

Asia and the Pacific Transport Sector's Trillion-Dollar Question

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**Asian Transport
2035 Outlook:
Investment Needs of Low-
and Middle-Income
Economies**



Asian
Transport
Observatory

2.6 Trillion

8

sub-sectors modelled —
road, rail, port, air, EV

2.3%

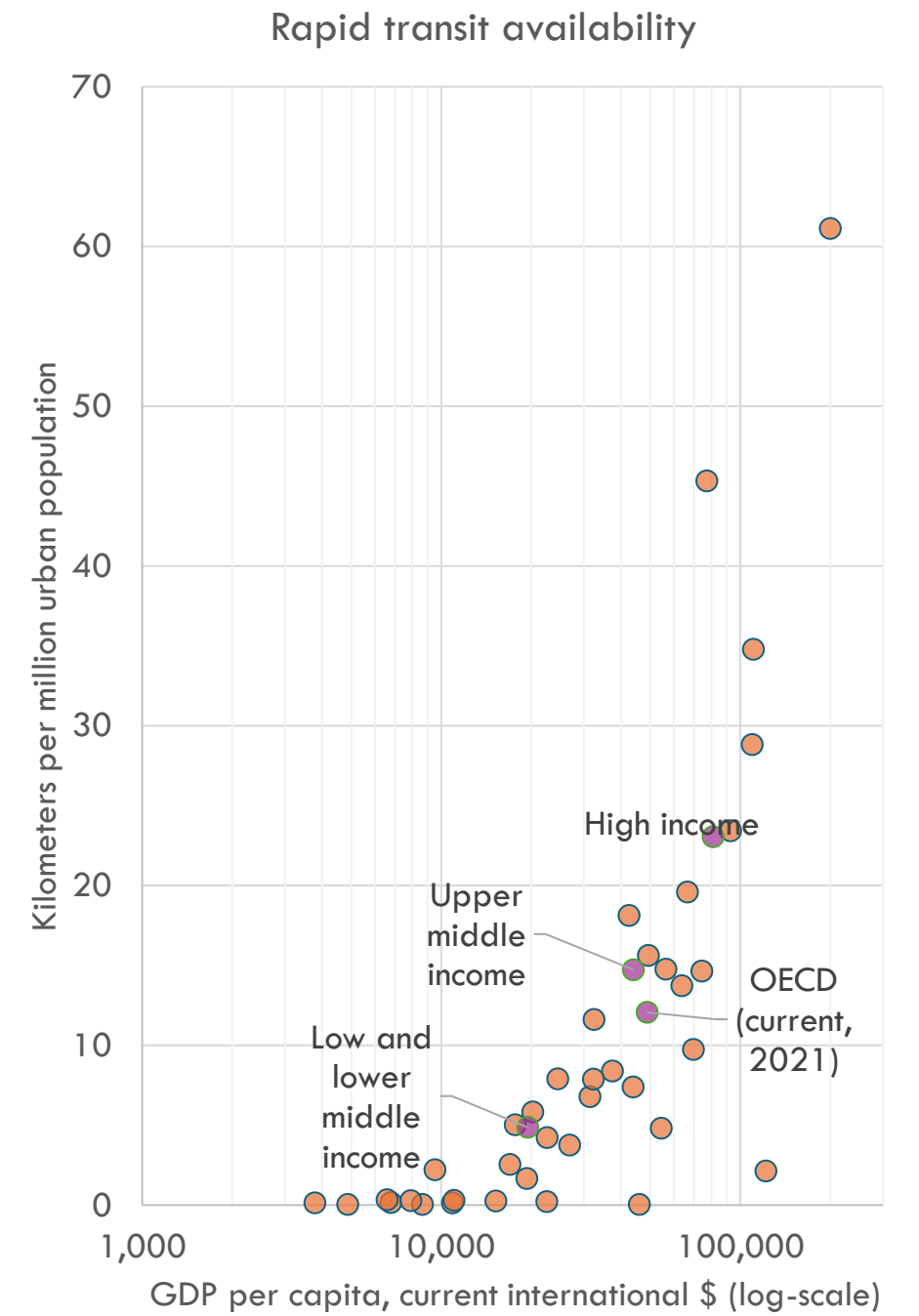
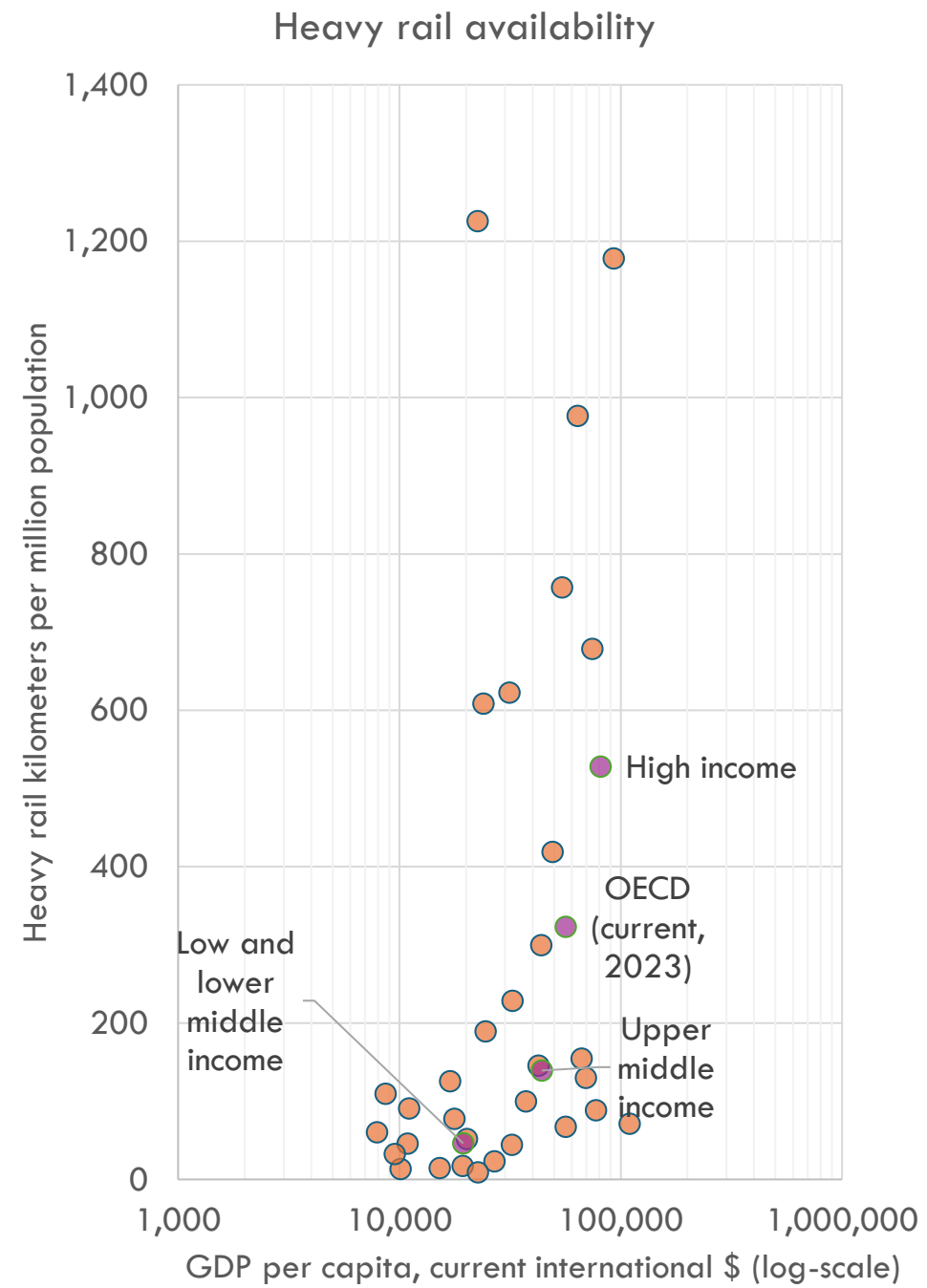
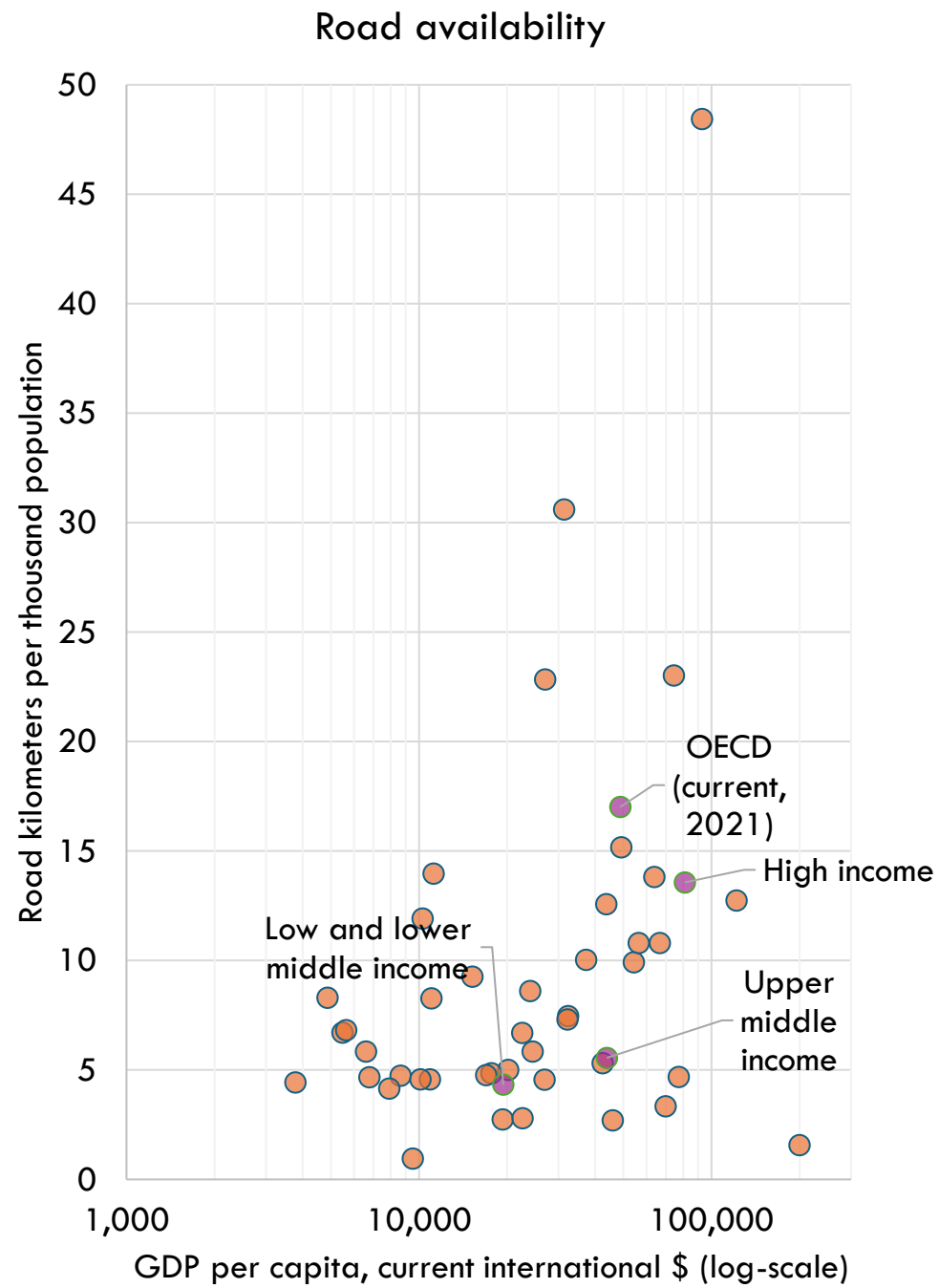
of LMIC GDP, every year,
from 2025 to 2035

3×

the annual investment
in the next decade



Infrastructure Gap



2035 Infrastructure Outlook

WHAT'S BUILT · KILOMETRES ADDED

US\$ 4 M / km → US\$ 8 M / km (*doubled*)

2015–2025

2025–2035



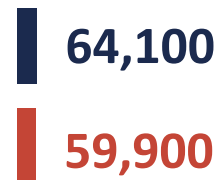
Roads



-16%



Heavy rail



-7%



High-speed rail



-37%



Urban transit



-35%

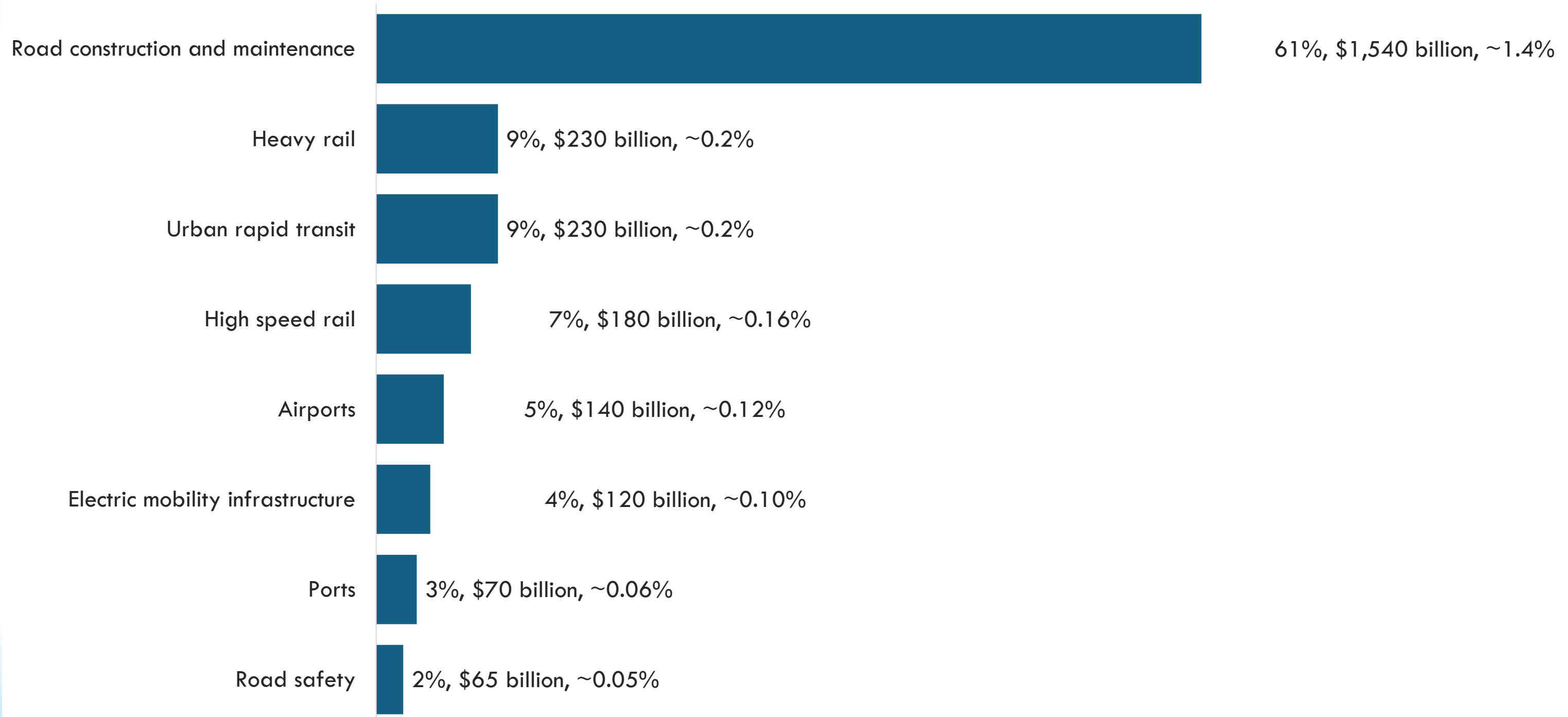
TOTAL (all modes)

3.66 M km

→ 3.08 M km

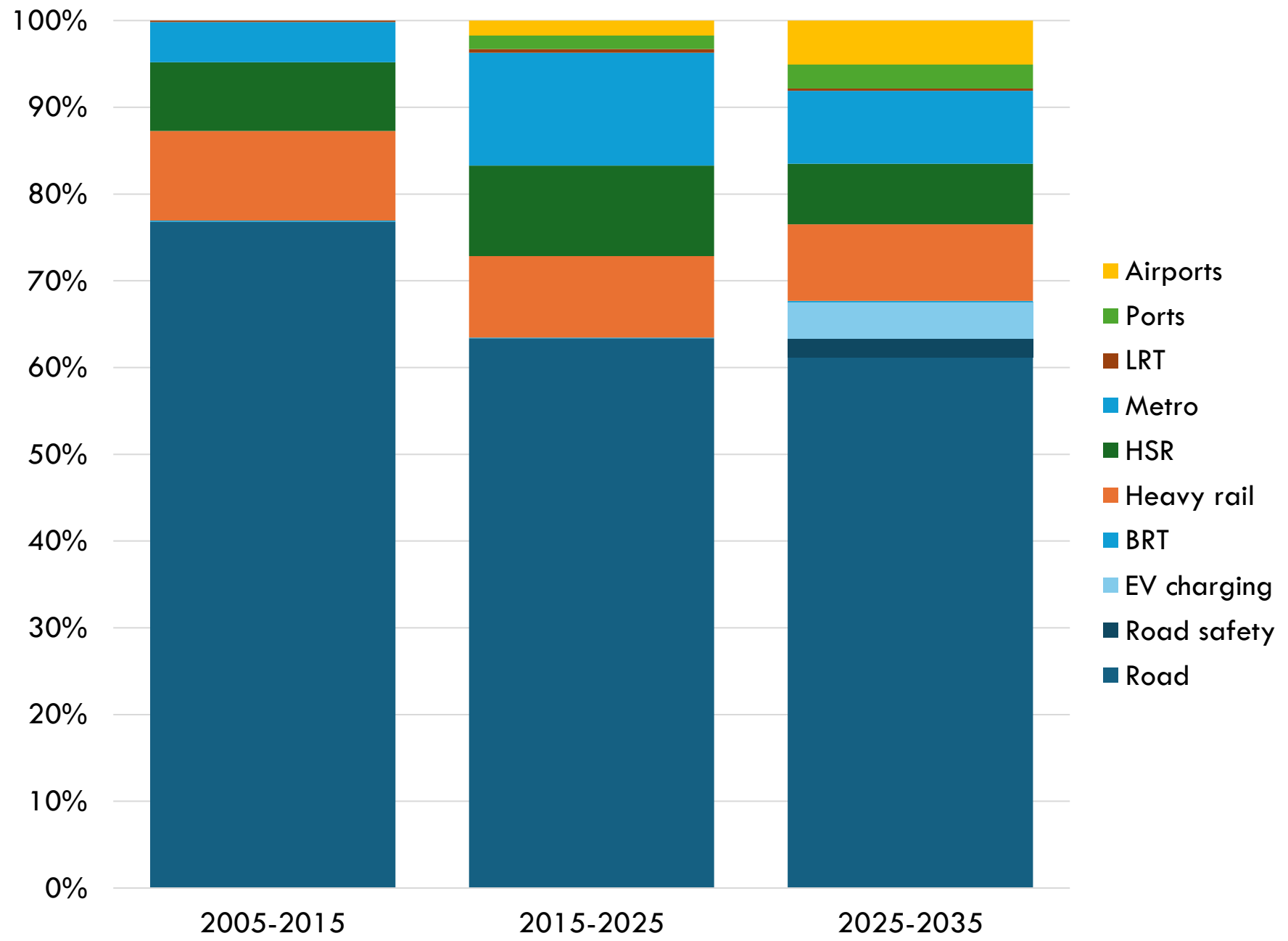
Where does 2.6 trillion/year USD go?

Share in LMIC investment

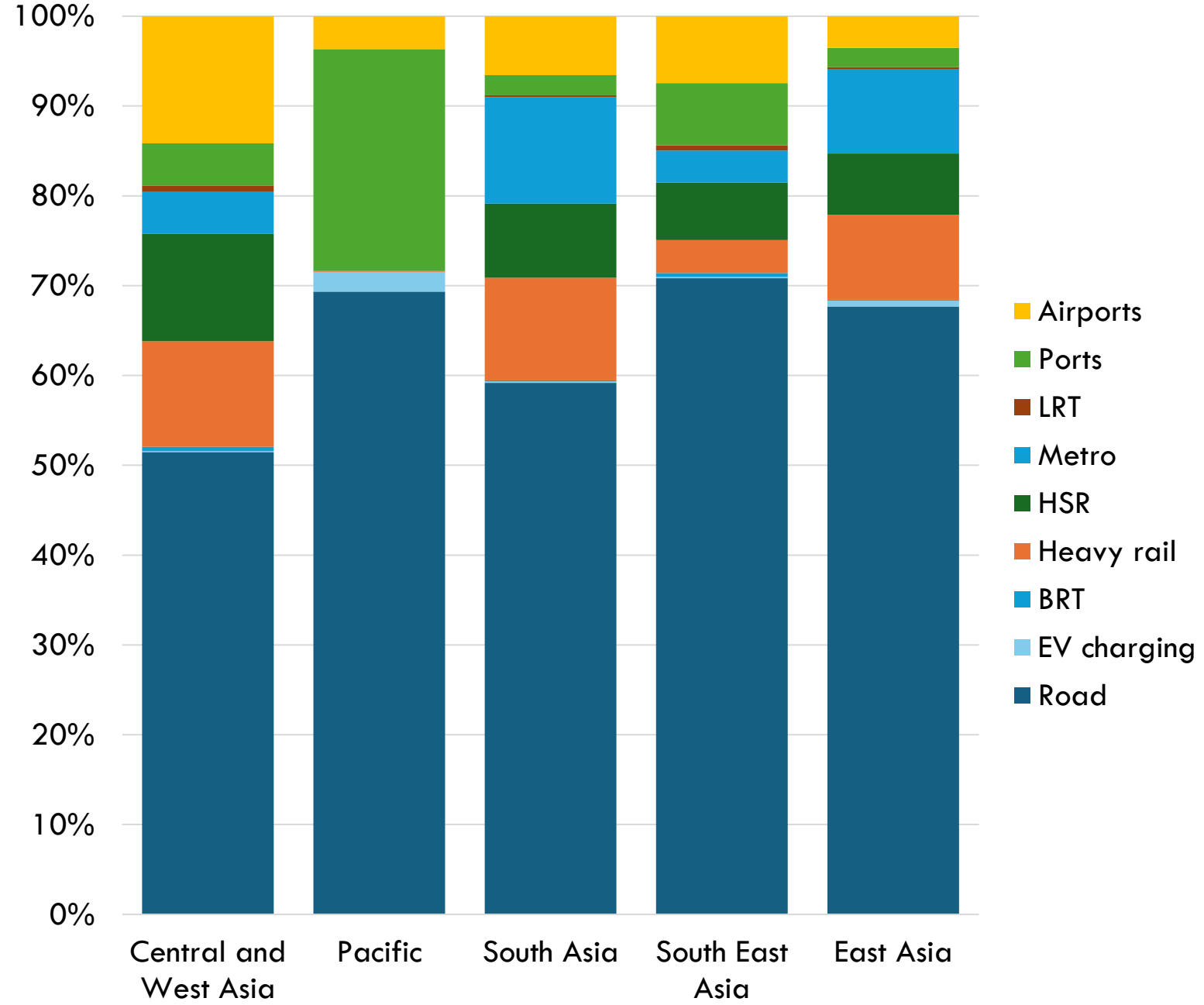


Investment by Mode and Subregion

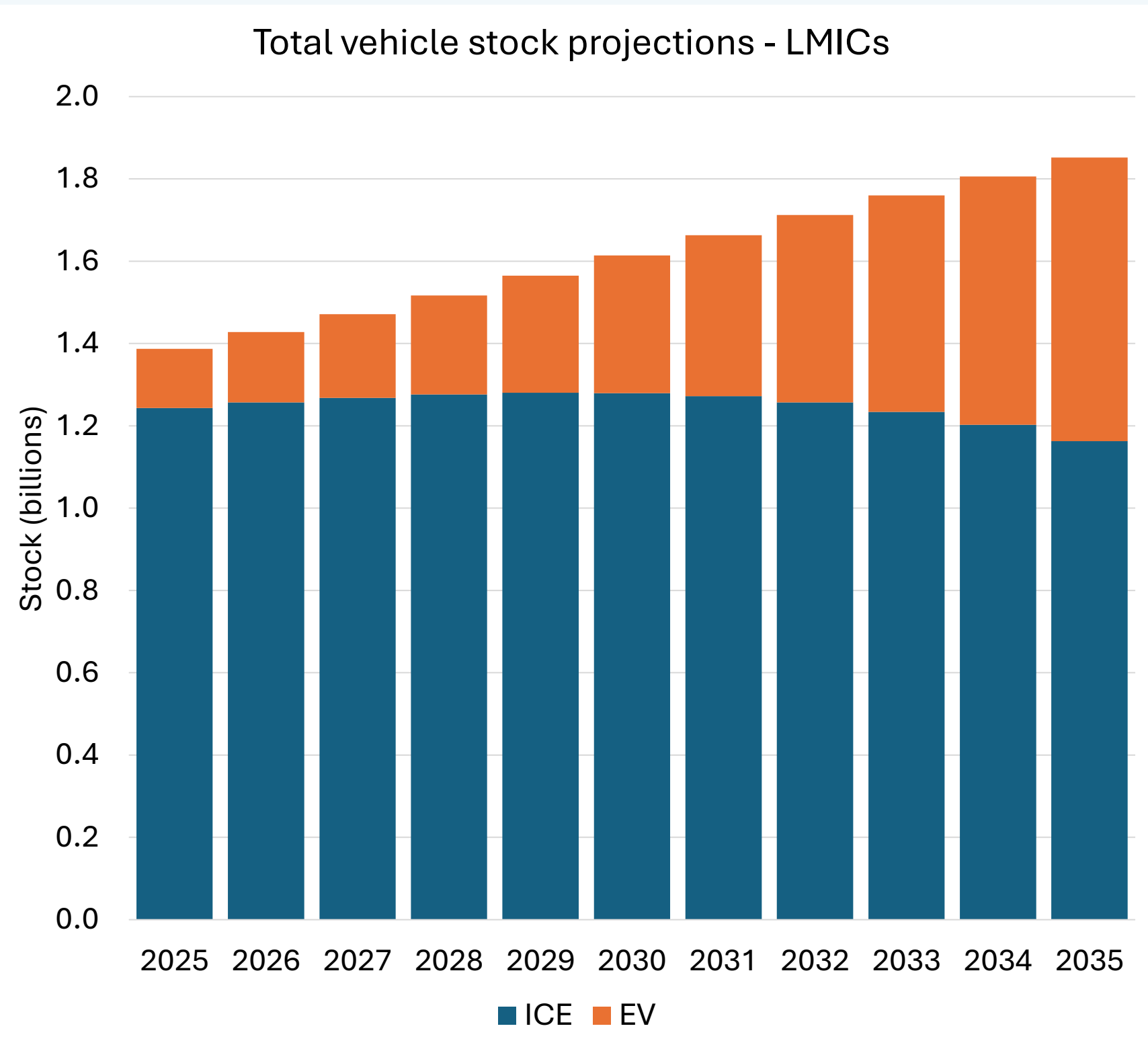
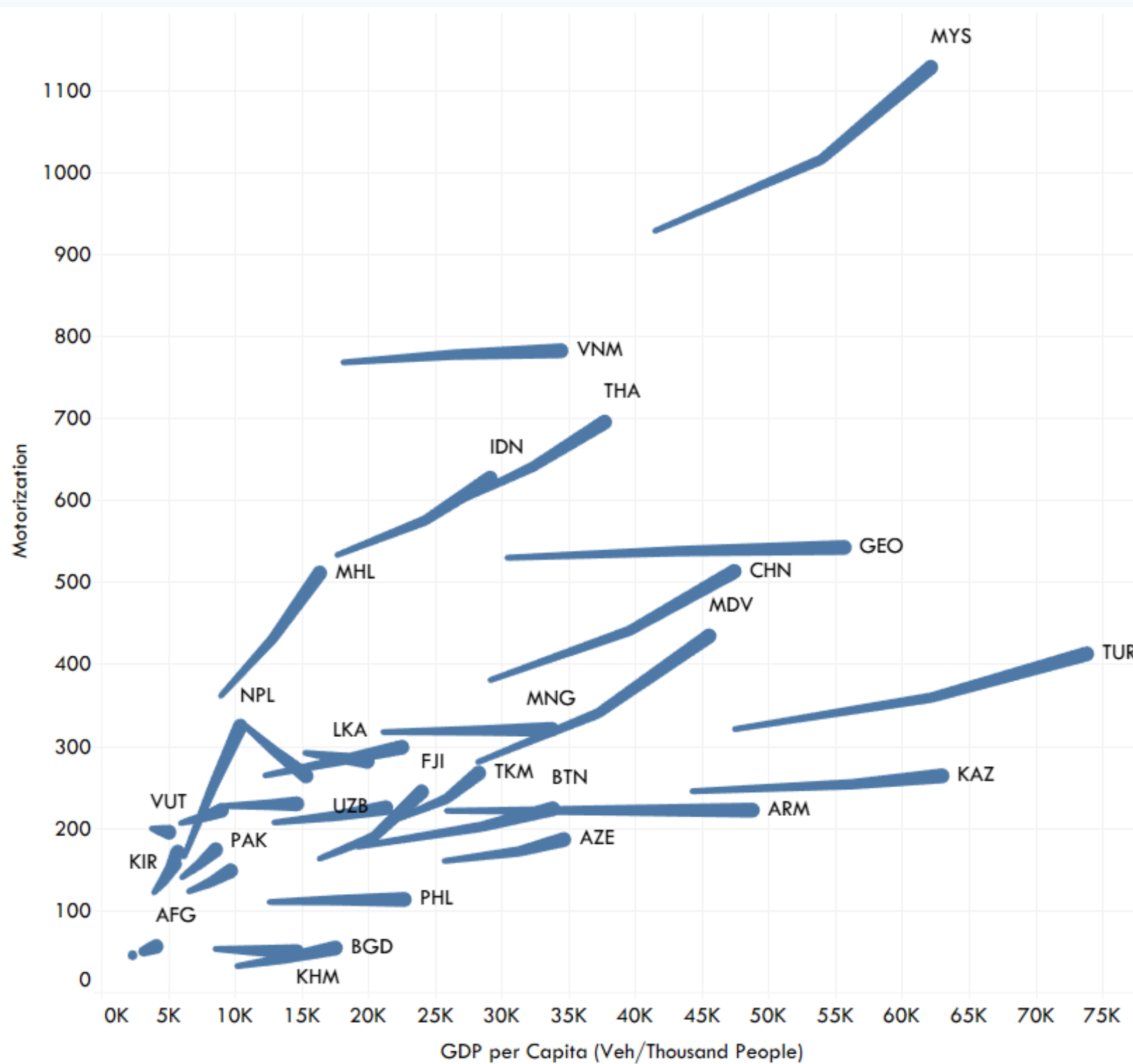
Transport infrastructure investment in LMIC, share by mode



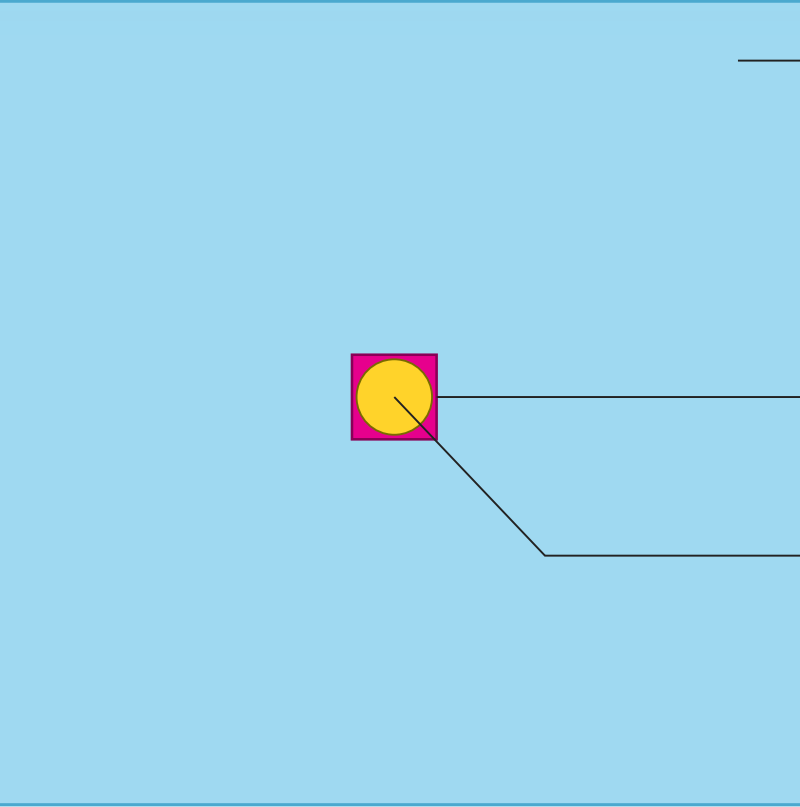
Transport infrastructure investment in LMIC, share by subregion (2025-2035)



“Electric” Motorization



Investment Gap



Projected annual investment needs
(2025-2035)

2.6 trillion USD

Average annual PPP
(2015-2023)

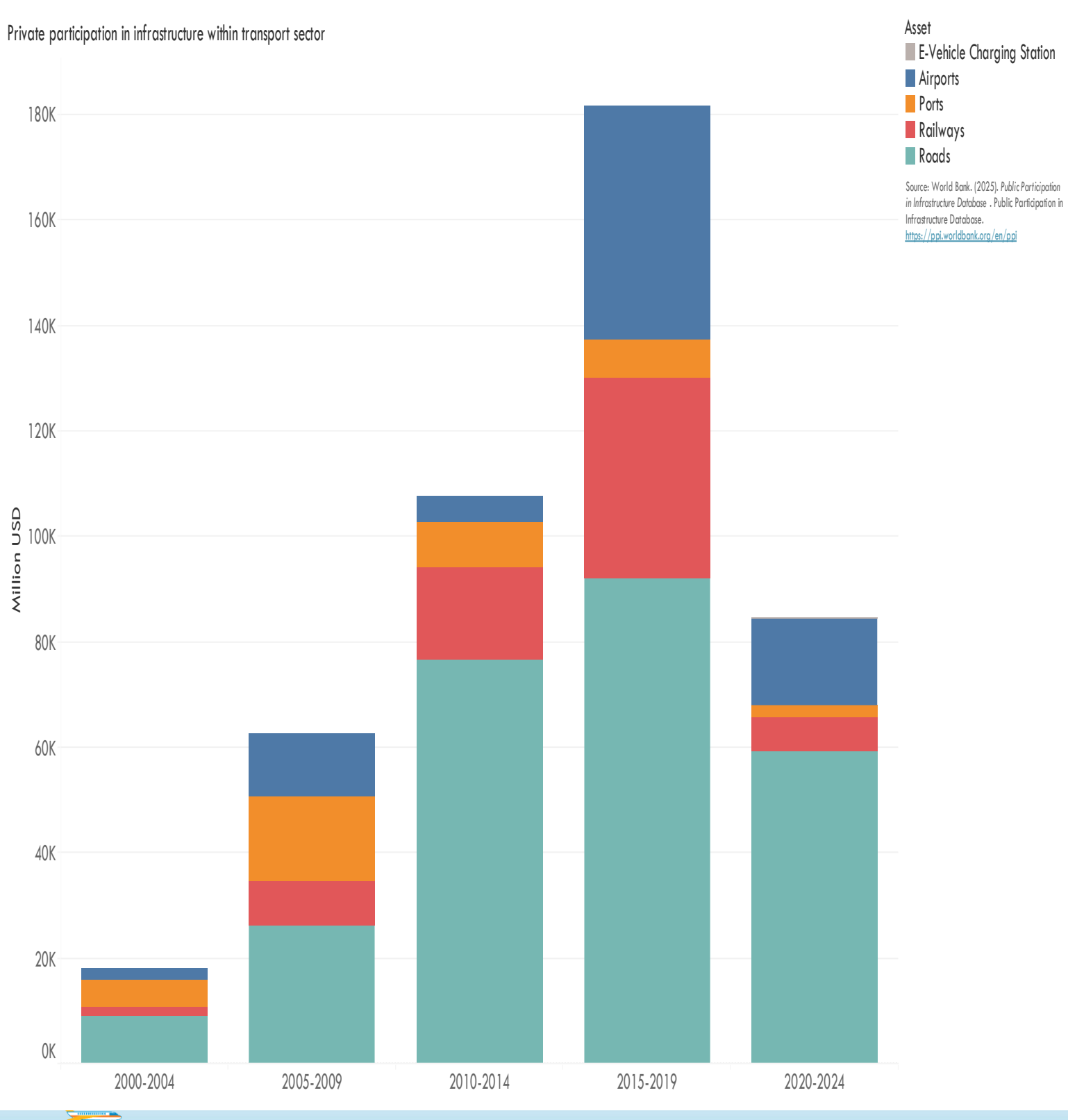
28.8 billion USD (1.1%)

Average annual development finance,
transport (2015-2023)

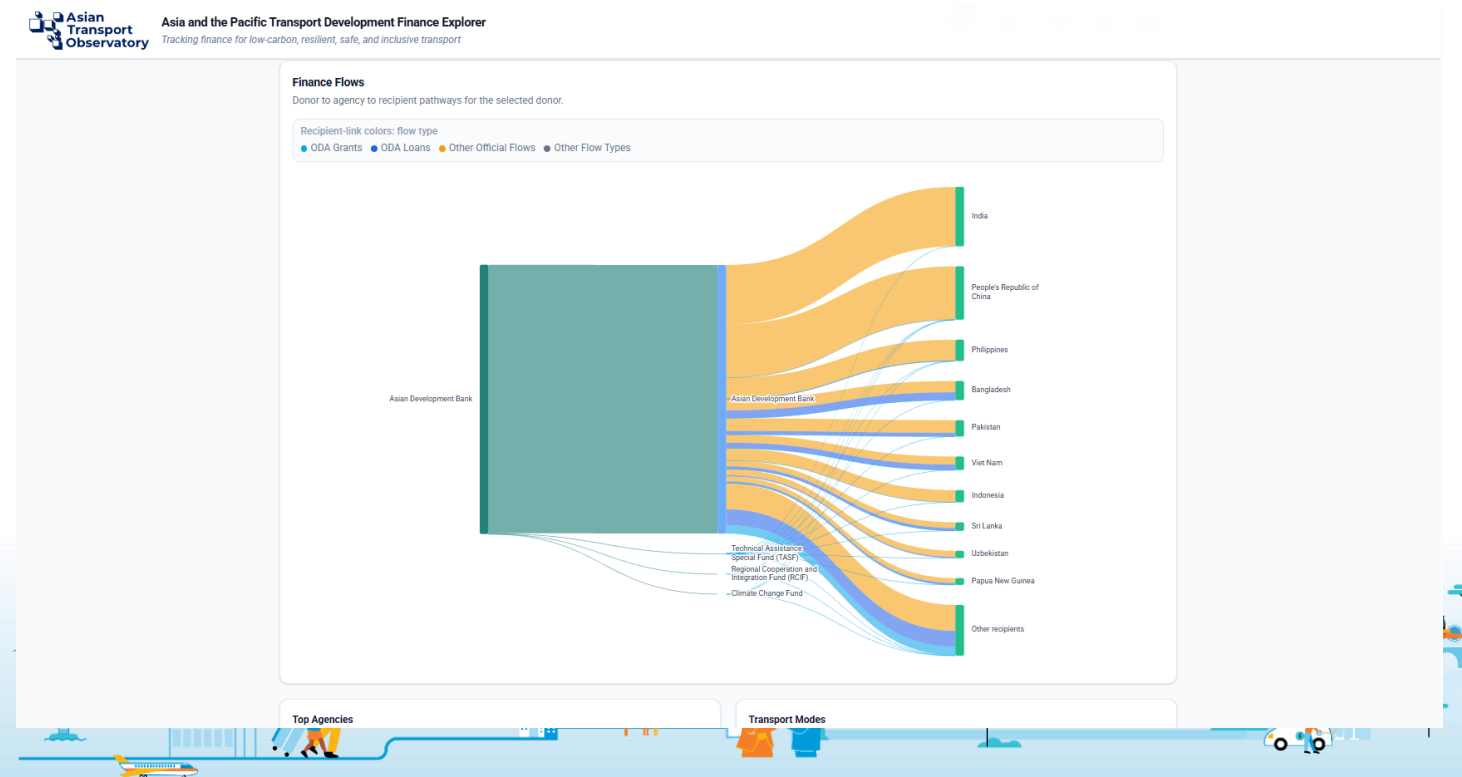
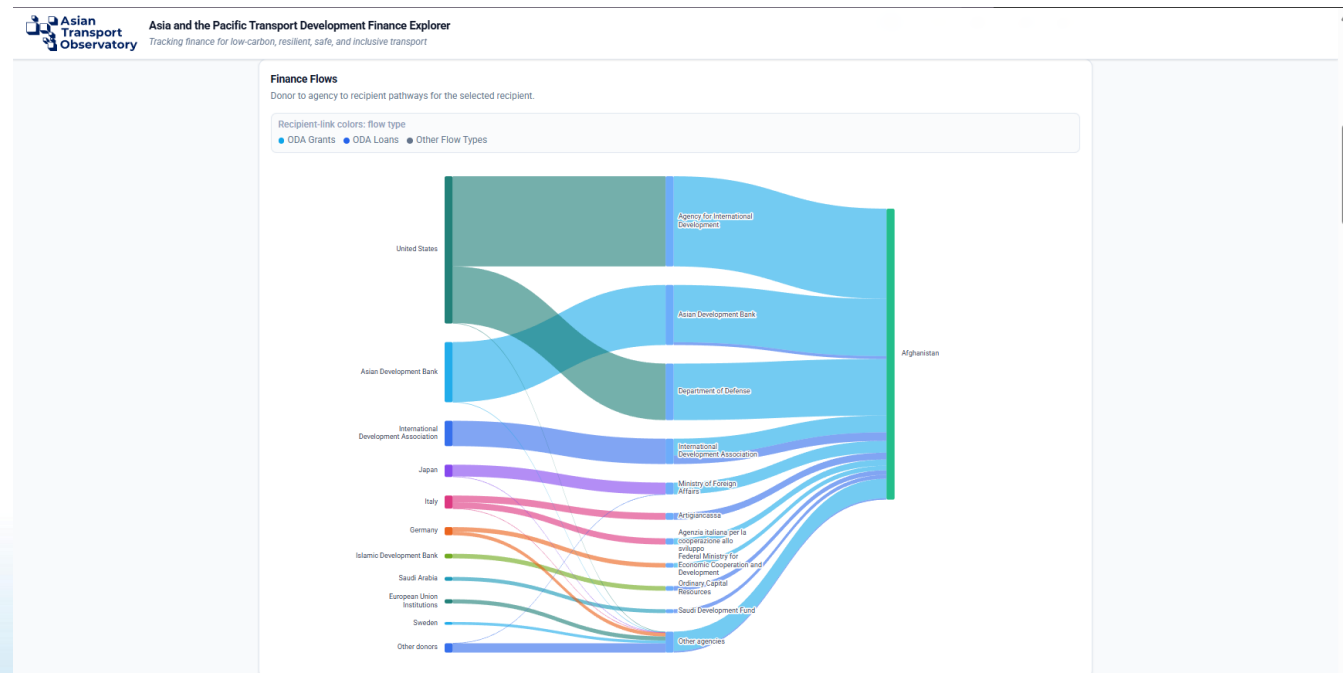
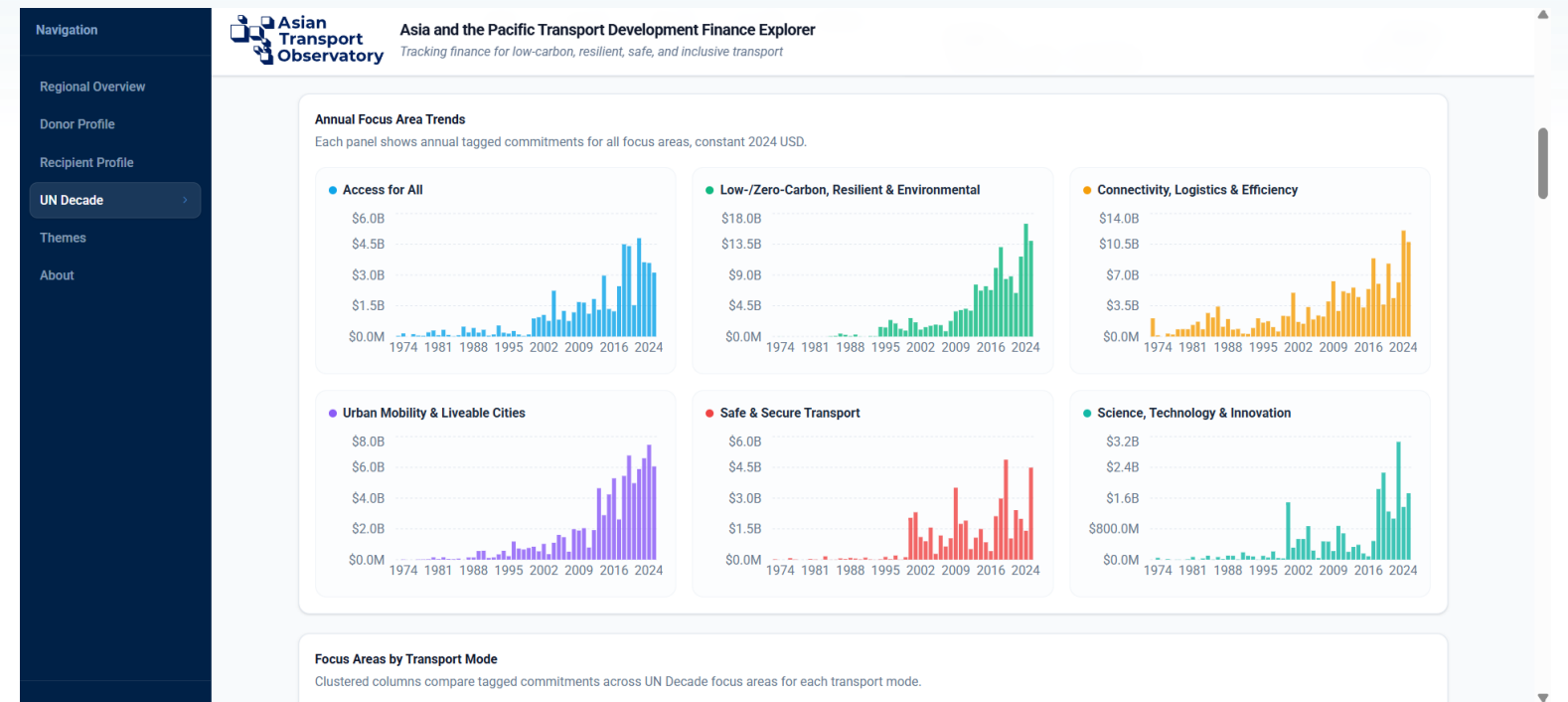
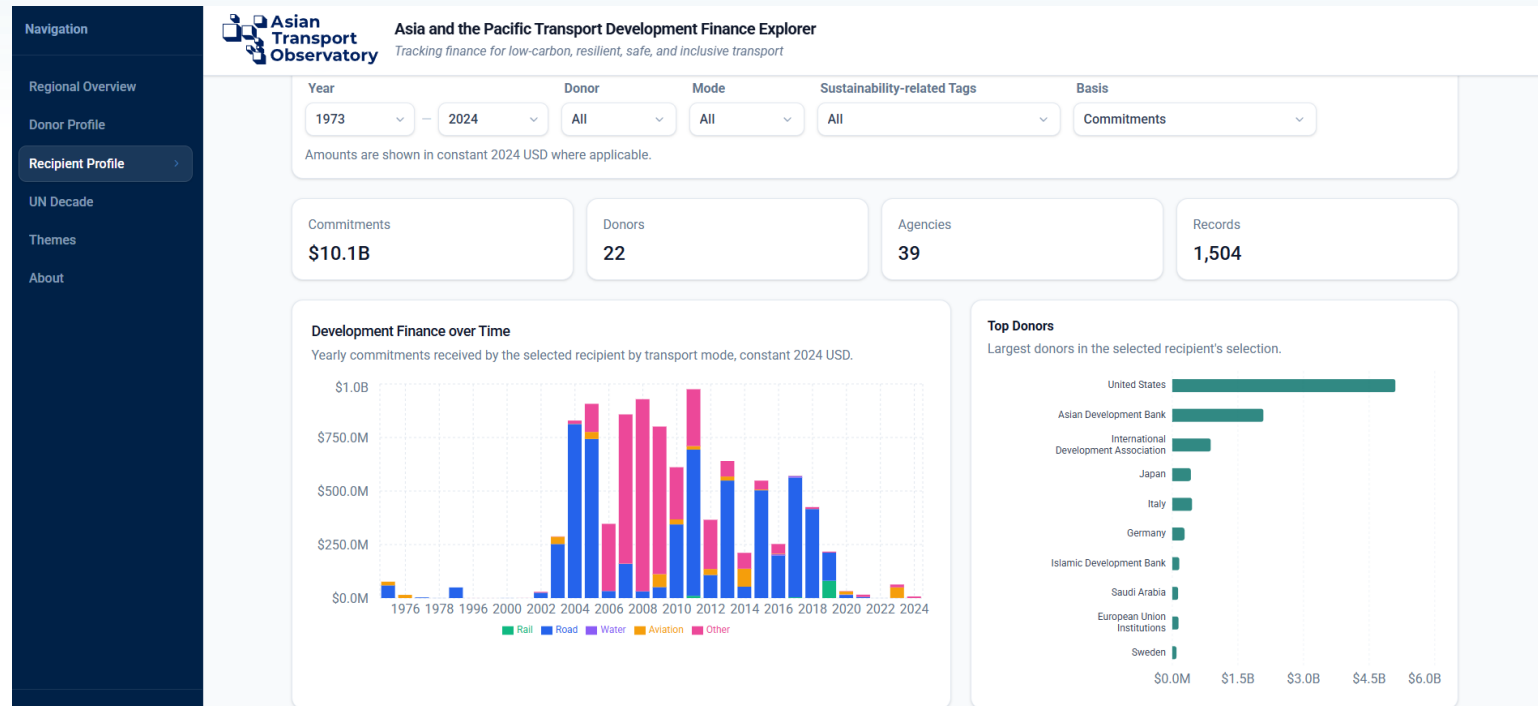
18.0 billion USD (0.7%)

Source: ATO estimates

50 Billion USD Explicit Fossil Fuel Subsidy

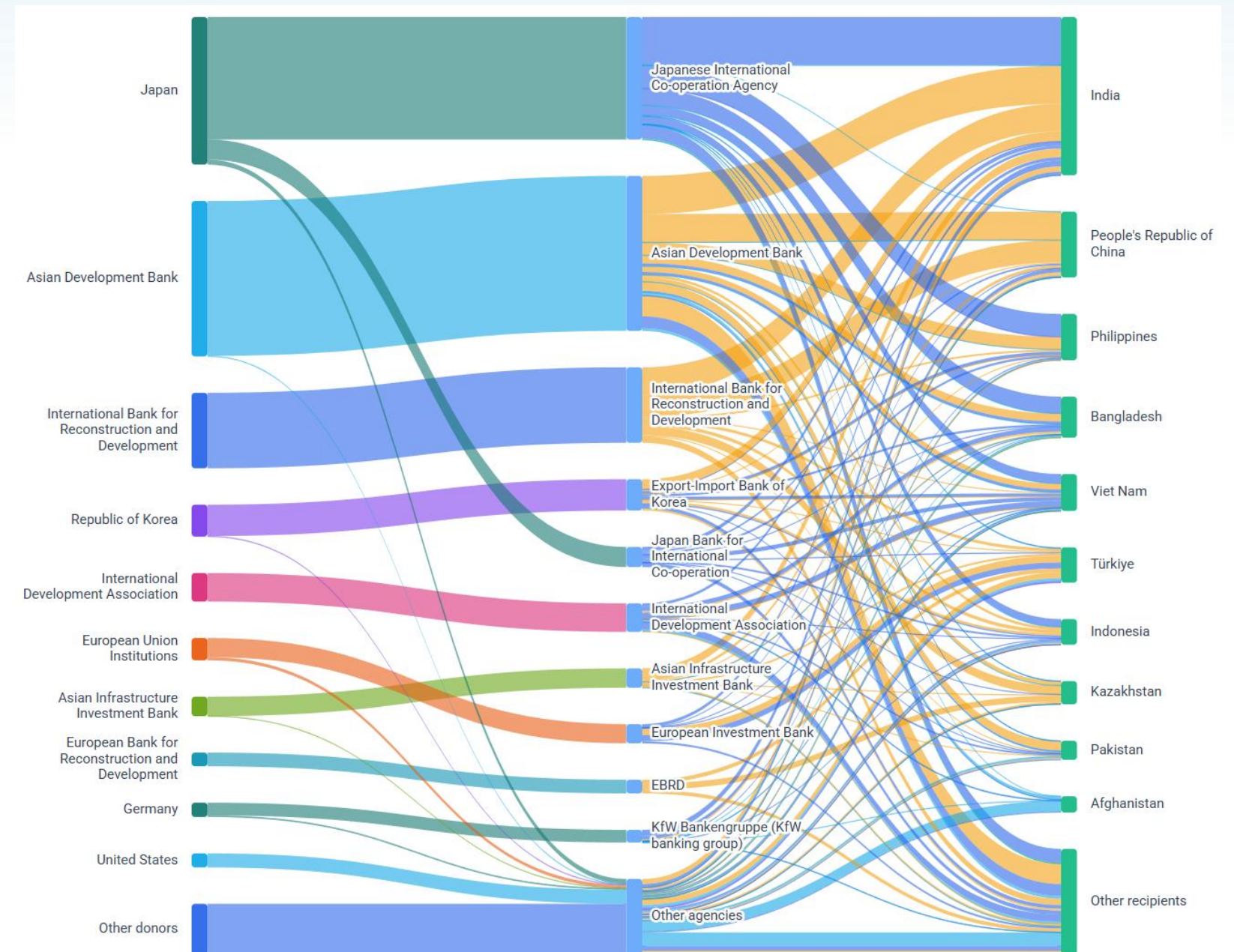


Dashboard Features



Development Finance is getting concentrated

- Official assistance to transport has grown since 2000, but it remains concentrated in a small set of recipient economies.
- Nine economies absorbed 78% of official assistance in 2000–2010.
- By 2021–2024, the same group's share had risen to 84%.

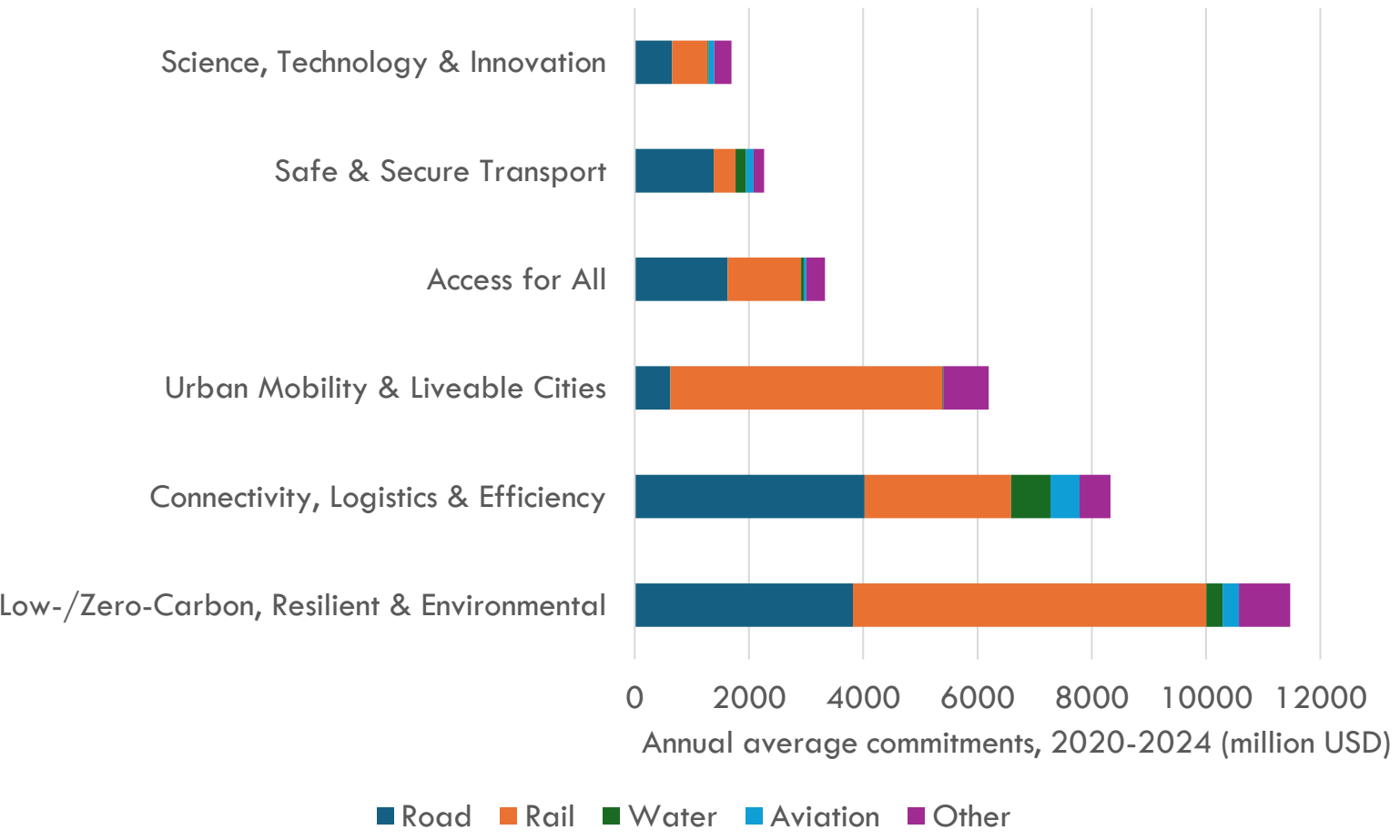
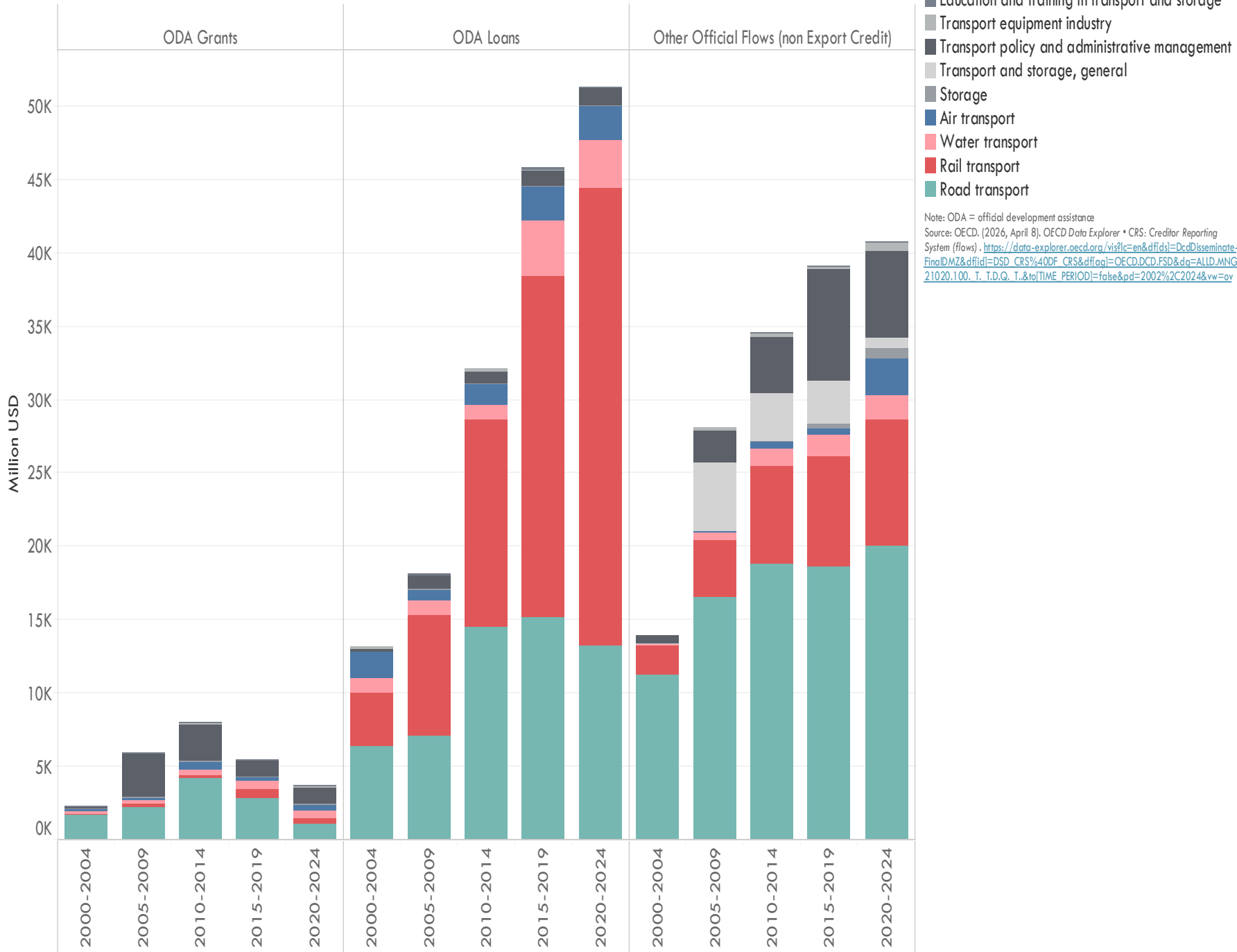


Development finance to the transport sector 200-2024, Asia-Pacific

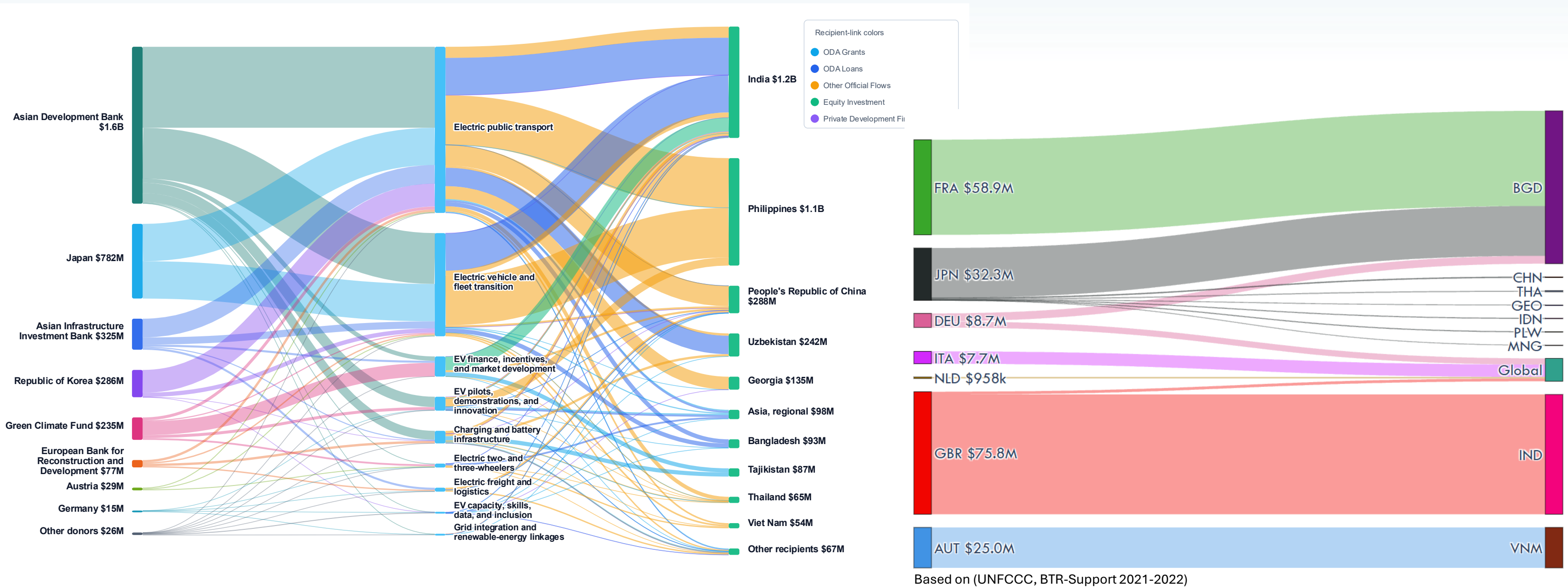


Shift in funding focus

Development financing to the transport sector



E-mobility Development Aid



Development finance to E-mobility (2015-2024)

- ~ 330 million per year on electric-mobility compared to 18.7 billion per year on transport total (2015-2024)
- Equivalent to 1.75% of annual aid to transport going to e-mobility



ASIA AND THE PACIFIC TRANSPORT FORUM 2026

FROM PRIORITIES TO ACTION

ADB



Thank you

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