

# TRENDS ON FREIGHT TRANSPORT IN ASIA & PACIFIC REGION



# ASIAN TRANSPORT OUTLOOK (ATO)



**51** Economies (ADB Members + Russia and Iran)

**460** Urban Centers (412 Asia-Pacific, 48 International)

**46** Urban Centers with a detailed review  
*\* To be increased to 50*

- Primary + Secondary Sources
- Multiple Sources for single indicator
- Multiple Dimensions, Modes and Scale
- Data + Policy

**373 national indicators,**  
53% have multi-year data, 10% have more than 2 sources, 20% have 2021 data

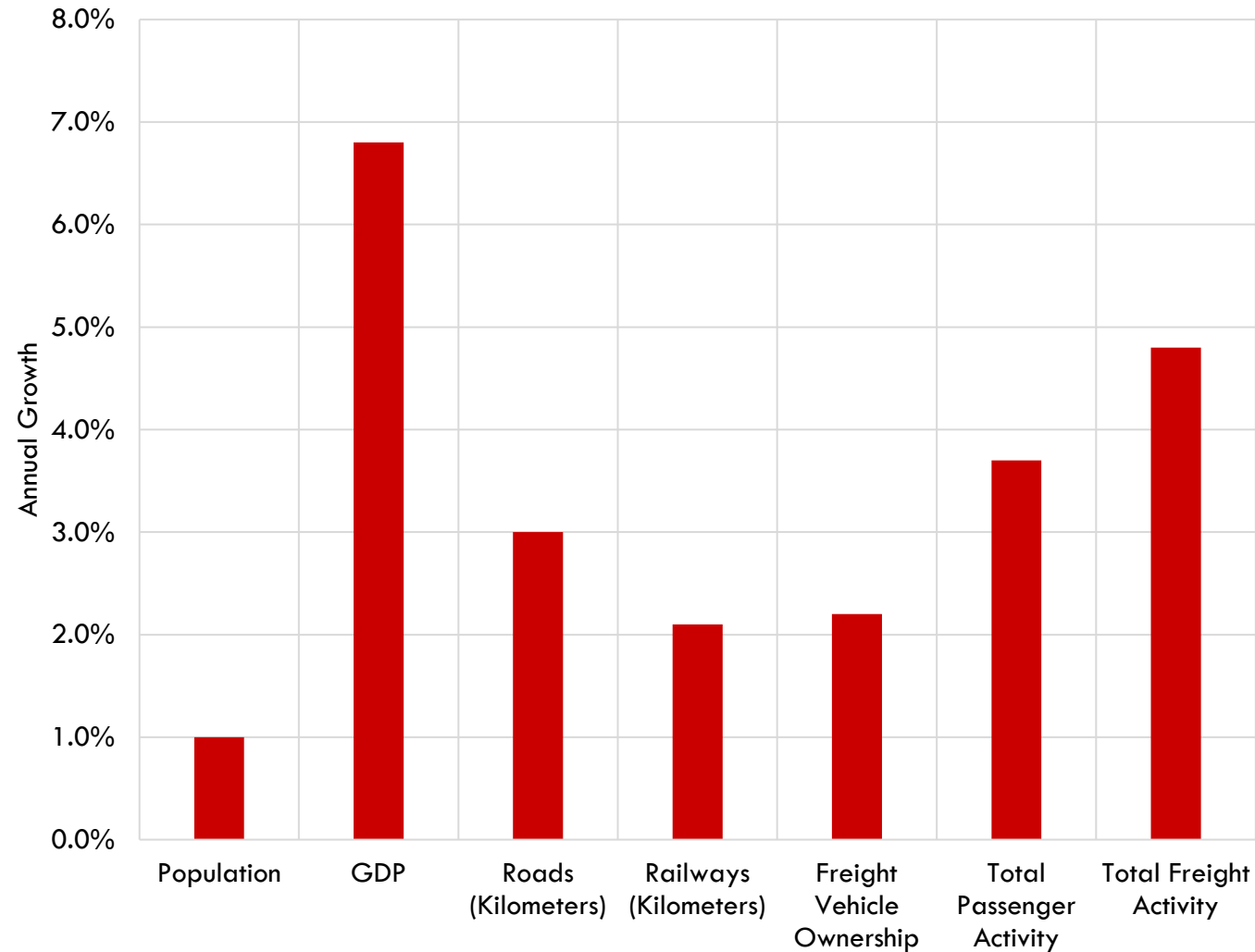
**180 urban indicators,**  
~80% have multi-year data, ~70% have more than one source

**1100+ national policy documents,**  
policy trackers

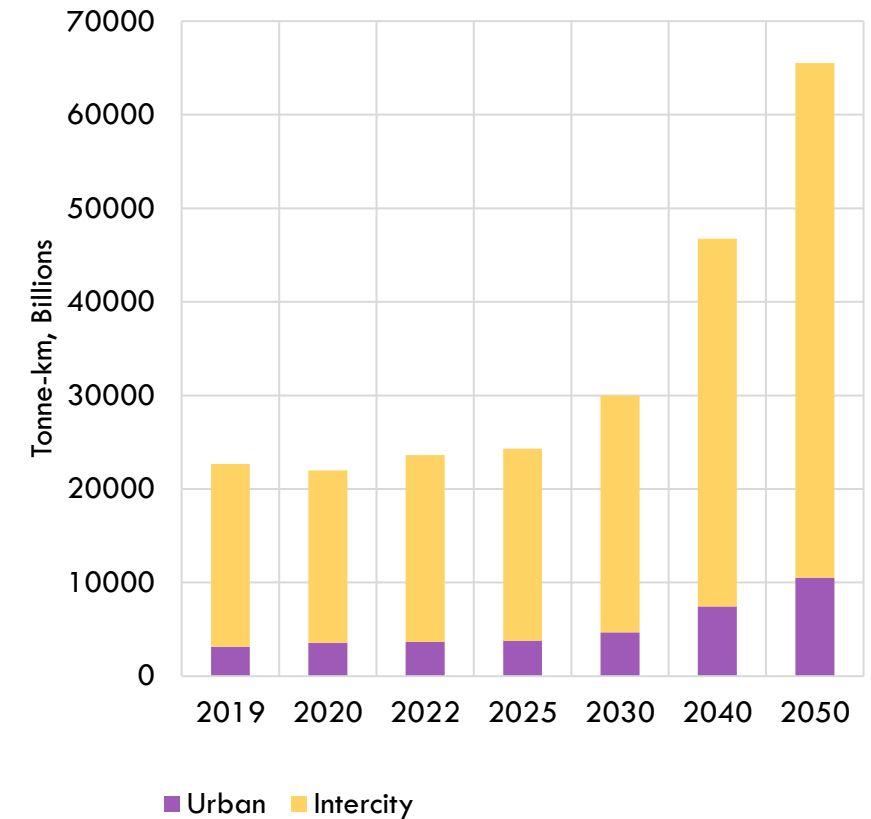
**1000+ projects in the cost database**

# GROWING FREIGHT DEMAND

2000-2020, Annual Growth

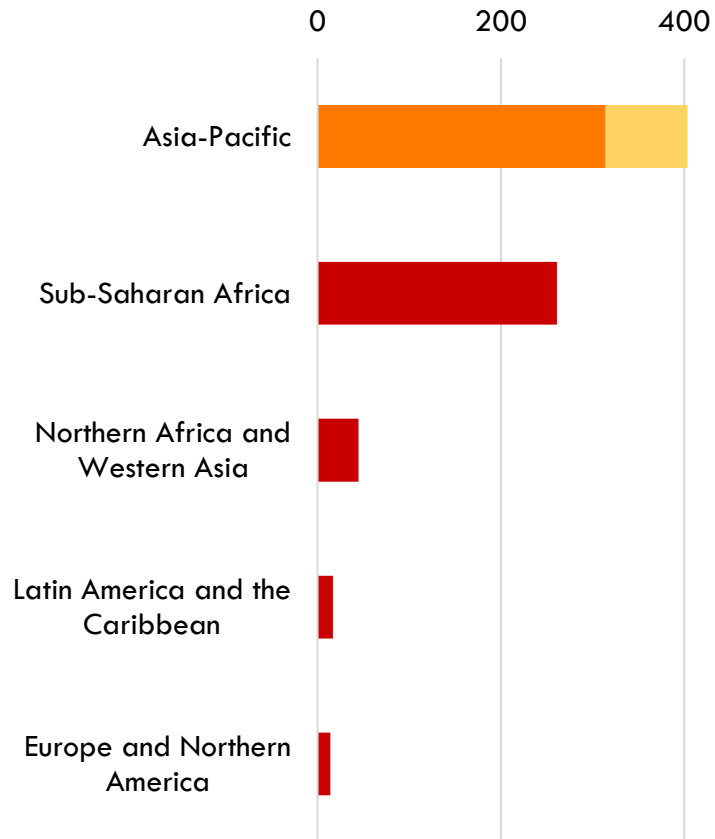


Freight Activity Projections in Asia & Pacific



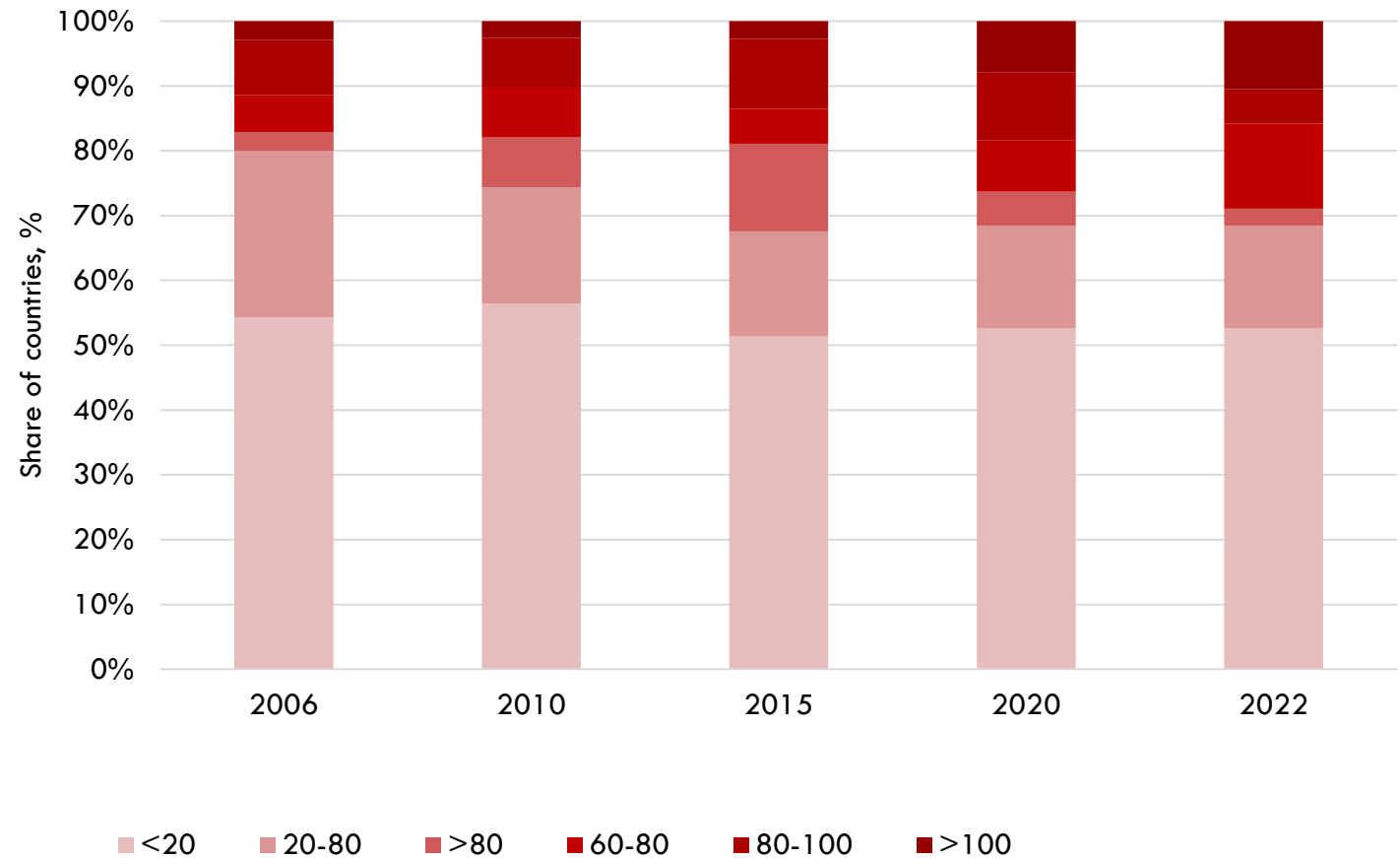
# LIMITED ACCESS AND CONNECTIVITY

Rural population without access to all-season roads (2022), millions



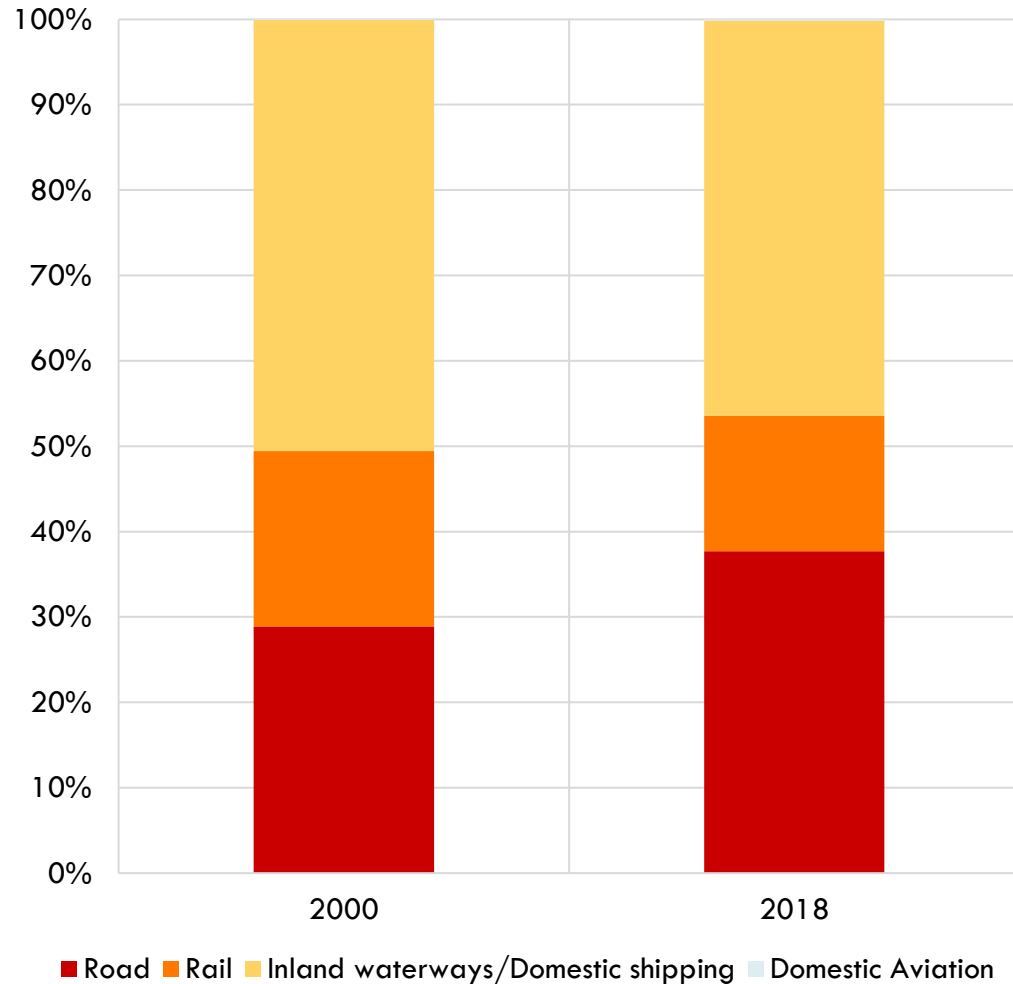
- Low and lower middle income
- Upper middle income
- High income

Liner shipping connectivity index in Asia (higher is better)

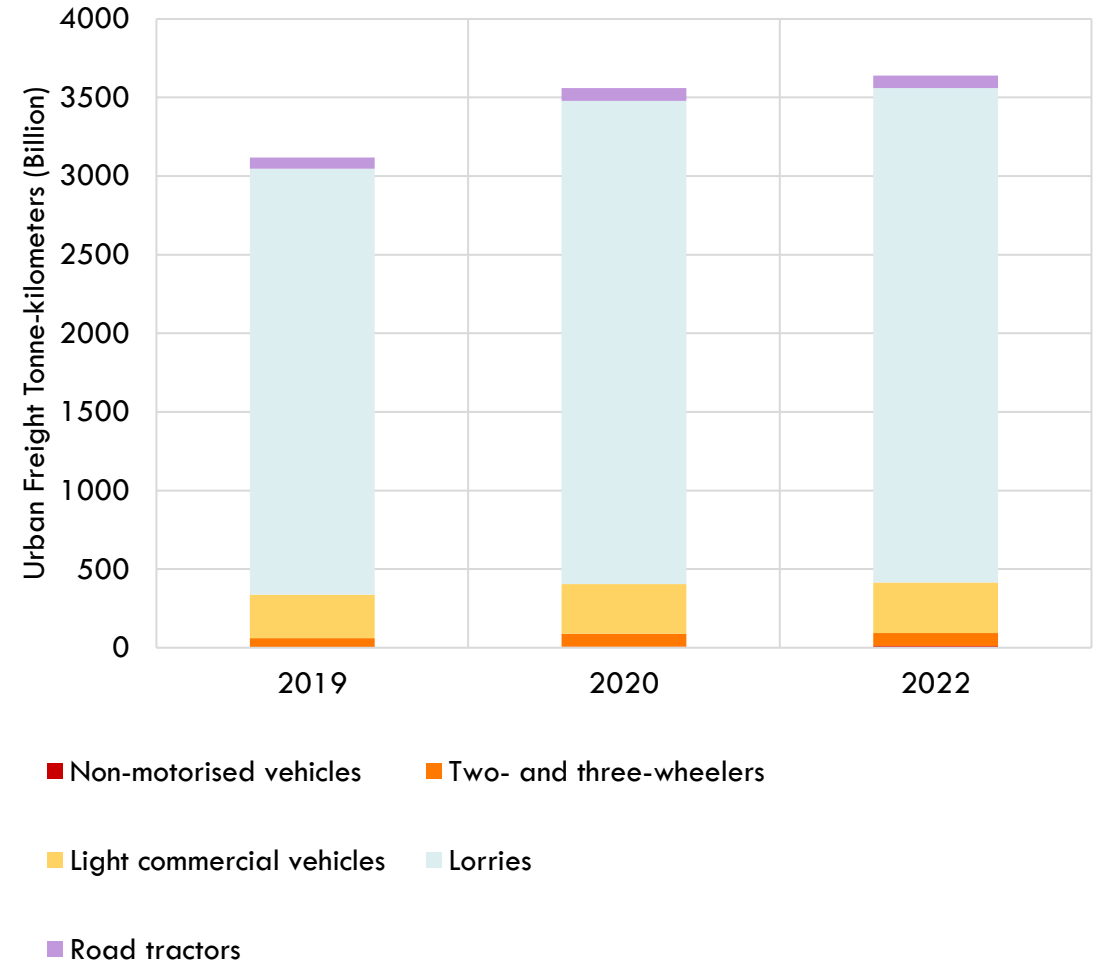


# MODAL SHIFTS

## National Freight Mode Share

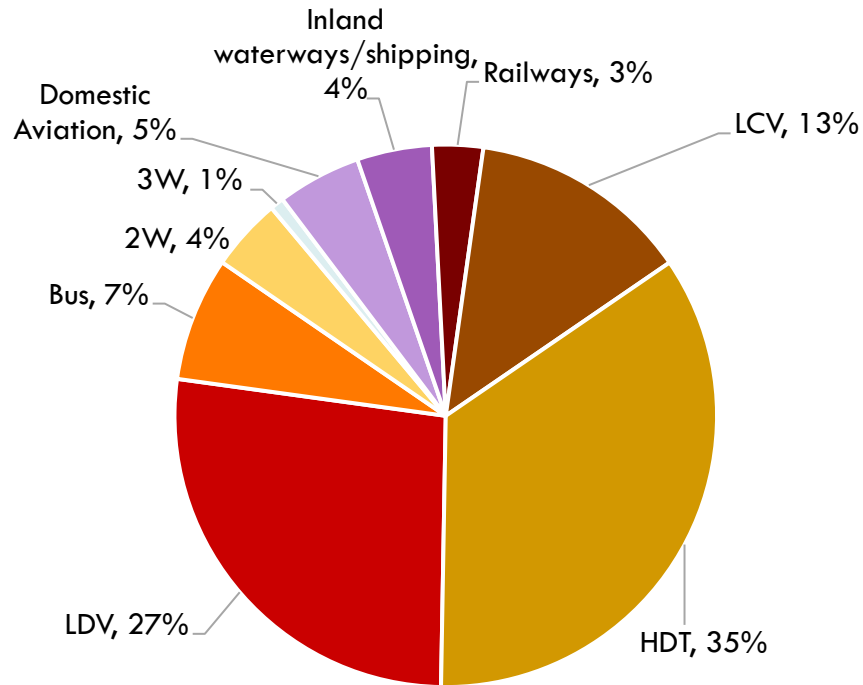


## Urban Freight Activity in Asia

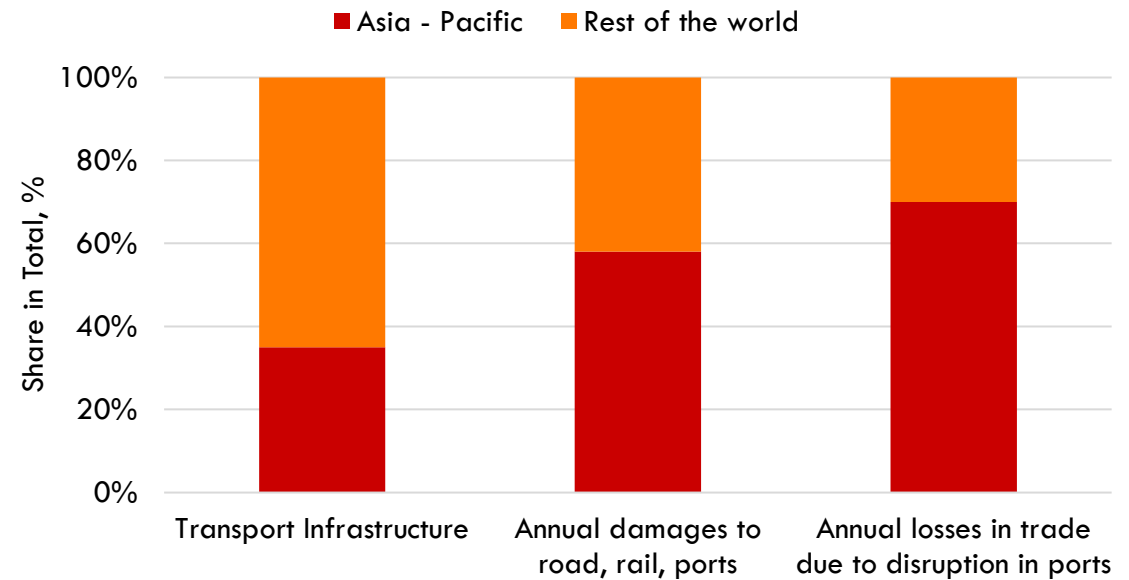


# FREIGHT TRANSPORT RELATED EXTERNALITIES

Asia & Pacific, Transport CO2 Emissions Share



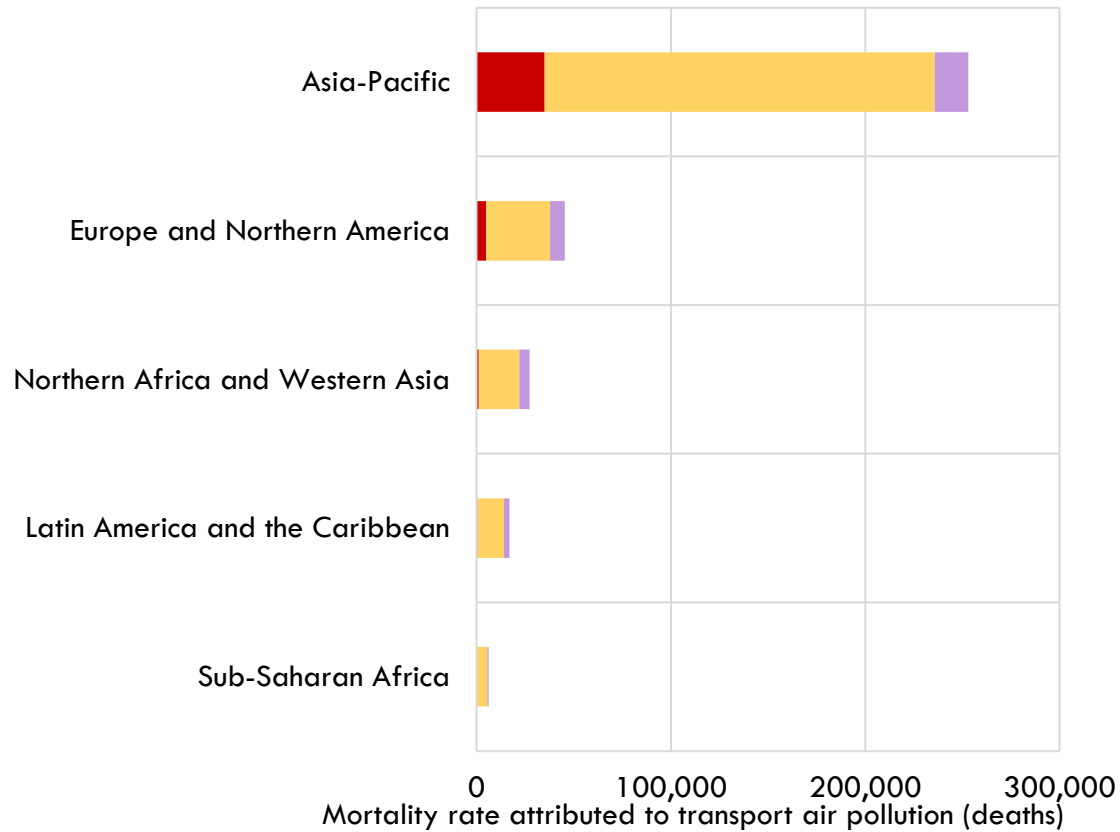
Share of Asia-Pacific in transport infrastructure and potential damages to surface infrastructure due to hazards



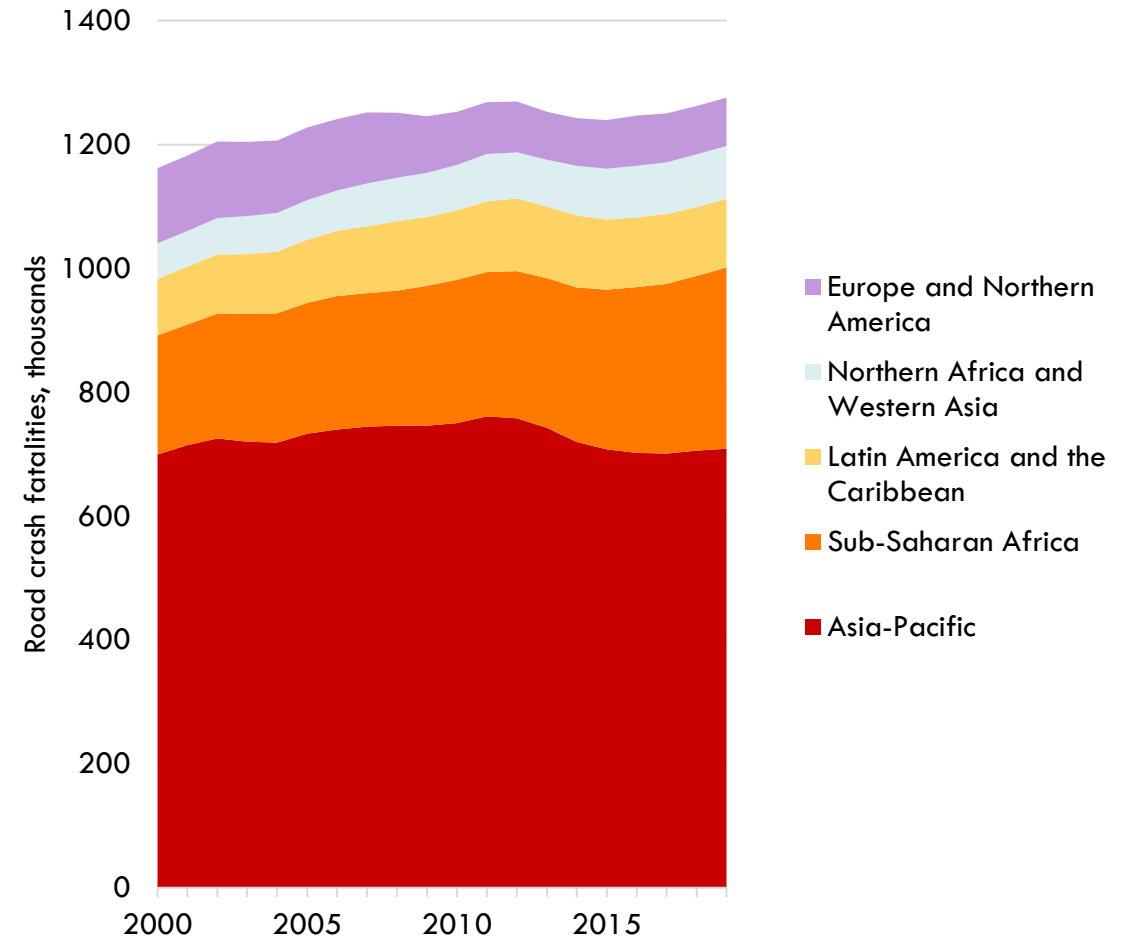
# FREIGHT TRANSPORT RELATED EXTERNALITIES

PM10 and ozone-attributed premature deaths

■ Non-road transport ■ Road transport ■ Int'l shipping



Road crash fatalities





### Sample of 15 economies

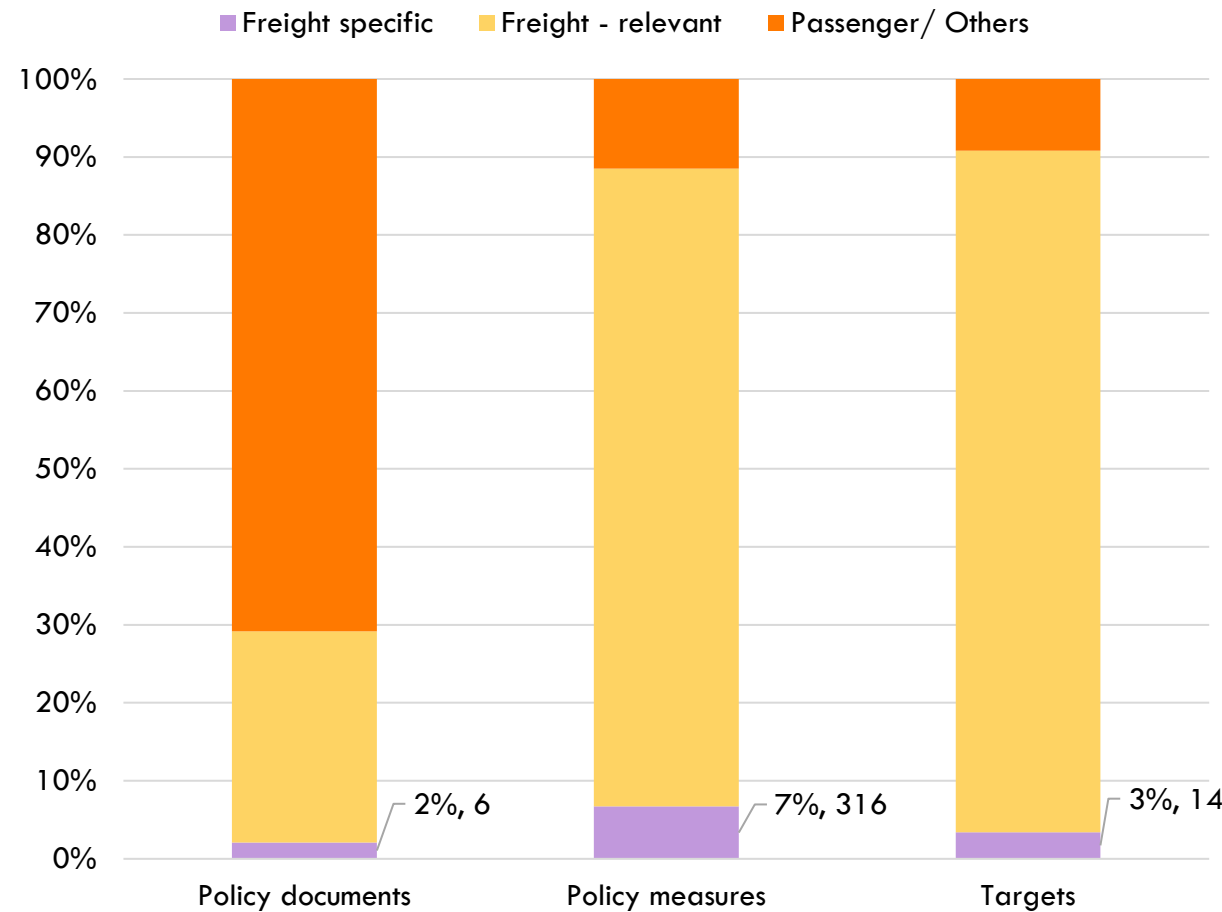
Bangladesh , Bhutan, Indonesia, Kazakhstan, Lao People's  
Democratic Republic, Malaysia, Maldives, Nepal, Pakistan,  
Philippines, Sri Lanka, Thailand, Timor-Leste, Uzbekistan & Viet Nam

# POLICY INSIGHTS



# POLICY LANDSCAPE

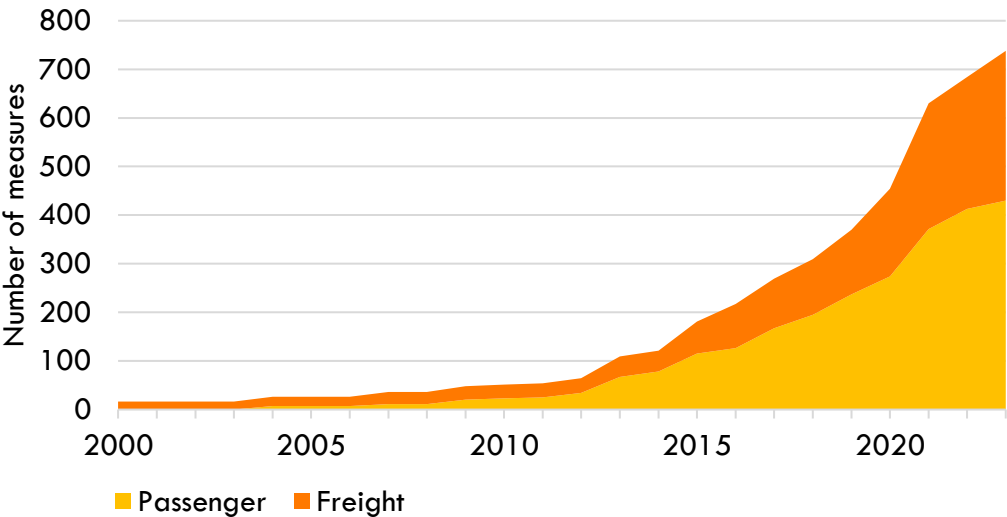
**Distribution**



**Freight policy documents**

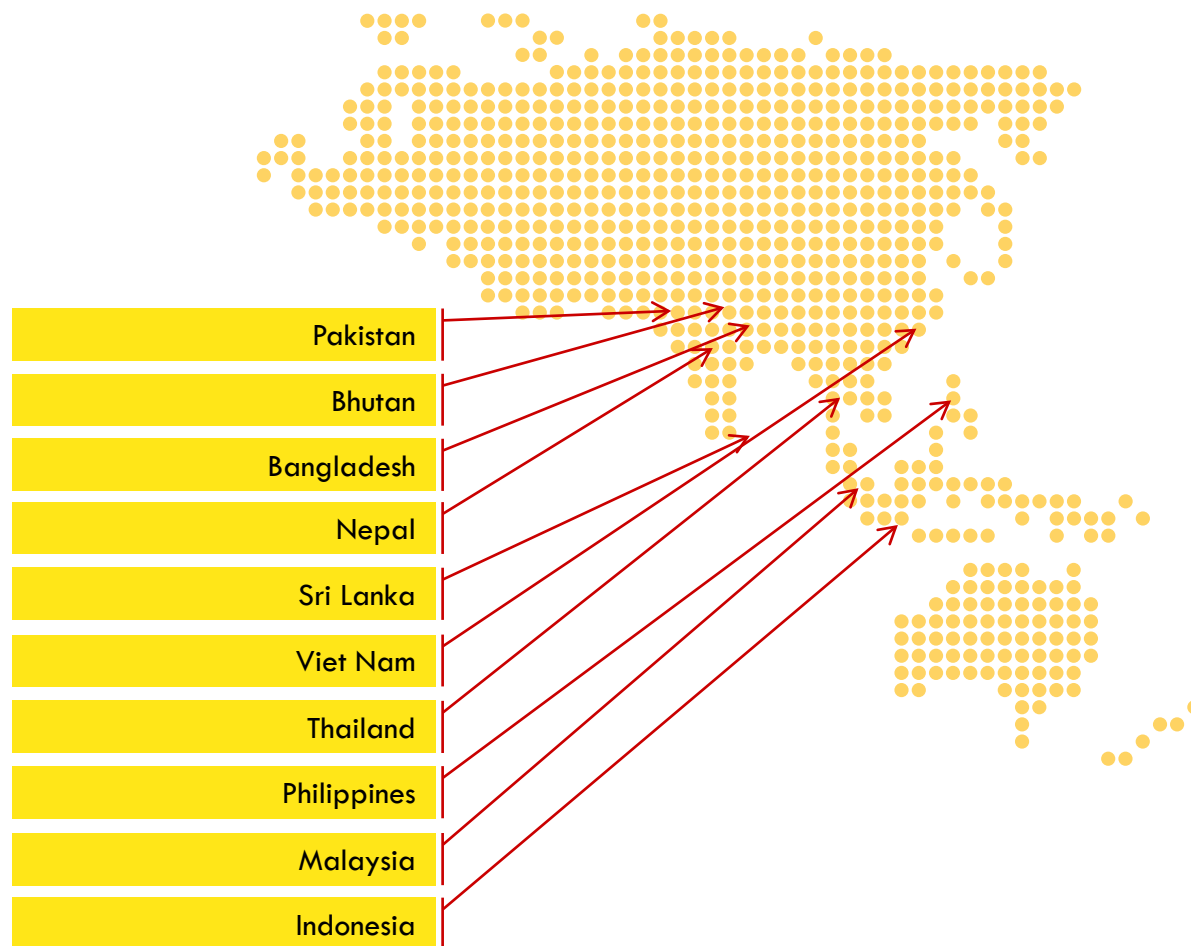
Country	Document Name	Year Published
Indonesia	Development of National Logistics System Framework	2013
Malaysia	Logistics and Trade Facilitation Master Plan 2015-2020	2015
Pakistan	National Freight and Logistics Policy	2020
Philippines	National Logistics Master Plan 2017-2022	2017
Thailand	Action Plan on Thailand Logistics Development 2023-2027	2023
Viet Nam	National Logistics Master Plan	2016

**Explicit Passenger and Freight Mitigation Measures**



# GROWING FREIGHT DEMAND RELATED POLICIES

## Fossil fuel subsidy elimination, Fuel tax, Vehicle taxes



## Number of Policy Measures based on survey

	Access restriction by corridor/ road	Fossil fuel subsidy elimination	Fuel tax	Road charging and tolls	Vehicle taxes
Bangladesh	2	1	2	5	2
Bhutan	3	1		1	3
Indonesia		1	1	2	1
Malaysia	2	1		1	1
Nepal	3		1	2	2
Pakistan				1	1
Philippines	1		1	2	2
Sri Lanka	2		1	3	4
Thailand		3	4	2	5
Uzbekistan	2			1	
Viet Nam		1		2	2

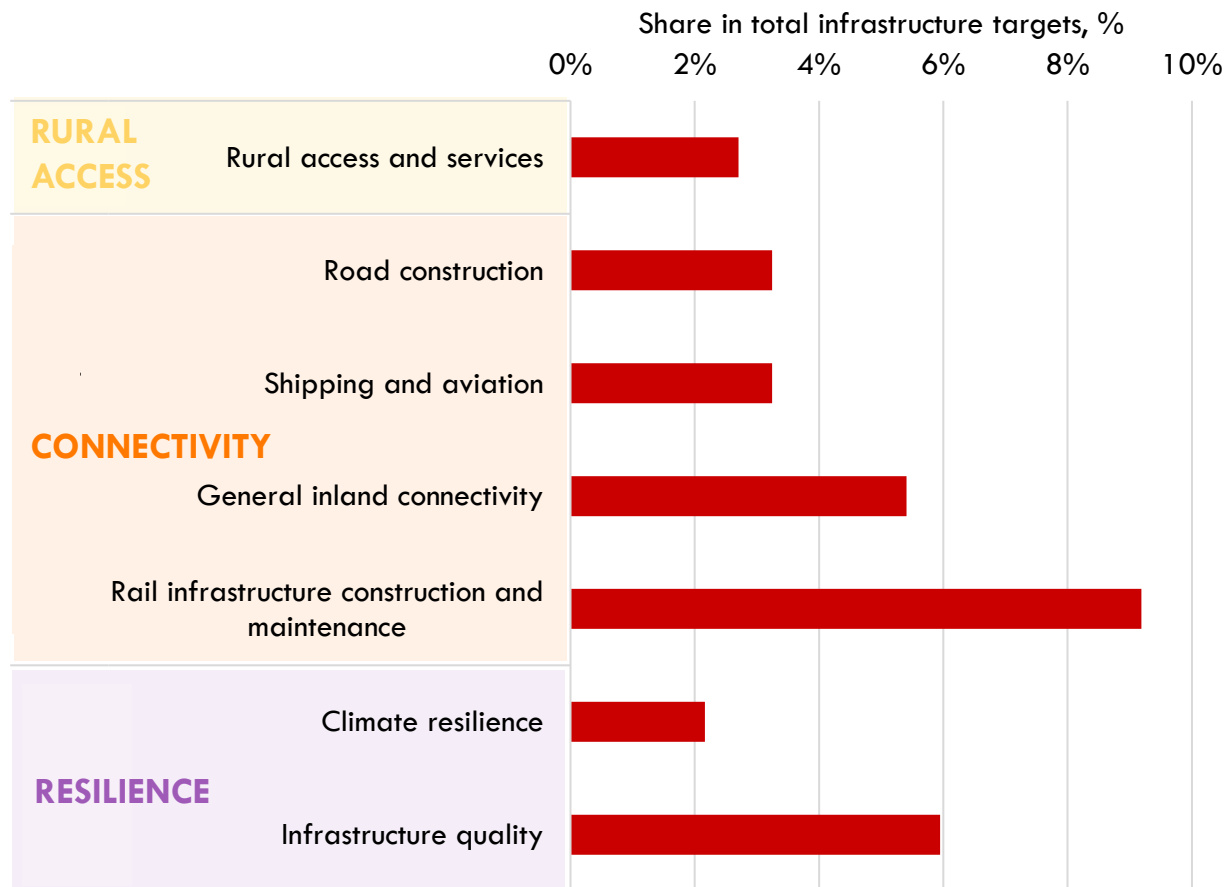
Bangladesh will phase out fossil fuel subsidies and redirect funds to development of renewable energy and climate adaptation (*Mujib Climate Prosperity Plan*)

Viet Nam targets implementation and full compliance of electronic toll collection by 2030 (*National Strategy for Road Safety*)

Nepal will increase fuel prices to limit the use of vehicles (*National Energy Strategy of Nepal*)

# LIMITED NATIONAL ACCESS AND CONNECTIVITY AND URBAN FREIGHT RELATED POLICIES

Freight-related transport infrastructure targets



Bangladesh targets to upgrade all village roads to asphalt standard by 2041 (Perspective Plan of Bangladesh 2021-2041)

Viet Nam targets to upgrade all district and commune roads to technical grade by 2030 (Road network planning for 2021-2030, vision to 2050)

Indonesia will build 21 new airports and 36 new ports by 2024 (National Medium Term Development Plan 2020-2024)

Lao PDR targets building and upgrading up to 2,800 km of land transport infrastructure connecting to bordering countries by 2025

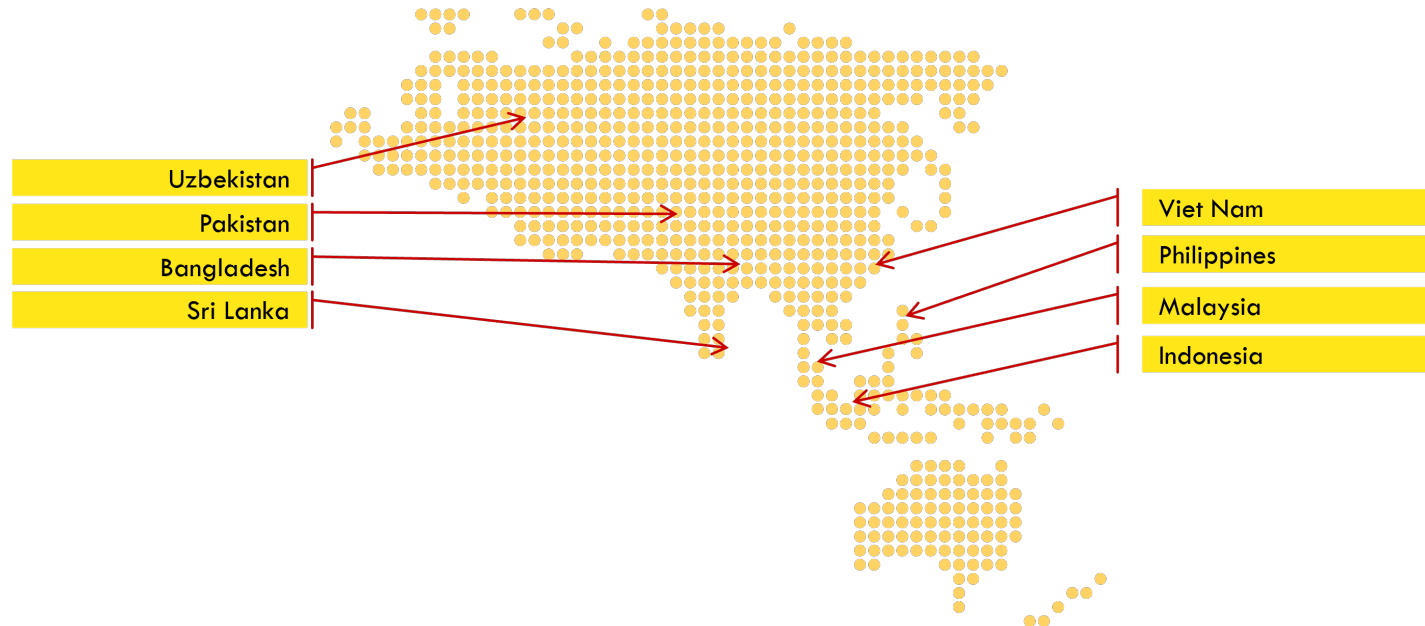
Pakistan will implement night operations for cargo movement and develop dedicated freight corridors to limit urban pass-through (National Freight and Logistics Policy, National Transport Policy of Pakistan 2018)

Malaysia will operationalize a comprehensive city logistics model by developing freight consolidation centers (National Land Public Transport Master Plan )

Bhutan aspires to mainstream less intrusive and low impact city-level freight distribution (Low Emission Development Strategy (LEDs) - Surface Transport)

# FREIGHT MODE SHIFT AND IMPROVEMENT RELATED POLICIES

## Freight mode shift Targets



## Freight improvement related measures

Indonesia targets to improve logistics performance index to reach 3.5 by 2025 (Development of National Logistics System Framework)

Bhutan will build dry ports and supporting facilities and railway links (Economic Development Policy 2016)

Pakistan aims to improve the efficiency of last-mile services by partnering with stakeholders (National Freight and Logistics Policy)

Thailand will implement intelligent logistics management and e-commerce systems (The Thirteenth National Economic and Social Development Plan 2023-2027)

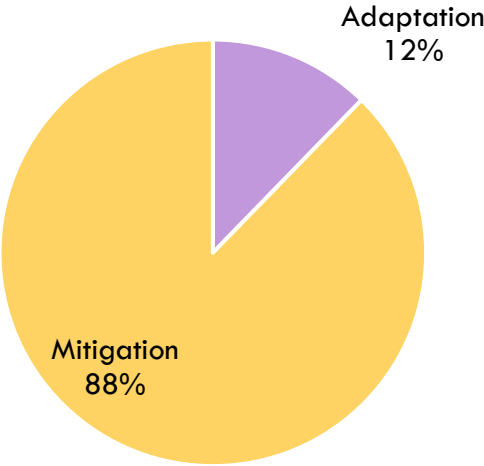
Sri Lanka's ambition is to switch back freight transport from road to rail (Updated Nationally Determined Contributions)

Bangladesh will utilize extensive inland waterways to transport freight and minimize logistics cost (Mujib Climate Prosperity Plan)

Malaysia will encourage KTMB to increase cargo transported with passenger trips (Low Carbon Mobility Blueprint 2021-2030)

# FREIGHT TRANSPORT RELATED EXTERNALITIES

Climate change mitigation and adaptation in transport measures with focus on freight

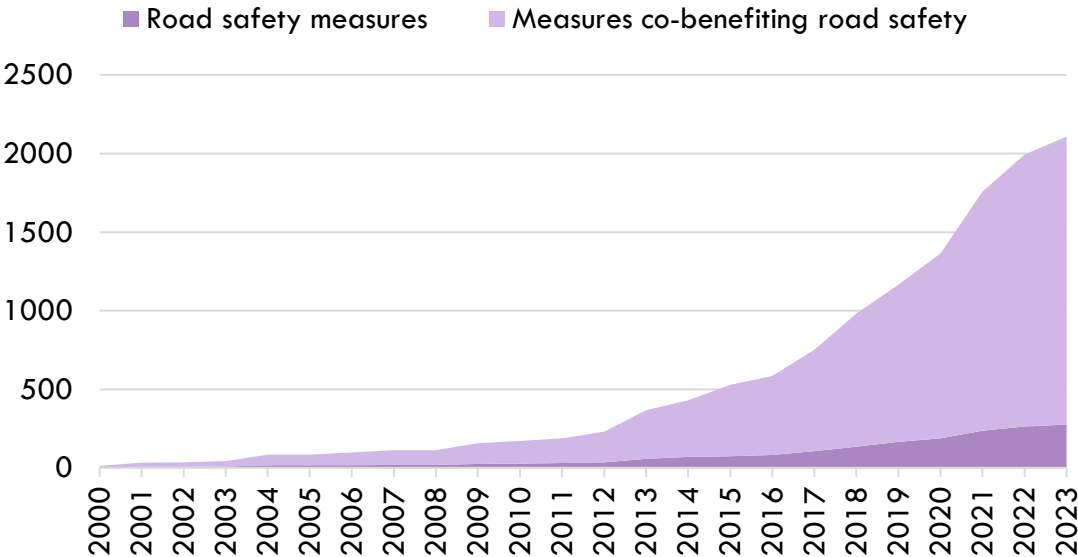


Indonesia will ban the import of second-hand trucks, trailers, and other key truck parts older than five years (Mitigation Action Outline on Truck Fleet Modernization Scheme in Indonesia)

Viet Nam aims strongly develop multimodal transport and logistics services in freight transport (Transport Strategy 2020)

Pakistan aims to improve road asset management, through private sector development, in line with best industry practices and contemporary trends. (National Freight and Logistics Policy)

Road Safety co-benefit measures

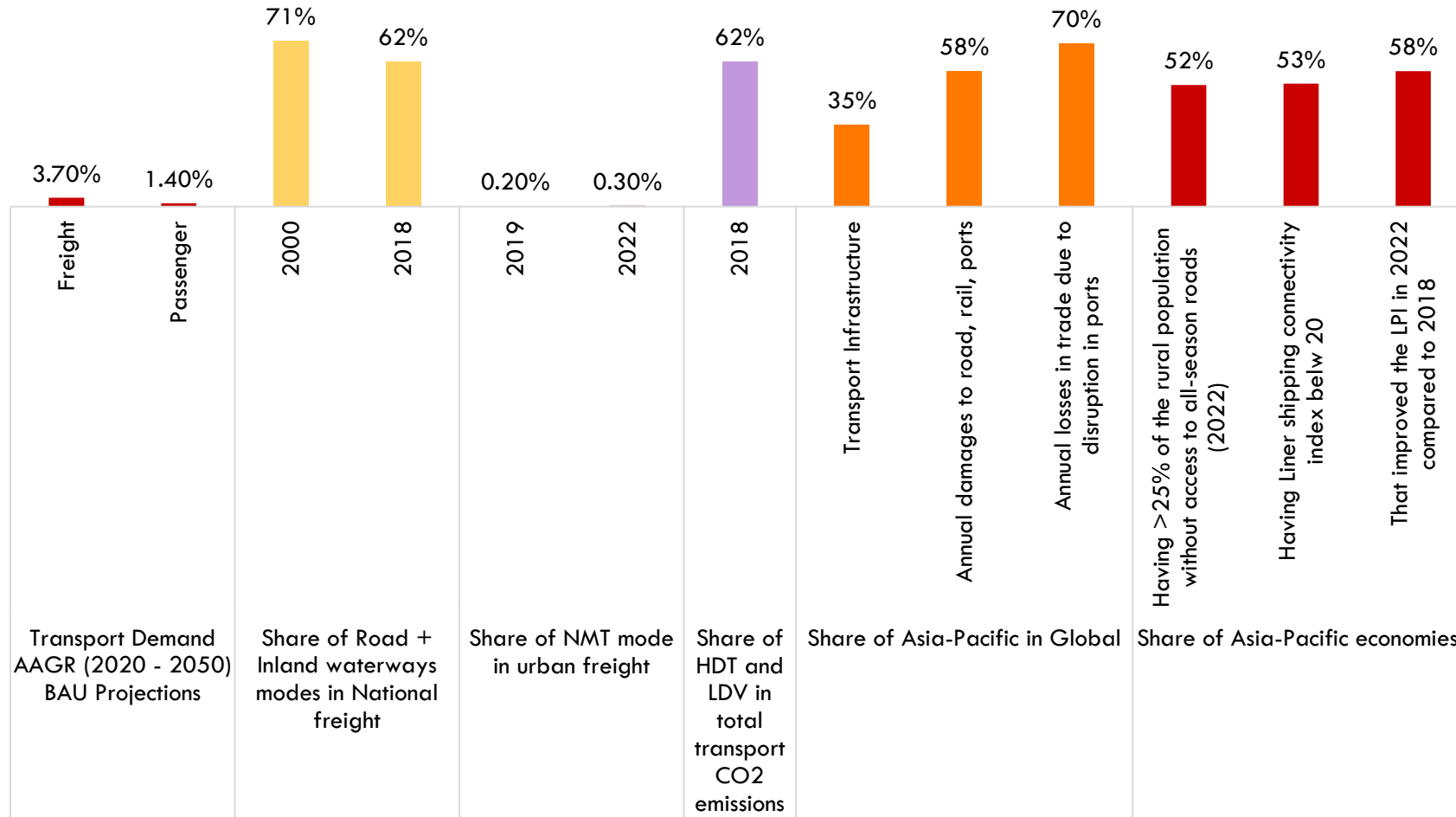


Maldives will enforce current safety standards and regulations for all categories of existing vehicles (National road safety action plan 2019 –2023)

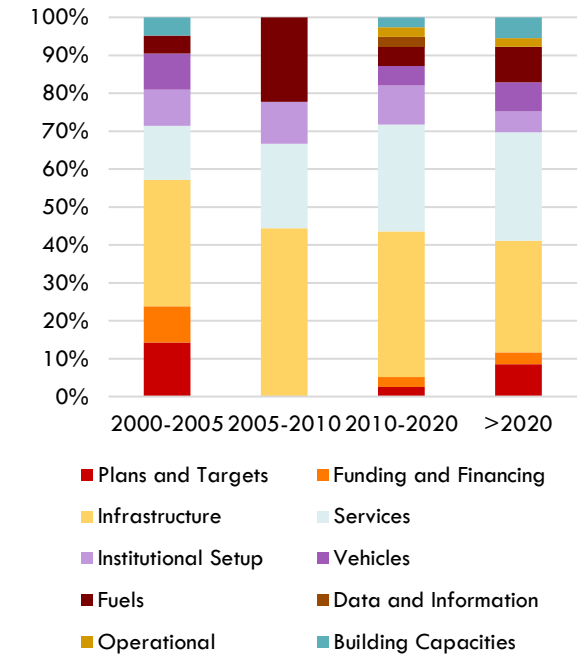
The Philippines targets 50% of roads are at least 3-stars safety rating by 2028 (Philippine Road Safety Action Plan 2023-2028)

# SUMMARY

## Freight transport sector – State of Play: Asia - Pacific



## Distribution of Freight measures



***“ATO translates data into insights,  
policies, and investments”***

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