Follow-up of transport policy objectives 2025

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TRANSPORT ANALYSIS

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Summary

The Overall Transport Policy Objective

The transport policy objective is to ensure a socio-economically efficient and long-term sustainable transport solution for the citizenry and business community of all of Sweden.

Transport Analysis assesses that society has not moved towards a long-term sustainable transport system from all relevant perspectives. There are both key and supplemental indicators that have trended negatively, and their different aspects cannot be compensated by the positive development of other indicators.

In 2024, Sweden's transport system was affected by weather-related incidents, including snow chaos on the E22 in January, a derailment on the Malmbanan in February, and flooding due to snowmelt and heavy rain. The E45 road was washed out near Lilla Edet, and another snowstorm hit the E22 in November. Despite this, the weather-related impact was less than in 2023.

The war in Ukraine and the Middle East, the climate crisis, inflation, and global elections have created worldwide uncertainty. Election outcomes showed weaker support for ambitious climate policies, particularly in the EU, though the "Fit for 55" package remains largely in place. A political shift in the U.S. under Donald Trump negatively affects climate ambitions and creates trade tensions.

Transport is influenced by conflicts around the Suez and Panama canals and Russia's closed airspace, which increases flight times and emissions. Istanbul is emerging as a hub for Asian traffic, while northern European airports are losing ground. The EU is responding with industrial support and strategic resource investments. Electrification of the vehicle fleet is impacted by trade conflicts, such as tariffs on Chinese EVs.

Transport system development is tightly linked to geopolitics, climate policy, and global trade. At the same time, infrastructure must support both civil and military needs. The green transition will contribute to climate targets but also brings new challenges.

Socio-economically efficient transport should internalize both direct and external costs such as air pollution, climate impact, noise, and accidents. Current cost imbalances indicate excessive truck use and urban car traffic. In rural areas, traffic bears more of its cost. For EVs in rural areas, traffic may even be over-internalized.

Transport system development contributes to Sweden's progress towards several UN Sustainable Development Goals (Agenda 2030), such as reductions in fatalities and serious injuries. GHG emissions have generally declined since the goals were adopted but increased sharply in 2024.

When compared to last year's report, three indicator assessments are changed:

- More people are exposed to noise levels above health thresholds, lowering the assessment of "Impact on People's Living Environment."
- Reduced domestic air access worsens "Accessibility – Other Passenger Transport."
- Decreased driving costs and relatively stable public transport prices compared to income developmenmt in lower-income groups improve "Financial Affordability of Transport."

All other indicator assessments remain unchanged. All assessments are shown in Figure A.

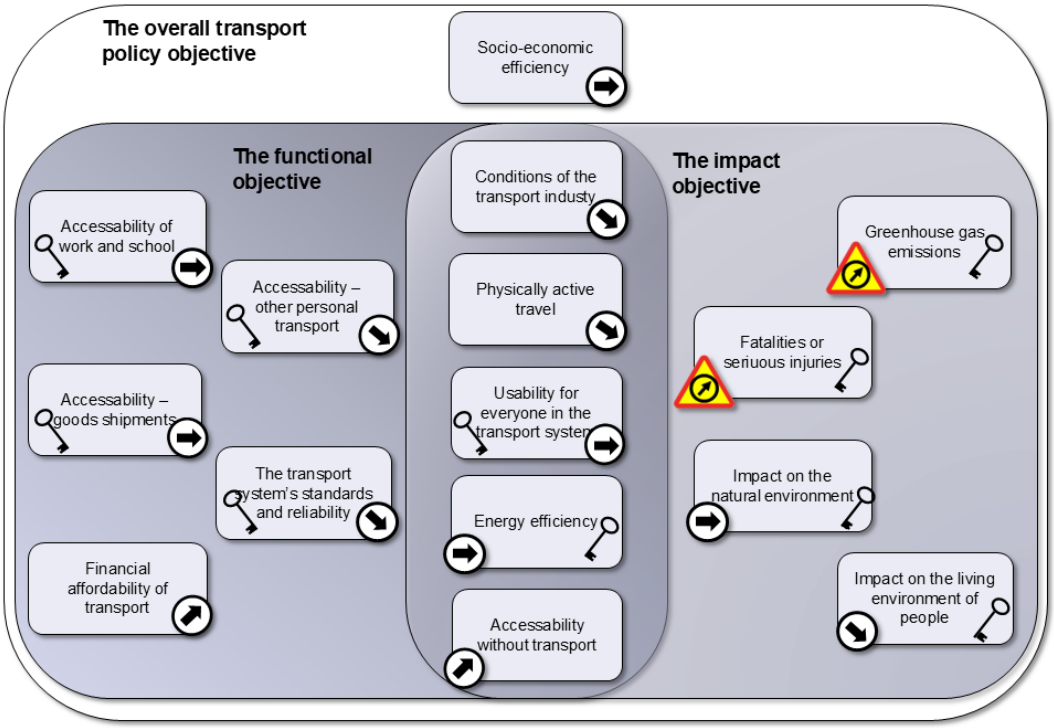

Figure A: Trends of the 15 indicators used to assess the state of the transport system. An upward arrow means that the indicator is trending in the direction specified by the objectives, while a downward arrow means that the indicator has trended in an undesirable direction. A horizontal arrow means that the state of the system overall is considered to be at a level equivalent to when the objectives were adopted in 2009. The warning sign is used to indicate that we believe that an intermediate objective will not be achieved in time.

The Functional Objective

The design, function and use of the transport system shall contribute to supplying everyone with basic access to transport of high quality and usability, and to driving development throughout Sweden. The transport system must be gender-equal, meeting the transport needs of men and women.

The status of the functional objective has developed negatively since the goals were adopted. Particularly concerning is the continued decline in *The Transport System's Standards and Reliability*, During 2024, a year with normal rail traffic, the negative trend of decreasing reliability of rail transport continues. Road traffic shows a similar trend, which signals a transport system not meeting basic requirements.

Accessibility to work and school and other personal transport has remained stable over time. However, interregional accessibility has declined, despite some recovery in 2023. The economic affordability of transport has improved. Perceived usability for persons with disabilities remains unchanged. The number of heavy vehicle license holders continues to decline, and their median age increases, indicating worsening *Conditions of the Transport Industry.* Accessibility for freight transport remains at 2009 levels.

Digitalisation continues to improve, increasing opportunities for *Accessibility Without Transport*. However, health risks from increased sedentary lifestyles and fewer physically active trips are emerging. There are positive signs of increased *Energy Efficiency*, particularly in road traffic, but gains are modest, and modal shift to more efficient modes is lacking.

Geographical disparities in accessibility remain significant and appear to be deepening over time. Regions with good accessibility are improving, while those with poor accessibility develop more slowly or negatively.

The Impact Objective

> The design, function and use of the transport system shall be adapted so that there are no fatalities or serious injuries and so it contributes to the overall generational goal for the environment and environmental quality goals, and to improved health.

Two key indicators – *Greenhouse gas Emissions* and *Fatalities or Serious Injuries* – show clear positive trends since 2009. However, neither is progressing fast enough to meet 2030 targets.

GHG emissions trends reversed in 2024 due to reduced biofuel blending obligations and lower fuel taxes. The share of electric and plug-in hybrids among newly registered vehicles declined, while exports of relatively new EVs hit a record high. Although the share of EVs in use continues to rise, the pace of electrification is slowing. Current trends suggest the national 2030 GHG reduction target will not be met.

Energy efficiency improvements are mostly seen in road traffic. Road transport's share of freight has increased, and no significant shift to more energy-efficient modes appears in the statistics. A slight reversal was noted in 2023, with road freight’s share decreasing marginally.

Since 2024, new sub-measures from the Swedish Transport Administration related to landscape-adapted infrastructure are included under the *Impact on the Natural Environment* indicator. Additional measures show a mixed picture: some trends are positive, others negative.

Accidents involving wildlife and reindeer continue to rise significantly faster than traffic volumes. A positive trend is seen in reductions of nitrogen oxide and sulfur dioxide emissions, and fewer observed oil spills. Therefore, the impact on nature is considered similar to 2009.

The *Impact on the Living Environment of People* indicator is now assessed to have had a negative development over time due to increased noise exposure, stemming from both a growing urban population and rising traffic. Transport Analysis thereby concurs with assessments from the Transport Administration, the Swedish National Board of Housing, Building and Planning and the Swedish Environmental Protection Agency.

Particle and nitrogen dioxide levels are trending positively. However, significant regional disparities remain across all measures.

In 2024, 362 people died in the entire transport system. Since 2007, fatalities (including suicides) have fallen by 37%. Road deaths decreased to 210 (from 229). If current trends continue, halving fatalities in road accidents by 2030 appears realistic. Rail fatalities increased from 103 to 107; to meet the 2030 target of max 48 deaths, suicide prevention is essential.

Of the supplementary indicators, only *Accessibility Without Transport* shows a positive development. Although only one key indicator trends negatively, this means that the Impact Objective has not come closer to fulfillment.

Transport Analysis is a Swedish agency for transportpolicy analysis. We analyse and evaluate proposed and implemented measures within the sphere of transportpolicy. We are also responsible for official statistics in the transport and communication sectors. Transport Analysis was established in 2010 with its head office in Stockholm and a branch office in Östersund.

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