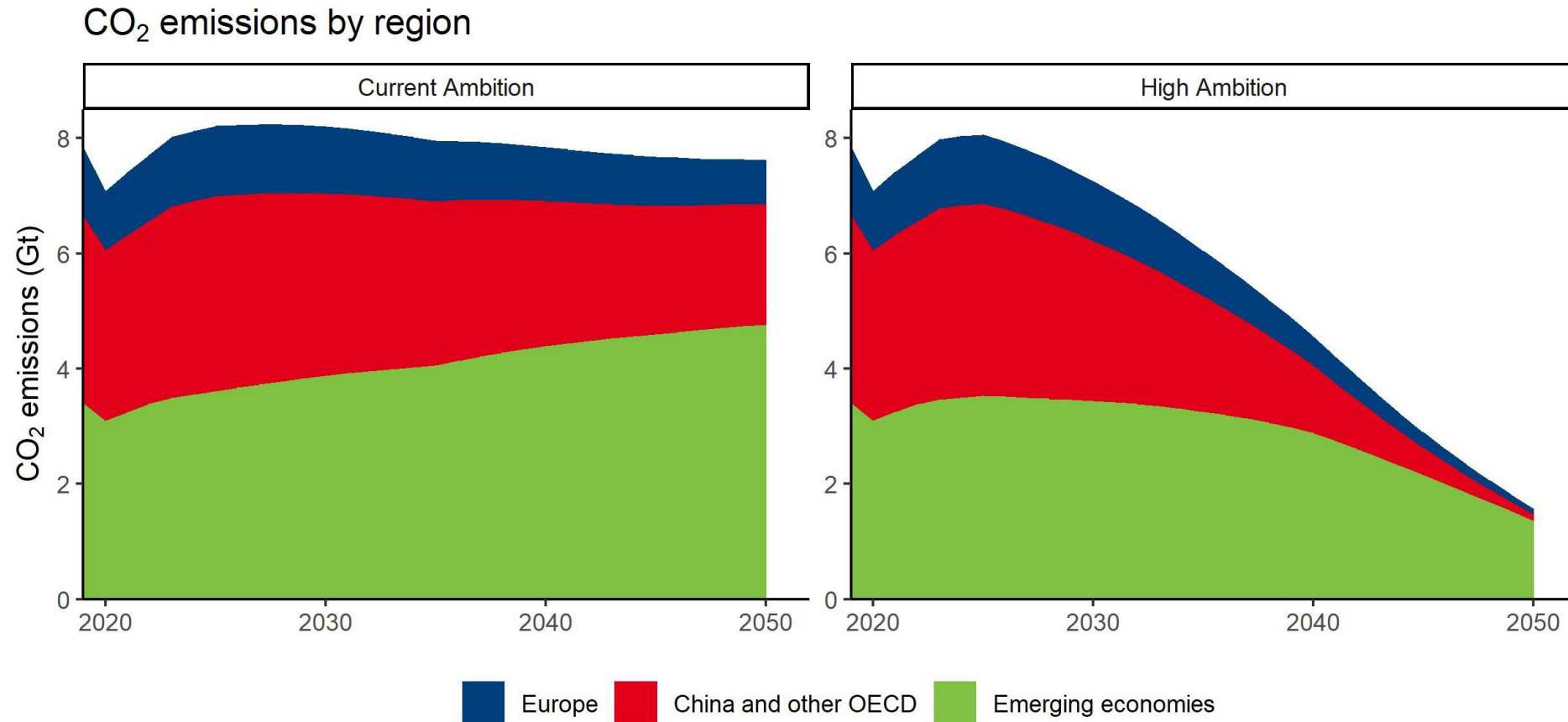
Ambitions for ZEV freight vehicles are increasing



Key point:

- A growing number of countries have targets for ZEV trucks (e.g. Europe, North America), more countries need to commit, and infrastructure deployment needs to accelerate.

Emerging economies need support to decarbonise

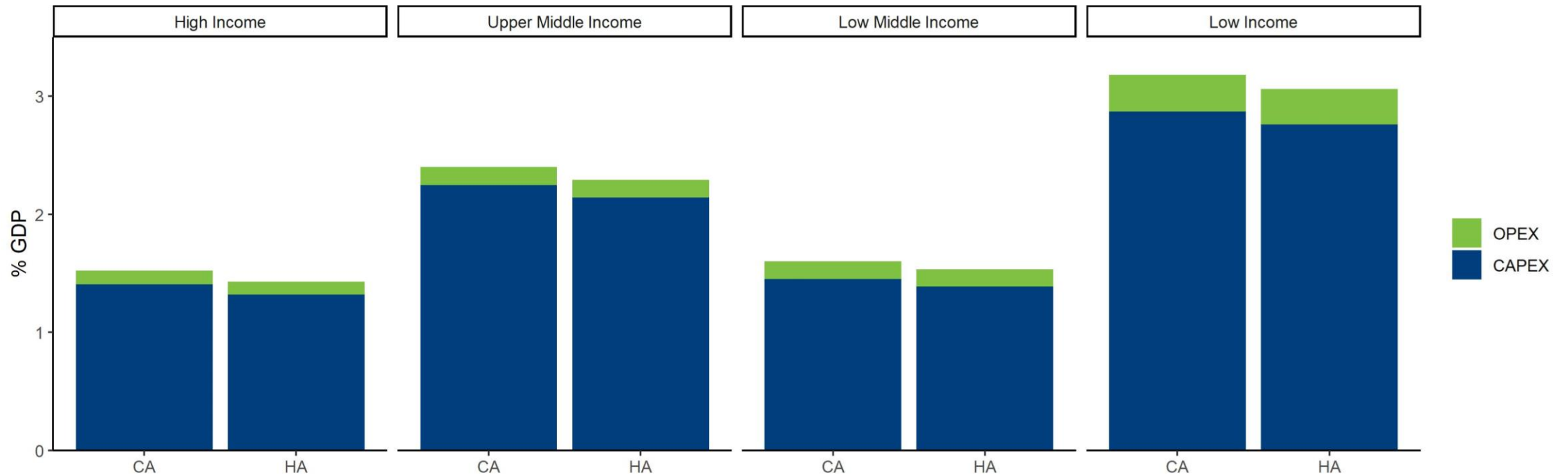


Key point:

- Low-income countries have higher travel demand growth, older fleets and are dependent on imports.
- They will need more time and support to begin decarbonisation pathways.

Align investment towards a low carbon future

Total investment needed for infrastructure capacity to cater to demand under the two scenarios



Key point:

- High demand growth leads to significant transport infrastructure investment needs.
- The high ambition scenario will cost approximately **5% less**.
- 10-20% of infrastructure investments are for **EV charging infrastructure** (~1/3 for heavy duty)

Policy Recommendations

- Develop comprehensive transport strategies to reduce private vehicle use, manage urban sprawl, and allow for strategically aligned investment.
- Accelerate emissions reductions from hard-to-abate transport modes
- Align institutional investment with sustainable transport pathways
- Focus on technical capacity building in emerging economies to help reduce the barriers to investment.
- Begin future proofing infrastructure where possible.

Thank you

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