



European Commission  
DG MOVE

Swiss Confederation  
Federal Office of Transport (FOT)



## Observation and analysis of transalpine freight traffic flows Key figures 2018



Photo: Sigmaplan

August 2019



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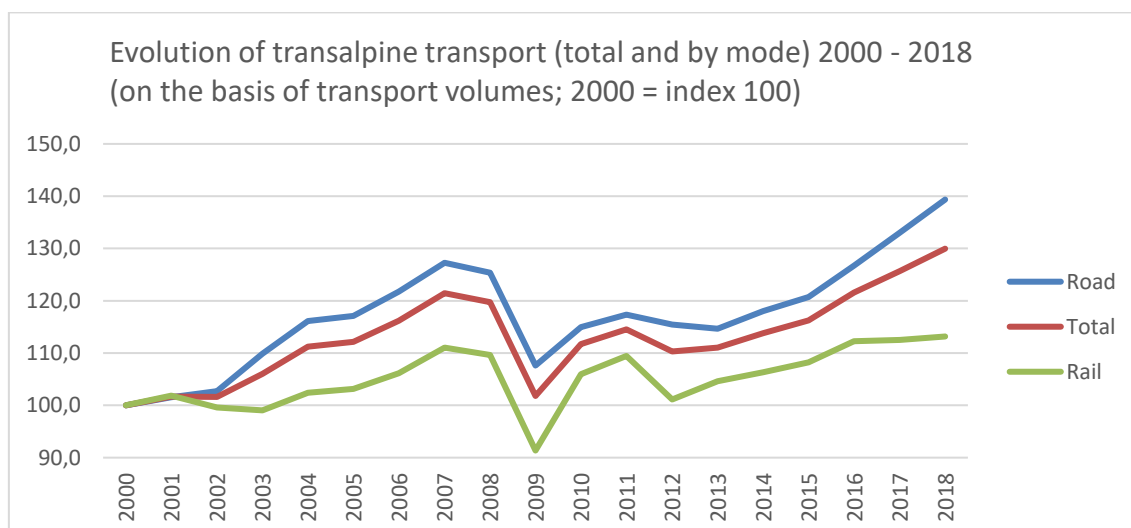
**Alpine crossings covered by this report**

## Key findings

- At 223.5 million tonnes, the amount of goods carried across the Alps reached a new record level in 2018. It was +3.4% (or 7.4 million tonnes) higher than in 2017.
- Almost all growth (95%) in transalpine freight traffic between 2017 and 2018 was in road transport, rail accounting only for 5% of overall growth. Road volumes increased by +4.7% to 153.7 million tonnes (a new record level) while rail volumes grew by a mere +0.6% to 69.8 million tonnes (still enough to also reach a new record level).
- As a consequence, the share of rail in overall transalpine freight traffic continued to fall and reached a new all-time low at 31.2% (from 32.1% in 2017). In Austria, it was also at the lowest level ever recorded (27.8%) while in France it was at the second lowest level ever recorded (7.4%) and in Switzerland it was at the second highest level ever recorded (70.5%).
- Rail transport volumes carried across the Swiss Alps recovered somewhat (by +2.9%) from a difficult year 2017 (when the incident in Rastatt and works on the Luino line had held back rail traffic somewhat), but they decreased by around 1% each in both Austria and France.
- The number of heavy goods vehicles (HGV) crossing the Alps by road reached a new record level at 11.4 million, +4.4% more than in 2017. While the number of HGV crossing the Swiss Alps fell by -1.4% (to about 940'000 HGV), it grew by +3.2% in France (to almost 3 million) and by +5.6% in Austria (to almost 7.5 million). The Brenner alone accounted for a third of all HGV crossing the Austrian Alps (close to 2.5 million).
- More and more transalpine traffic uses the Austrian crossings: Austria's share in total traffic reached a record 62.0% while the corresponding shares of France and Switzerland have slightly gone down (to 20.3 and 17.7% respectively).

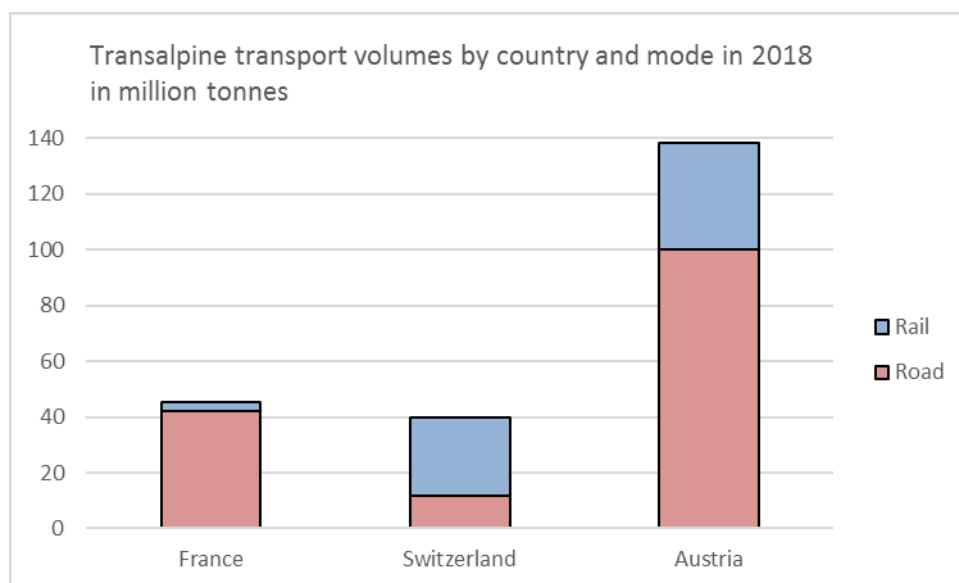
## 1 Transport volume

In 2018, a record 223.5 million tonnes of goods were carried across the Alps<sup>1</sup>, +3.4% more than in 2017. 153.7 million tonnes, more than two thirds (68.8%) of the total amount, was carried by road. The remaining 31.2%, or 69.8 million tonnes of freight, were carried by rail.



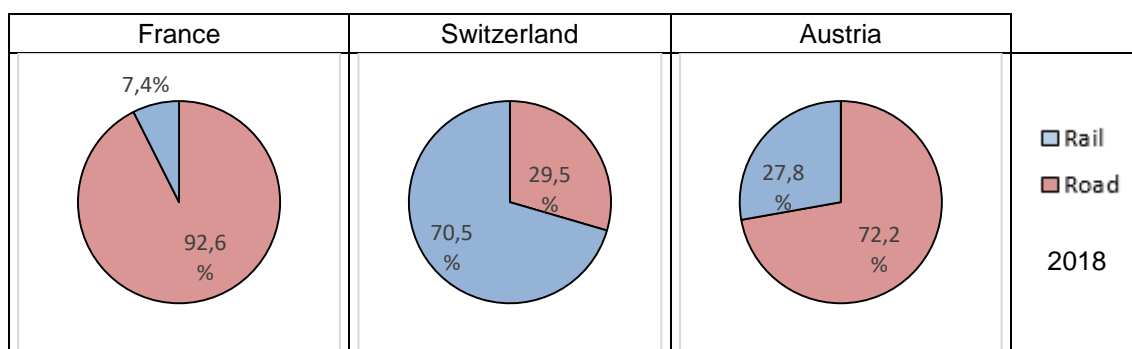
<sup>1</sup> See map on preceding page

The large majority of freight crossed the Alps in Austria (138.5 million tonnes or 62% of the total transport volume). French crossings assumed an amount of 45.4 million tonnes and Swiss crossings 39.6 million tonnes; 20% and 18% respectively). The share of Switzerland was 0.3 percentage points lower than in 2017 and the lowest since 2003. The share of Austria was 0.4 percentage points higher than in 2017 and the highest ever. This suggests that more and more transalpine traffic uses Austrian crossings, irrespective of developments in other countries; in Switzerland, for instance, the restrictions in rail infrastructure of 2017 were no longer there in 2018 and more rail traffic could hence use the Swiss crossings again.



## 2 Modal share

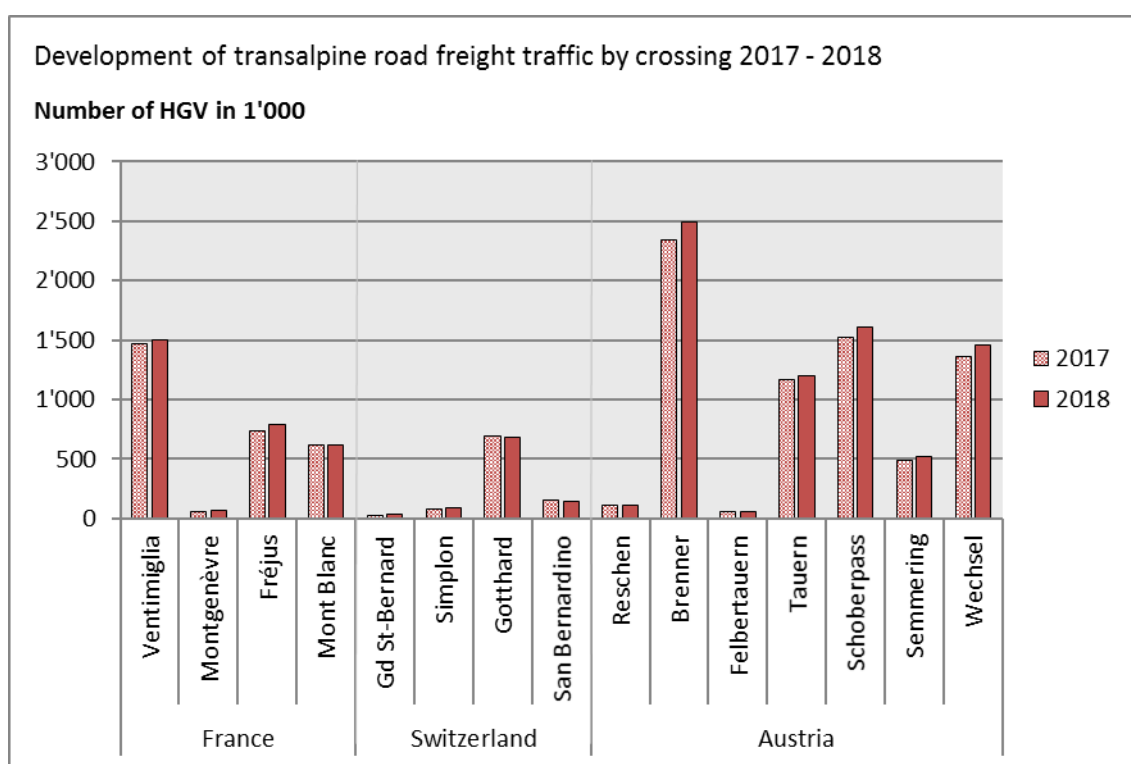
The modal share of rail on the whole Alpine arc decreased slightly from 32.1% in 2017 to 31.2% in 2018, the lowest level ever recorded. Rail has failed to increase its overall market share in transalpine traffic over the last 20 years. However, there are big differences between the three countries: in Switzerland, the rail share recovered to 70.5% (after 69.9% in 2017 and the record level of 71.0% in 2016), in Austria it fell for the first time below 28% (from 29.2% in 2017) and in France it only accounted for 7.4% of all goods carried across the Alps (after 7.7% in 2017) and is now only slightly above the record low share of 7.1% recorded in 2009.



### 3 Road

In 2018, 153.7 million tonnes of goods were transported by road across the Alps, +4.7% more than in 2017. Road transport volumes increased in Austria (+6.0%) and in France (+3.2%), but decreased (albeit insignificantly) in Switzerland (-0.2%). The distribution across the different countries was as follows: Austria 65%, France 27% and Switzerland less than 8%.

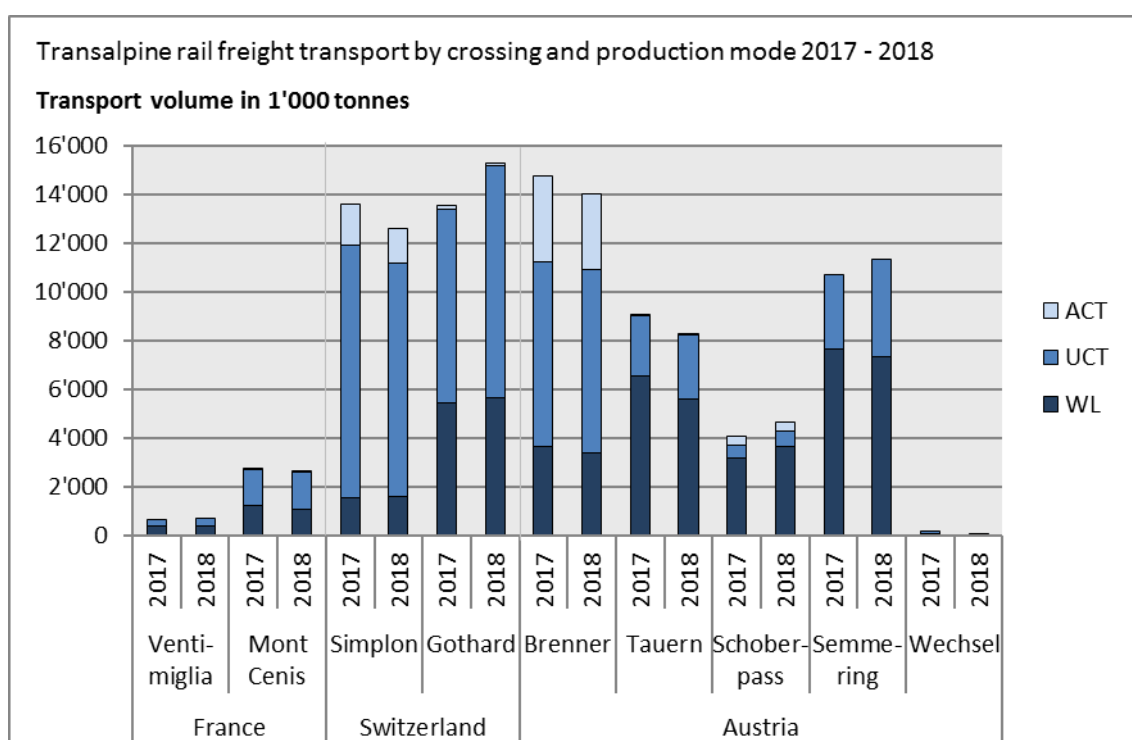
The total number of heavy goods vehicles (HGV) crossing the Alps increased in 2018 by +4.4% and reached a new record of 11.4 million HGV. The number of HGV was +5.6% higher in Austria and +3.2% higher in France, while in Switzerland it decreased by -1.4%. The number of HGV crossing the Alps in Switzerland fell to about 940'000 HGV in 2018, the lowest level since the mid-1990s. Nearly 7.5 million HGV (65.5% of the total) crossed the Austrian Alps, a new record value. The figure below shows the evolution of the number of HGV by crossing from 2017 to 2018.



Among the most important road crossings (those with a share of HGV more than 4% of the total), only Gotthard saw a decrease (-2.9% fewer HGV). The range of growth rates of the other important crossings is between +2.7% (Ventimiglia) and +6.8% (Wechsel). The stagnating value on the Mont Blanc (+0.1%) is partly due to the high reference value of the previous year due to the closure of the nearby Grand St. Bernard tunnel in the second half of 2017. The Brenner remains by far the most important road crossing: 2.5 million HGV (21.9% of the total) used that crossing in 2018, +6.4% more than in 2017.

## 4 Rail

A new record of 69.8 million tonnes of goods were carried by rail across the Alps in 2018, +0.6% more than in 2017. After the restricted availability of rail infrastructure on important access lines in 2017, Switzerland saw an increase of +2.9% in transalpine rail transport volumes. By contrast, the rail transport volumes decreased slightly in Austria (-0.9%) and in France (-1.1%). The distribution across the different countries was: Austria 55%, Switzerland 40% and France 5%. The figure below shows the transport volumes in 2017 and 2018 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 2017 and 2018 was rather heterogeneous. Lower volumes were recorded at the Tauern (-8.5%), the Simplon (-7.2%), the Brenner (-4.8%) and the Mont Cenis (-3.8%) while the Gotthard (+13.0%) made good its losses of the previous year that had been due to the incident at Rastatt and the construction works on the Luino line. The latter was the main reason for shifting back reserved capacities for freight trains from the Simplon to the Gotthard crossing. Increased transport volumes were also observed on the Schoberpass (+14%) and the Semmering (+6.0%).

Looking at all Alpine crossings, the different production modes evolved as follows: the volumes in unaccompanied combined transport (UCT) show strong growth (+6.2%) while the volumes in conventional wagon load decreased by -3.4%. Transport volumes in accompanied combined transport (ACT) which accounted for only 7.3% of the total transalpine transport volume on rail decreased by -12%.

## Transalpine traffic and transport data 2017 – 2018

		2017						
		Road		Rail				
				Total	WL	UCT	ACT	
KHGV	Kt	Kt	Kt	Kt	Kt	Kt	KHGV	
France	Ventimiglia	1'465.0	19'534.5	672.7	429.0	243.7		
	Montgenèvre	56.7	584.6					
	Fréjus/Mont Cenis	740.6	11'130.6	2'739.2	1'242.8	1'463.2	33.3	1.4
	Mont Blanc	621.5	9'445.5					
<b>Total France</b>		<b>2'883.8</b>	<b>40'695.3</b>	<b>3'411.9</b>	<b>1'671.8</b>	<b>1'706.8</b>	<b>33.3</b>	<b>1.4</b>
Switzerland	Gd St-Bernard	25.5	300.2					
	Simplon	80.7	984.4	13'593.6	1'563.8	10'381.1	1'644.3	100.2
	Gotthard	697.7	8'569.8	13'562.1	5'469.7	7'932.6	158.7	8.8
	San Bernardino	150.4	1'863.6					
<b>Total Switzerland</b>		<b>954.2</b>	<b>11'718.0</b>	<b>27'150.3</b>	<b>7'033.5</b>	<b>18'313.7</b>	<b>1'803.0</b>	<b>109.1</b>
Austria	Reschen	108.7	955.1					
	Brenner	2'344.0	36'338.9	14'757.6	3'691.9	7'577.5	3'488.2	159.5
	Felbertauern	60.5	767.6					
	Tauern	1'167.0	15'153.3	9'086.7	6'574.0	2'445.2	67.5	4.4
	Schoberpass	1'518.4	18'782.9	4'093.1	3'183.8	524.0	385.3	26.8
	Semmering	487.6	5'612.0	10'732.1	7'690.5	3'041.6		
	Wechsel	1'364.7	16'718.8	180.8	94.9	85.9		
<b>Total Austria</b>		<b>7'050.8</b>	<b>94'328.6</b>	<b>38'850.3</b>	<b>21'235.1</b>	<b>13'674.2</b>	<b>3'941.0</b>	<b>190.7</b>
<b>Total 3 countries</b>		<b>10'888.8</b>	<b>146'730.3</b>	<b>69'417.9</b>	<b>29'940.4</b>	<b>33'694.8</b>	<b>5'782.7</b>	<b>301.2</b>

		2018						
		Road		Rail				
				Total	WL	UCT	ACT	
KHGV	Kt	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					
<b>Total France</b>		<b>2'975.9</b>	<b>41'982.3</b>	<b>3'373.4</b>	<b>1'519.1</b>	<b>1'829.6</b>	<b>24.6</b>	<b>0.9</b>
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					
<b>Total Switzerland</b>		<b>941.0</b>	<b>11'697.5</b>	<b>27'929.1</b>	<b>7'293.1</b>	<b>19'083.9</b>	<b>1'552.1</b>	<b>97.1</b>
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		
<b>Total Austria</b>		<b>7'446.4</b>	<b>100'011.6</b>	<b>38'505.2</b>	<b>20'101.5</b>	<b>14'878.4</b>	<b>3'525.3</b>	<b>170.1</b>
<b>Total 3 countries</b>		<b>11'363.3</b>	<b>153'691.4</b>	<b>69'807.7</b>	<b>28'913.7</b>	<b>35'791.9</b>	<b>5'102.1</b>	<b>268.1</b>

		Difference 2017/2018 in percent						
		Road		Rail				
		KHGV	Kt	Total Kt	WL Kt	UCT Kt	ACT Kt	
France	Ventimiglia	+2.7%	+2.7%	+9.7%	-3.8%	+33.6%		
	Montgenèvre	+11.5%	+11.5%					
	Fréjus/Mont Cenis	+6.2%	+6.2%	-3.8%	-11.0%	+2.8%	-25.9%	-33.4%
	Mont Blanc	+0.1%	+0.1%					
<b>Total France</b>		<b>+3.2%</b>	<b>+3.2%</b>	<b>-1.1%</b>	<b>-9.1%</b>	<b>+7.2%</b>	<b>-25.9%</b>	<b>-33.4%</b>
Switzerland	Gd St-Bernard	+32.3%	+33.1%					
	Simplon	+7.0%	+5.7%	-7.2%	+5.0%	-8.2%	-12.7%	-10.0%
	Gotthard	-2.9%	-1.8%	+13.0%	+3.3%	+20.4%	-26.4%	-21.7%
	San Bernardino	-4.3%	-1.2%					
<b>Total Switzerland</b>		<b>-1.4%</b>	<b>-0.2%</b>	<b>+2.9%</b>	<b>+3.7%</b>	<b>+4.2%</b>	<b>-13.9%</b>	<b>-11.0%</b>
Austria	Reschen	-1.3%	-2.8%					
	Brenner	+6.4%	+6.8%	-4.8%	-7.6%	-1.0%	-10.2%	-10.3%
	Felbertauern	+1.3%	-11.0%					
	Tauern	+2.8%	+2.8%	-8.5%	-14.6%	+8.2%	-15.7%	-13.6%
	Schoberpass	+5.9%	+6.1%	+13.7%	+15.8%	+20.5%	-13.2%	-13.4%
	Semmering	+6.3%	+7.1%	+6.0%	-4.7%	+33.1%		
	Wechsel	+6.8%	+8.0%	-39.8%	-39.7%	-39.8%		
<b>Total Austria</b>		<b>+5.6%</b>	<b>+6.0%</b>	<b>-0.9%</b>	<b>-5.3%</b>	<b>+8.8%</b>	<b>-10.5%</b>	<b>-10.8%</b>
<b>Total 3 countries</b>		<b>+4.4%</b>	<b>+4.7%</b>	<b>+0.6%</b>	<b>-3.4%</b>	<b>+6.2%</b>	<b>-11.8%</b>	<b>-11.0%</b>

**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) Road data processing for Montgenèvre: SOeS 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 the adaptation of the load factors for road and rail following the final evaluation of the CAFT 2015 survey in Austria, the absolute figures for the transport volumes for the period 2015 to 2017 have changed in comparison to the respective reports of those years.