

# Asia and the Pacific's Transport and Infrastructure and Investment Outlook 2035

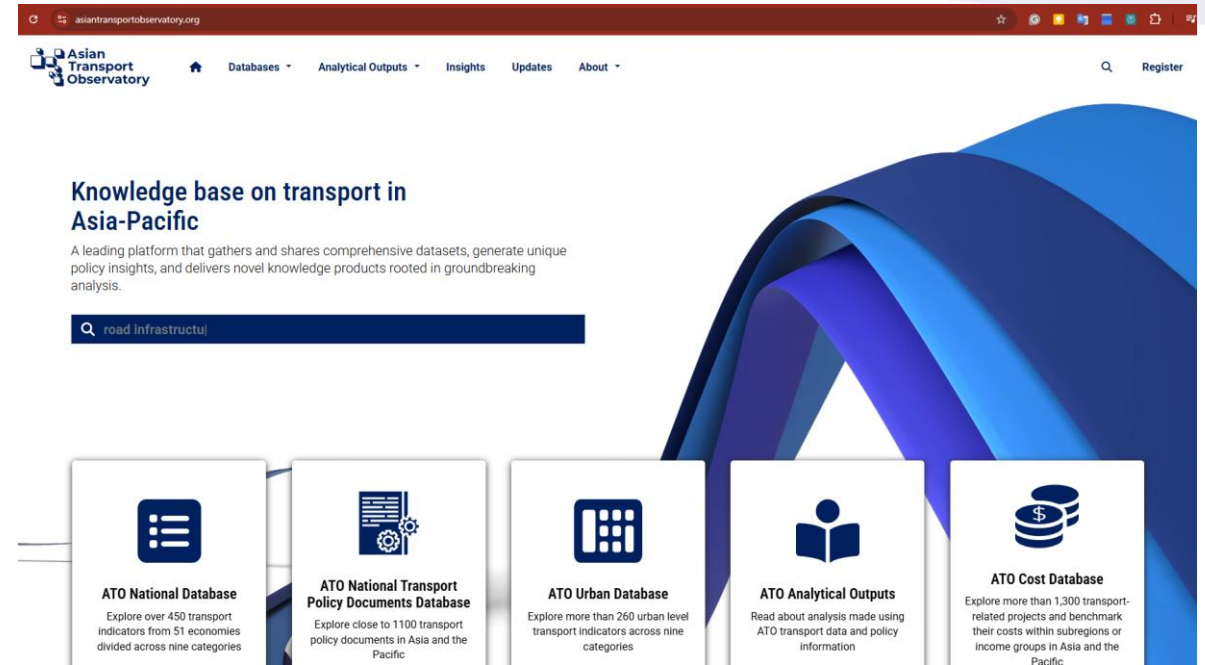
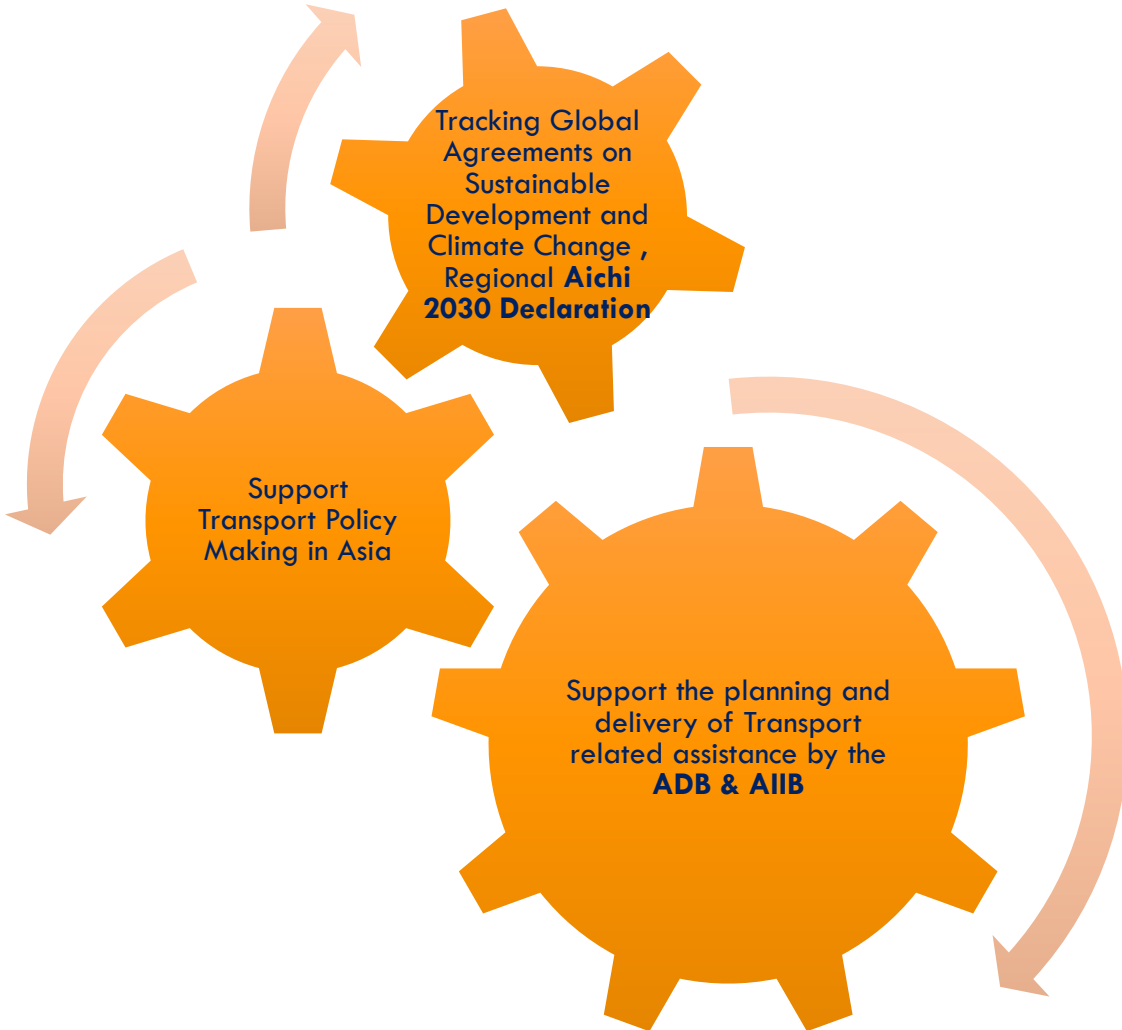
**Sudhir Gota**

Co-Team Lead  
Asian Transport Observatory

11<sup>th</sup> ITF Transport Statistics Meeting  
April 15, 2025

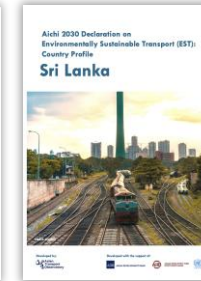
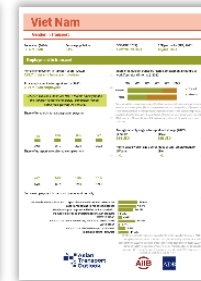
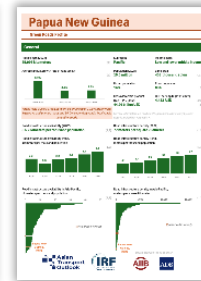
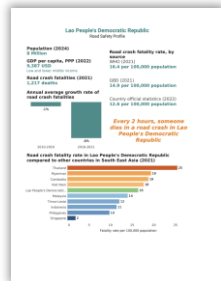
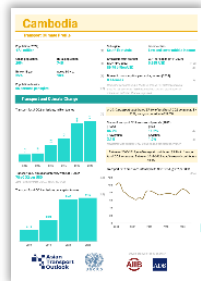
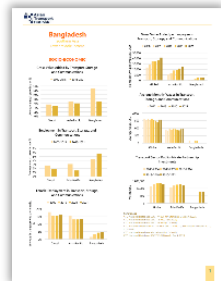
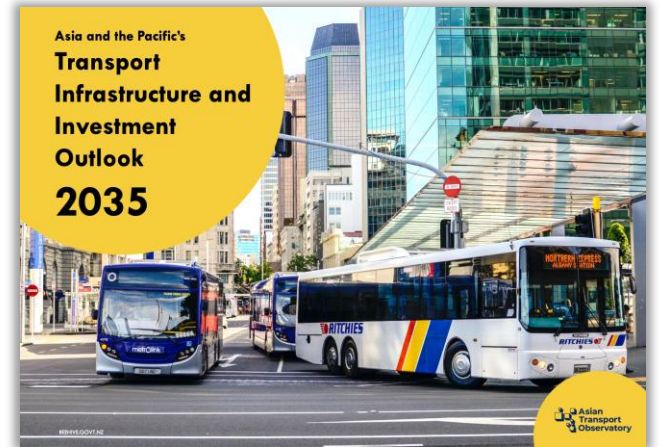
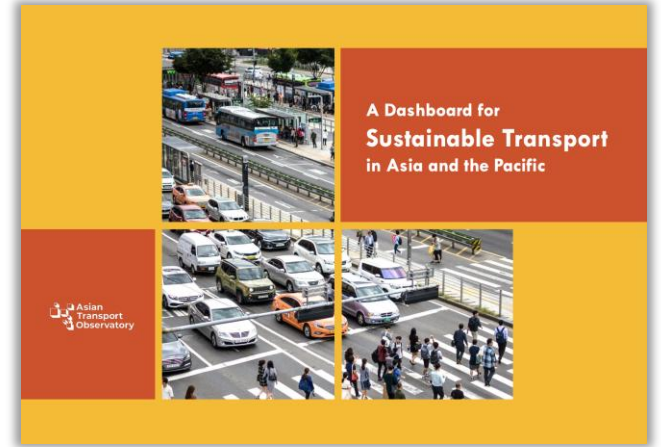
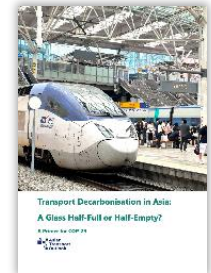
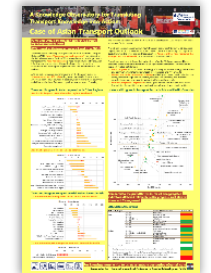
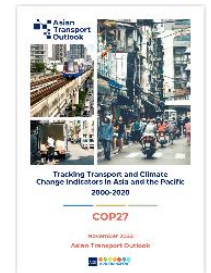
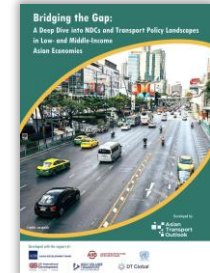
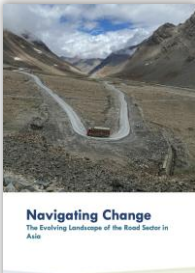
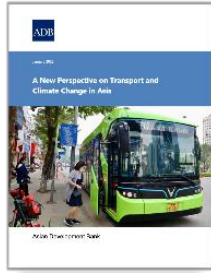
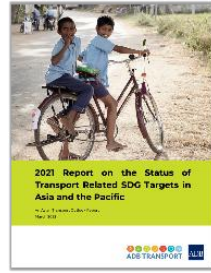
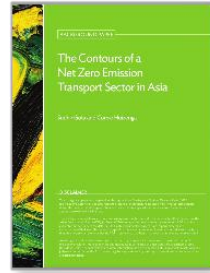
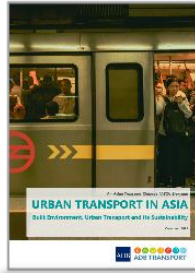
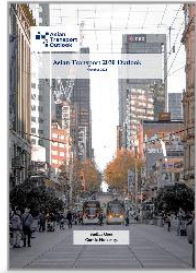


# Asian Transport Observatory



- Multiple Sources for single indicator (Primary/Secondary)
- Multiple Dimensions & Modes
- Data and Policy
- Historical & **Outlook** (2000-2035)
- Tracking Instrument for SDG's, PA, Regional Processes
- Incremental Approach
- Partnerships
- Helpdesk
- Non-advocacy

# Translating data into insights, policies, and investments



SDG Profiles  
(39 countries)

Transport Climate Profiles  
(23 countries)

Road Safety Profiles  
(28 countries)

E-mobility Profiles  
(10 countries)

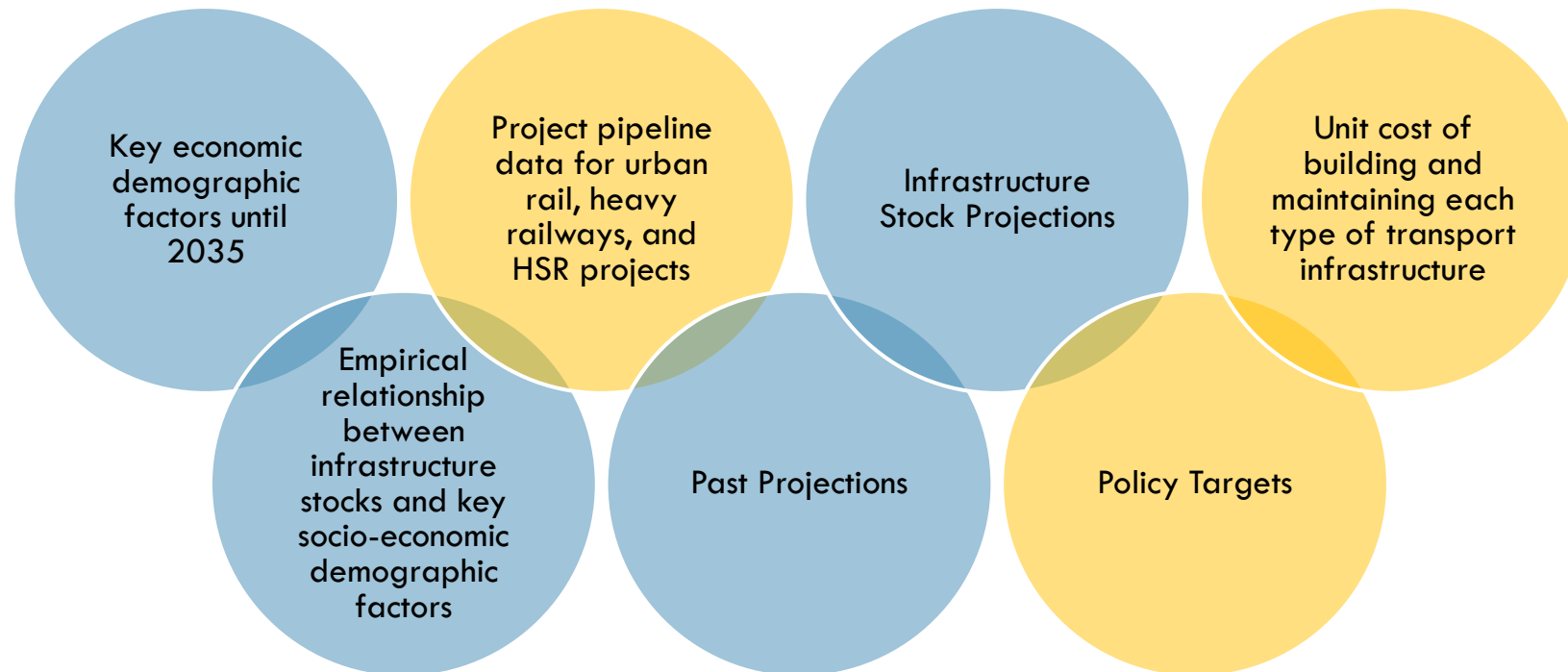
Green Roads Profiles  
(23 countries)

Gender Profiles  
(20 countries)

Aichi Profiles  
(18 countries)

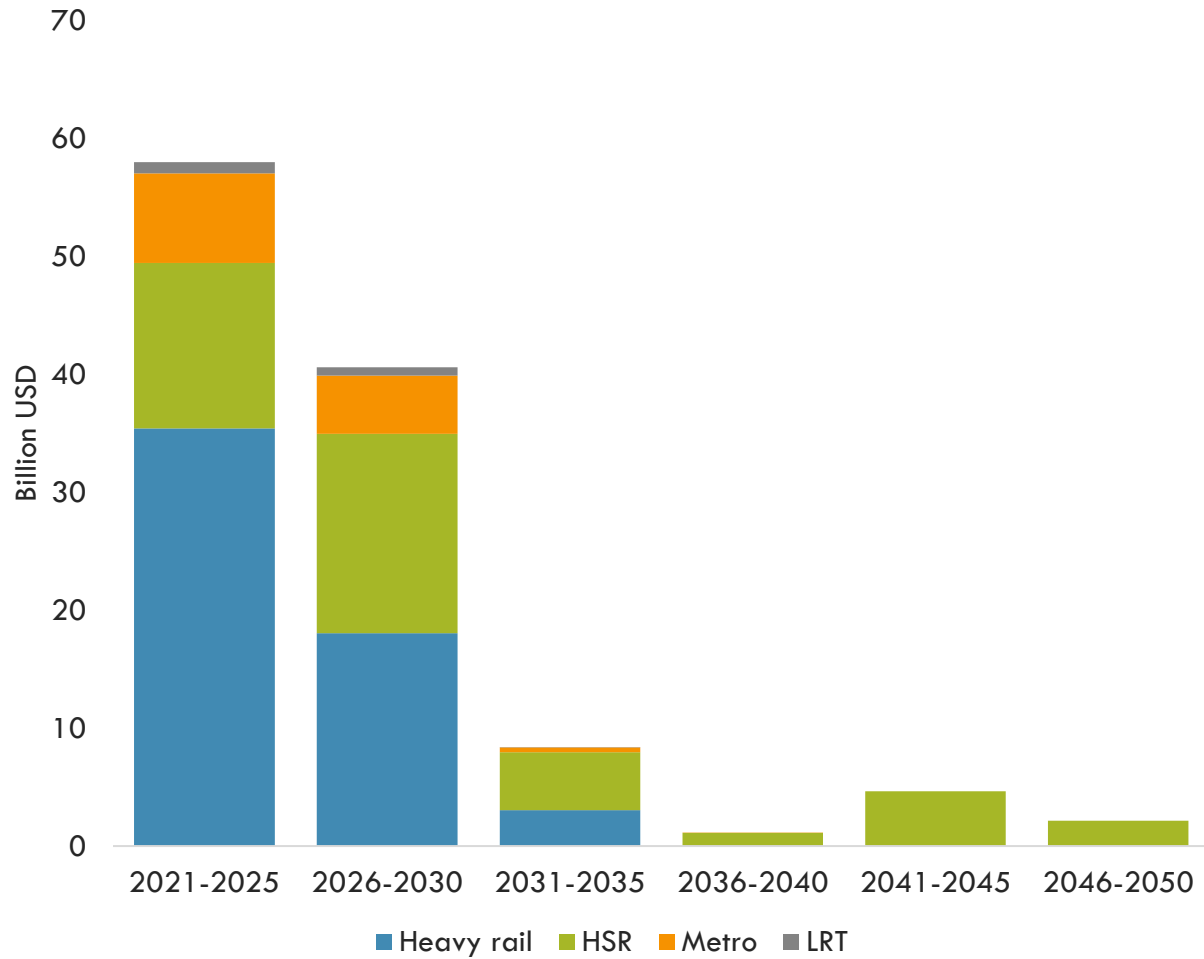
Rail Profiles  
(17 countries)

# How much will Asia invest in transport infrastructure over the next decade?

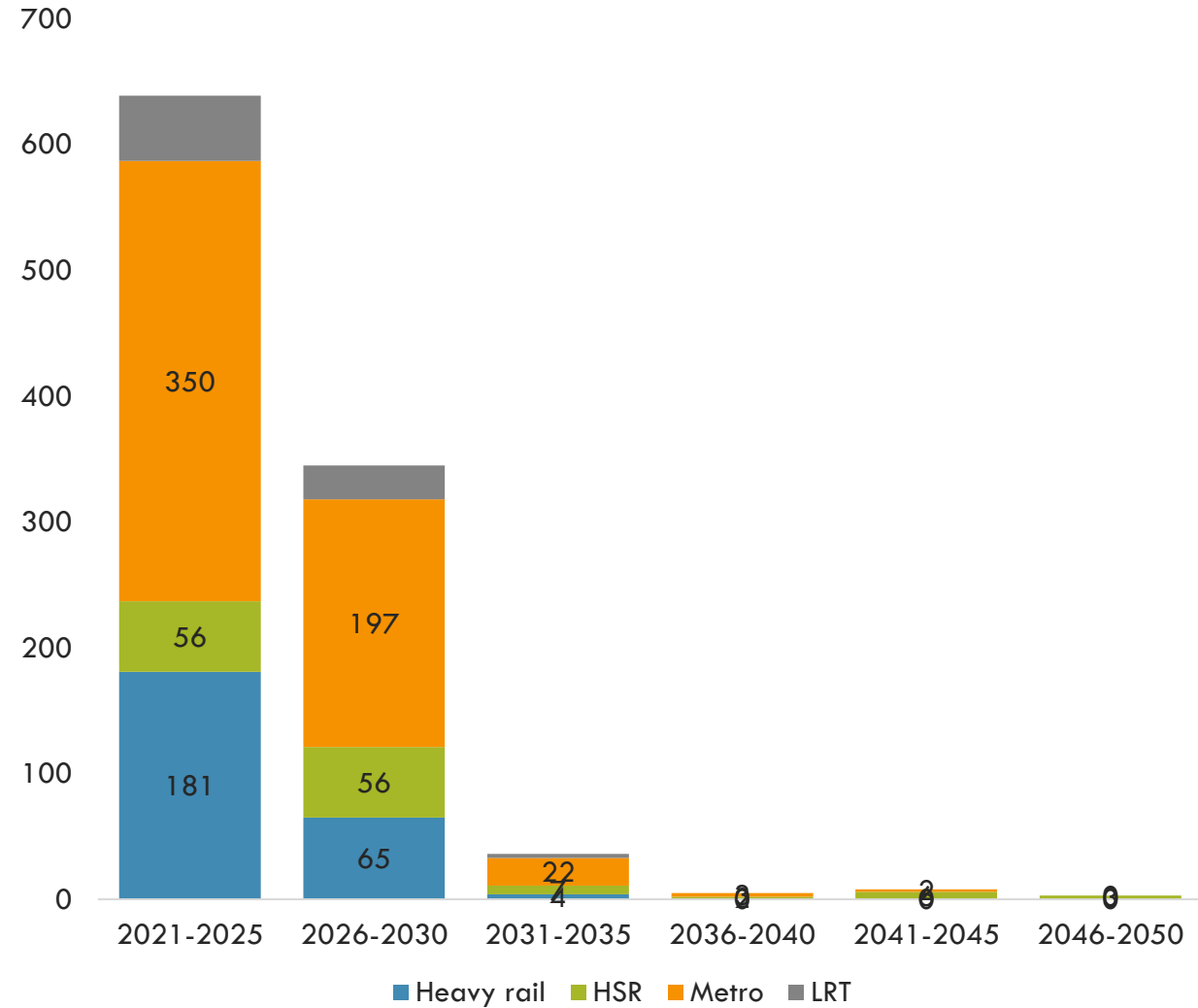


# Project pipeline

Total amount of projects



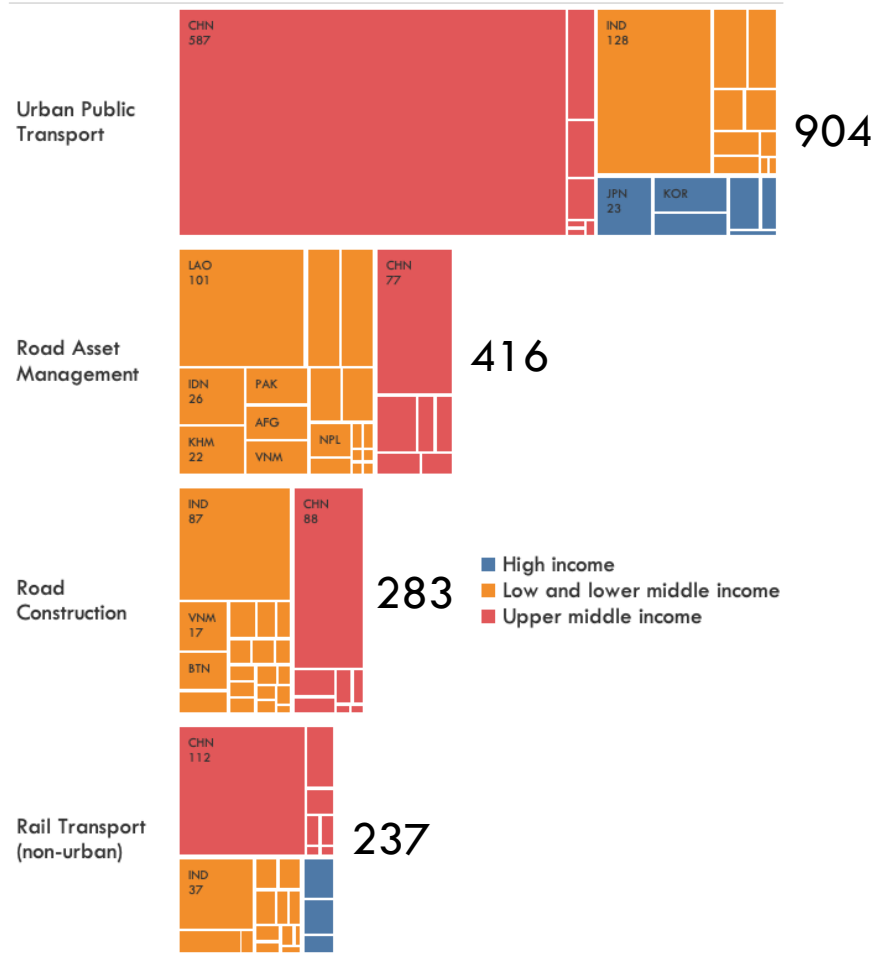
Number of projects



# ATO Cost database

ATO Cost Database

Number of projects by typology and income group

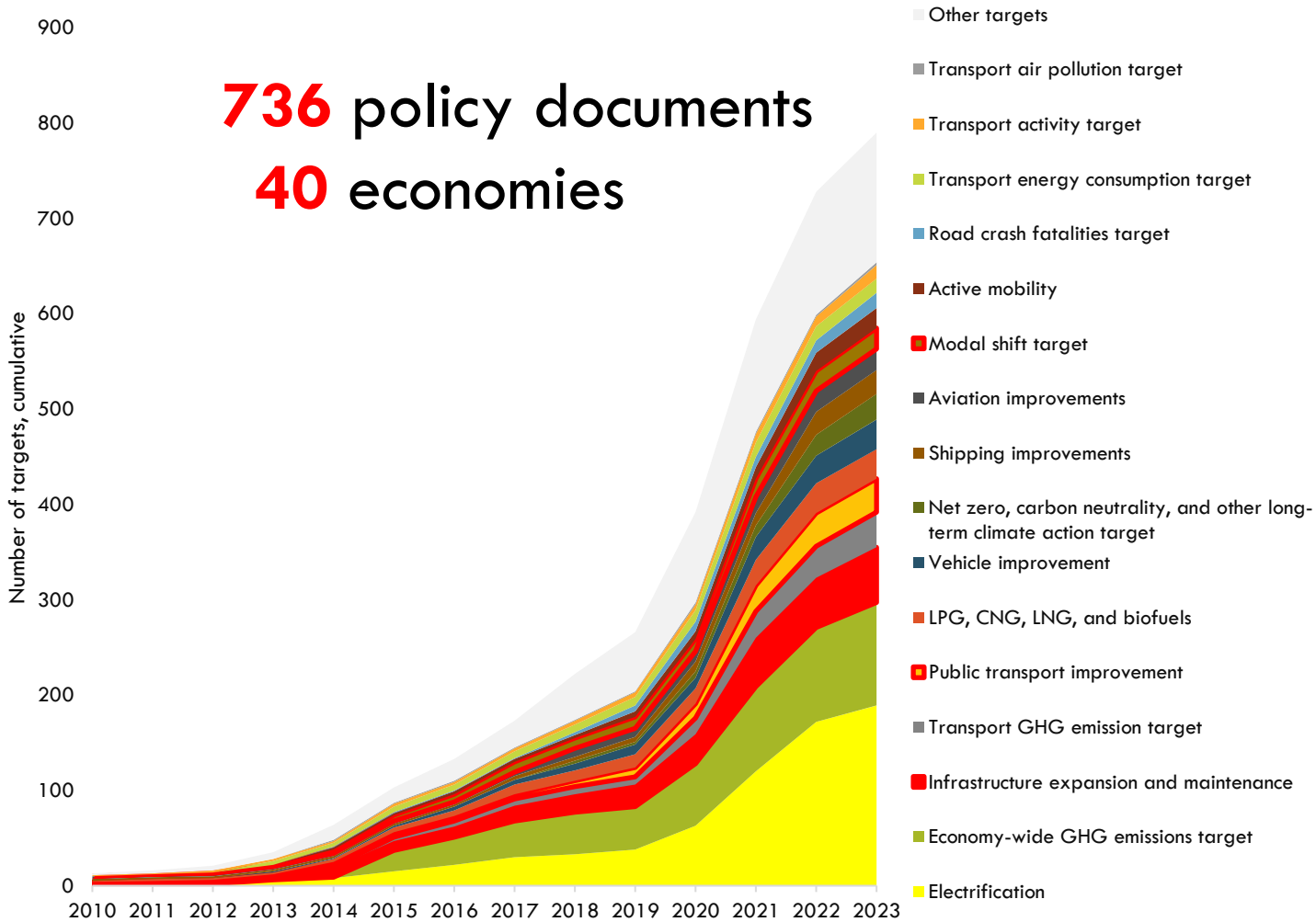


		ATO-2024 million \$ constant 2015 USD per km						
Mode	Type	ADB-2017	IEA-2013	AIIB-2018	Fisch-Romito et al. (2019)	High income	Upper middle income	Low and lower middle income
Road	Construction				1.1 million\$/lane-km	2-10	1-8	1-7
	Primary road	0.6 million \$/km	1.2 million\$/lane-km			0.6-3	0.7-2	0.4-2.5
	Secondary road			1.7 M\$/km		0.1-0.6	0.2-0.6	0.08-0.6
	Tertiary road							
	Annual maintenance (% of Cons)		2.50%		0.75%	0.5%-1.6%	0.3%-1.0%	0.2%-1.0%
Heavy Rail	Construction	3.8 million \$/km	4.5 million/track-km	9 M\$/km	4.5 million/track-km	14-22	2-12	3-10
	Annual maintenance (% of Cons)		1%			0.5%-1.4%	0.2%-0.9%	0.3%-0.8%
HSR	Construction		24 million \$/track-km		24 million \$/track-km	18-36	20-25	15-30
	Annual maintenance (% of Cons)		0.40%	50.5 M\$/km	0.40%	1.0%-1.4%	1.0%-1.1%	1.0%-1.0%
Metro	Construction					140-160	90-120	60-90
	Annual maintenance (% of Cons)					0.8%-1.4%	1.0%-1.1%	1.0%-1.0%
LRT	Construction					100-100	50-50	35-35
	Maintenance (% of Cons)					1.0%-1.4%	1.0%-1.0%	1.0%-1.0%
BRT	Construction		9 million per trunk-km		7 million per trunk-km	50-50	13-13	8-8
	Annual maintenance (% of Cons)		3%		1%	2.0%-2.0%	1.5%-1.5%	1.5%-1.5%

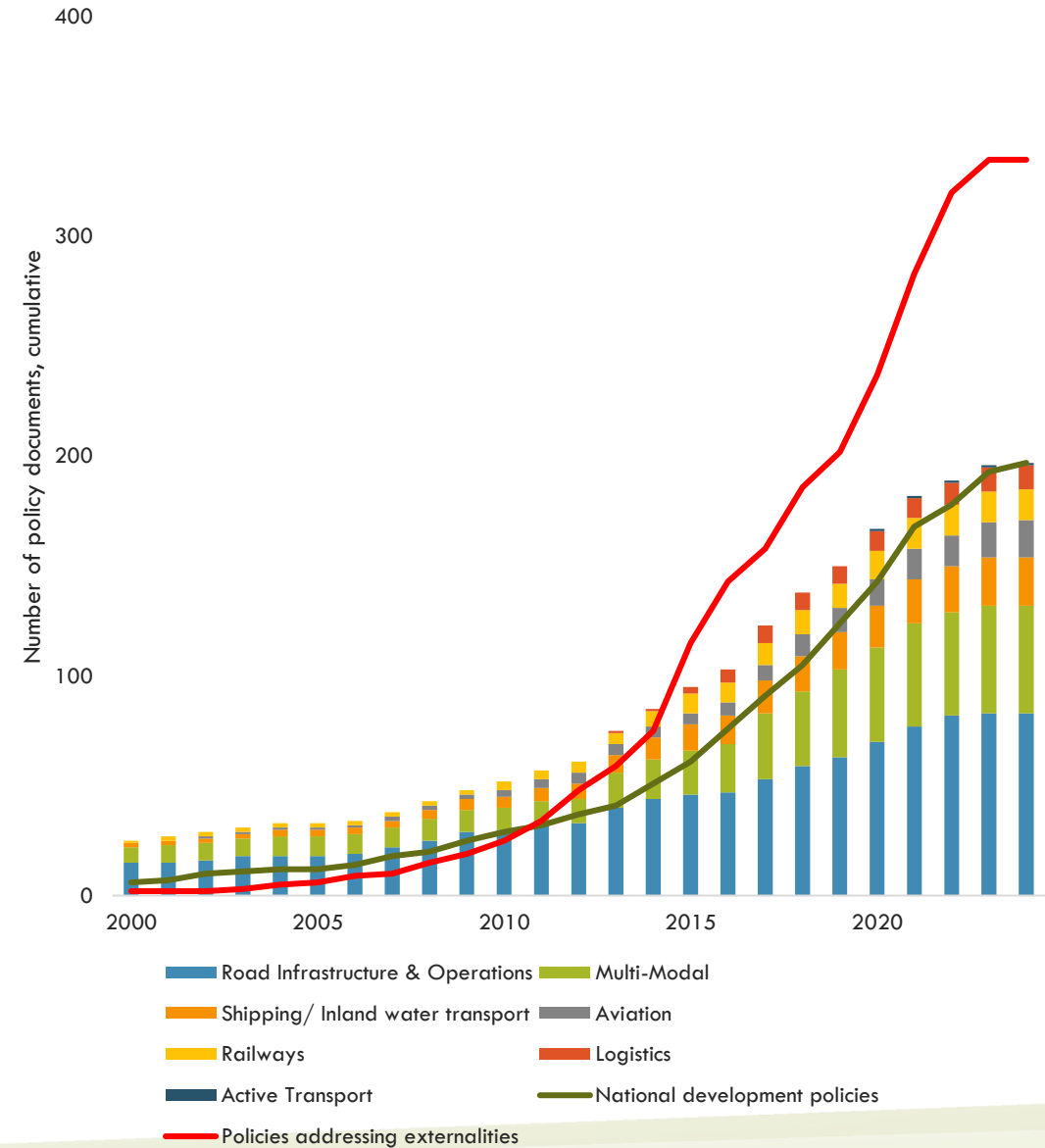
# ATO Policy database

## Policy targets relevant to transport

**736** policy documents  
**40** economies

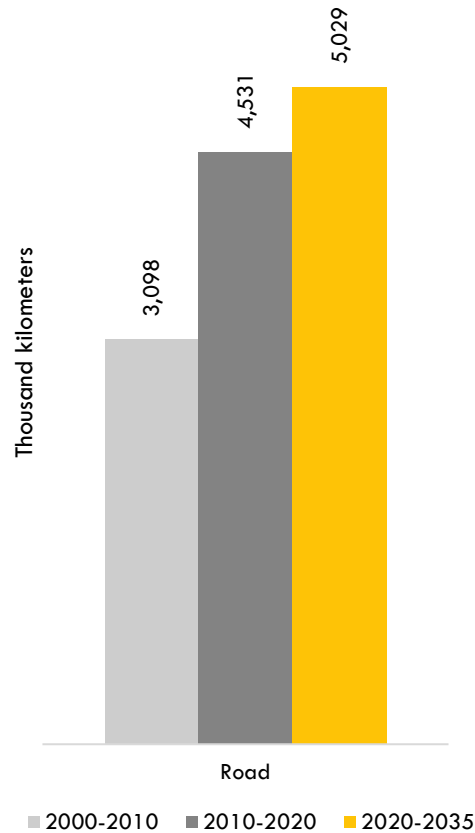


## Policy documents by type

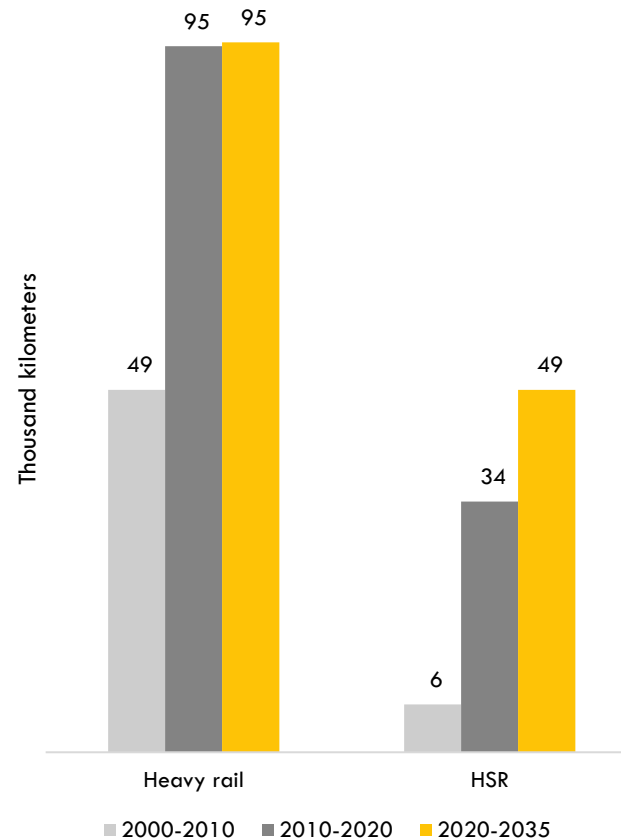


# Projected transport infrastructure growth

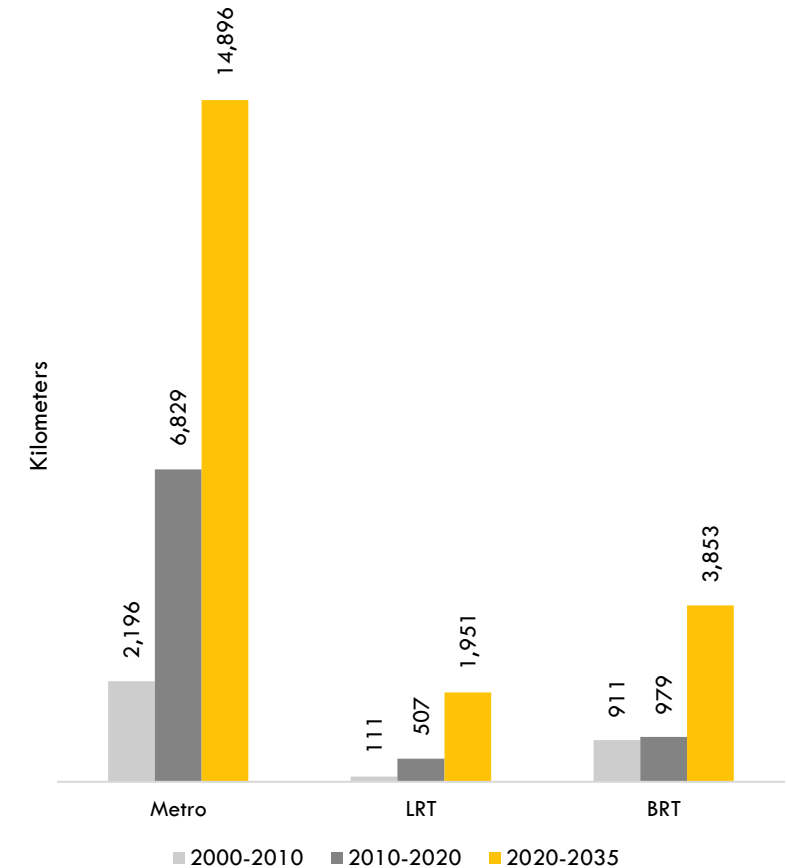
Road infrastructure kilometers added



Heavy rail and HSR infrastructure kilometers added



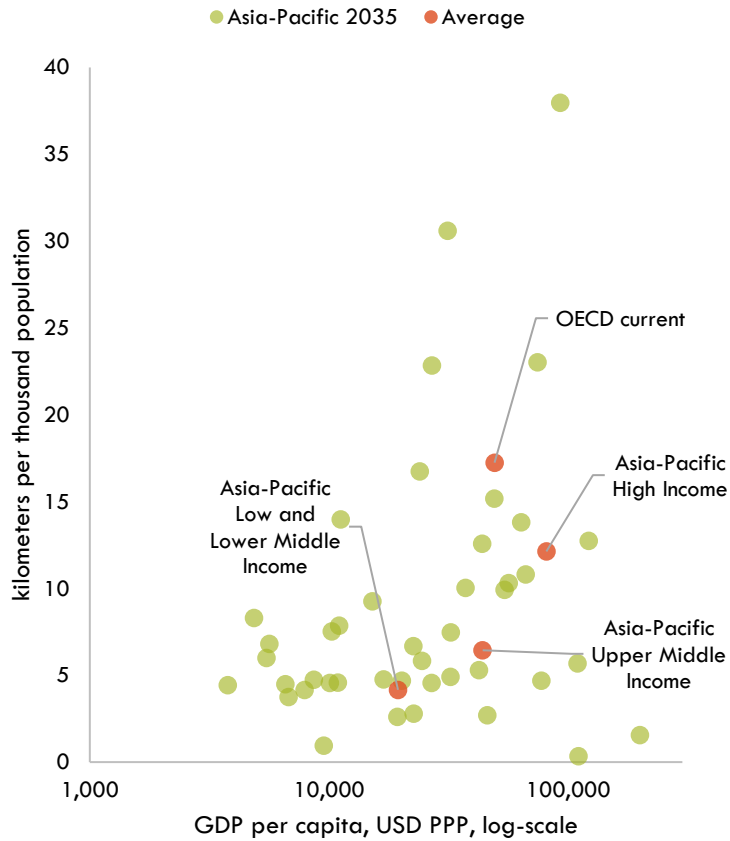
Rapid transit (metro, LRT, BRT) infrastructure kilometers added



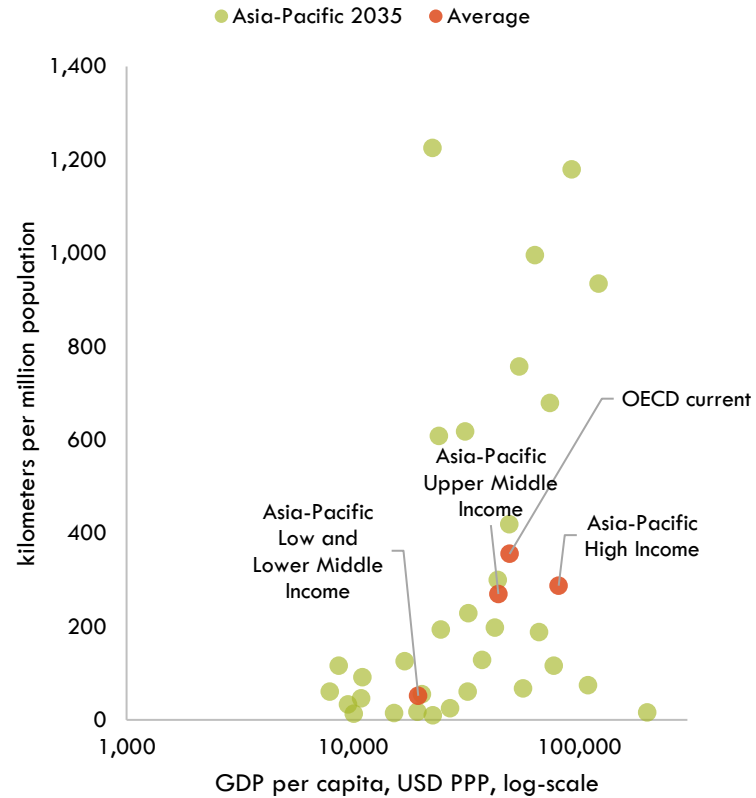
One-third of all railway expansion in Asia from 2020 to 2035 would consist of high-speed rail

# Projected transport infrastructure growth

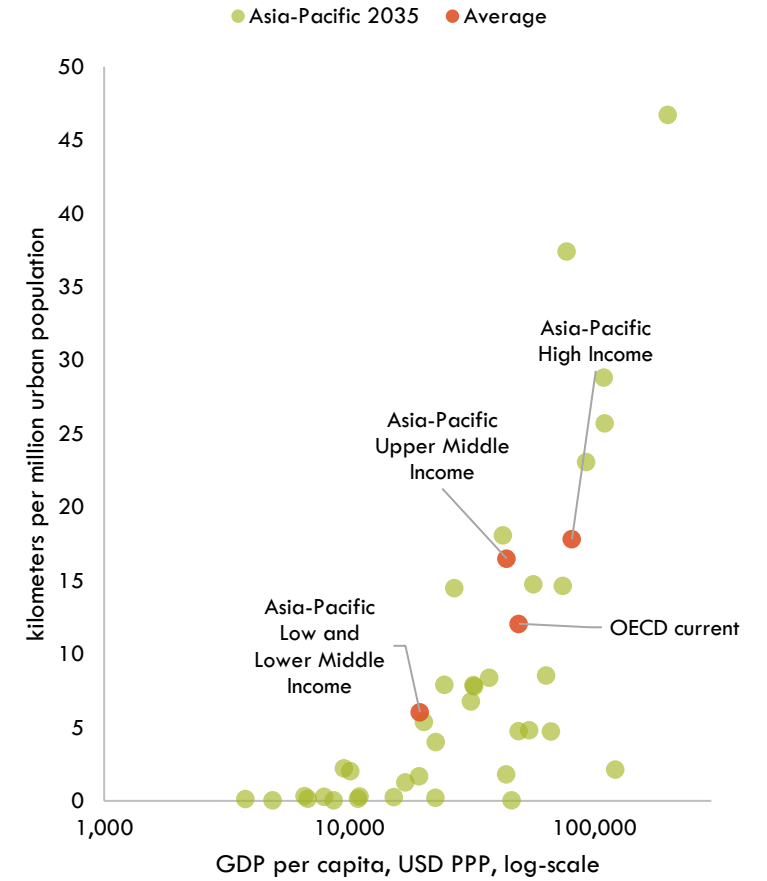
Road infrastructure availability in 2035 vs. OECD current average



Heavy rail and HSR infrastructure availability in 2035 vs. OECD current average

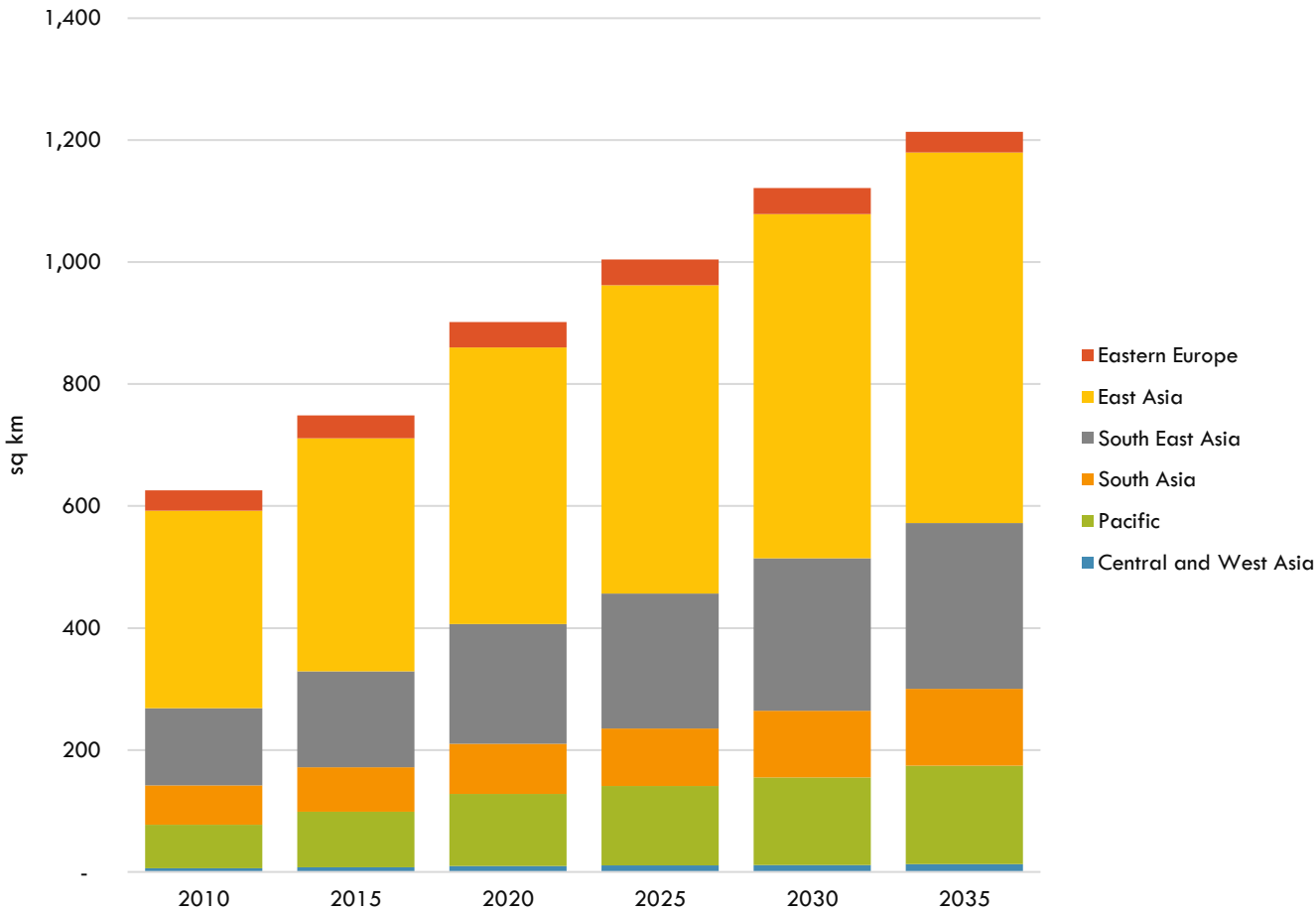


Rapid transit infrastructure availability in 2035 vs. OECD current average

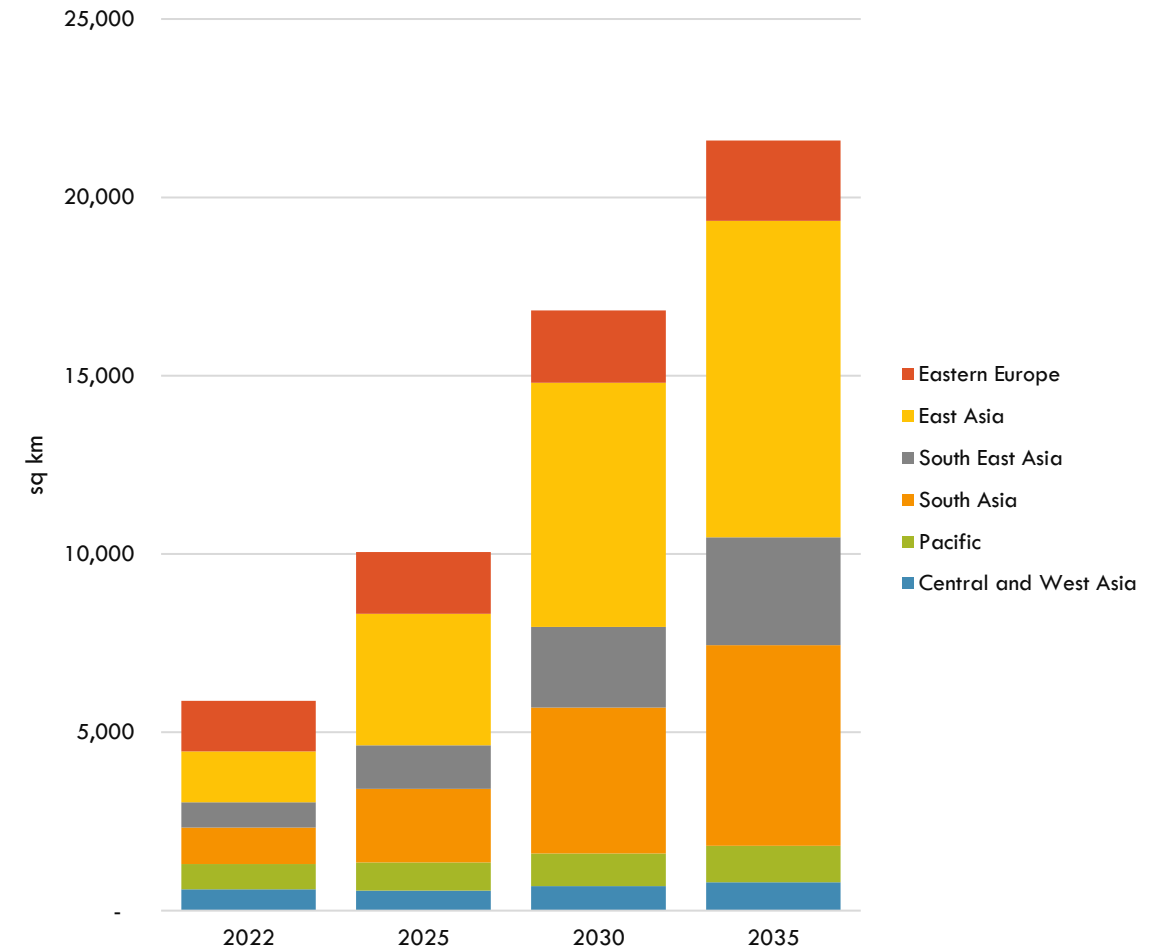


# Port and Airports

Future port area, by subregion

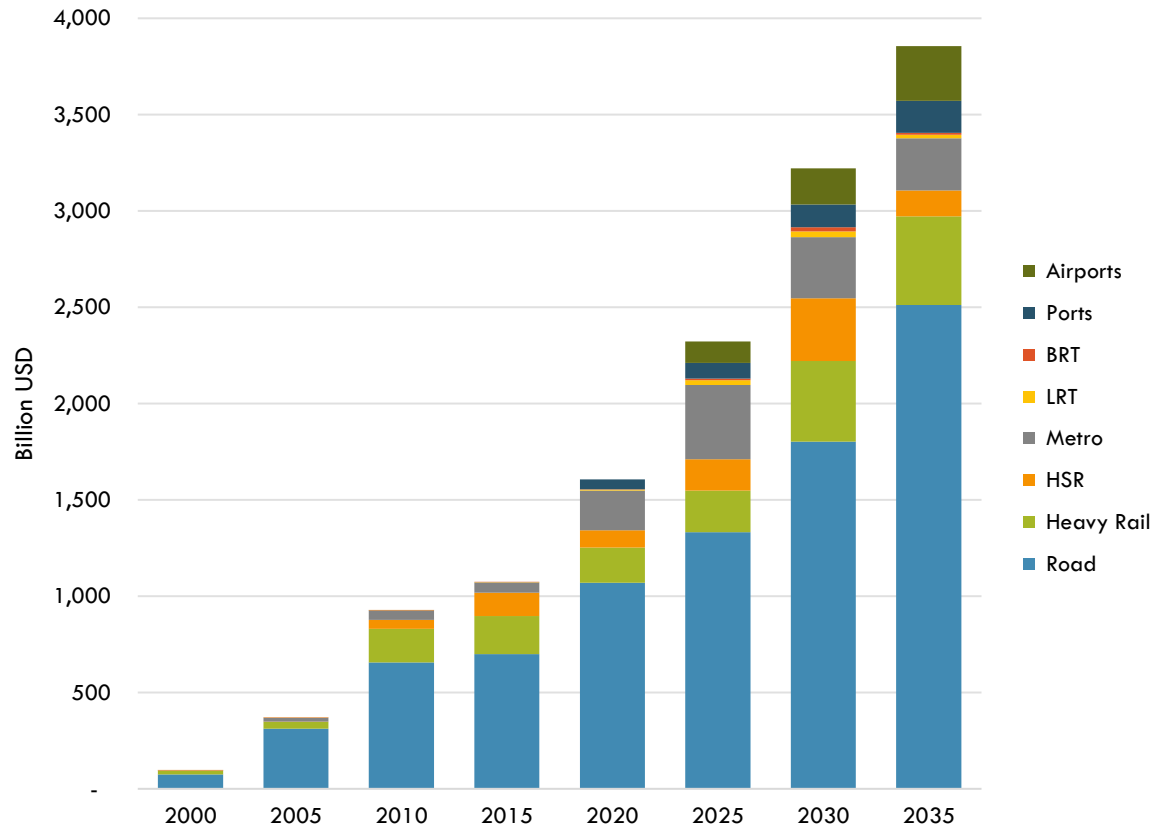


Aerodrome area by subregion

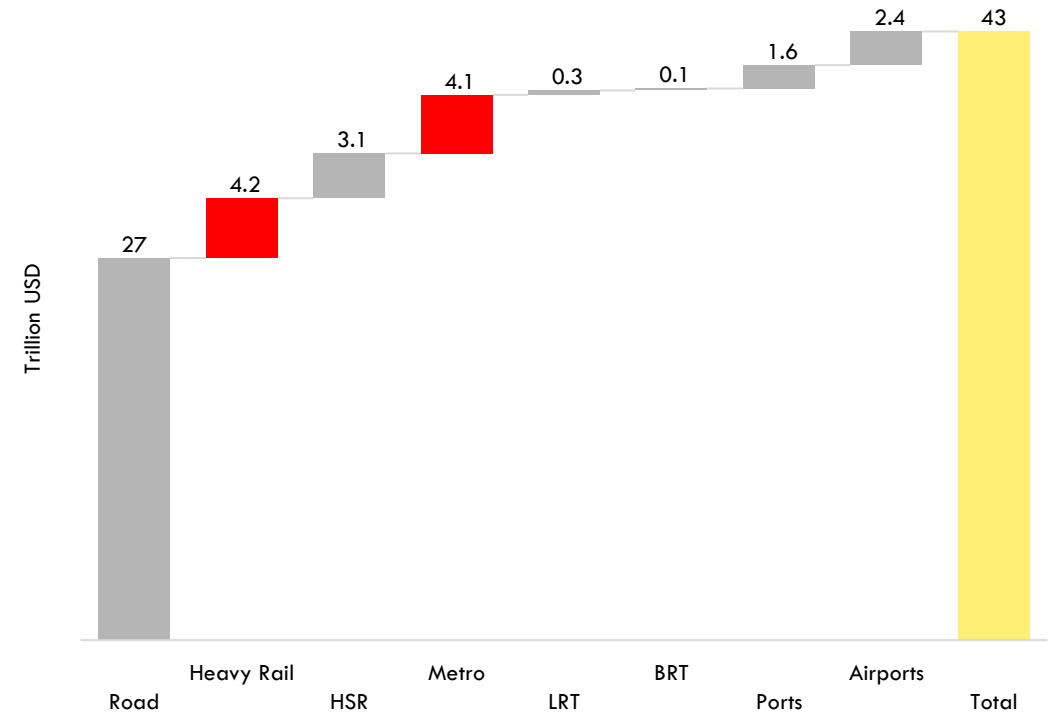


# Investment needs projections (Asia-Pacific)

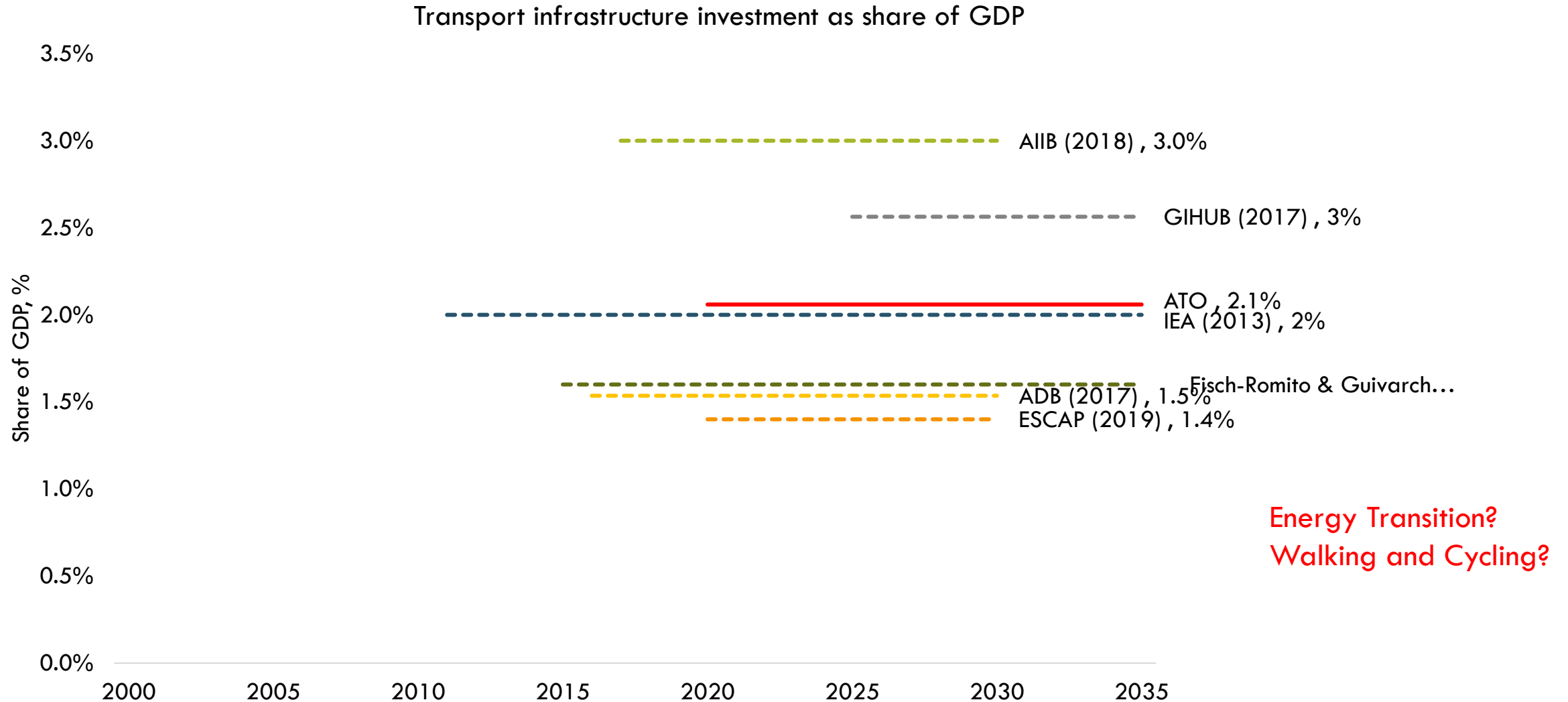
Transport infrastructure investment needs (construction, maintenance, climate proofing)



2020-2035 Infrastructure Needs  
**\$43 Trillion** for total transport



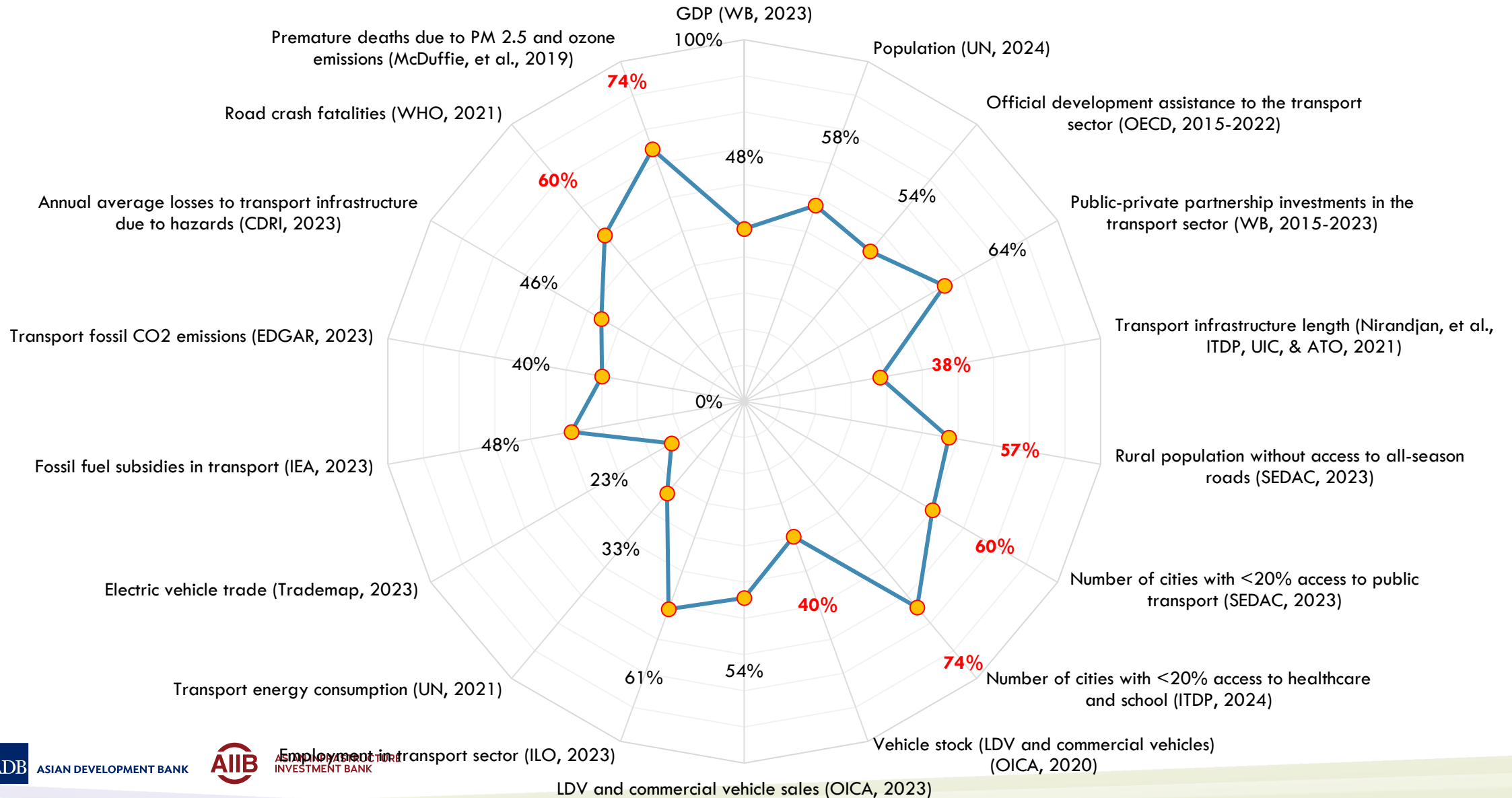
# How our estimates compare with other estimates



Energy Transition?  
Walking and Cycling?

# Transport in 2035?

## ASIA'S SHARE IN GLOBAL



# asiantransportobservatory.org

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

<b>ATO Team</b>	info@asiantransportobservatory.org
<b>Jamie Leather</b>	jleather@adb.org
<b>Andres Pizarro</b>	andres.pizarro@aiib.org
<b>Manuel Benard</b>	manuel.benard@aiib.org
<b>Alvin Mejia</b>	alvinmejia@asiantransportobservatory.org
<b>Sudhir Gota</b>	sudhirgota@asiantransportobservatory.org
<b>Mel Francis Eden</b>	meleden@asiantransportobservatory.org
<b>Adwait Limaye</b>	adwait@asiantransportobservatory.org
<b>Benjamin Soco</b>	benjaminsoco@asiantransportobservatory.org