



Ministry of Infrastructure
and Water Management

Mobility Report 2025

Summary



Summary

How has the mobility of people and goods developed over the past 10 years and what were the effects of mobility on accessibility, road safety and the living environment? What can we expect in terms of mobility in the coming years?

In this Mobility Report 2025, we discuss the most important developments in the period 2014-2024. We also present estimates for the current year (2025) and the medium term (2030). Below, we summarise the most important insights per theme.

Mobility of people

Due to a change in methodology in the data collection for the national travel survey (ODiN) in 2024, no reliable ODiN data is available (as yet) for 2024. We will therefore limit ourselves in this Mobility Report to ODiN data for 2023 (indicated in italics below). However, we do have data from other sources for 2024 on trains, buses, trams and metros, aviation and the extent of working from home.

- > The total **distance travelled** by residents of the Netherlands aged 6 and older on Dutch territory in 2023 was 4% lower than in 2014. In 2023, an average of 11,300 km per person per year was travelled (31 km per person per day).
 - **Car:** In 2023, the distances travelled as a car driver and passenger were below the 2014 level (-3% and -9% respectively).
 - **Bicycle:** The distance travelled by bicycle in 2023 was 7% higher than in 2014. In recent years, there has been a clear increase in the share of e-bikes (from 8% in 2014 to 38% in 2023; not shown in the table).
 - **Walking:** In 2023, the distance travelled on foot was 37% higher than in 2014.
 - **Public transport:** In 2024, the distance travelled by train increased compared to 2023. The distance travelled by bus, tram and metro increased by 8% compared to 2023. In 2024, the distance travelled by train was below the 2014 level; by bus, tram and metro, 4% more distance was travelled in 2024 than in 2014.
- > The proportion of workers who **worked from home** for at least 1 hour per week (not shown in the table) was roughly the same in 2024 as in 2023 (42% and 41% respectively) and higher than in the years before the COVID-19 pandemic (when it was around 30%).
- > In 2024, 76.2 million passengers travelled **by plane** from, to or via a Dutch airport. This is an increase of approximately 7% compared to 2023 (71.3 million air passengers) and a quarter higher than in 2014, when 60.9 million air passengers travelled via Dutch airports.

Mobility of people	Total	Car driver	Car passenger	Train	Bus, tram, metro	Bicycle	Walk	Aviation
	Distance travelled on Dutch territory (billion kilometres)							Number of passengers at Dutch airports (million)
2024	*	*	*	17.2	5.0	*	*	76.2
2023	187.0	94.1	35.2	16.5	4.7	17.9	6.8	71.3
2024 compared to 2023 (%)	*	*	*	+**	+8%	*	*	+7%
2024 compared to 2014 (%)	*	*	*	-**	+4%	*	*	+31%
2023 compared to 2014 (%)	-4%	-3%	-9%	-**	-3%	+7%	+37%	+23%

* Due to a change in methodology, not all data for 2024 is available.

** The figures for the main rail network (>90% of passenger kilometres) contain a number of trend breaks. In 2020, 2022 and 2024, the measurement system for part of the passenger kilometres was changed. As a result, the figures are not easily comparable for successive years (CROW, 2025). We expect that the general direction of the development is correct.

Freight transport

- > Total **transport performance** (in tonne-kilometres), i.e. the weight transported multiplied by the distance travelled, on Dutch territory increased by 3.4% in 2024 compared to 2023. The level in 2024 was lower than in 2014 (-11.5%). The **weight lifted** (in tonnes), including transshipment at airports and seaports, increased by 0.7% in 2024 compared to 2023.
- > In 2024, the majority of transport performance on Dutch territory was delivered by **road freight transport**. Between 2023 and 2024, an increase in transport performance was visible for inland waterway transport and road transport, namely by 1.6% and 4.0% respectively. Pipeline transport also increased (+8.1%), while freight transport by rail decreased (-4.8%).
- > Since 2014, **road** transport has seen the strongest increase of all modes of transport in tonne-kilometres, namely 9.4%. **Rail** transport in 2024 was almost the same (+0.2%) as in 2014. **Inland waterway** transport decreased by 12.2%. **Pipeline** transport shows the strongest decline, namely 41.0% since 2014. This sharp decline is due to less natural gas being transported as a result of a decrease in the production and consumption of natural gas.

Freight transport	Freight transport on Dutch territory	Road (excl. delivery vans)	Inland waterway	Rail	Pipeline
	Transport performance on Dutch territory (billion tonne-km)				
2024	125.1	55.0	42.3	6.2	21.7
2024 compared to 2023 (%)	+3.4%	+4.0%	+1.6%	-4.8%	+8.1%
2024 compared to 2014 (%)	-11.5%	+9.4%	-12.2%	+0.2%	-41.0%

NB: Preliminary data are shown in grey and *italics*

Accessibility

- > Between 2018 and 2024, the **calculated¹ accessibility of jobs** increased on average in the Netherlands. This applies to all modes of transport: car, public transport and bicycle. The growth in the number of jobs in the Netherlands has contributed to the improved accessibility of jobs. For cars, more so than for public transport and bicycles, the increase in accessibility was strongest in the Randstad.
- > The accessibility of **educational institutions in secondary vocational education, higher professional education and university education** declined slightly between 2018 and 2024 for all three modes of transport, slightly more so for cars than for public transport and bicycles. This was due to a decline in the total number of educational institutions. No clear spatial pattern is visible for public transport and cycling: for public transport and cycling, there are areas throughout the country with a decrease in accessibility and areas with an increase in accessibility.
- > The calculated accessibility of **hospitals** in the Netherlands also decreased on average between 2018 and 2024 for all three modes of transport. For cars and public transport, this was particularly the case in the northern Randstad. The decline in the number of hospitals plays a major role in this.

Accessibility		Jobs within reasonable travel time	Education within reasonable travel time	Hospitals within reasonable travel time
		Indexed number (2018=100)		
2024 compared to 2018 (%)	Car	109	95	95
	Public transport	112	99	96
	Bicycle	113	99	97

- > When we ask Dutch people how they **perceive** their **accessibility**, the vast majority (approximately 95%) indicate that they can usually or always reach their place of work, place of education and hospital when they want to. This does not apply to the remaining roughly 5% of the population.
- > The distance travelled (by vehicles) and the travel time lost on the main road network in the Netherlands in 2024 were 2.7% and 5.1% higher than in 2023, respectively. This means that the distance travelled on the main road network in 2024 was slightly below the level before the COVID-19 pandemic (2019). The distance travelled by **road traffic** on the total road network in 2024 was slightly higher than in 2019 for the first time (137.5 billion and 135.9 billion kilometres respectively).
- > The distance travelled by **rail traffic** increased by 5% between 2023 and 2024. The average delay per train journey remained the same in 2024 as in the previous year, at 2.2 minutes.

¹ We use the accessibility indicator developed for the Integral Mobility Analysis (IMA-21). It is a model-based indicator that reflects the number of jobs, hospitals and secondary vocational education (MBO), higher professional education (HBO) and university education (WO) institutions that are “accessible within a reasonable travel time by car, public transport or bicycle from a specific area”. A so-called travel time decay function has been applied, so that destinations that can be reached in a short travel time are weighted more heavily than destinations that require a long travel time.

Accessibility	Total road traffic	Road traffic main road network	Loss of time for the main road network	Total rail traffic	Delays on the railways
	Distance travelled (billion vehicle kilometres)		Time (million hours)	Distance travelled (million train kilometres)	Average delay (minutes per train journey)
2024	137.5	71.3	101.3	147	2.2
2024 compared to 2023 (%)	+2.5%	+2.7%	+5.1%	+5.0%	0.0%
2024 compared to 2014 (%)	+8.9%	+7.5%	+43.1%	+1.4%	NA

Road safety

- > In 2024, 675 people died in road accidents, 9 less than in 2023. This was the second consecutive year since 2022 that the number of **road deaths** had fallen. That year had the highest number of road deaths in the period 2014-2024, namely 745. The number of road deaths in 2024 was 18% higher than in 2014.
- > The largest decrease in the number of road deaths between 2023 and 2024 was among cyclists (-9%) and pedestrians (-17%) (not shown in the table). Between 2023 and 2024, there was a relatively sharp increase among passenger car occupants (+13%) and motorcyclists (+22%).
- > The decline in the number of road fatalities between 2023 and 2024 is greatest in the 70 to 80 age group (-28, from 143 to 115) (not shown in the table). There was also a decrease in the age group younger than 15 (-2) and 15 to 20 (-6). In the other age groups, the number of road fatalities increased between 2023 and 2024.
- > Cyclists are the largest group of road deaths, with 246 fatalities (not included in the table). The number of cyclists killed in accidents has shown a trend of increase over the past 10 years. Car occupants were the second largest group of road deaths in 2024, with 220 fatalities. Most victims were elderly people in the 80+ age group. The number of victims in the older age groups in recent years is also higher than 10 years ago.

Road safety	Road deaths
	Number
2024	675
2024 compared to 2023 (%)	-1%
2024 compared to 2014 (%)	+18%

Living environment

- > **Greenhouse gas emissions** from the mobility sector² were estimated at 29.2 Mt CO₂ equivalents in 2024 (according to preliminary estimates using the IPCC calculation method). This represents a decrease (-5%) compared to emissions in 2023 (30.7 Mt). Compared to 1990, they are 13% lower. The policy target for 2030 is 21 Mt CO₂ equivalents. IPCC emissions from road traffic (in table) were 24.4 Mt CO₂ equivalents in 2024. This was 5% lower than in 2023 and 14% lower than in 2015.
- > According to preliminary estimates, total **air pollutant emissions** of NO_x and PM10 from the mobility sector in 2024 will be the same as in 2023. Compared to 2015, they are 18% (NO_x) and 25% (PM10) lower. Road traffic (in table) also shows that levels in 2024 were comparable to those in 2023. Compared to 2015, NO_x emissions in particular have fallen for this sector (-35%); PM10 emissions from road traffic also fell during this period (-12%).
- > At the end of 2024, the number of **(active) passenger cars** in the Netherlands was 9.2 million. Of these, 74% ran on petrol, 7% on diesel, 1% on LPG; 6% were fully electric, 4% were plug-in hybrids and 7% were regular hybrid cars (not shown in table).
- > Compared to 2023, the number of passenger cars increased by 2%. The number of plug-in hybrid cars in the fleet increased the most (42%), followed by fully electric cars (28%) (not shown in table).

 Environment	GHG emissions road traffic	NO _x road traffic	PM10 road traffic	Passenger cars
	Emission (Mt CO ₂ -eq)	Emissions (million kg)	Emissions (million kg)	Number (thousands)
2024	24.4	52.0	3.6	9,248
2024 t.o.v. 2023 (%)	-5%	0%	0%	+2%
2024 t.o.v. 2015 (%)	-14%	-35%	-12%	NA

NB: Preliminary data are shown in grey and *italics*

Forecast

- > We estimate future mobility developments, both for the current year (2025) and for the medium term (2030). The current, established policy is the starting point for this. We have also developed several scenarios for road traffic and public transport. Assumptions that are favourable to mobility growth (such as economic growth and population growth) are grouped together in the “more” scenario, while assumptions that are less favourable to mobility growth are grouped together in the “less” scenario. The base scenario is roughly in the middle. For aviation, freight transport and cycling, we are only working with a base scenario. The table below presents the estimates for the medium term.
 - **Road traffic:** In all scenarios, the distance travelled by road traffic on Dutch territory in 2030 will be greater than in 2024. In the less scenario, this is expected to be +7%, in the base scenario +9% and in the more scenario +11%. An increase in distance travelled is expected for both passenger and freight traffic.

² Emissions from maritime transport are not included in the IPCC system; emissions from inland waterway transport and aviation are only included if they concern journeys originating and ending within the Netherlands; in the case of aviation, only emissions during take-off and landing are included.

- **Public transport:** For train travel, two of the three scenarios predict growth in 2030 compared to 2024. In the baseline scenario, passengers are expected to travel 6% more distance by train in 2030 than in 2024. In the more scenario, this distance travelled is expected to be 13% higher than in 2024. However, the less scenario shows a slight decrease (-0.5% compared to 2024). For bus, tram and metro (btm), we expect a decrease in the distance travelled by passengers compared to 2024 in two of the three scenarios. In the baseline and less scenarios, a decrease of 1.5% and 8.5% respectively is expected in 2030 compared to 2024. In the more scenario, however, growth is expected: 11.5% compared to 2024.
- **Bicycles:** We expect bicycle use (measured in terms of the total distance travelled by bicycle) to be 8% higher in 2030 than in 2023³. The use of electric bicycles is expected to increase by approximately 40% during that period. The use of regular bicycles is expected to decrease by approximately 11% during that period.
- **Aviation:** The number of passengers at Dutch airports is expected to rise to 91 million in 2030, which is 19% more than in 2024.
- **Freight transport:** We expect the volume of freight transport on Dutch territory to decrease by approximately 5% in the period 2024-2030. The transport performance of rail freight, road transport and inland waterway transport is expected to decrease by 5%, 5% and 6% respectively.

Forecast 		Scenarios for 2030 compared to 2024		
		Less	Base	More
Road traffic NL territory	Distance travelled (vehicle km)	+7%	+9%	+11%
Road traffic main road network	Distance travelled (vehicle km)	+9%	+11%	+13%
Train	Distance travelled (passenger km)	-0.5%	+6%	+12.5%
Bus, tram, metro	Distance travelled (passenger km)	-8.5%	-1.5%	+11.5%
Bicycle ³	Distance travelled (km)	NA	+8%	NA
Aviation	Passenger movements (number)	NA	+19%	NA
Freight transport	Transport performance on Dutch territory (tonne-km)	NA	-5%	NA

More information about these themes can be found in the main report
Mobiliteitsbeeld 2025 (in Dutch).

³ Unlike the other growth figures, the growth for cycling is relative to 2023. The ODIN dataset is used for these realisation figures, and as mentioned earlier, no plausible ODIN results are available for 2024 at this time. For the other modes of transport, we have used realisation figures from other sources for the year 2024.

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