



European Commission
DG MOVE

Swiss Confederation
Federal Office of Transport (FOT)



Observation and analysis of transalpine freight traffic flows Key figures 2019



Photo: Sigmaplan

July 2020



WALTER FUSSEIS





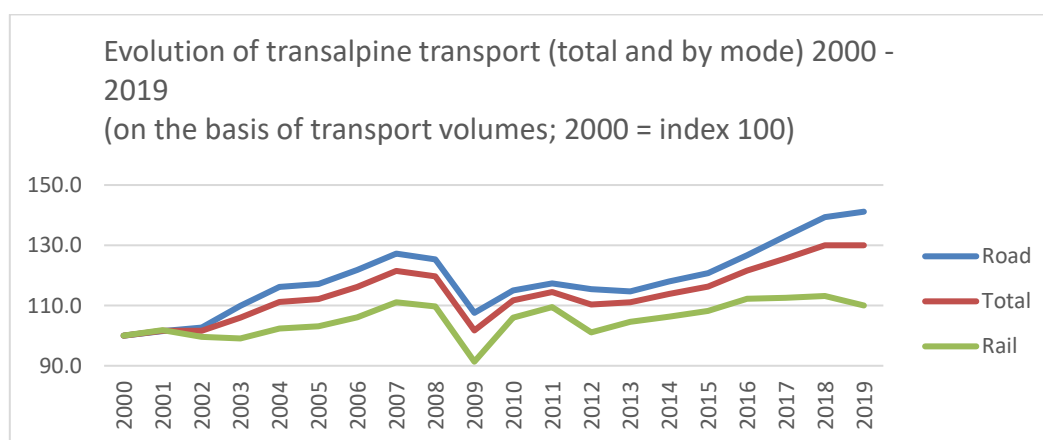
Alpine crossings covered by this report

Key findings

- At 223.5 million tonnes, the amount of goods carried across the Alps in 2019 was almost exactly at the same level as in 2018.
- This is the result of a growth of +1.3% in road transport volume and a decrease of -2.8% in transport volume by rail. Road volumes reached a new record level with 155.7 million tonnes, while rail volumes decreased by 2.0 million tonnes, to 67.9 million.
- As a consequence, the overall share of rail in transalpine freight traffic continued to fall and reached a new all-time low at 30.4% (from 31.2% in 2018). In Austria, it was also at the lowest level ever recorded (27.0%) while in France it was slightly higher than in 2018 (7.8% compared to 7.4%). In Switzerland the share of rail remained at the same level as in 2018 (70.5%).
- The evolution of rail transport volumes across the Alps varied widely from one country to the next: Austria showed a moderate decrease of -2.3% and Switzerland a notable decline of -4.6%. In contrast, the rail transport volumes in France increased by +6.9%.
- The number of heavy goods vehicles (HGV) crossing the Alps by road reached a new record level at 11.5 million, +1.2% more than in 2018. While the number of HGV crossing the Swiss Alps fell by -4.6% (to just below 900'000 HGV), it grew by +2.0% in France (to more than 3 million) and by +1.6% in Austria (to more than 7.5 million). The Brenner alone accounted for a third of all HGV crossing the Austrian Alps (more than 2.5 million).
- More and more transalpine traffic uses the Austrian crossings: Austria's share in total traffic reached a record 62.4%. The corresponding share of France increased slightly to 20.7%; that of Switzerland fell to 16.9% (2018: 32.0%, 20.3 and 17.7% respectively).

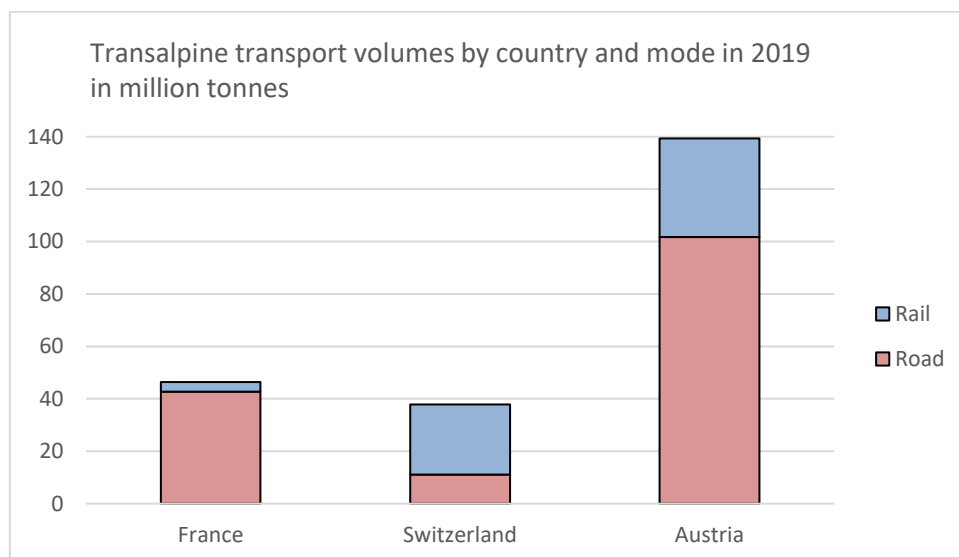
1 Transport volume

In 2019, 223.5 million tonnes of goods were carried across the Alps¹, almost exactly the same amount as in 2018. 155.7 million tonnes, almost 70% of the total amount was carried by road. The remaining 30%, or 67.9 million tonnes of freight, were carried by rail. The stagnation of transalpine transport volume reflects the quite modest GDP growth rates above all in Italy (+0.3%) and Germany (+0.6%) but also in Switzerland, France and Austria (+0.9%, +1.5% and +1.6% respectively) and in the EU28 as a whole (+1.5%).



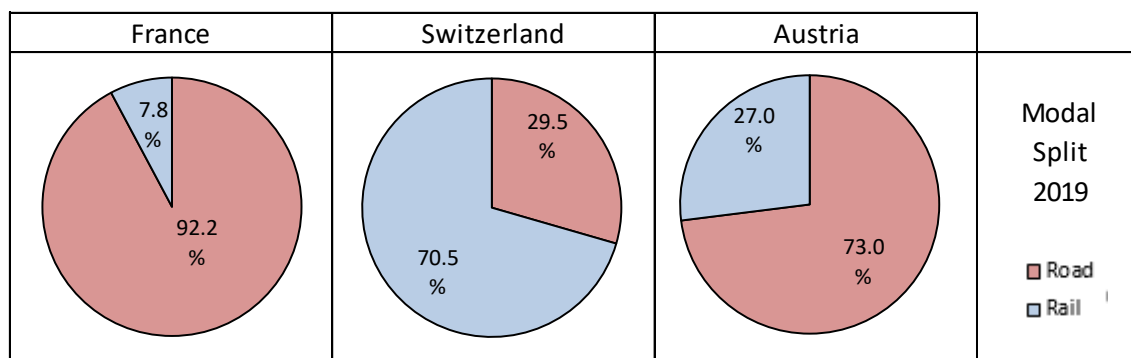
¹ See map on preceding page

The large majority of freight crossed the Alps in Austria (139.4 million tonnes or 62% of the total transport volume). French crossings assumed an amount of 46.3 million tonnes and Swiss crossings 37.8 million tonnes; 21% and 17% respectively). The share of Switzerland was 0.8 percentage points lower than in 2018 and the lowest since 1999. The share of Austria was 0.4 percentage points higher than in 2018 and the highest ever. This suggests that more and more transalpine traffic uses Austrian crossings, even if all Alpine crossings are available without restrictions.



2 Modal share

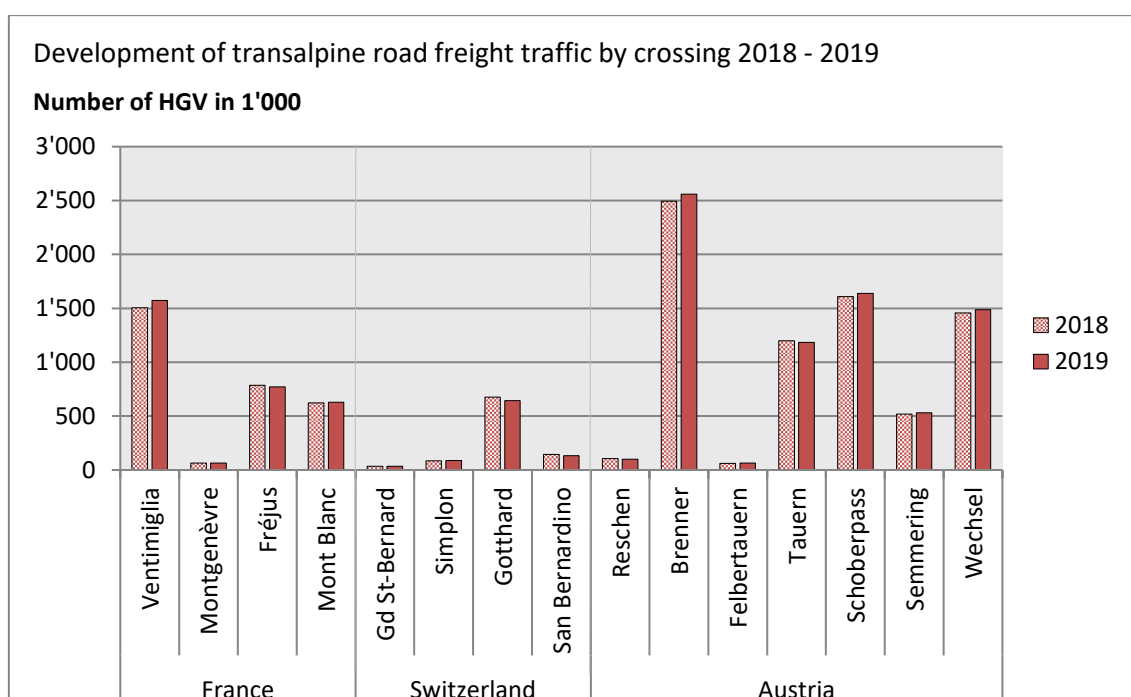
The modal share of rail on the whole Alpine arc decreased slightly from 31.2% in 2018 to 30.4% in 2019, the lowest level ever recorded. Despite the politically declared intentions, rail has failed to increase its overall market share in transalpine freight traffic over the last 20 years. In fact, in 1999, rail still accounted for more than a third (34.7%) of all freight traffic across the Alps. While the already high share of rail in the modal split in Switzerland could be kept and even slightly increased (from 68.7% in 1999 to 70.5% in 2019, the same as in 2018 and only slightly below the record level of 71.0% in 2016), rail lost around one sixth of its market share in Austria (from 32.2% in 1999 to a record low of 27.0% in 2019, following an uninterrupted decline by altogether 5 percentage points since 2013) and more than half in France (from 19.9% in 1999 to 7.8% in 2019, which occurred mostly in the years till 2009 when rail reached a record low share of 7.1%. Since then, the share of rail recovered somewhat to 9.3% in 2013 to decline again to 7.4% in 2018. The latest declining trend appears to have been interrupted in 2019).



3 Road

In 2019, 155.7 million tonnes of goods were transported by road across the Alps, +1.3% more than in 2018. Road transport volumes increased in Austria and in France by +1.8% each, but decreased notably in Switzerland (-4.8%). The distribution across the different countries was as follows: Austria 66%, France 26% and Switzerland less than 8%.

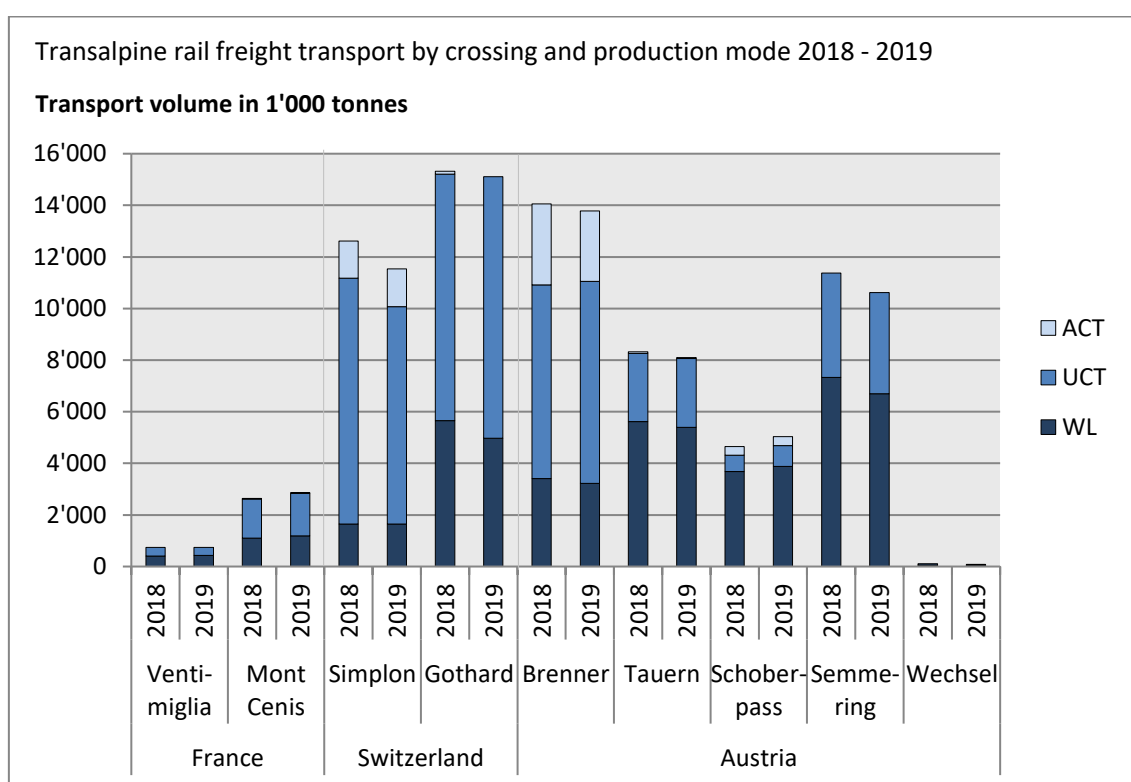
The total number of heavy goods vehicles (HGV) crossing the Alps increased in 2019 by +1.2% and reached a new record of 11.5 million HGV. The number of HGV was +1.6% higher in Austria and +2.0% higher in France, while in Switzerland it decreased by -4.6%. The number of HGV crossing the Alps in Switzerland fell to just below 900'000 HGV in 2019, the lowest level since the mid-1990s. More than 7.5 million HGV crossed the Austrian Alps, a new record. The figure below shows the evolution of the number of HGV by crossing from 2018 to 2019.



Among the most important road crossings (those with a share of HGV more than 4% of the total), only Tauern, Fréjus and Gotthard saw a decrease (-1.3%, -1.9% and -5.1% fewer HGV respectively). The range of growth rates of the other important crossings is between +0.9% (Mont Blanc) and +4.5% (Ventimiglia). The Brenner remains by far the most important road crossing: more than 2.5 million HGV (22.3% of the total) used that crossing in 2019, +2.6% more than in 2018.

4 Rail

67.9 million tonnes of goods were carried by rail across the Alps in 2019, -2.8% less than the record volume of 2018. The most significant influence was the substantial decrease of -4.6% in Switzerland. In Austria, the volumes carried by rail decreased by -2.3%. Besides the modest economic development, this decline can be attributed to several minor restrictions on the transalpine railway corridors and the modest service quality. The high percentage increase in France (+6.9%) had little impact on the overall development due to the low transport volume. The volume distribution across the different countries was: Austria 55%, Switzerland 39% and France 5%. The figure below shows the transport volumes in 2018 and 2019 by crossing and by production mode: conventional wagon load (WL), unaccompanied combined transport (containers, semi-trailers, swap bodies, UCT) and accompanied combined transport (whole HGV with drivers, ACT).



The evolution of transport volumes by rail between 2018 and 2019 was rather heterogeneous. Higher volumes were only recorded at Mont Cenis (+8.7%) and the Schoberpass (+8.2%). All other important crossings showed decrease rates between -1.4% (Gotthard) and -8.5% (Simplon), the Austrian crossings were in between.

Looking at all Alpine crossings, the different production modes evolved as follows: the volumes in unaccompanied combined transport (UCT) remained at the same level as in 2018 while the volumes in conventional wagon load (WL) decreased by -5.0% and those in accompanied combined transport (ACT or rolling motorway) by -9.9%. The ACT losses concentrated on the Brenner (-13%) and on the Gotthard (-100%, following the suspension of ACT services in December 2018). The overall market shares of the different production modes in 2019 were: WL 40.5%, UCT 52.7% and ACT 6.8% (after 41.4%, 51.3% and 7.3% respectively in 2018).

Transalpine traffic and transport data 2018 – 2019

		2018						
		Road		Rail				
				Total	WL	UCT	ACT	
KHGV	Kt	Kt	Kt	Kt	Kt	KHGV		
France	Ventimiglia	1'504.1	20'056.6	738.2	412.7	325.5		
	Montgenèvre	63.3	651.8					
	Fréjus/Mont Cenis	786.3	11'817.4	2'635.1	1'106.4	1'504.1	24.6	0.9
	Mont Blanc	622.2	9'456.4					
Total France		2'975.9	41'982.3	3'373.4	1'519.1	1'829.6	24.6	0.9
Switzerland	Gd St-Bernard	33.8	399.5					
	Simplon	86.3	1'040.6	12'608.9	1'642.5	9'531.1	1'435.3	90.2
	Gotthard	677.1	8'416.1	15'320.2	5'650.6	9'552.8	116.8	6.9
	San Bernardino	143.8	1'841.3					
Total Switzerland		941.0	11'697.5	27'929.1	7'293.1	19'083.9	1'552.1	97.1
Austria	Reschen	107.3	928.8					
	Brenner	2'494.2	38'826.5	14'048.1	3'412.9	7'501.3	3'133.9	143.1
	Felbertauern	61.3	682.9					
	Tauern	1'199.1	15'583.8	8'317.5	5'616.0	2'644.6	56.9	3.8
	Schoberpass	1'608.5	19'932.9	4'653.2	3'687.5	631.2	334.5	23.2
	Semmering	518.4	6'008.6	11'377.5	7'327.9	4'049.6		
	Wechsel	1'457.6	18'048.1	108.9	57.2	51.7		
Total Austria		7'446.4	100'011.6	38'505.2	20'101.5	14'878.4	3'525.3	170.1
Total 3 countries		11'363.3	153'691.4	69'807.7	28'913.7	35'791.9	5'102.1	268.1

		2019						
		Road		Rail				
				Total	WL	UCT	ACT	
KHGV	Kt	Kt	Kt	Kt	Kt	KHGV		
France	Ventimiglia	1'572.0	20'961.4	743.6	431.8	311.9		
	Montgenèvre	63.3	651.8					
	Fréjus/Mont Cenis	771.7	11'598.3	2'863.7	1'183.1	1'660.3	20.3	0.8
	Mont Blanc	628.0	9'544.7					
Total France		3'035.0	42'756.2	3'607.4	1'614.9	1'972.1	20.3	0.8
Switzerland	Gd St-Bernard	34.4	406.4					
	Simplon	89.4	1'078.1	11'538.2	1'649.6	8'421.6	1'467.0	86.6
	Gotthard	642.9	7'983.2	15'110.8	4'968.6	10'142.2	0.0	0.0
	San Bernardino	131.4	1'673.3					
Total Switzerland		898.1	11'140.9	26'649.0	6'618.2	18'563.8	1'467.0	86.6
Austria	Reschen	100.1	843.3					
	Brenner	2'559.7	39'918.9	13'781.9	3'217.1	7'835.9	2'728.9	124.8
	Felbertauern	64.4	717.2					
	Tauern	1'183.4	15'387.0	8'100.1	5'395.3	2'667.7	37.1	2.3
	Schoberpass	1'638.8	20'320.8	5'035.0	3'883.4	808.1	343.5	23.9
	Semmering	529.6	6'144.9	10'616.0	6'703.0	3'913.0		
	Wechsel	1'486.9	18'447.9	81.5	42.8	38.7		
Total Austria		7'562.9	101'780.0	37'614.5	19'241.6	15'263.4	3'109.5	151.0
Total 3 countries		11'495.9	155'677.1	67'870.9	27'474.7	35'799.3	4'596.8	238.4

		Difference 2018/2019 in percent						
		Road		Rail				
		KHGV	Kt	Total	WL	UCT	ACT	
				Kt	Kt	Kt	Kt	KHGV
France	Ventimiglia	+4.5%	+4.5%	+0.7%	+4.6%	-4.2%		
	Montgenèvre	+0.0%	+0.0%					
	Fréjus/Mont Cenis	-1.9%	-1.9%	+8.7%	+6.9%	+10.4%	-17.4%	-14.2%
	Mont Blanc	+0.9%	+0.9%					
Total France		+2.0%	+1.8%	+6.9%	+6.3%	+7.8%	-17.4%	-14.2%
Switzerland	Gd St-Bernard	+1.8%	+1.7%					
	Simplon	+3.6%	+3.6%	-8.5%	+0.4%	-11.6%	+2.2%	-4.0%
	Gotthard	-5.1%	-5.1%	-1.4%	-12.1%	+6.2%	-100.0%	-100.0%
	San Bernardino	-8.7%	-9.1%					
Total Switzerland		-4.6%	-4.8%	-4.6%	-9.3%	-2.7%	-5.5%	-10.8%
Austria	Reschen	-6.7%	-9.2%					
	Brenner	+2.6%	+2.8%	-1.9%	-5.7%	+4.5%	-12.9%	-12.8%
	Felbertauern	+5.1%	+5.0%					
	Tauern	-1.3%	-1.3%	-2.6%	-3.9%	+0.9%	-34.8%	-39.5%
	Schoberpass	+1.9%	+1.9%	+8.2%	+5.3%	+28.0%	+2.7%	+3.0%
	Semmering	+2.2%	+2.3%	-6.7%	-8.5%	-3.4%		
Wechsel	+2.0%	+2.2%	-25.2%	-25.2%	-25.1%			
Total Austria		+1.6%	+1.8%	-2.3%	-4.3%	+2.6%	-11.8%	-11.2%
Total 3 countries		+1.2%	+1.3%	-2.8%	-5.0%	+0.0%	-9.9%	-11.1%

Abbreviations:

KHGV	1000 heavy goods vehicles
Kt	1000 tonnes
WL	conventional wagon load transport
UCT	unaccompanied combined transport
ACT	accompanied combined transport (rolling motorway)

Data sources:

France:	Road data: ATMB, SFTRF, MEEDDAT and Autostrada dei Fiori (Italy)
	Rail data: RFI (Italy) and AFA (Autoroute Ferroviaire Alpine)
Switzerland:	Road and rail data: Federal Office of Transport (FOT), Matthias Wagner
Austria:	Road data: ASFINAG and government of Tyrol
	Rail data: ÖBB (data processing: BMVIT, Reinhard Koller)

Note:

Due to malfunction in the counting system at Montgenèvre the values for 2019 for this crossing were not available and therefore were assumed to be the same as in the previous year.