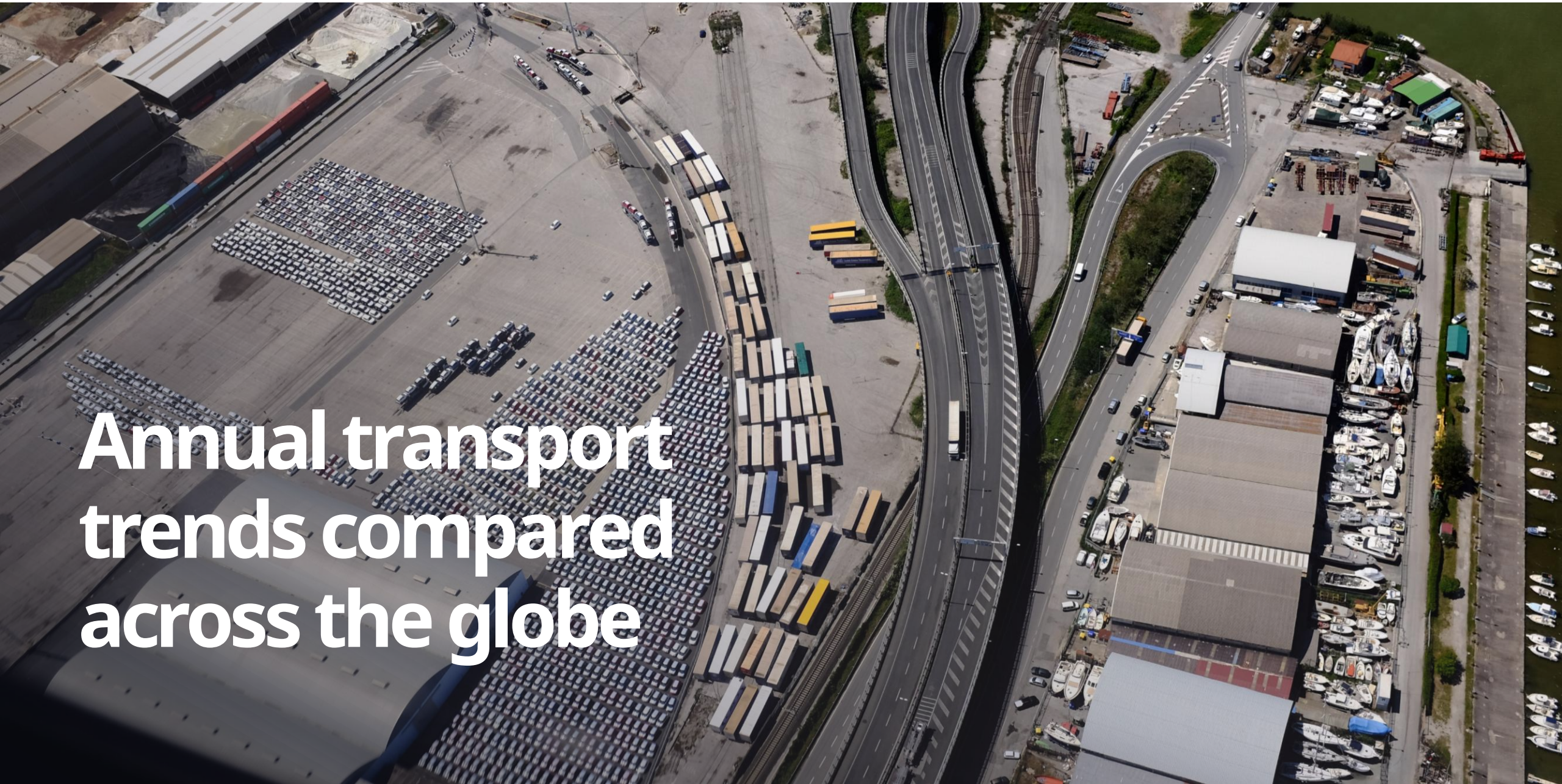
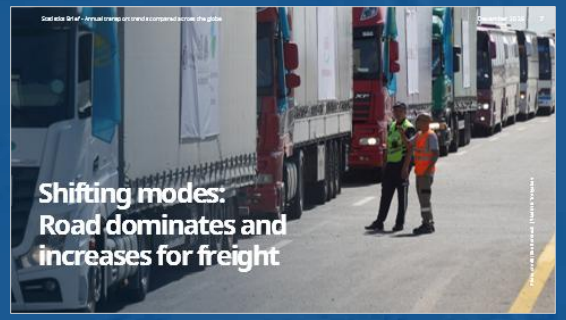
International Transport Forum

Statistics Brief



Annual transport trends compared across the globe

In this Edition



About this Statistics Brief

Inland freight transport grows unevenly over last decade

Photo credit: Shutterstock | Salvador Aznar

Inland freight transport grows unevenly over last decade

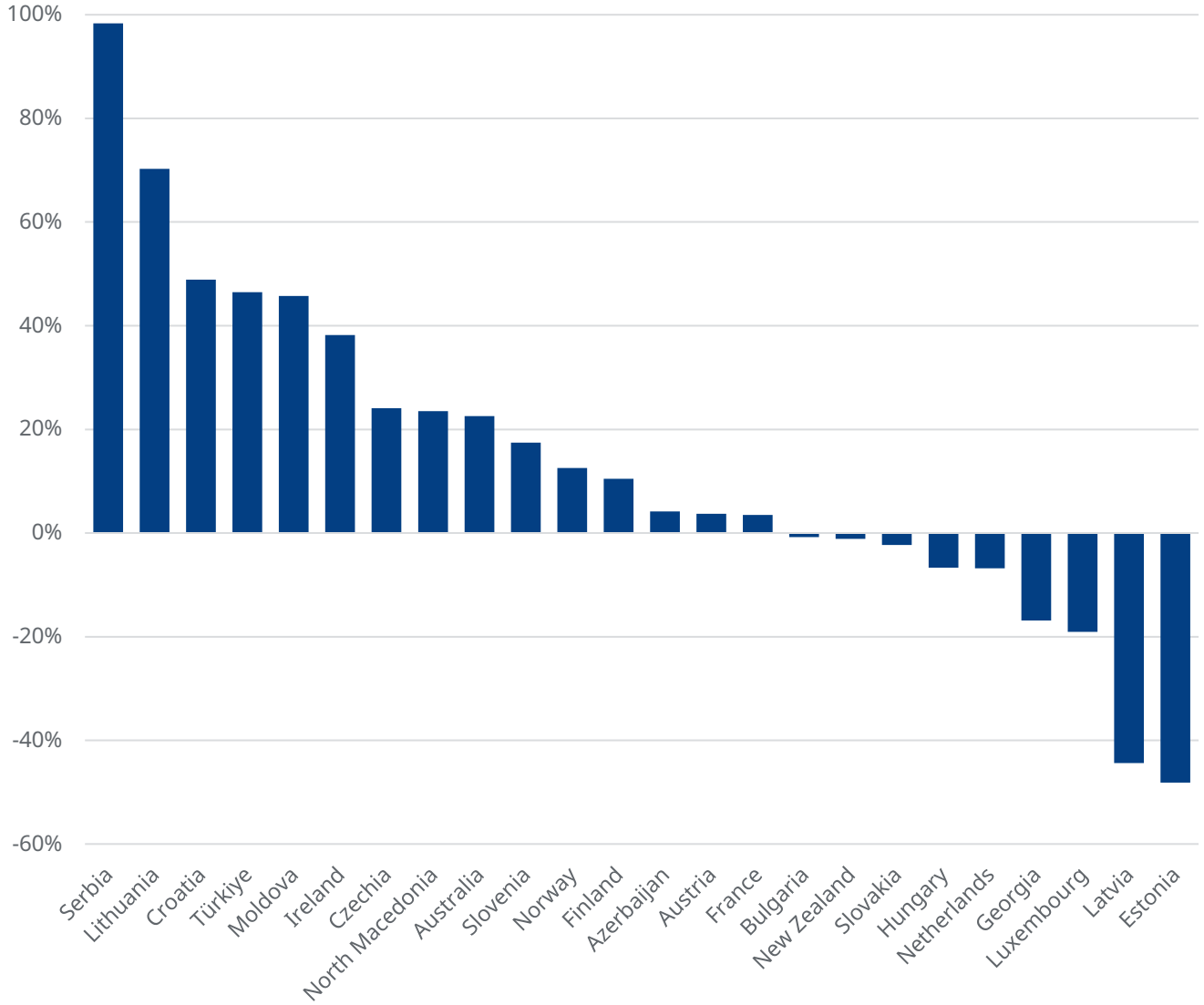
Inland goods transport grew in most ITF countries surveyed between 2014 and 2024. The latest data reveal the greatest increase in Serbia (+98%), followed by Lithuania (+70%) and Croatia (+49%). Conversely, large declines were recorded in Estonia (-48%), Latvia (-44%) and Luxembourg (-19%).

Serbia (see Spotlight) and Croatia's strong freight transport performance is driven by sustained economic growth and major infrastructure investments. Both countries recorded substantial GDP growth during the period; Serbia by 39% and Croatia by 38%. In addition, the construction of Pan-European Corridors V and X has attracted further investment and network development. Expanded capacity has intensified freight quantities along these corridors in recent years.

Estonia and Latvia's decade-long decline in freight volumes is due to ageing infrastructure and a heavy dependence on rail freight, exacerbated by the loss of freight transport with Russia. By contrast, Baltic neighbour Lithuania's younger fleet and more diversified transport sector have driven transport growth.

10-year comparison of goods transport

Change in inland freight transport activity (in tonne-kilometres) excluding oil pipelines (%), 2014–2024



Spotlight: Serbia's economy drives strong freight growth

Photo credit: Shutterstock | Anasteiða

Spotlight: Serbia's economy drives strong freight growth

Serbia's outstanding growth in freight transport from 2014 to 2024 - from 7 061 to 13 815 million tonne-kilometres – saw a tripling in goods transport by road. Rail and inland waterways transport have remained relatively stable.

Strong economic development is the key behind this growth. The landlocked nation attracted substantial foreign direct investment over the last decade, reinforcing its position as a leading destination for manufacturing and logistics in the Western Balkans. Moreover, the construction of the Pan-European Network Corridor X has spurred considerable development in road infrastructure and positioned the country as a major transit hub for north-south and east-west European routes.

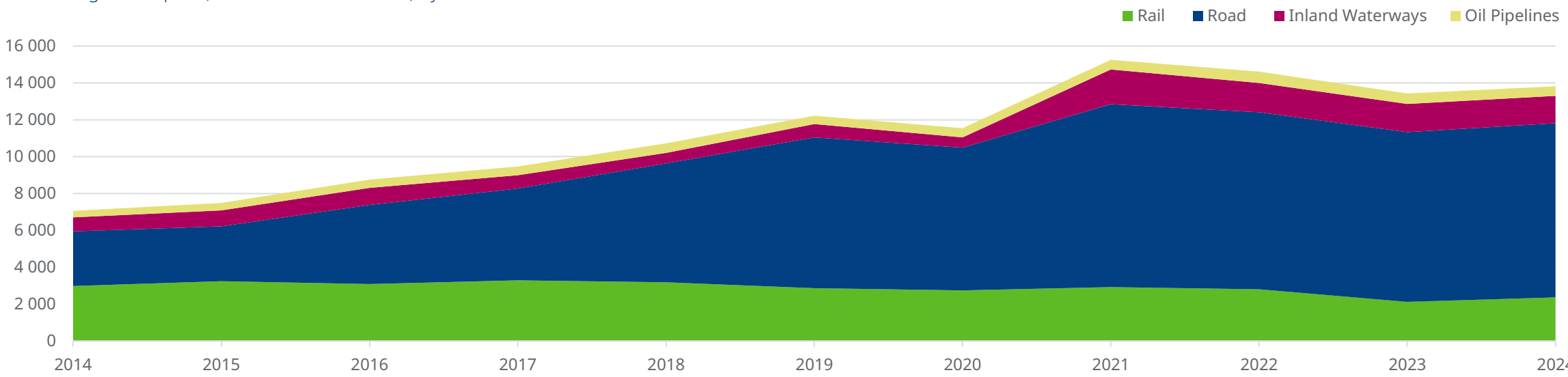
The main road corridor X extends over 1 452 km, with much of the route following the former Yugoslav "Brotherhood and Unity Highway". The Serbian section includes the A3 motorway from Tovarnik (Croatia) to Belgrade and the A1 motorway running south to Sopot (North Macedonia).

A 98 km section of the E80 (A4) and a 75 km section of the E75 (A1) were recently upgraded to motorway standard. The Belgrade–Bar motorway is also under construction as part of the proposed Corridor XI, a future motorway and ferry route linking Bari, Bar, Belgrade, and Bucharest.

July 2025 saw the opening of a new motorway section of the E763, part of the Belgrade–Bar route between Preljina and Požega.

Road dominates Serbia's 10-year freight growth

Inland freight transport (measured in million tkm) by mode from 2014



Shifting modes: Road dominates and increases for freight

Photo credit: Shutterstock | Vladimir Tretyakov

Shifting modes: Road dominates and increases for freight

The share of goods transported by road has been steadily increasing compared to other inland transport modes in most countries. A ten-year comparison reveals that 21 of the 25 countries reporting data experienced a relative increase in road transport between 2014 and 2024. This shift to relatively carbon-intensive road transport has an impact on greenhouse gas emissions when compared to using rail or inland waterways.

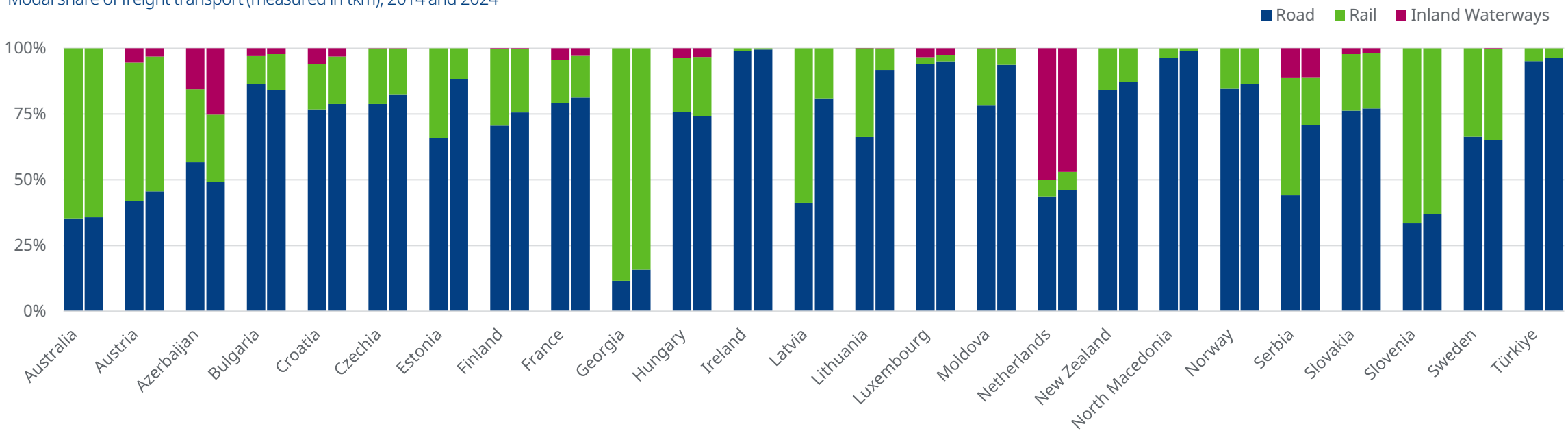
Only Bulgaria, Croatia, Hungary, the Netherlands, and Sweden recorded an increase in the share of rail freight transport, although these countries still rely primarily on road or inland waterways. Georgia (84%), Australia (64%), and Slovenia (63%) reported the highest rail shares in 2024, maintaining stable levels since 2014. Conversely, almost all freight transport in Ireland, North Macedonia, and Türkiye is performed by road, and this has remained stable since 2014.

This stability contrasts with the trend in the Baltics, where rail freight transport has decreased substantially due to the war in Ukraine and sanctions against Russia, and in Serbia, where the share of road freight transport increased by 27 percentage points between 2014 and 2024

Moreover, the Netherlands recently witnessed a decrease in the share of inland waterway freight (see Spotlight).

Compare how your country is shifting modes

Modal share of freight transport (measured in tkm), 2014 and 2024



Spotlight: Ukraine, economic and climate conditions hit Dutch inland waterways

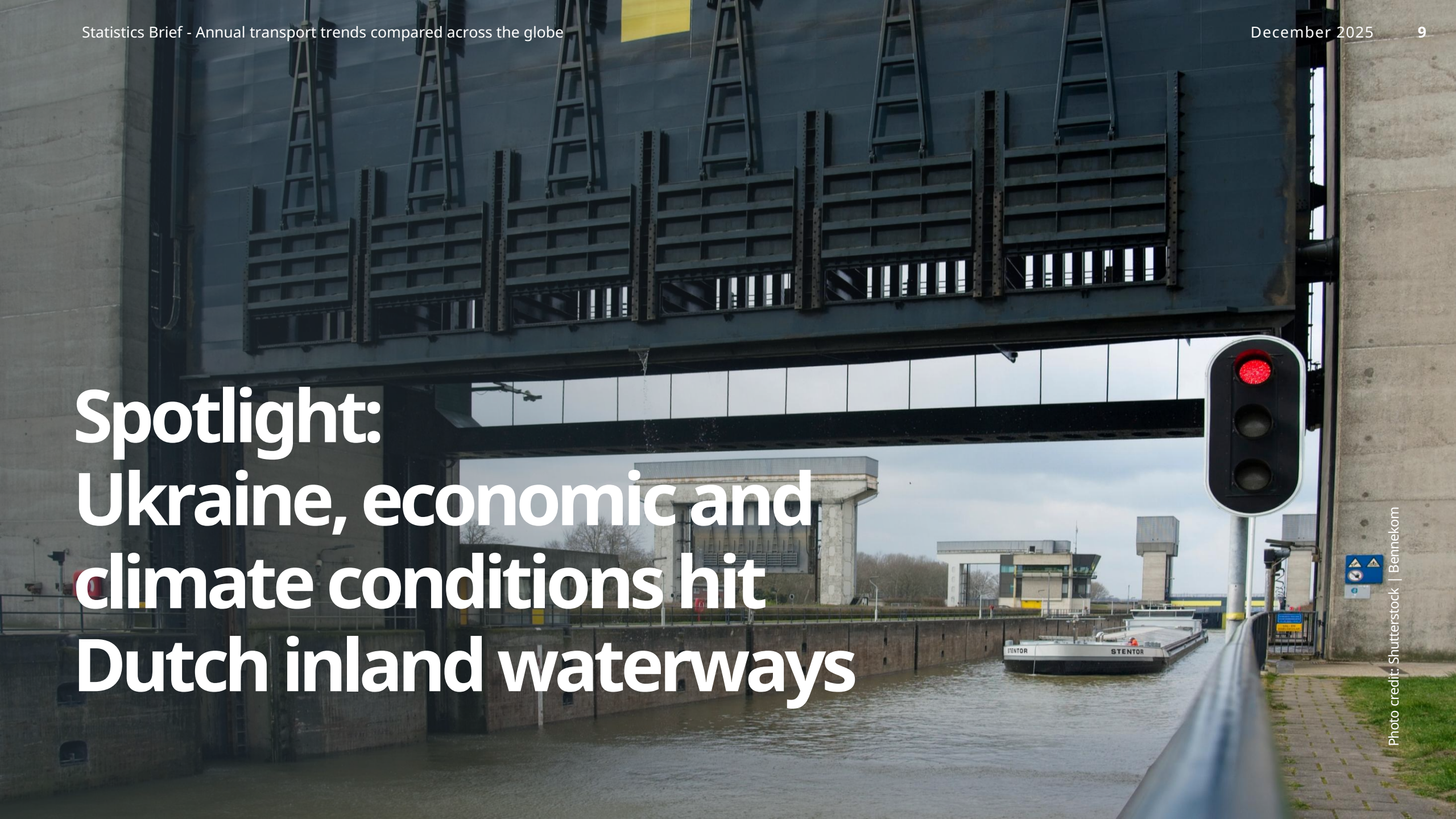


Photo credit: Shutterstock | Bennekom

Spotlight: Ukraine, economic and climate conditions hit Dutch inland waterways

44% of all goods transported in the Netherlands in 2024 used the inland waterway system – by far the highest share in ITF countries surveyed.

Our latest data analysis reveals significant recent fluctuations due to external factors. The war in Ukraine, weaker aggregate demand driven by high inflation and low water levels led to a 13.9% drop in volumes transported between 2022 and 2023 on the Lower Rhine.

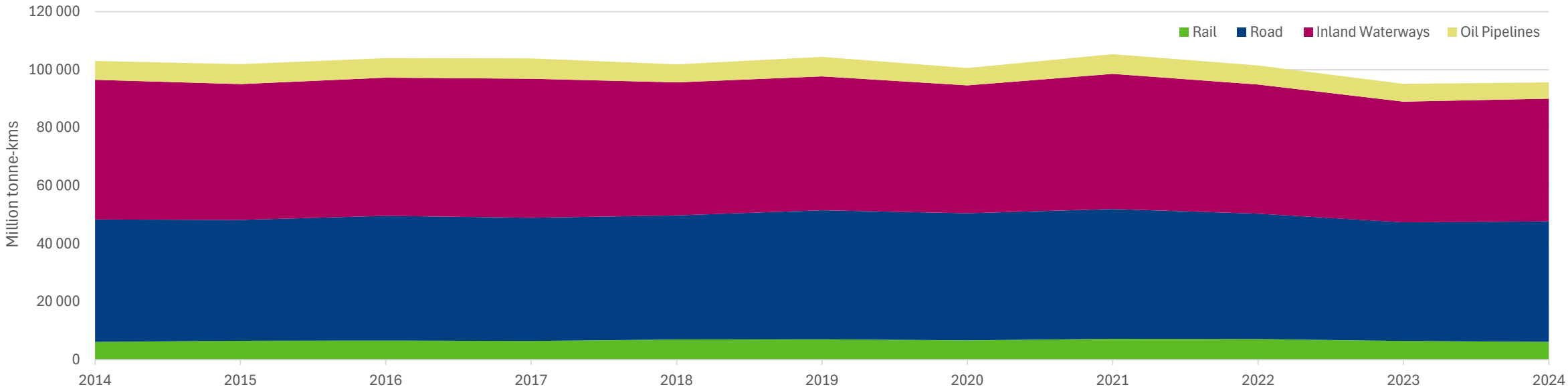
Many market segments recorded decreases; from -5.3% for metal products to -27% for coal, while mineral oil products and iron ore expanded by 3% and 2.5%.

Water levels directly affect inland waterway performance, determining how much cargo a vessel can safely load and transport. The load factor, in turn, influences the unit costs of inland waterway transport. Notable examples include the low-water periods in autumn 2018 and summer 2022, which limited the volume of freight on the Rhine and caused a partial modal shift in container transport to rail and road.

The Dutch gauge station at Nijmegen, which monitors the number of days when water levels fall below the reference low-water mark, recorded 136 days in 2018 and 62 days in 2022, compared to an annual average of 37 days for the period 2016–2023.

Inland waterways freight transport in the Netherlands decreased in the last decade

Inland freight transport by mode from 2014



A mixed recovery: Passenger mobility post-pandemic

Photo credit: Shutterstock | csikiphoto

A mixed recovery: Passenger mobility post-pandemic

By 2024, passenger transport showed signs of recovery from the drop in mobility following the Covid-19 pandemic, with some countries surpassing 2019 passenger levels.

Rail transport showed only partial recovery from the pandemic, given the strong negative impact Covid-19 had on shared transport. By 2024, 14 of 30 countries were above their 2019 levels. The recovery appears to be country-specific; available data does not indicate regional variations.

Serbia (+105%), Hungary (+94%) and Croatia (+57%) lead rail passenger transport recovery as they report figures larger than pre-pandemic levels. These numbers also reflect the recent increased investment in railway infrastructure.

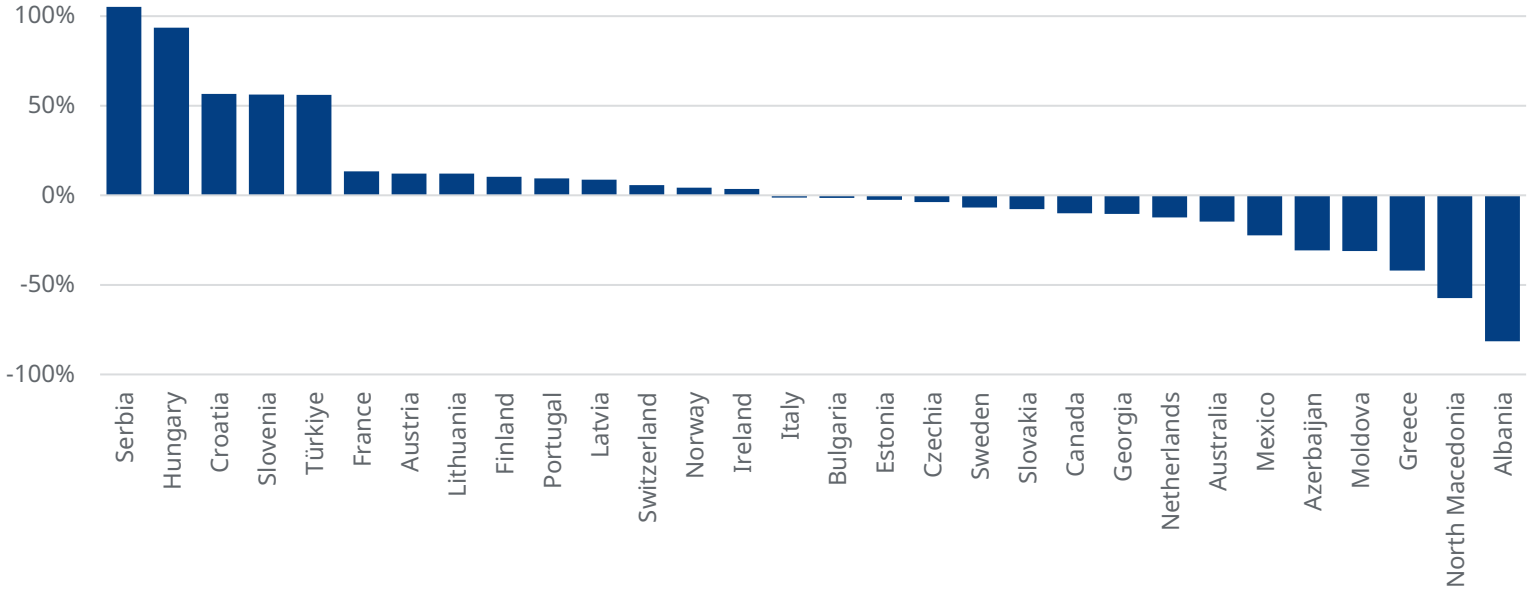
More than half of reporting countries show improvements in road passenger transport compared to pre-pandemic levels.

As with rail, recovery shows mixed results in countries with available data. In 2024, North Macedonia (+20%), Türkiye (+18%), and Czechia (+13%) exceeded pre-pandemic levels.

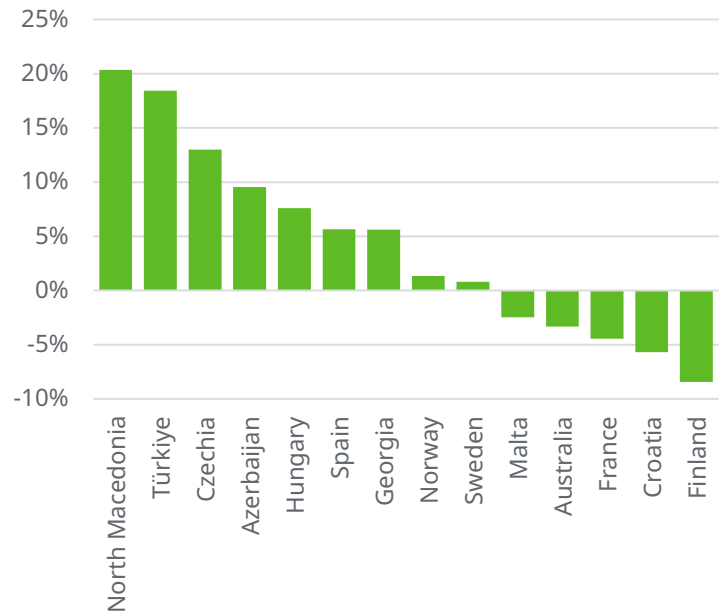
Croatia, Finland and France have recovered to pre-pandemic levels in rail, but not in road passenger transport. In particular, Finland's road passenger transport remains 8% below its pre-pandemic level (see Spotlight).

Is passenger transport is recovering post-pandemic?

Change in passenger rail transport (in passenger-kilometres, pkm) (%), 2019–2024



Change in passenger road transport (in pkm) (%), 2019–2024



Spotlight: Finland passenger mobility yet to recover from Covid-19

Photo credit: Shutterstock | GagliardiPhotography

Spotlight: Finland passenger mobility yet to recover from Covid-19

Between 2019 and 2024, passenger transport in Finland declined by 7%, failing to return to pre-pandemic levels.

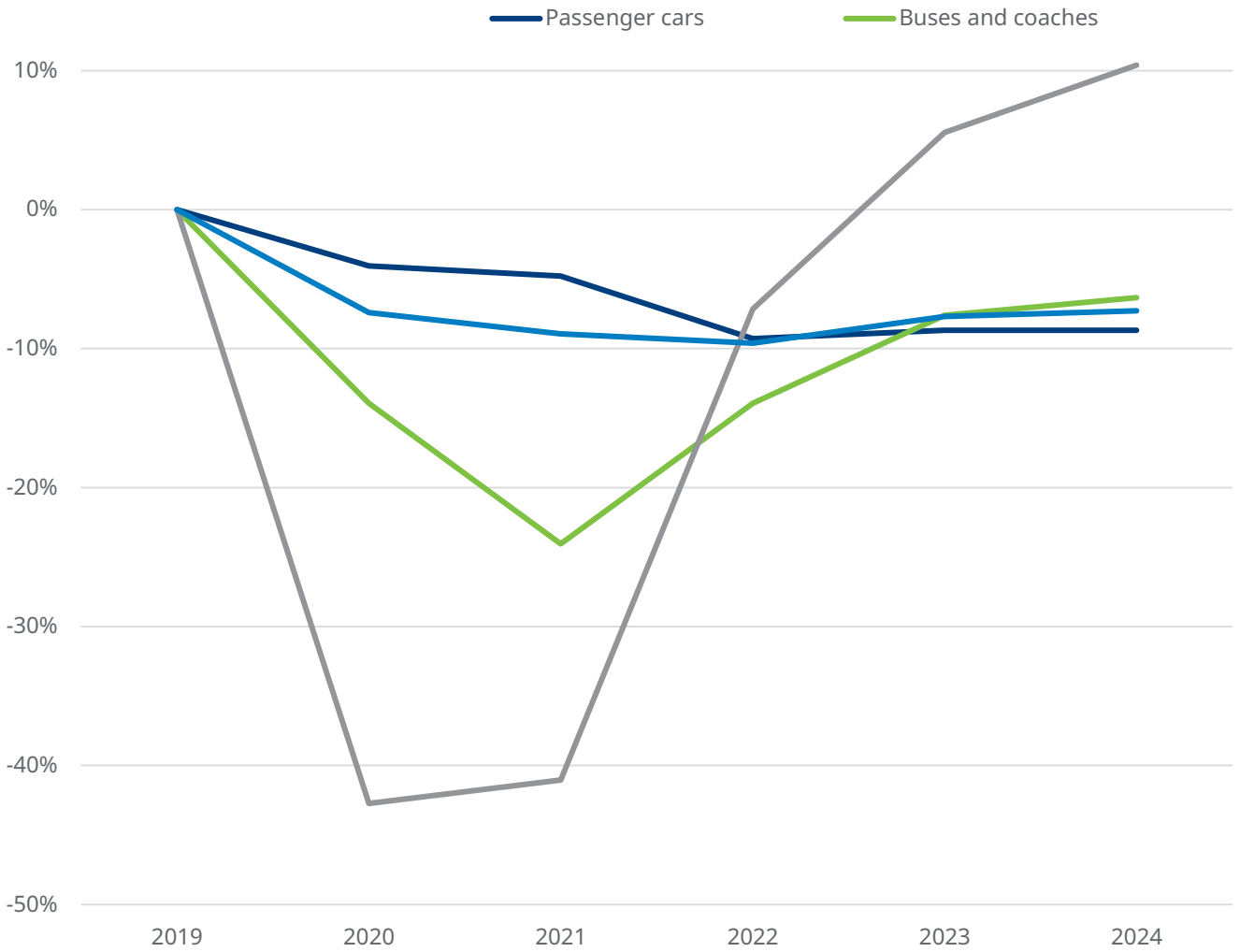
Road passenger transport fell by 8% overall, with passenger cars experiencing the largest decrease (-9%) compared to buses and coaches (-6%). In contrast, rail passenger transport grew by 10%. The Covid-19 pandemic had a marked impact on daily mobility, initially reducing the use of shared transport services, while the spread of teleworking further contributed to the decline in passenger transport.

As the pandemic subsided, the prevalence of teleworking began to diminish. Nevertheless, according to Eurostat, Finland continued to rank among the European countries with the highest share of remote working in 2024, as many companies adopted hybrid work models

Furthermore, rising fuel prices may partly account for the diverging trends between rail and road transport. The lowest level of passenger road transport was recorded in 2022, coinciding with the sharp increase in energy prices.

Finnish passenger transport remains below pre-pandemic levels

Change in passenger transport (in pkm) (%), 2019–2024



Road fatalities stable in ITF countries

Photo credit: Shutterstock | Adi bekti

Road fatalities stable in ITF countries

Road deaths have remained relatively stable across ITF reporting countries over the past decade.

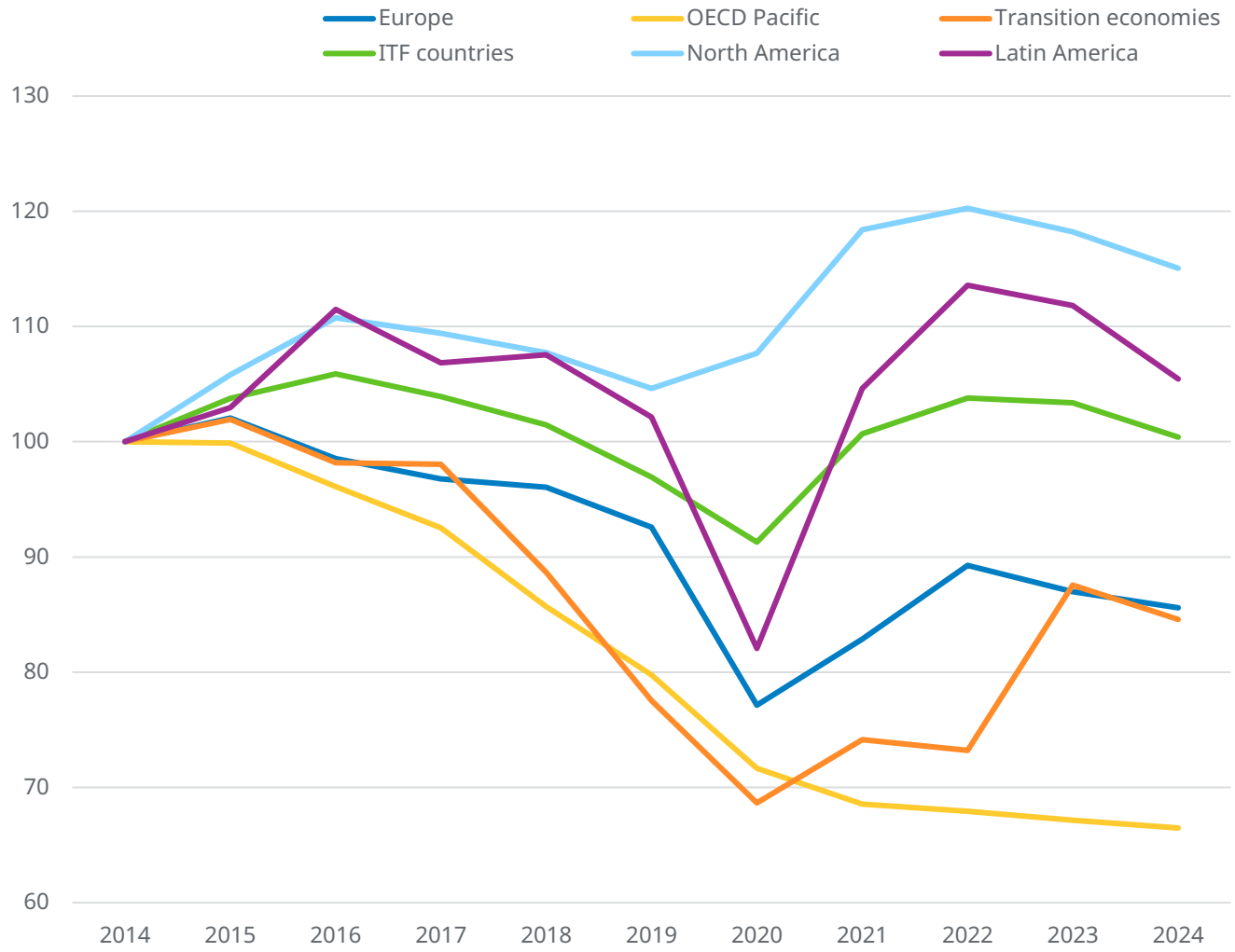
Road safety results for Transition Economies have recently shown signs of stabilisation, whereas in North and Latin America, road casualties have increased by 15% and 5% over ten years. In Europe, fatalities in 2024 were 14% lower than a decade earlier, with decreases recorded in 21 of the 24 countries surveyed.

The OECD Pacific region experienced the largest drop in fatalities, with a 34% decrease, although Australia saw a 14% increase.

Among all countries analysed, Lithuania recorded the most substantial improvement, with a 54% reduction in fatalities, followed by Latvia and Korea with decreases of 48% and 47%, respectively.

See the forthcoming ITF Road Safety Annual Report 2025 for the latest analysis and statistics,

Changes in road safety over a decade
Road fatalities by world region (2014=100)



Europe: Belgium, Bulgaria, Croatia, Czechia, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Malta, Netherlands, Norway, Serbia, Slovakia, Slovenia, Sweden, Switzerland, United Kingdom.
OECD Pacific: Australia, Japan, Korea, New Zealand
Transition economies: Albania, Azerbaijan, Georgia, Moldova, North Macedonia, Türkiye
North America: Canada, Mexico, USA
Latin America: Argentina, Chile, Colombia, Uruguay
ITF Countries: ITF reporting countries

A decade of robust maritime freight growth

Photo credit: Shutterstock | Nelson Antoine

A decade of robust maritime freight growth

Container shipping figures are up between 2014 and 2024 in most ITF reporting countries, reflecting a period of significant evolution in freight shipping.

The number of loaded and unloaded containers in seaports has increased in 19 out of the 22 countries analysed. Croatia (+202%) and Azerbaijan (+150%) showed the strongest growth, while Finland (-15%) and Germany (-18%) recorded the biggest decreases.

In six countries, the shipping transport has increased by more than 50%.

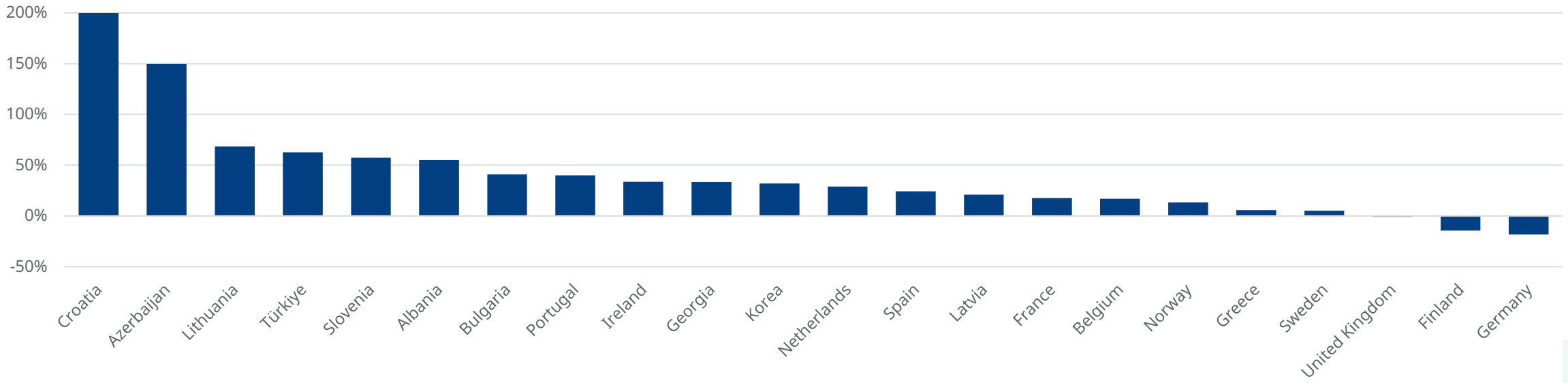
Among these, Albania, Croatia, and Slovenia have ports located on the Adriatic Sea (see Spotlight). When countries shift their production and exports from bulk goods toward advanced manufacturing and higher-value goods, containerised trade generally increases as a result.

During the 2000s, China's rapid industrialisation was a major factor behind the expansion in containerised trade. This correlation is also reflected in the expansion of container traffic registered between 2014 and 2024 in some European ports.

In Croatia, the recent rise in maritime freight corresponds with the country's growing imports of manufactured goods such as machinery, transport equipment, and other processed products. Ongoing investment in port facilities and logistics infrastructure that support container handling further boosts container throughput.

A decade of port activity compared

Containers loaded and unloaded in seaports: percentage change in gross tonnage, 2014–2024



Spotlight: Adriatic Sea ports become pivotal

Photo credit: Shutterstock | gioele piccinini

Spotlight: Adriatic Sea ports become pivotal

The Adriatic Sea has lately been considered peripheral within the Mediterranean and Europe, characterised by numerous small and medium-sized ports.

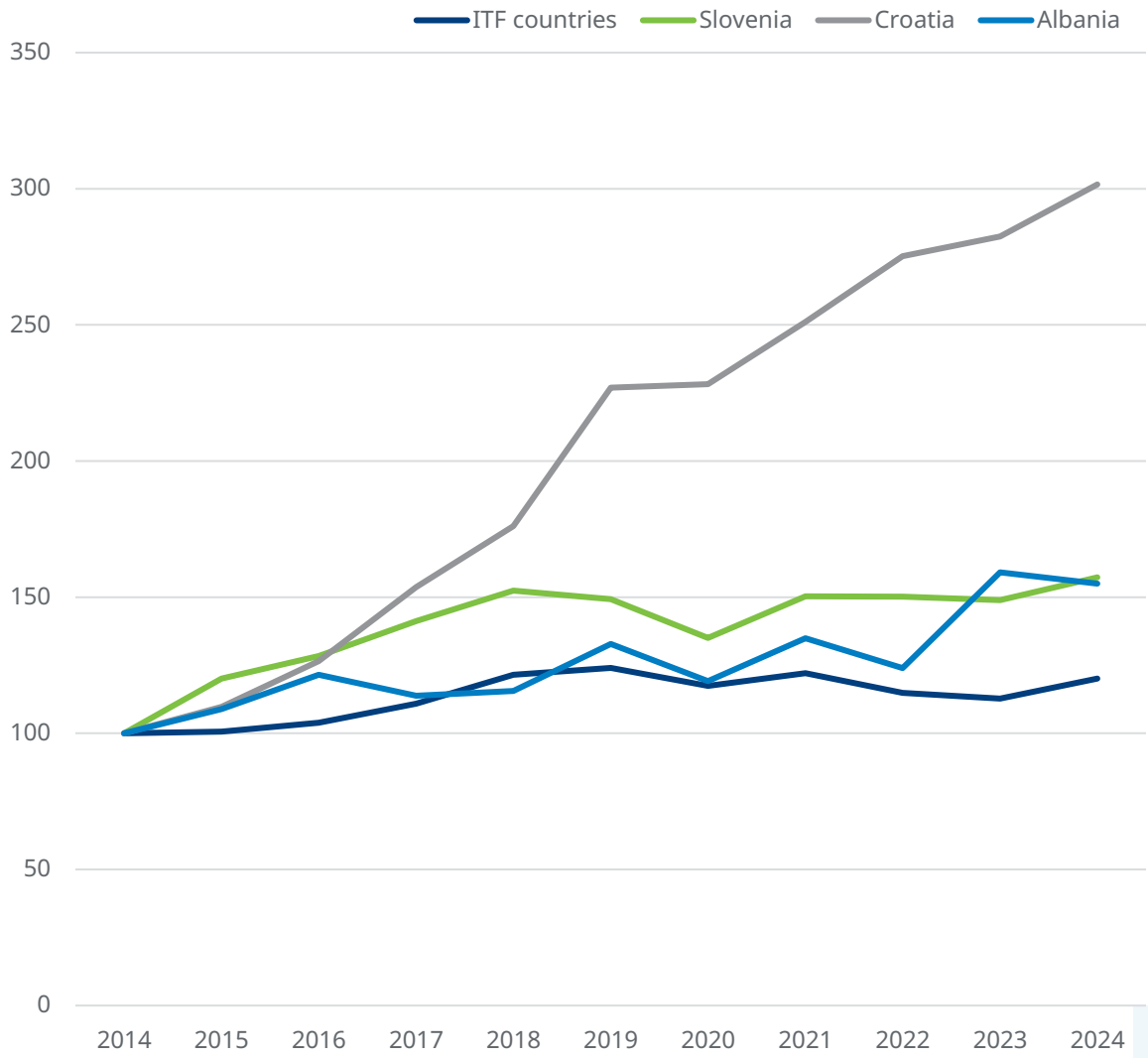
As Central Europe becomes more integrated into international trade, new opportunities are emerging for Adriatic Sea ports as they are well-positioned to benefit from improvements in hinterland infrastructures that could attract cargo currently routed through Northern European ports.

The Adriatic location offers a shorter distance to Asian and African markets, which translates into reduced delivery times. Container traffic is concentrated in the northern part of the Adriatic, where the ports of Koper (Slovenia), Rijeka (Croatia), and Trieste (Italy) have shown significant growth in transshipment operations.

This growth is particularly evident in the handling of automobiles, bulk cargoes (mainly coal, grain, and iron ore) and oil. Smaller ports, such as Bar, Durres, and Split, are connected to larger ports through feeder services.

A decade of growth in freight transport across Adriatic seaports

Evolution of containers loaded and unloaded in seaports, measured in gross tonnage (2014=100)



Data spotlight: France

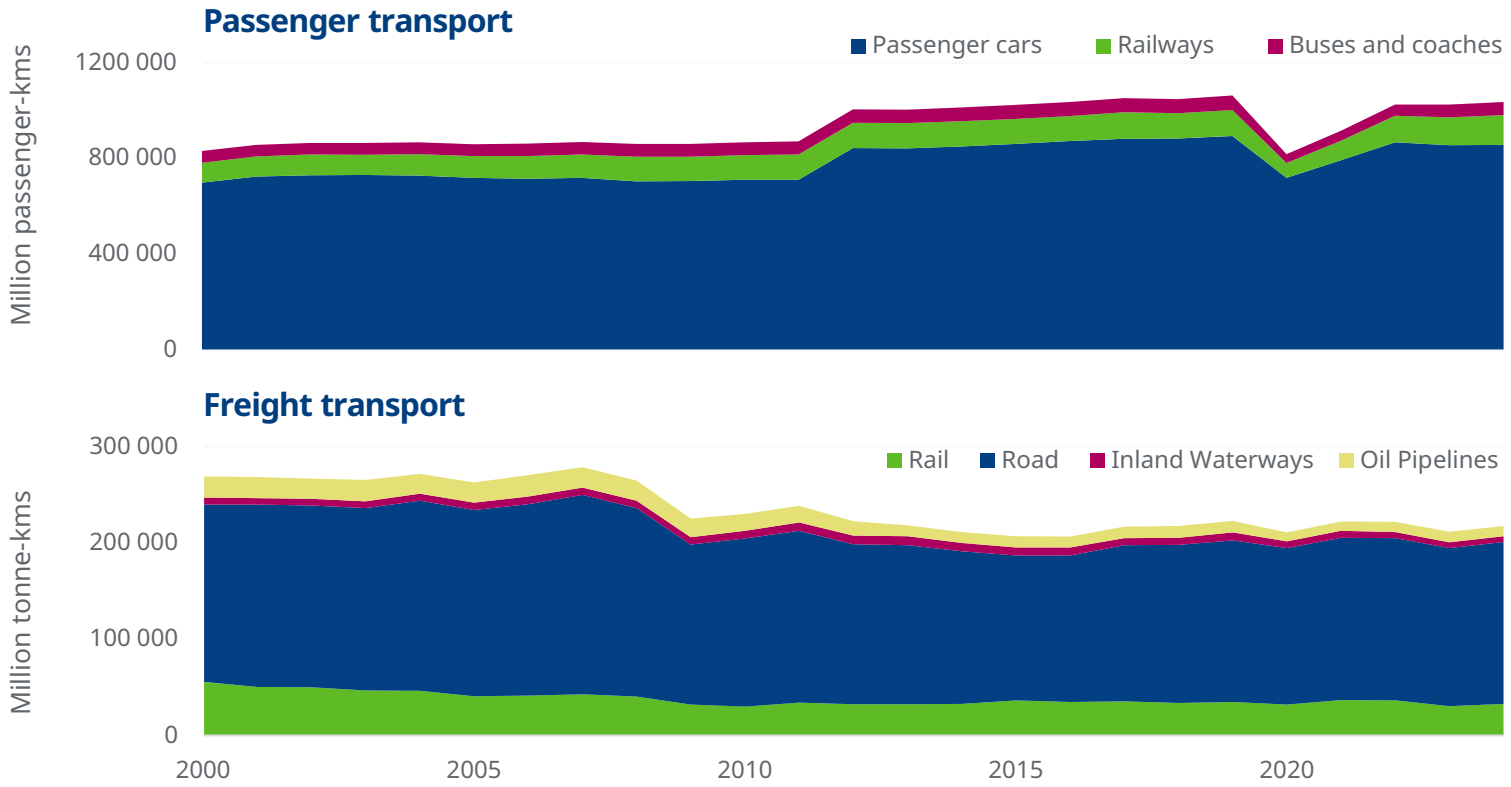
Photo credit: Shutterstock | Richard Semik

Data spotlight: France

ITF data provide extensive insights into transport trends across member countries. In France, freight transport volumes have remained relatively stable over the past decade, following a sharp decline in 2009 caused by the aftermath of the financial crisis (−17% compared to 2006).

Passenger transport, after being severely hit by the Covid-19 pandemic, has now almost recovered (−3% compared to 2019). As for road safety, in 2024 France has reduced the number of road fatalities by 6% compared to 2014. Moreover, the country recorded 12% fewer crashes in 2024 compared to 2014.

Finally, infrastructure upgrades have remained modest. France's rail electrification rate stands above ITF average at 72%, but the share of electrified rail tracks has increased by only 1.5 percentage points since 2017. Over the same period, the share of motorways within the road network has remained stable, accounting for just 1% in 2024.



Compared to 2014, France reported

12% less road crashes in 2024

6% Less road fatalities in 2024

Compared to 2017, France reported

1.5 pp electric tracks share increase in 2024

0.15 pp motorways share decrease in 2024

Data spotlight: Azerbaijan

Photo credit: Shutterstock | MasyuraN

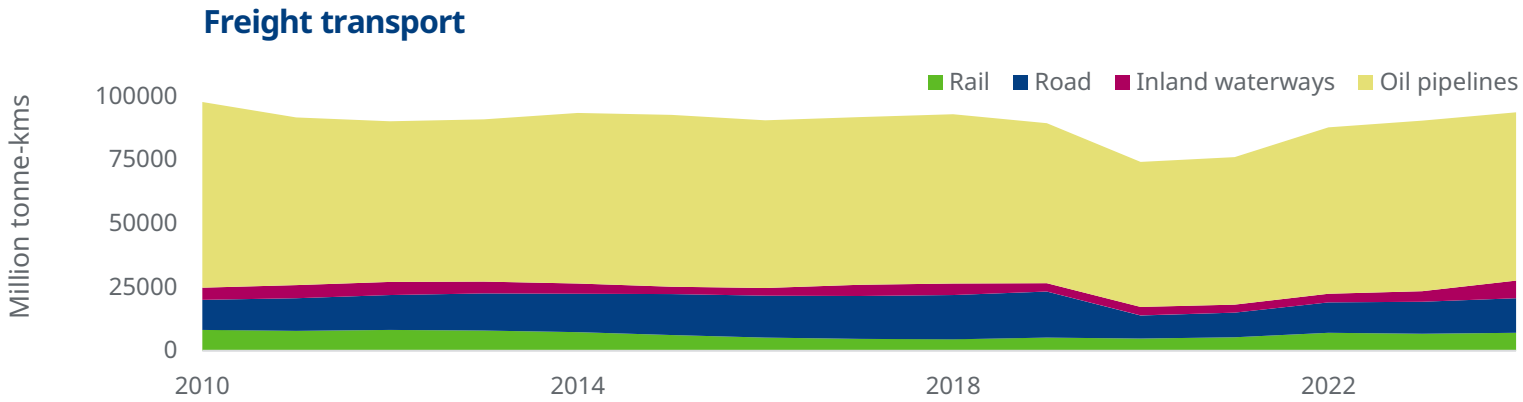
Data spotlight: Azerbaijan

In ITF's 2025-26 Presidency country, Azerbaijan, oil pipelines accounted for 71% of freight transport in 2024, followed by road. Freight volumes have been slightly in decline in recent years, falling 4% compared to 2010, and reaching the lowest level during the pandemic.

Passenger transport - severely hit during Covid-19 - has now completely recovered (+9% compared to 2019).

In 2024, Azerbaijan reduced the number of road fatalities by 32% compared to 2014. Moreover, the country recorded 46% fewer crashes in 2024 compared to 2014.

Infrastructure upgrades remain modest. Azerbaijan's rail electrification rate stands at 54%, but the share of electrified rail tracks has remained stable between 2014 and 2024. Over the same period, the share of motorways within the road network has remained stable, accounting for 26% in 2024.



Compared to 2014, Azerbaijan reported

46%
less road crashes in 2024

32%
less road fatalities in 2024

Compared to 2014, Azerbaijan reported

0.06 pp
electric tracks share decrease in 2024

0.01 pp
motorways share increase in 2024

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:
Annual Transport Trends

The data in this Statistics Brief are as of 31 October 2025. 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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