

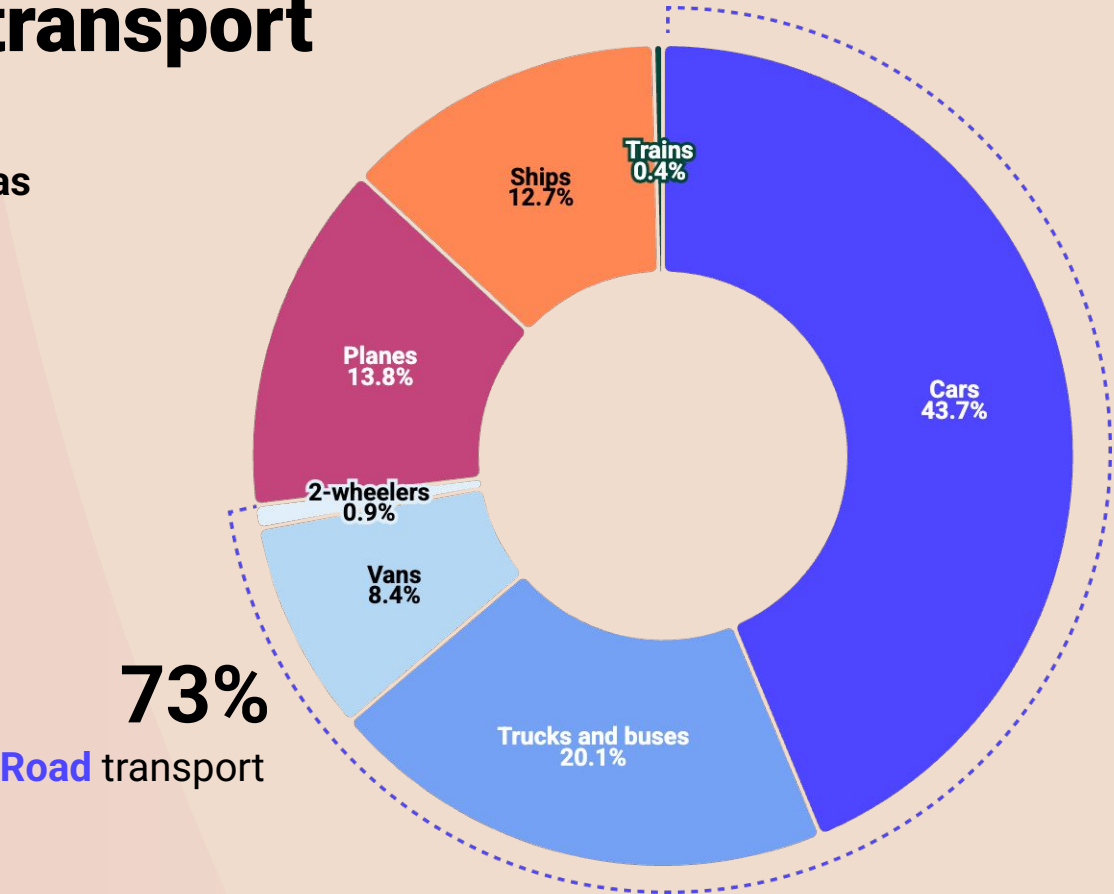
State of European Transport 2025

 T&E



The state of transport

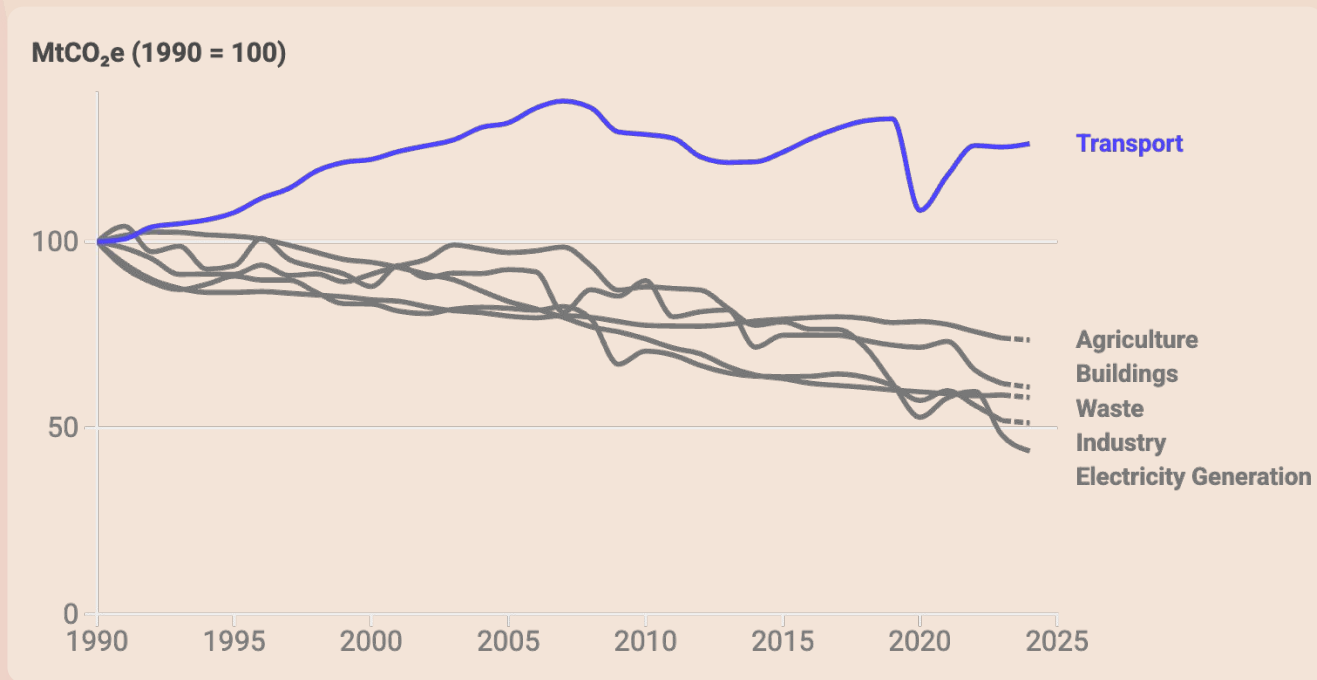
EU share of greenhouse gas emissions by transport mode in 2024



Source: UNFCCC GHG inventories, EEA, Stratas Advisors, Eurocontrol

Transport CO₂ starting to see structural decline

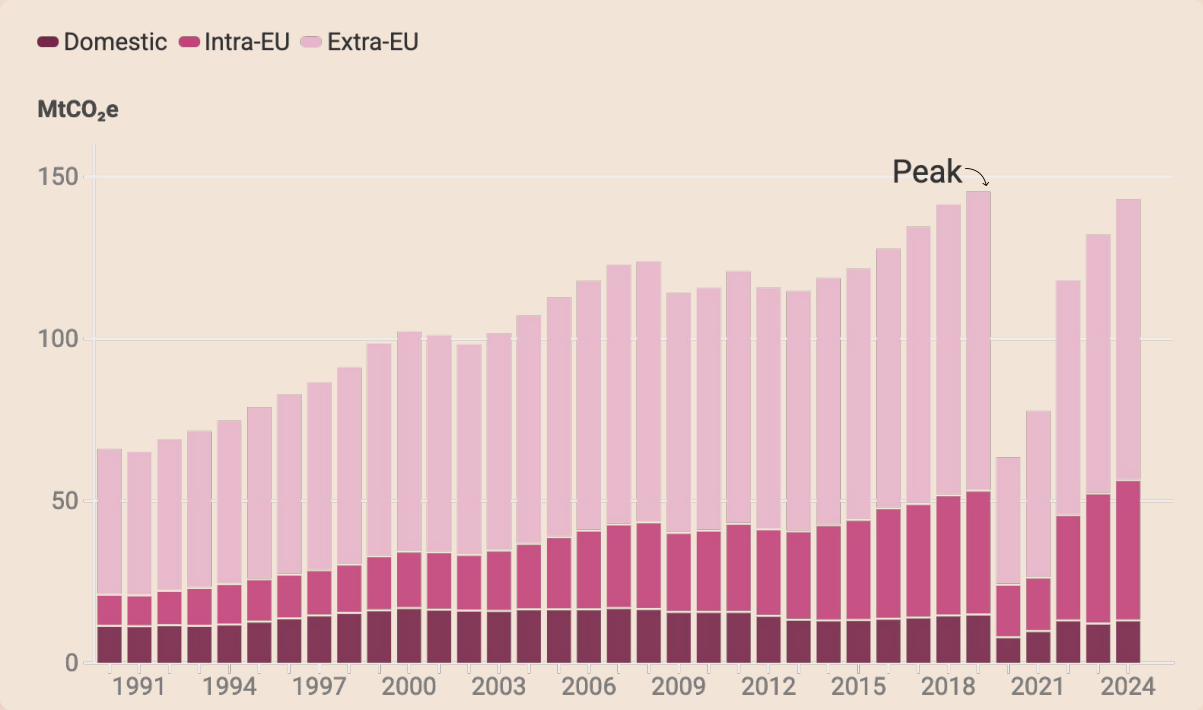
Change in greenhouse gas emissions by sector



Source: UNFCCC, EEA, Stratas Advisors, Ember • Transport includes international aviation and maritime emissions. Public electricity includes heat generation. Dashed line indicates five year trend

Yet aviation almost back to pre-Covid levels

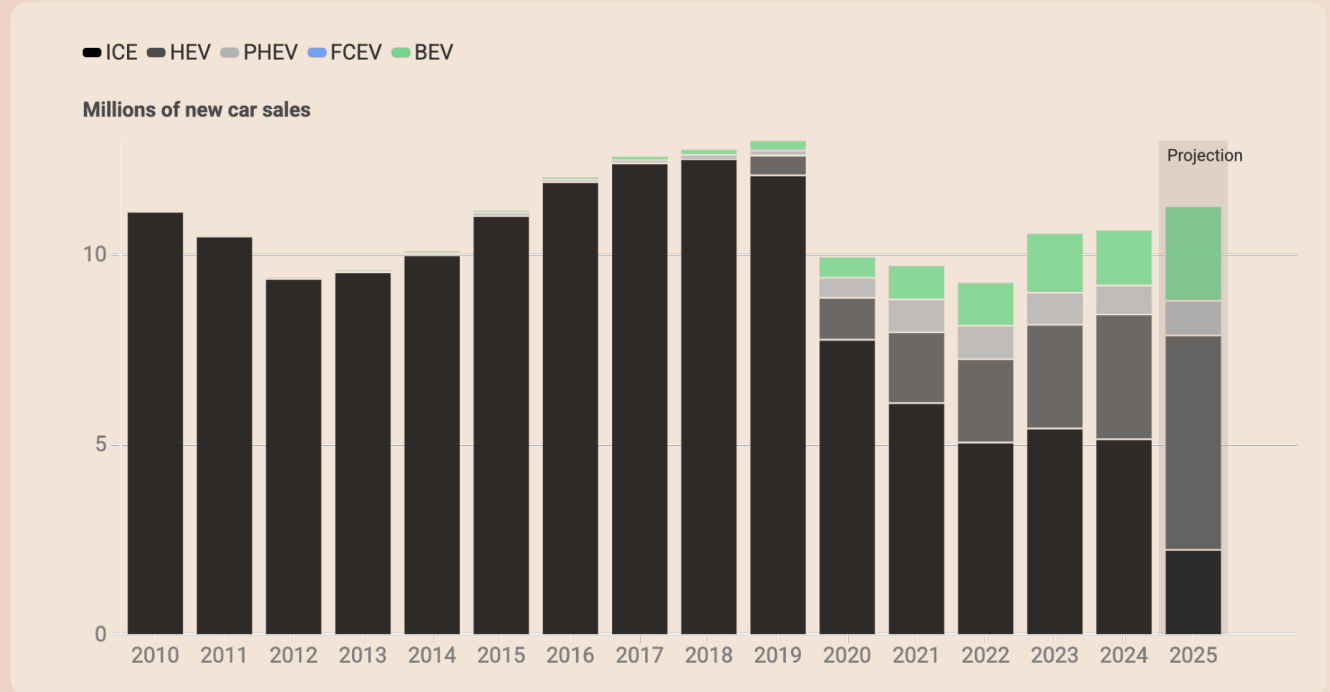
Historical aviation emissions



Source: T&E analysis, UNFCCC GHG inventories, Eurocontrol, EU ETSL

Peak combustion is behind us

Sales of combustion engine cars in the EU peaked in 2019



Source: EEA, ACEA, Global data. HEVs include full and mild hybrids

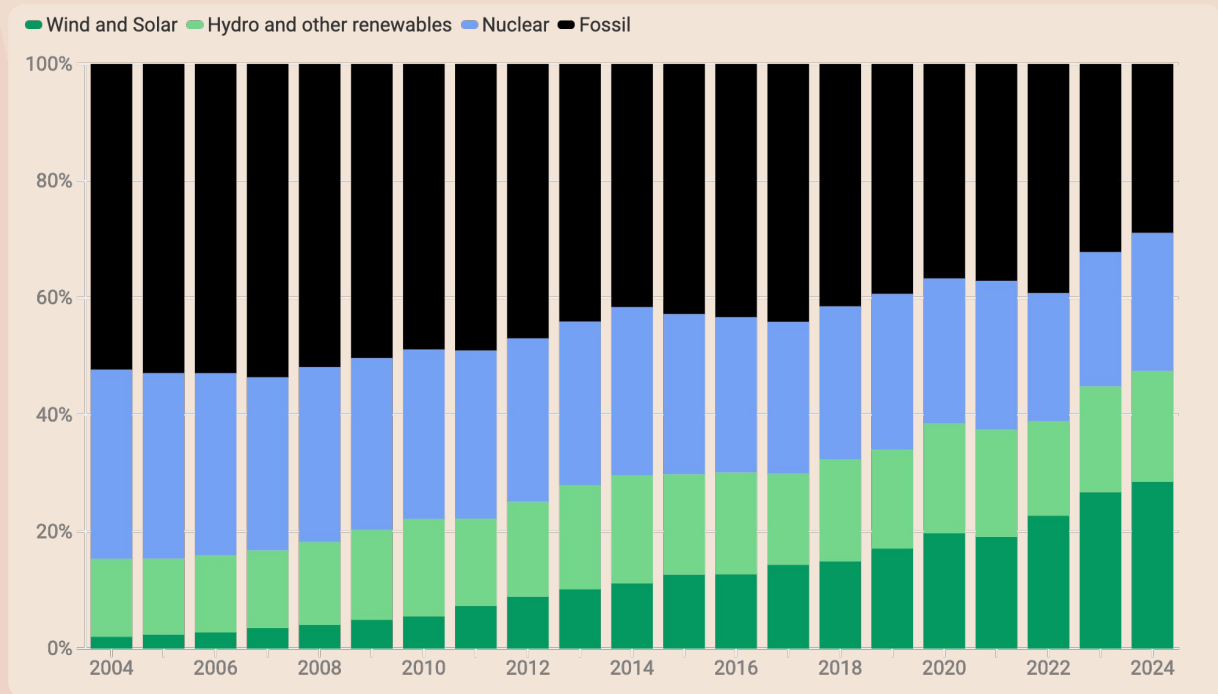
Electric transport powered by greener grid

Increasing renewables and electrification in lock-step

Share of EU electricity generation (%)

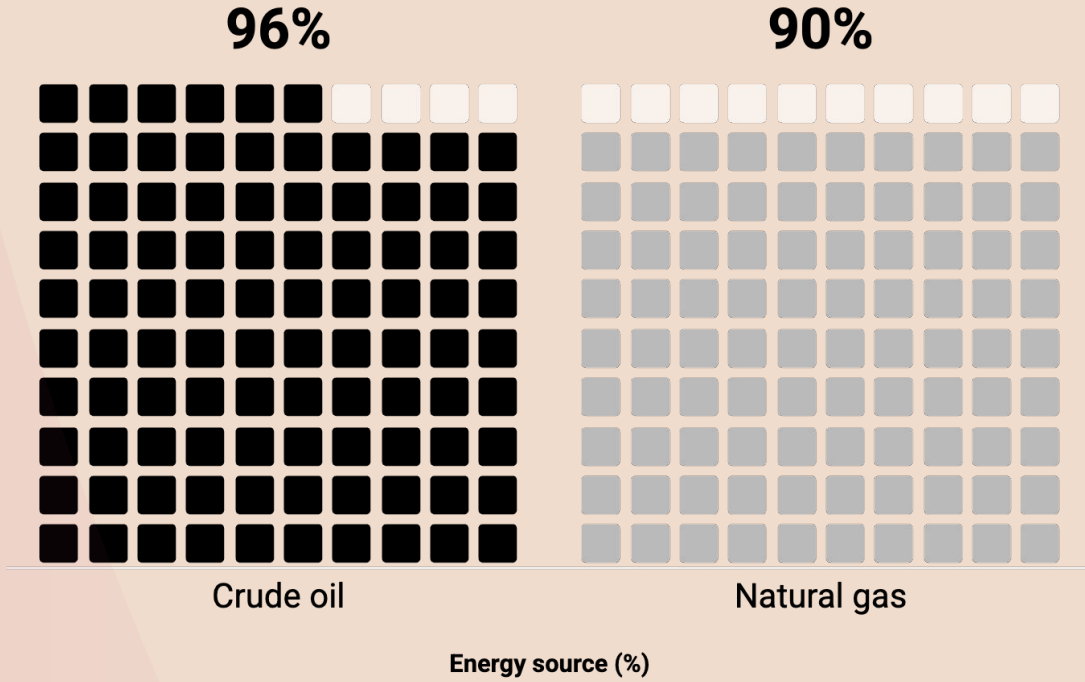
70%

Carbon free electricity generation in 2024



Europe remains highly dependent on imported oil and gas

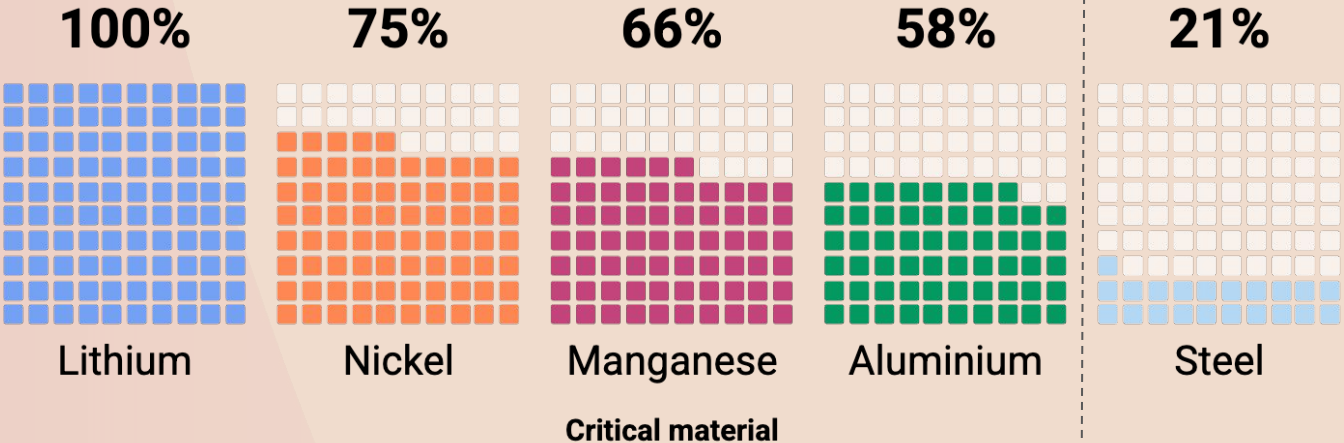
Percentage of imports vs the total consumption



Source: Eurostat

Also for some battery metals

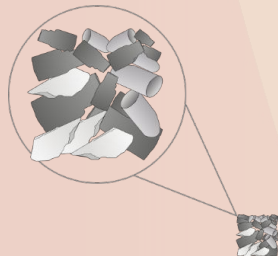
Europe highly dependent on materials processing abroad



Sources: European Commission: Study on the critical raw materials for the EU 2023; EUROFER

But... an EV contains far less than an ICE burns

Lifetime material consumption: electric vehicle battery vs petrol fuel burned



49kg

Materials newly mined for an EV battery after recycling



12,400L

Amount of fuel burned during the lifetime of one hybrid vehicle sold in 2030

What could we do with €250 billion a year?

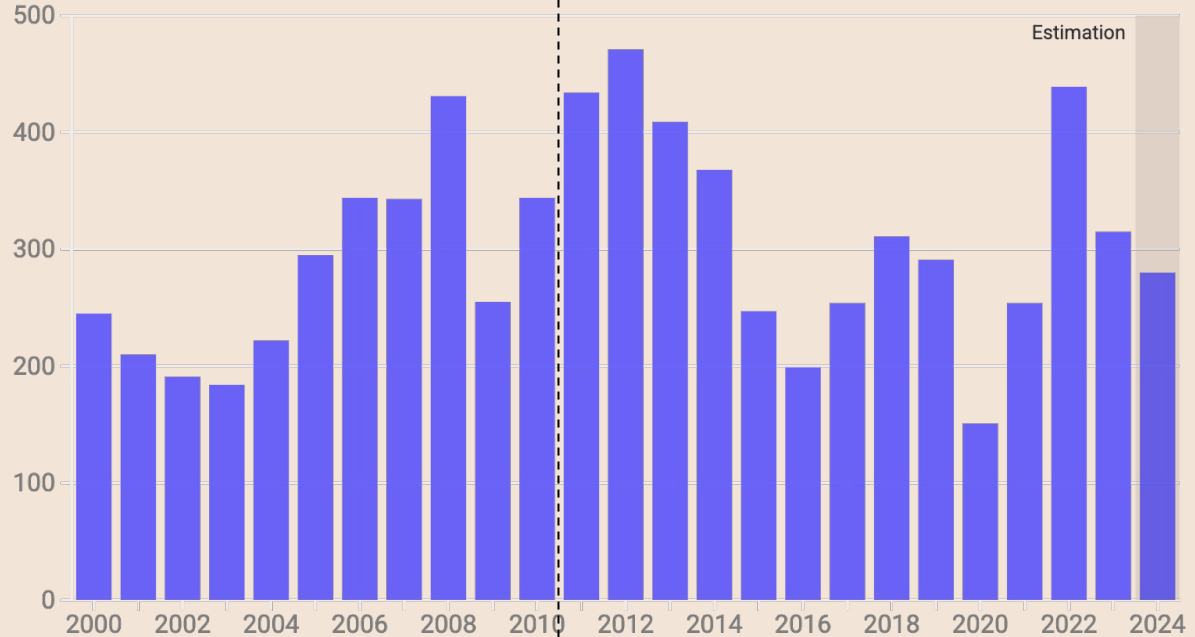
Crude oil imports

Money that leaves
the EU economy

€4 trillion

since William joined
T&E in 2011

Annual crude oil imports, billion €

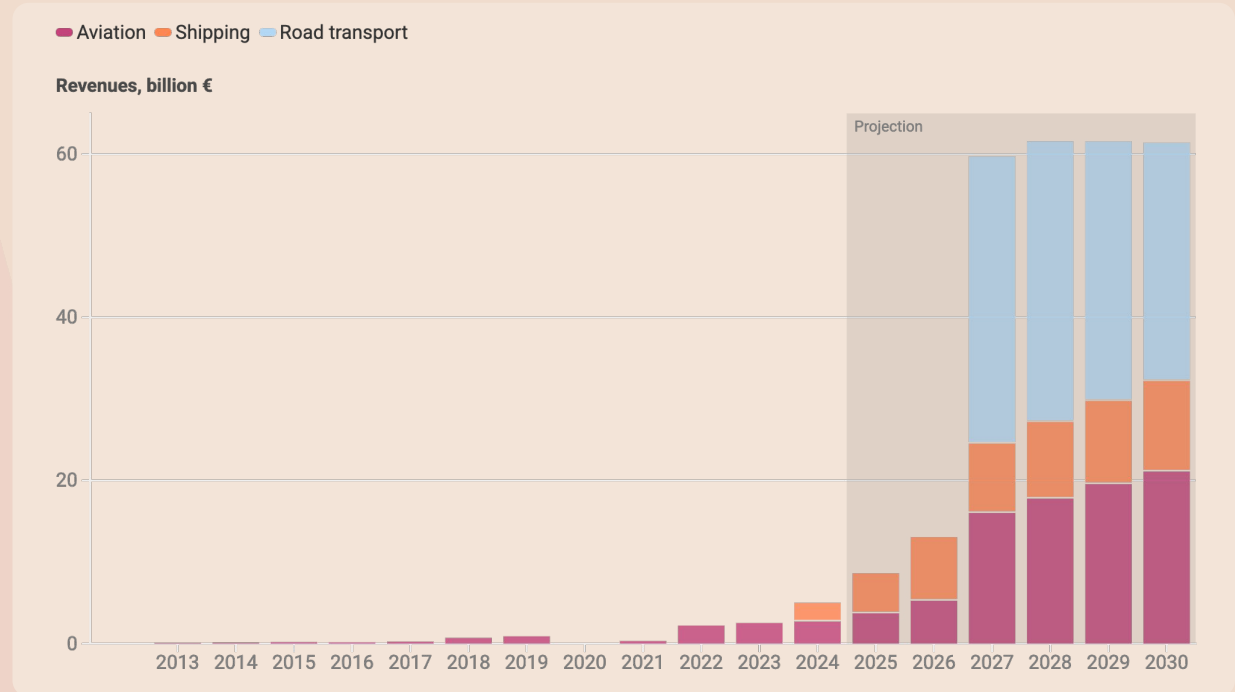


The EU's carbon pricing revolution can help finance the transition

Shipping and aviation coverage in the EU ETS – which will soon be extended to road transport

€265

Billion from now until the end of the decade



Source: T&E, ICAP, Ember, IEA, BNEF • *ETS1 allowance price (covering aviation and shipping) assumed at €80 in 2025 and rising to the €129 in 2030. Assumed all departing scope for aviation in 2027. ETS2 allowances price (covering road transport) is assumed constant at €56, corresponding to the EC 2020 reference price corrected for inflation.

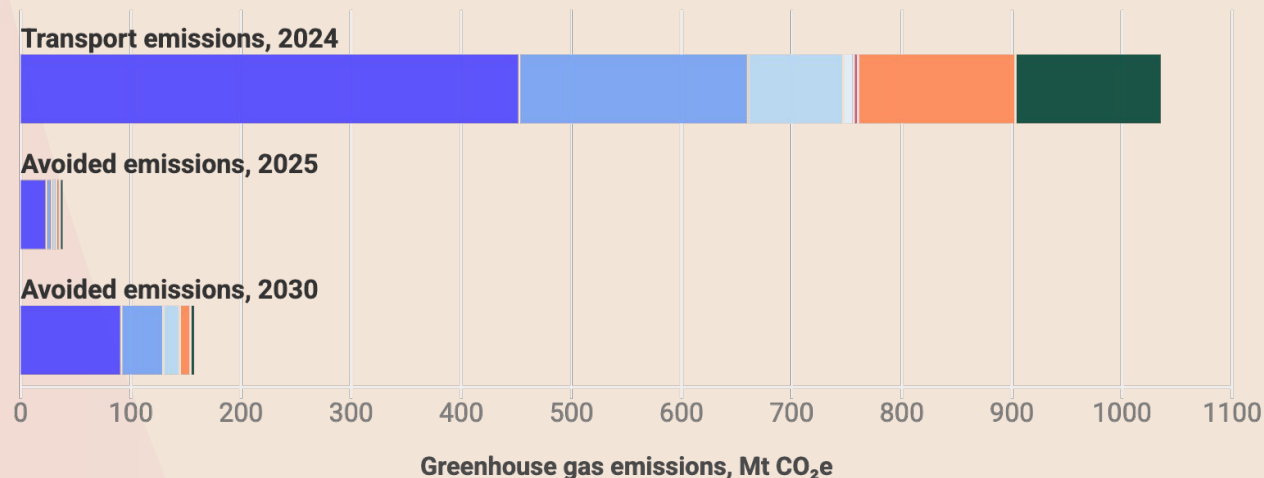
Green policies are finally delivering

Clean transport policies are reducing fuel imports

157 Mt

CO₂ emissions avoided in 2030, €21bn/year

Cars HDVs Vans 2-wheelers Railways Aviation Shipping



Thank you

William Todts

Executive Director at T&E