

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

Sudhir Gota and Alvin Mejia





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



2.6 Trillion

2.3%

of LMIC GDP, every year,
from 2025 to 2035

8

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

3×

the annual investment
in the next decade

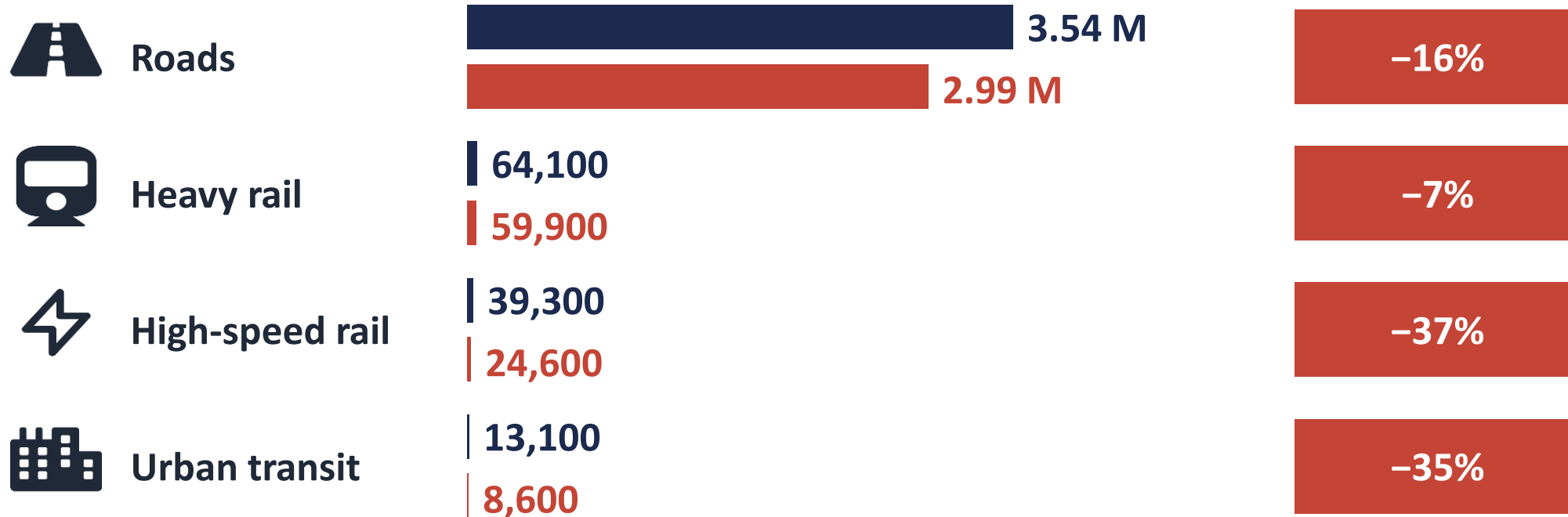
2035 Infrastructure Outlook

WHAT'S BUILT · KILOMETRES ADDED

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

2015–2025

2025–2035



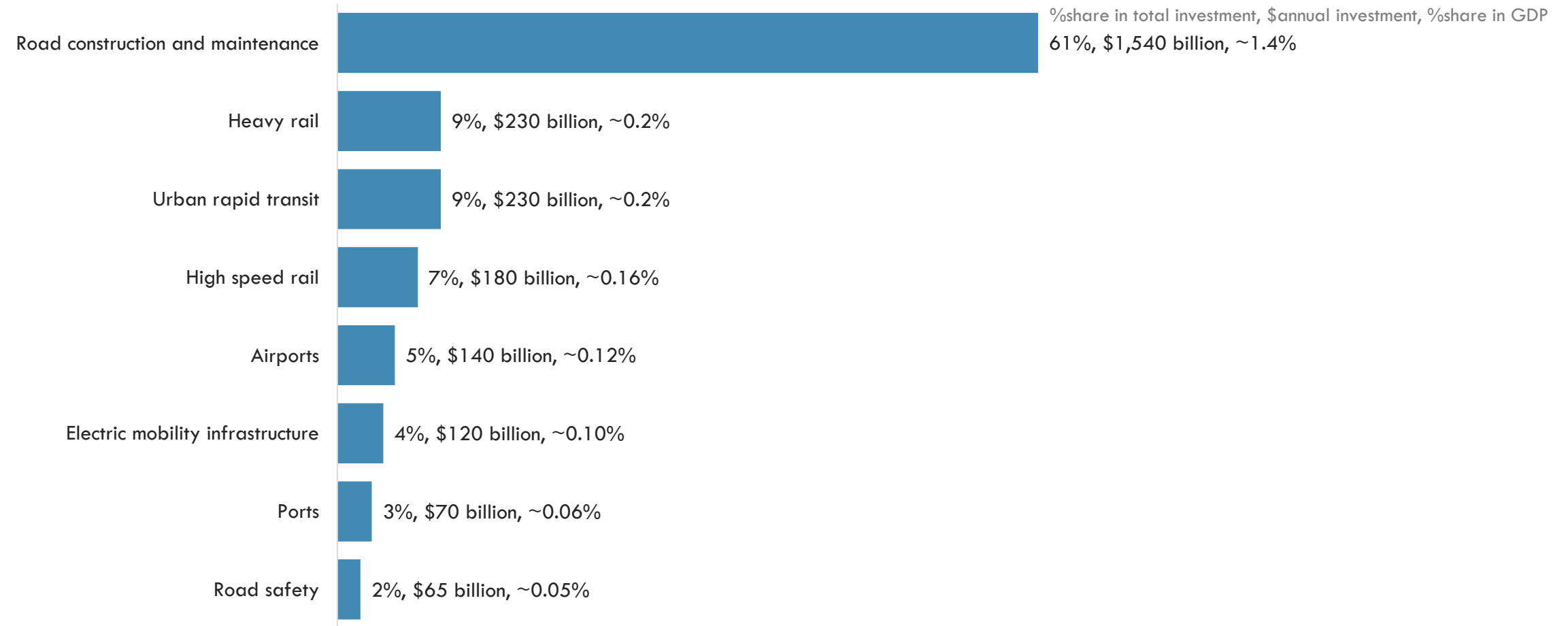
TOTAL (all modes)

3.66 M km

→ 3.08 M km

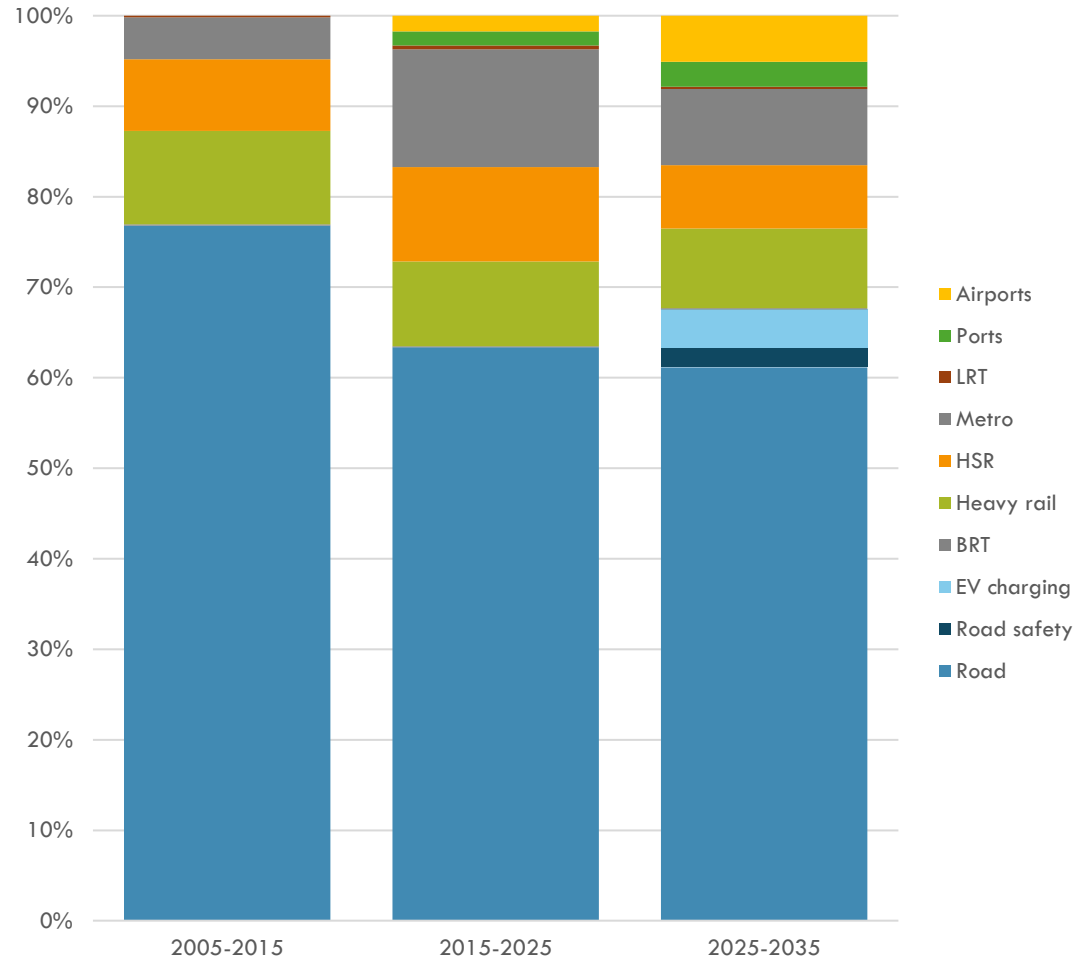
Where does 2.6 trillion/year USD go?

Share in LMIC investment

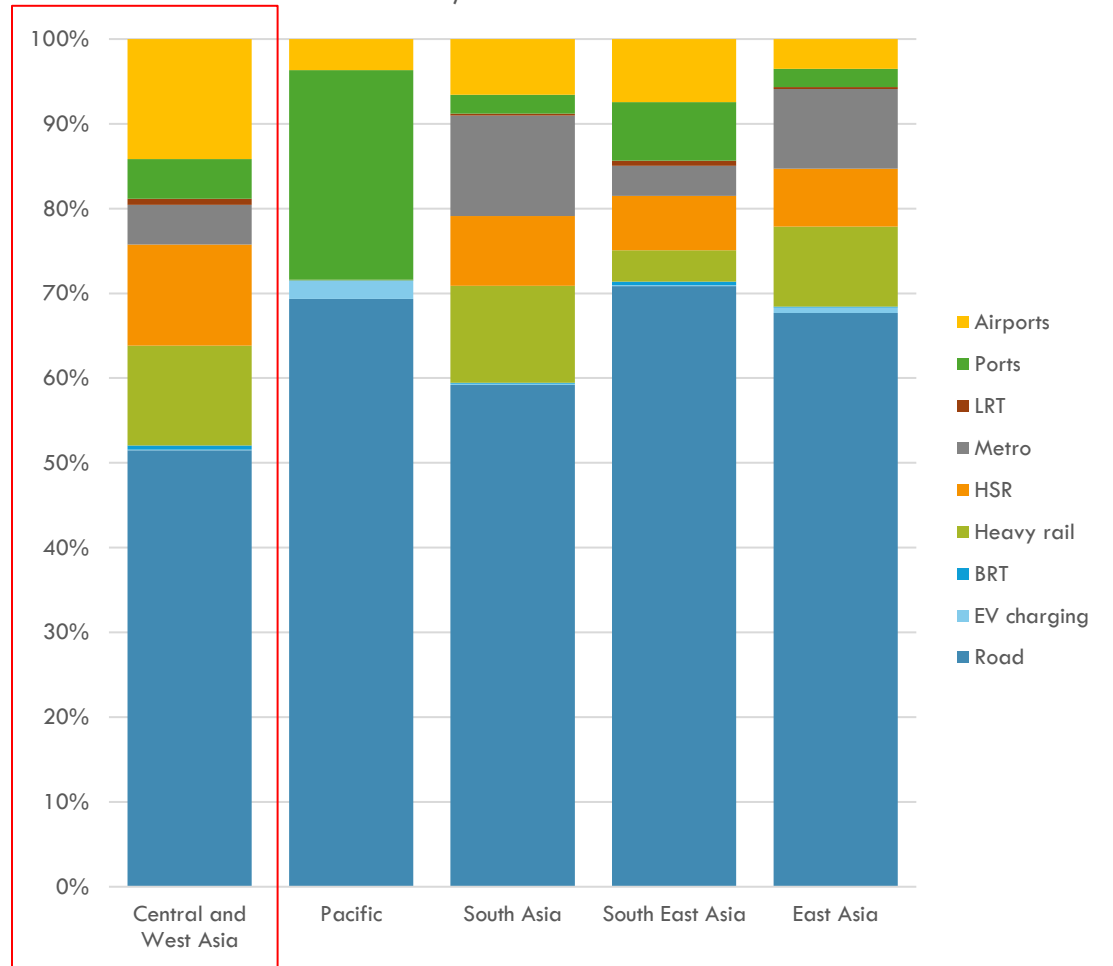


Investment outlook

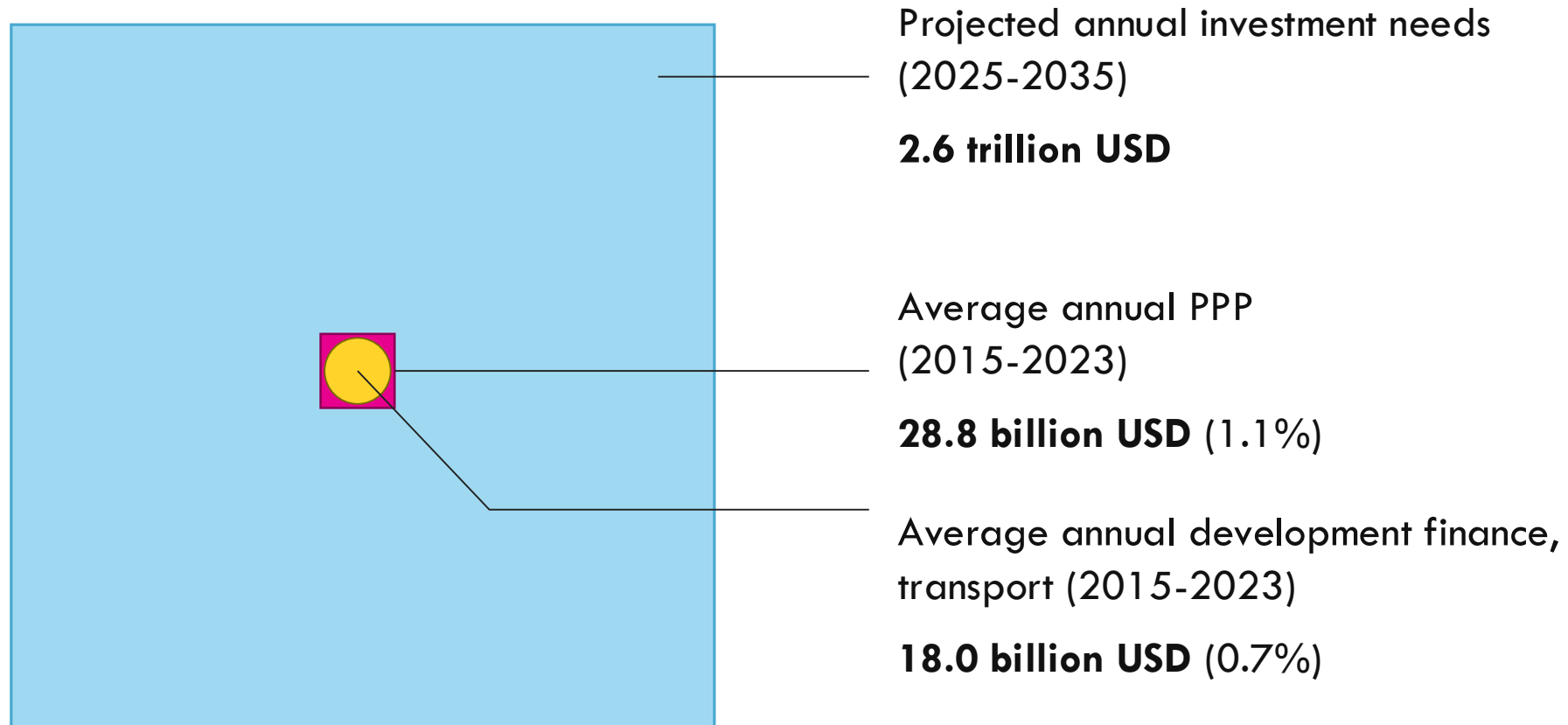
Transport infrastructure investment in LMIC, share by mode



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



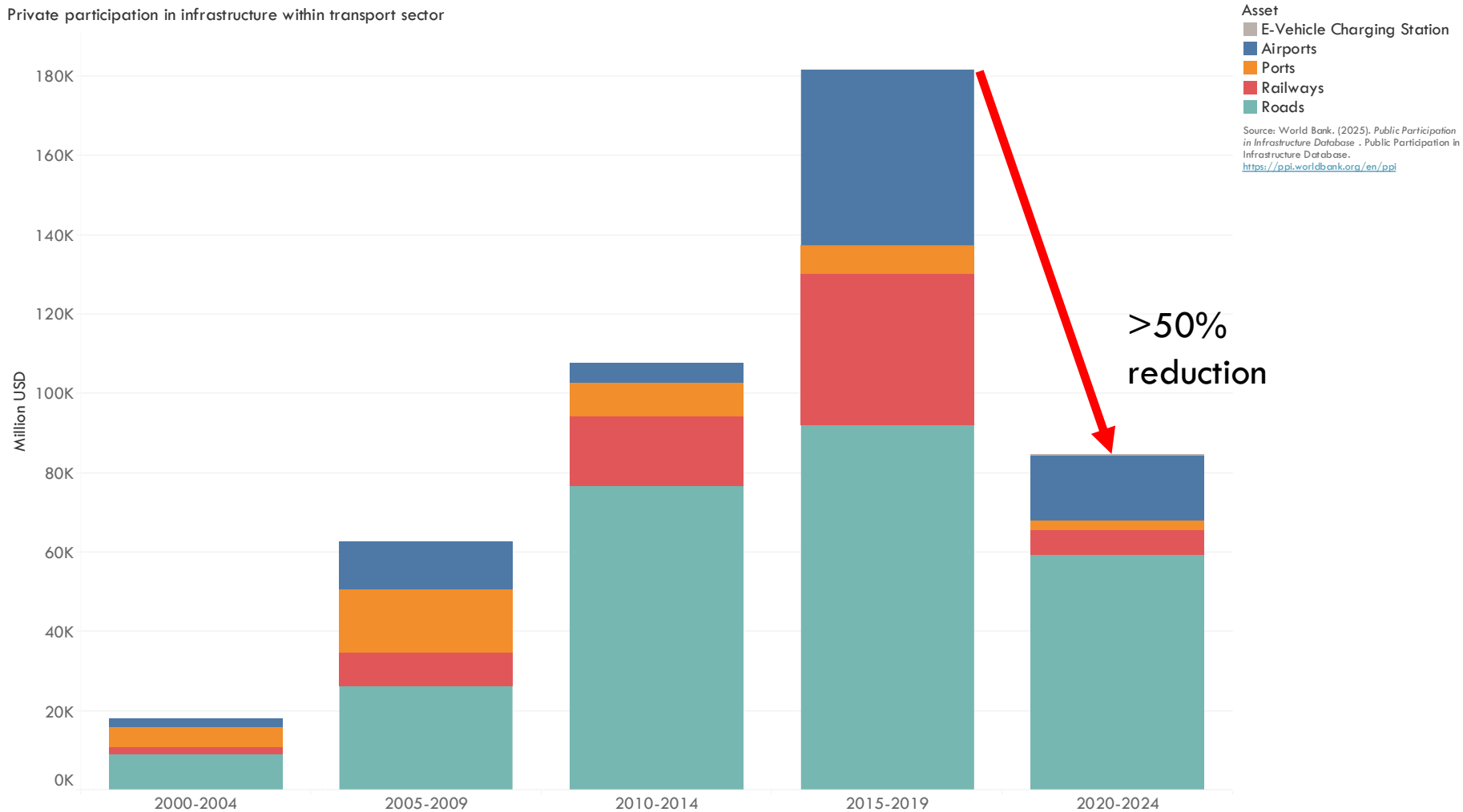
Investment Gap



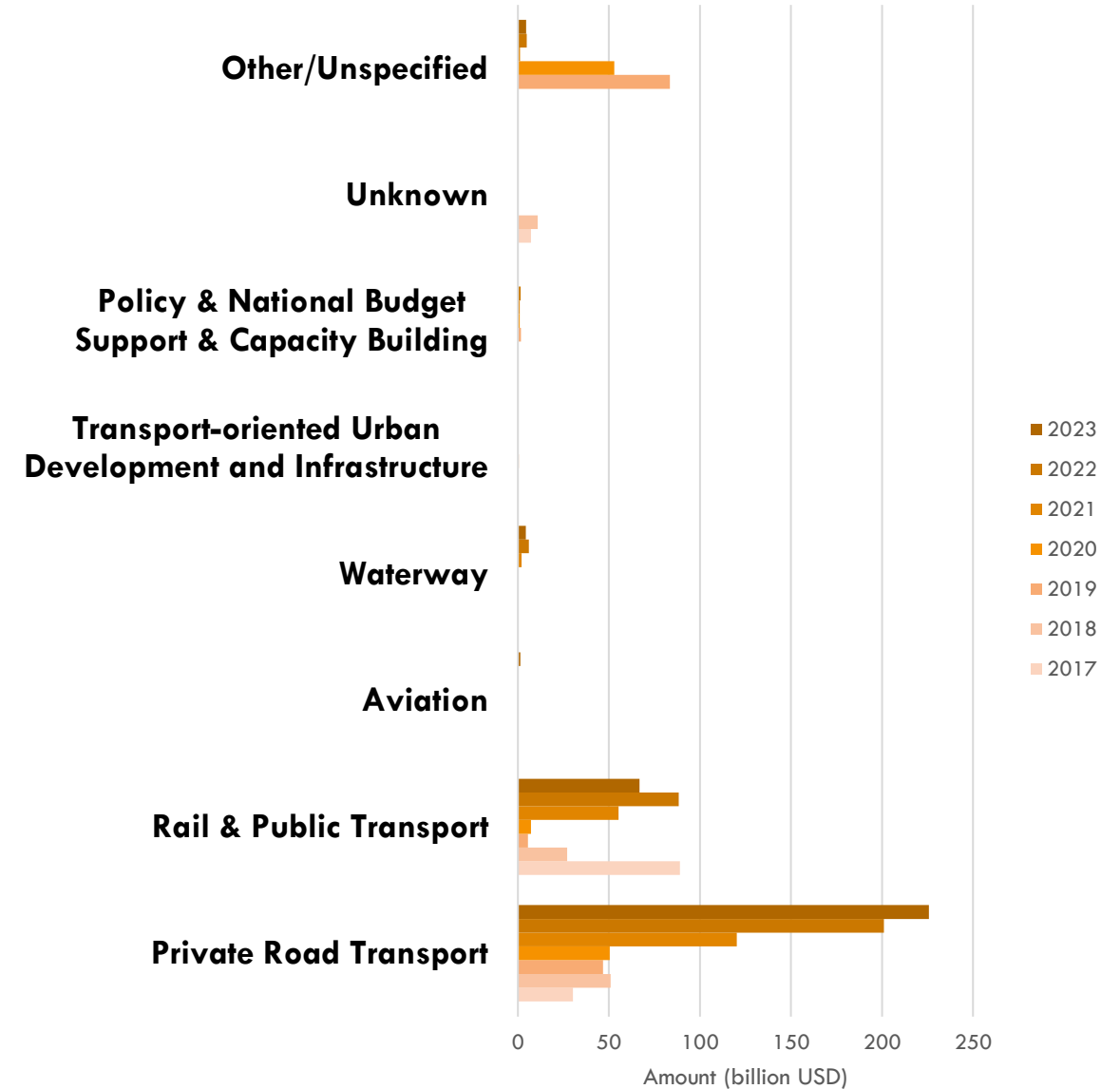
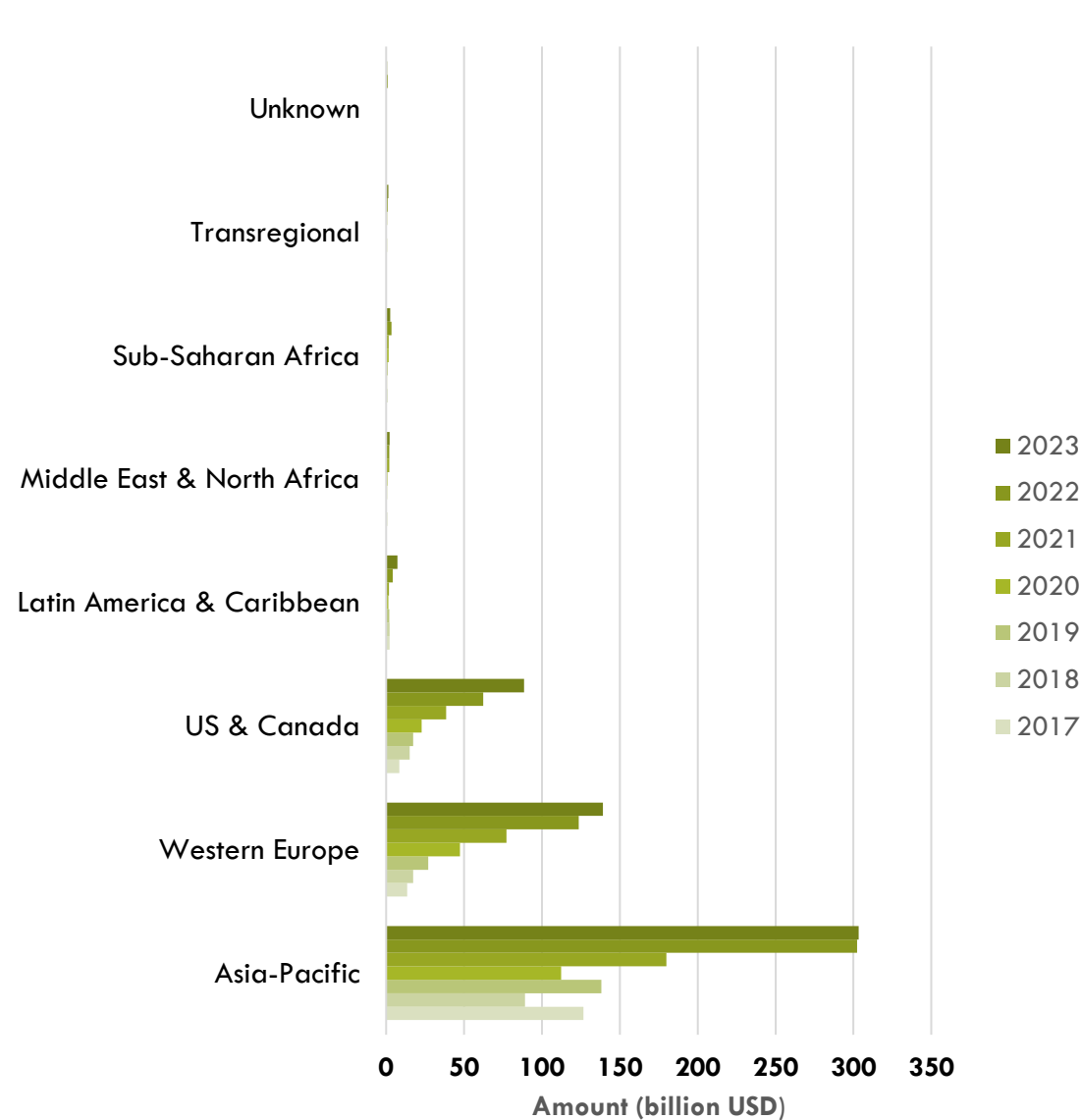
50 Billion USD Explicit Fossil Fuel Subsidy

Private Participation in Transport Infrastructure

Private participation in infrastructure within transport sector



Climate Finance

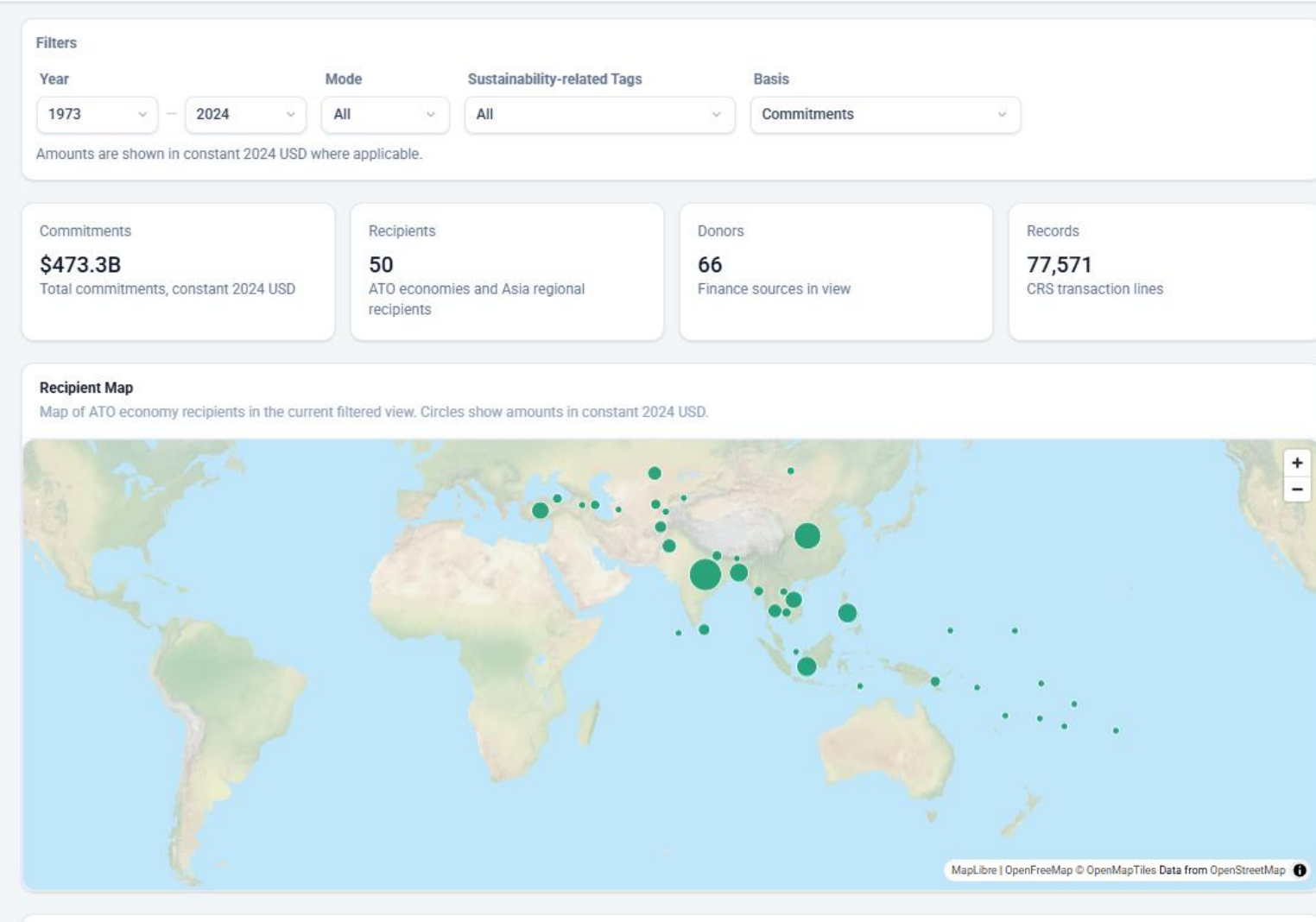


Development Finance Explorer

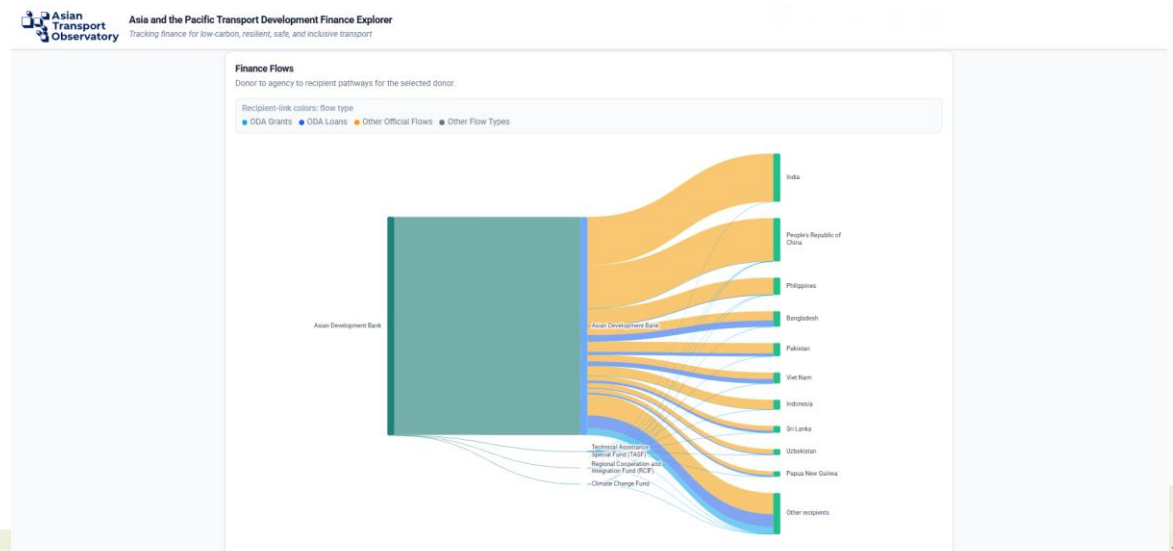
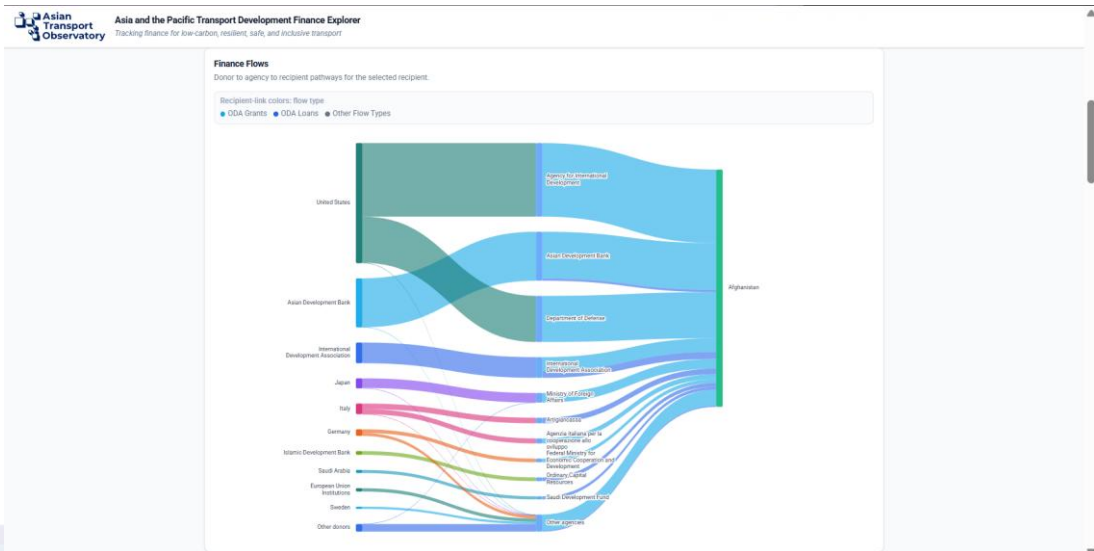
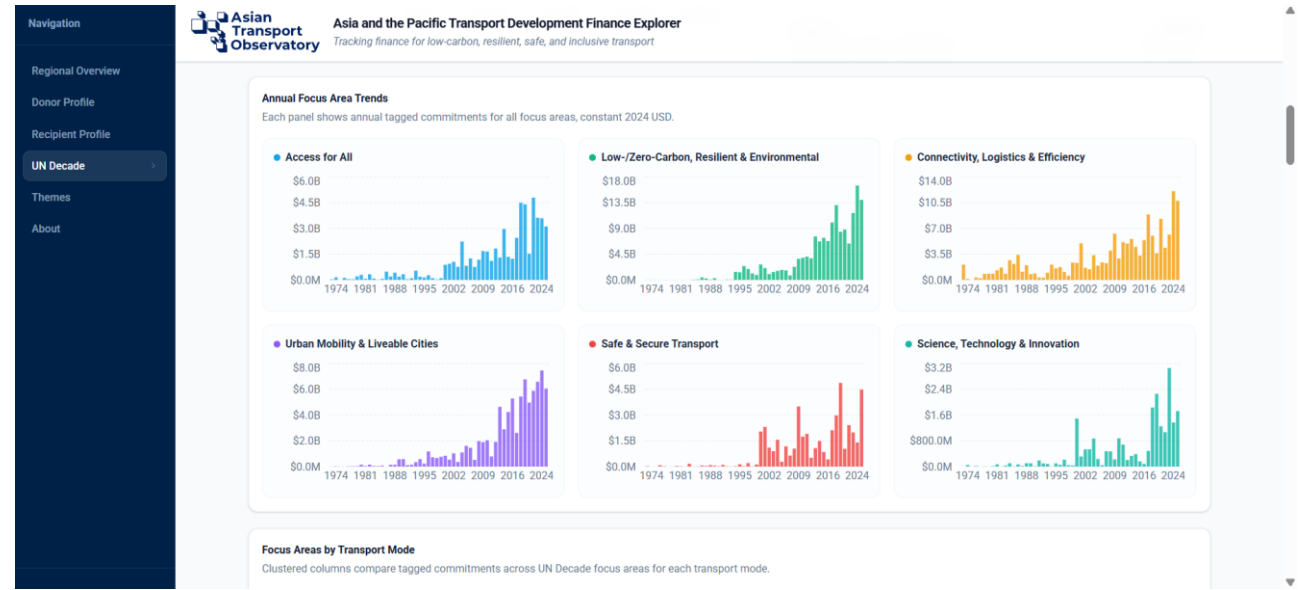
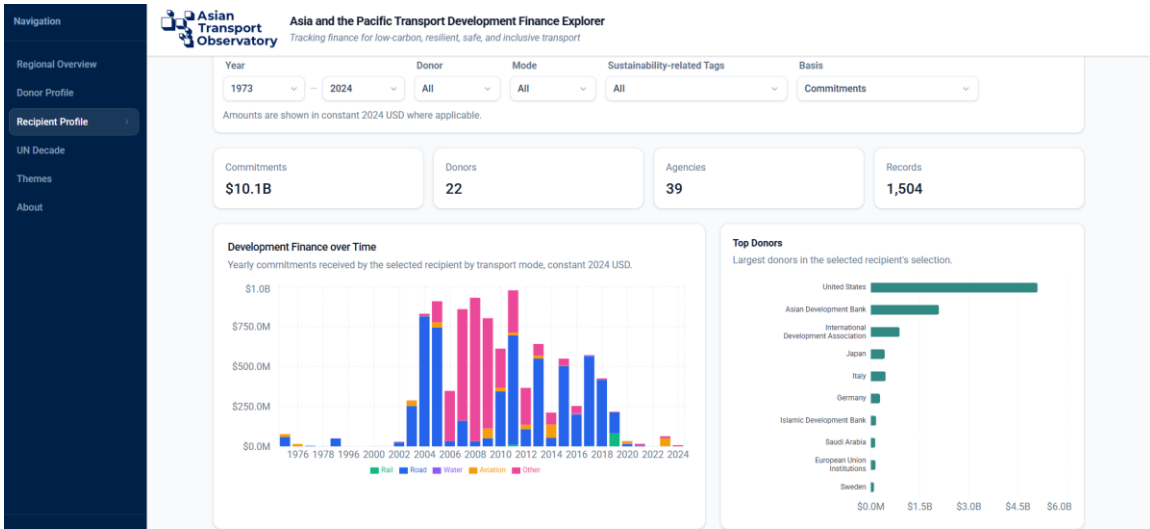
- Tracks transport commitments and disbursements across donors, recipients, modes, and years
- Covers 66 donors, 50 recipients, and 77k+ CRS fact records for Asia-Pacific for period 1973-2024



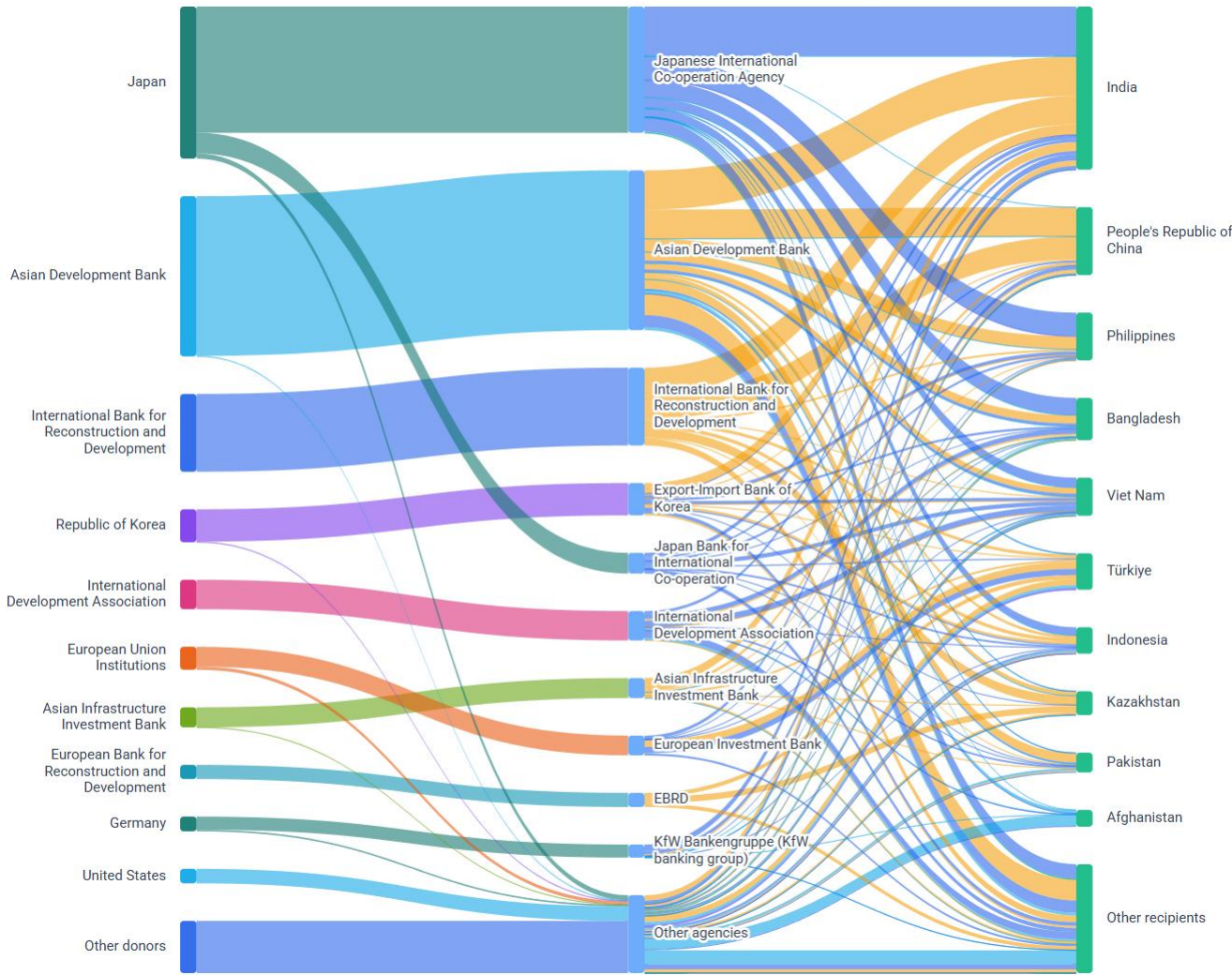
Asia and the Pacific Transport Development Finance Explorer
Tracking finance for low-carbon, resilient, safe, and inclusive transport



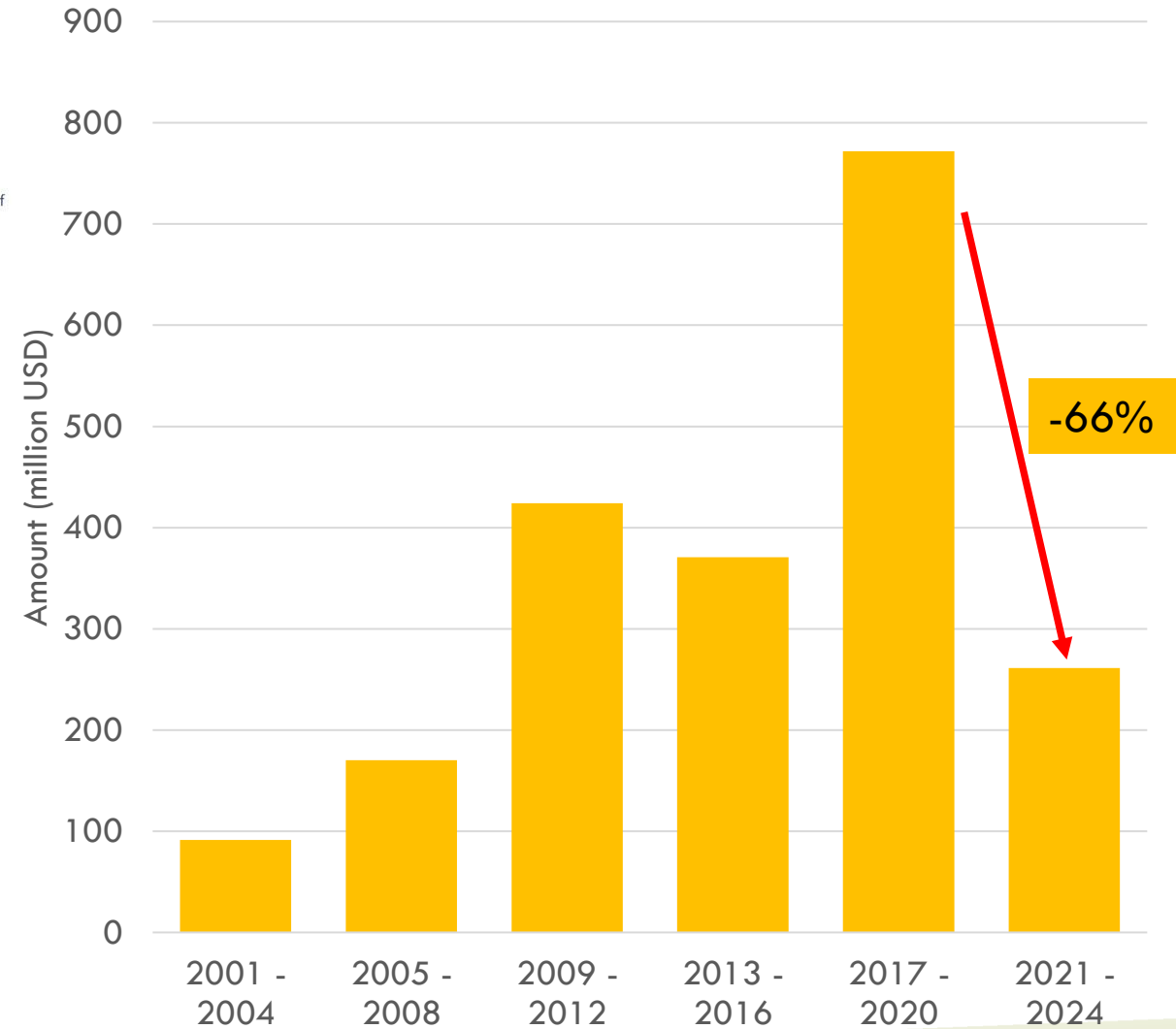
Dashboard Features



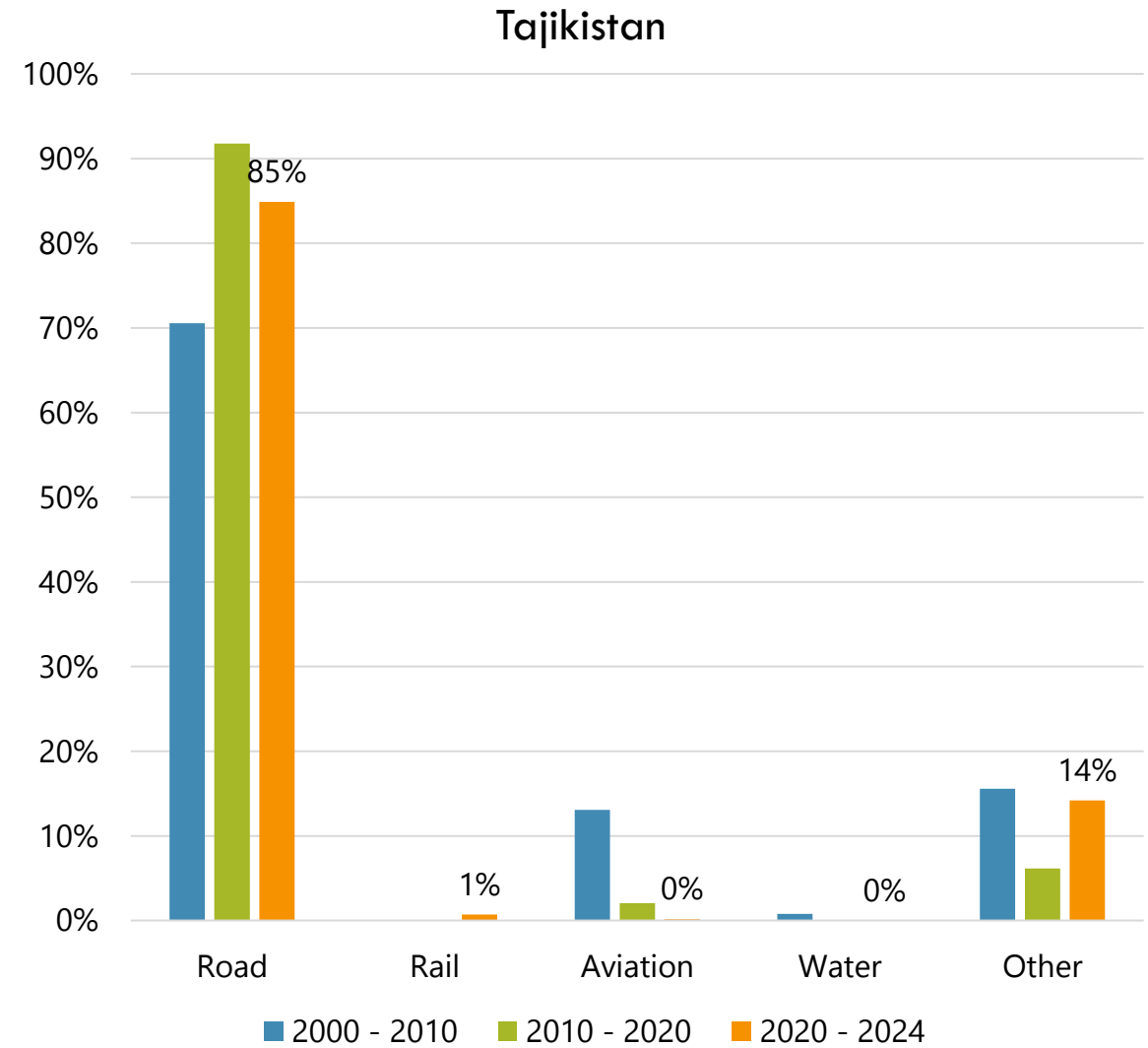
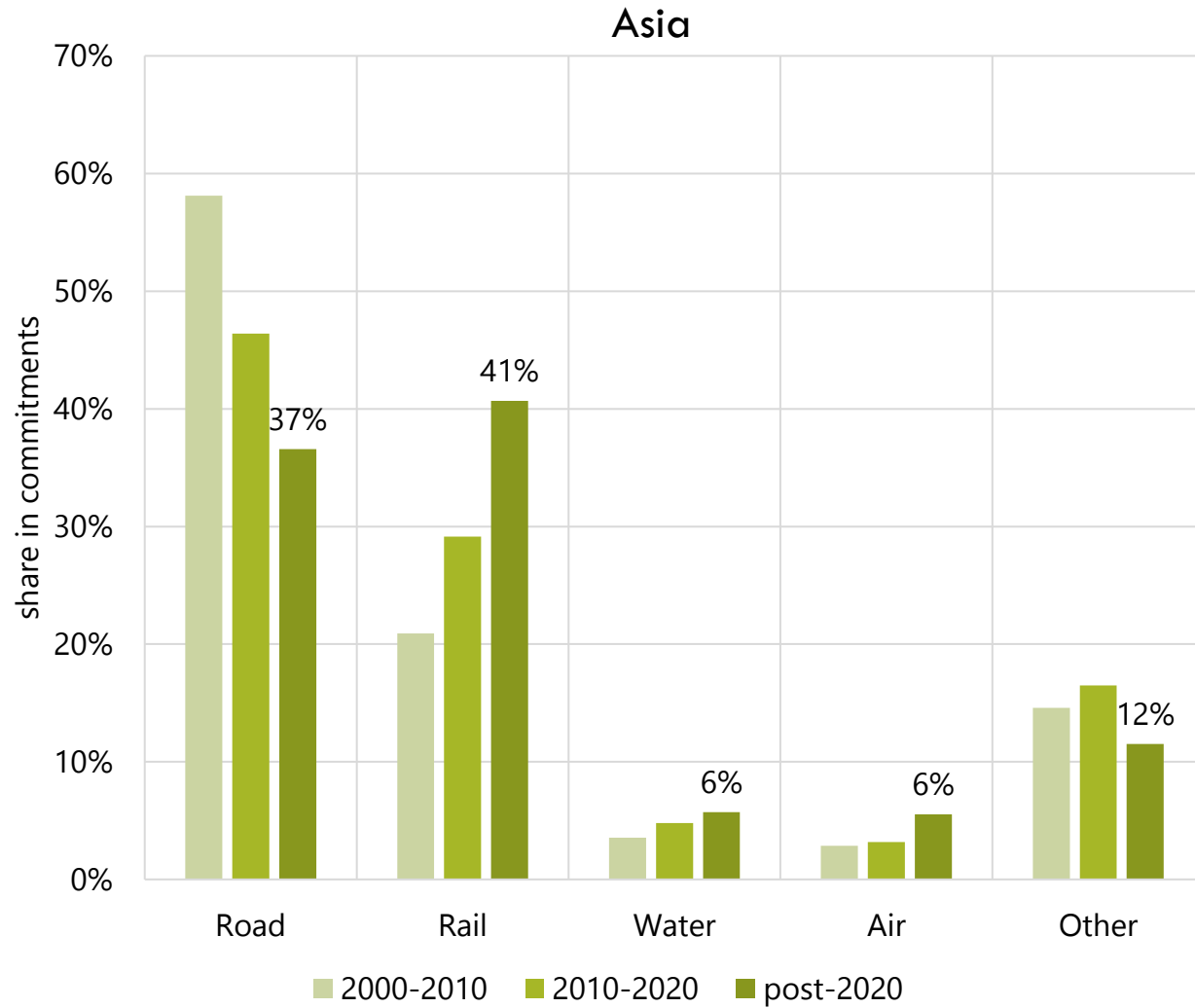
Development Finance is getting concentrated



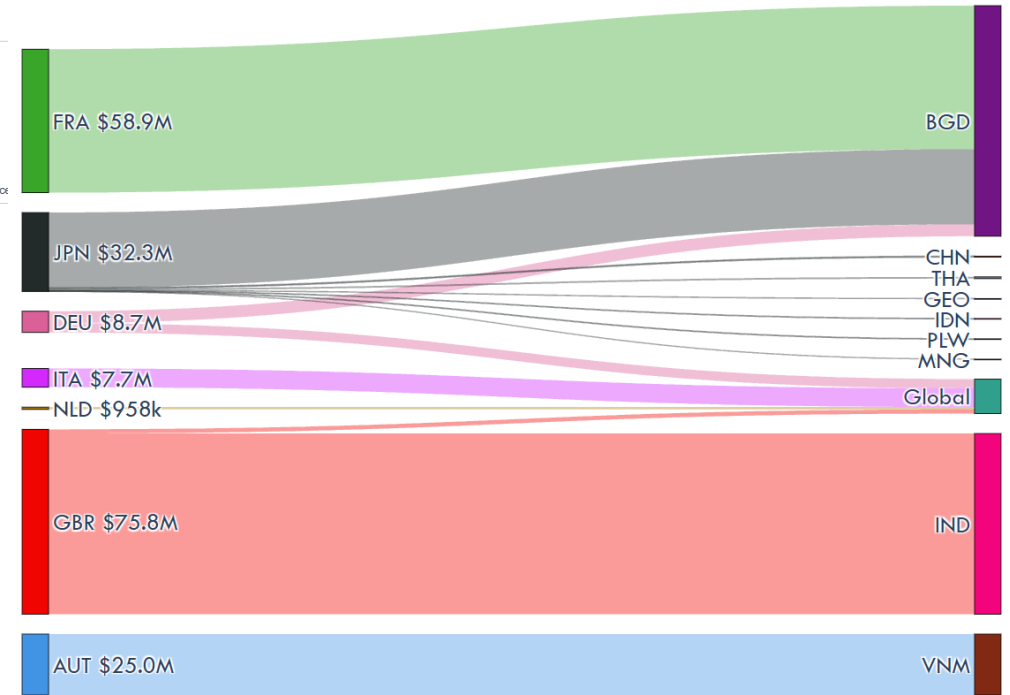
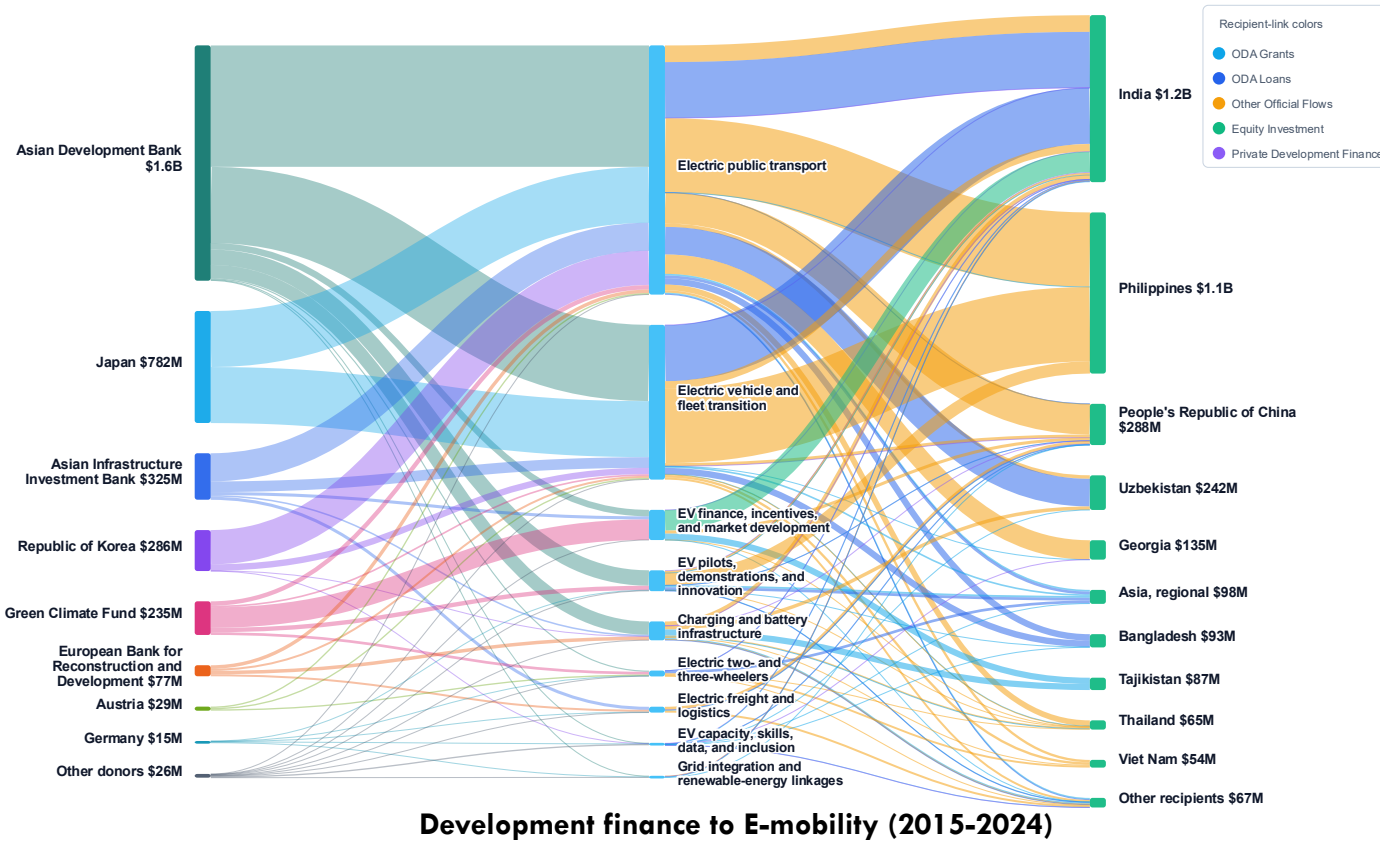
Transport development aid, Tajikistan



Shift in funding focus



E-mobility Development Aid



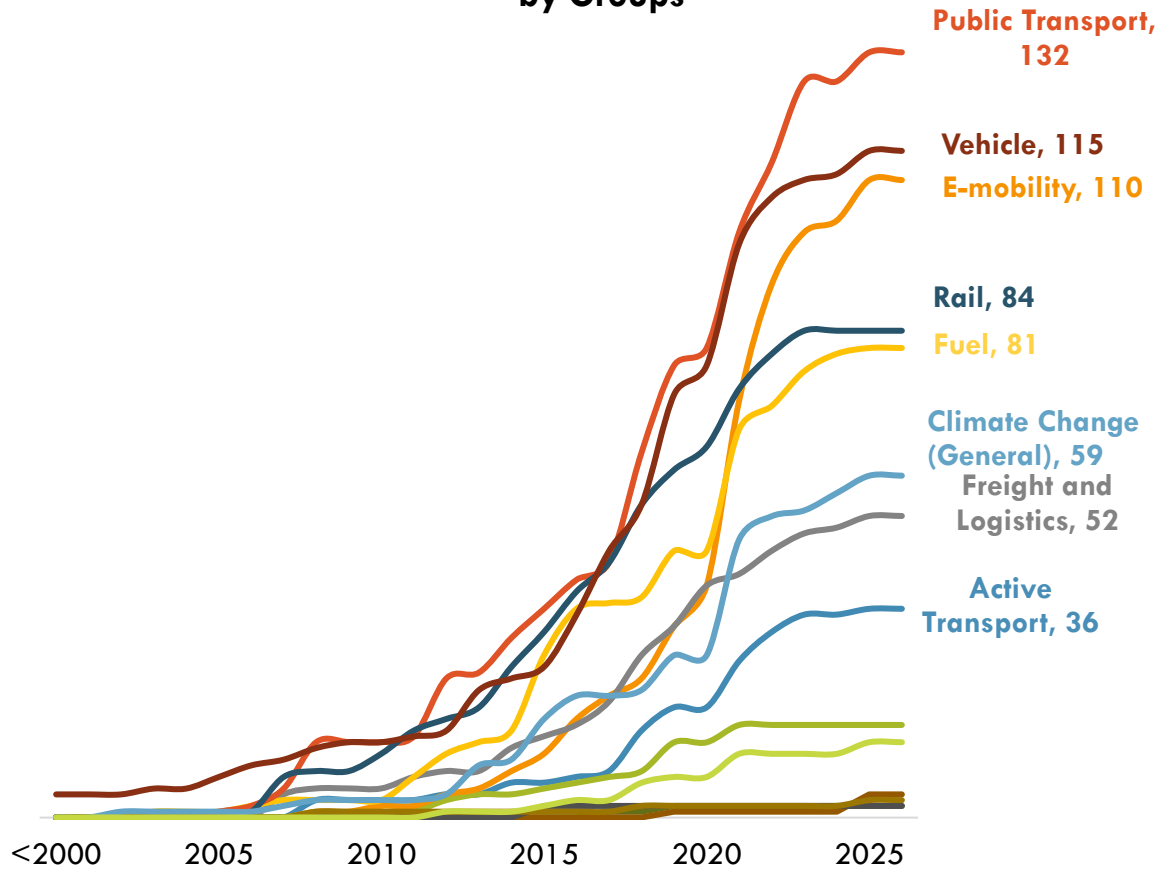
Based on (UNFCCC, BTR-Support 2021-2022)

2% of transport related funding (11.2 billion USD)

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

Tajikistan Low Carbon Transport Policies

Cumulative Low Carbon Transport Measures in Tajikistan by Groups



 <p>1</p> <p>Electrify the fleet</p> <p>≈ 1M EVs by 2050</p>	 <p>2</p> <p>Rail and transit</p> <p>15% rail by 2050</p>	 <p>3</p> <p>Fuel-economy standards</p> <p>Euro 6 + CO₂ limits</p>	 <p>4</p> <p>Finance and carbon price</p> <p>\$10–30/tCO₂ by 2030</p>
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90%

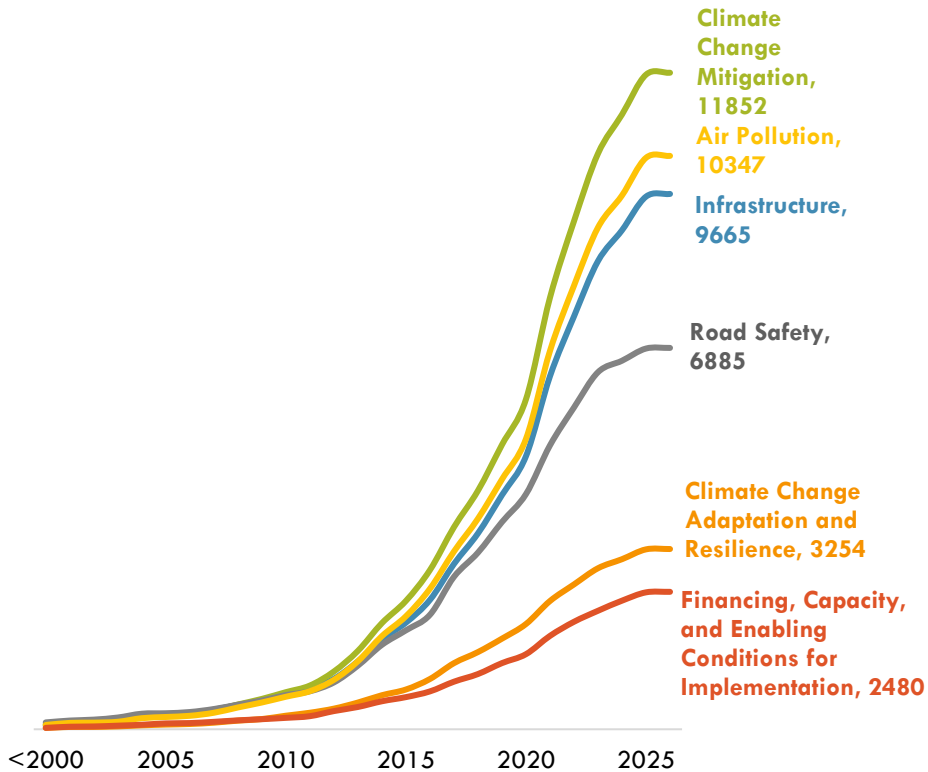
potential fall in transport emissions by 2050, against 2019, under the Low-Carbon Development Scenario

2010–2030, 893 Million USD, (including additional projects)

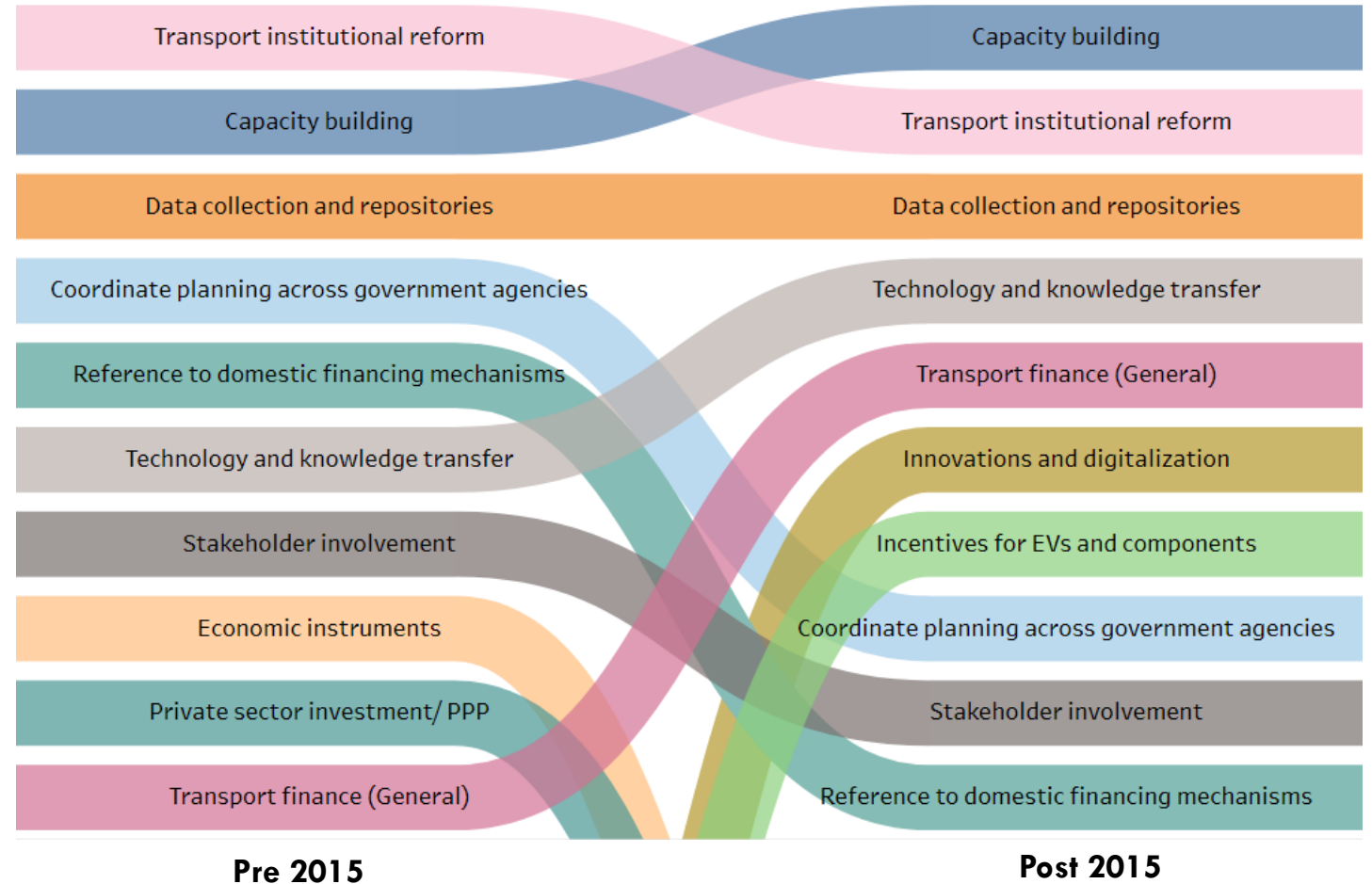
3 Billion USD/Year, 3% of GDP

What gets measured gets financed?

Cumulative Measures + Targets across Themes



Top 10 Policy Measures in the theme Financing, Capacity, and Enabling Conditions for Implementation



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

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