

# Toll Road Operators more strongly committed than ever to safe, sustainable and smart mobility

## There will be no transport decarbonization without decarbonizing road transport

Despite its critical role, the road transport sector faces significant challenges. Since 1990, emissions from road transport have steadily increased, now accounting for 73% of transport-related emissions and 21% of total emissions in Europe.

The urgency to decarbonize road transport has never been greater. Addressing this challenge requires a unified and coordinated effort at both European and national levels to modernize road infrastructure and accelerate the transition to sustainable, resilient, and efficient transport systems. This transition is vital for achieving the EU's climate goals and meeting the objectives of the European Green Deal.

To make it possible, the mobility sector requires large investments in sustainable, safe, and digitized infrastructure to upgrade the European motorway network. A 2024 PwC study, commissioned by ASECAP, has estimated that an investment of €72 billion, in addition to current motorway obligations, is necessary to upgrade

the motorway infrastructure to tackle the current challenges. To address them, the EU and its Member States must explore alternative financing solutions. Among these, the user/polluter pay principle via the levy of tolls offers a promising approach. By leveraging toll systems and existing policies, this model aligns road transport with sustainability and efficiency goals, making it cleaner and more economically viable.

Toll road operators are implementing key measures contributing to the decarbonisation of road transport as highlighted below.

## Towards carbon-free transport to answer climate change challenges

Even if the challenge ahead - a carbon-free mobility on their motorway network by 2050 to fulfil the EU Green Deal objectives – is a huge one that will imply massive investments, toll road operators are already working very hard to reduce their carbon footprint in their daily activities and operations as shown below. They will pursue their strong efforts in the years to come.

Environmental impacts				
	2021	2022	2023	2024
<b>CO2 emissions – Scope 1 and 2 (tons)</b>	497,798	416,985	397,160	397,619
<b>Renewable energy - produced by motorway operators (MWh)</b>	5,109	6,291	9,720	15,129
<b>Energy consumption (MWh)</b>	1,560,298	1,523,651	1,235,244	1,273,114

Source: ASECAP KPIs database

**Scope 1 emissions** are direct greenhouse gas emissions from sources owned or controlled by a company, such as fuel combustion in company vehicles, while **Scope 2 emissions** are indirect emissions from the generation of purchased electricity, steam, heating, and cooling consumed by the company.



Data related to **CO2 emissions** show a steady decrease since 2021 with a 20.1% reduction between 2021 and 2024. A remarkable achievement is the sharp increase in **renewable energy** produced by the motorway operators: it has almost tripled between 2021 and 2024. A downward – and encouraging – trend can be observed as well concerning **energy consumption** which dropped by 18.4% between 2021 and 2024. Together, these data points reflect a positive shift towards more sustainable energy practices among motorway

operators, highlighting their efforts to both produce more renewable energy and reduce their total energy consumption.

### Responsible management of the environment

Current and future EU legislation on EV charging, circular economy and biodiversity will significantly contribute to transforming the motorway sector into a fully sustainable one. But the toll operators are already achieving good performance and are making steady progress in those fields.

Electric charging/biodiversity/circular economy				
	2021	2022	2023	2024
<b>E-charging points in the network (number)</b>	1,423	2,935	4,992	6,287
<b>Service areas with e-charging stations (number)</b>	438	758	923	1,012
<b>Water protection systems/basins (number)</b>	12,434	12,431	12,824	12,786
<b>Noise barriers (km)</b>	3,289.28	3,325.64	3,393.65	5,523.7
<b>Infrastructures for fauna crossing only (number)</b>	2,979	3,023	3,030	3,426
<b>Other infrastructures allowing animal crossings (number)</b>	14,771	14,847	14,848	12,870
<b>Total recycled or reused waste (tons)</b>	2,762,988	3,618,336	3,731,012	7,324,955
<b>Total waste (tons)</b>	4,566,697	5,398,357	5,712,976	9,085,353
<b>Waste recovery rate (%)</b>	60.50%	67.03%	65.31%	80.62%

Source: ASECAP KPIs database

The data on **e-charging points** and **service areas with e-charging stations** within the network from 2021 to 2024 reflects a significant expansion in the infrastructure for electric vehicles (EVs). **E-charging points** have seen a sharp increase over the four years. On the network operated by ASECAP members, in 2021, there were 1,423 e-charging points. This number nearly quadrupled to 6,287 in 2024. This substantial growth demonstrates a strong commitment to expanding EV infrastructure, which is crucial for supporting the transition to electric mobility and meeting growing demand. **Service areas with e-charging stations** also experienced significant growth: the number increased from 438 in 2021 to 1,012 in 2024, which accounts for a 131% increase. This expansion aligns with the increase in e-charging points, indicating that more service areas are being equipped to provide convenient charging options for travellers.

Furthermore, they increasingly **recycle or reuse** their **waste**: in 2024, ASECAP members recycled or reused 80.62% of their total waste.

In addition, toll road operators have pursued their efforts by

further reducing noise pollution and preserving biodiversity and wildlife: the total length of noise barriers reached 5,532.7 km in 2024 (+68.2% from 2021). As of the end of 2024, the network features 3,426 **infrastructures specifically designed for fauna crossings** (+15% from 2021).

### Infrastructure Safety:

#### Working towards Road Safety Vision Zero objective

**Road safety is the first priority of the toll road operators.** The social contract of motorway companies is to safeguard the safety of road users and their workers first. Nevertheless, the ambition of the toll motorway sector is to reach the EU and UN targets: **Vision Zero**. The motorway infrastructures are designed and built with highest quality and technological standards which make them the safest infrastructure than any other road infrastructure. Toll road operators also have the obligation to guarantee congestion-free traffic on their network. C-ITS and AI play a crucial role therein, which has a positive impact on fuel consumption, CO2 emissions and air pollution which are reduced.



Road injuries and fatalities				
	2021	2022	2023	2024
<b>Injured persons</b>	17,182	18,874	19,729	21,120
<b>Fatal accidents</b>	466	526	483	465
<b>Fatalities</b>	511	624	543	525
<b>Personal injury rate*</b>	66.6	67.6	68.4	69.4
<b>Fatal accident rate**</b>	1.8	1.9	1.7	1.5
<b>Fatality rate ***</b>	2.0	2.2	1.9	1.7
<b>km travelled (million km)</b>	258,097	279,051	288,364	304,179

Source: ASECAP KPIs database

Data cover ASECAP EU members without Germany and Hungary

\*Personal injury rate: number of injuries per billion kms travelled on motorways

\*\* Fatal accident rate: number of fatal accidents per billion kms travelled on motorways

\*\*\* Fatality rate: number of fatalities per billion kms travelled on motorways

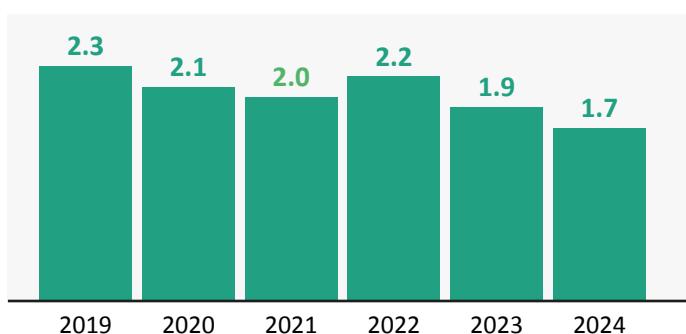
The data show positive trends with a steady decrease in the number of **fatal accidents** and **fatalities** since 2022. However, efforts must be pursued to reduce the number of **injured persons**.



### Toll motorway companies play a crucial role in shaping the future of sustainable and resilient mobility in Europe

The concession model, based on the user/polluter pay principle, enables high-quality transport infrastructure without burdening public budgets. Toll companies finance, maintain, and operate roads, reinvesting revenues in sustainability (zero-emission technologies, deployment of alternative fuel infrastructure, intermodal solutions, etc.), innovation, and resilience. This approach promotes environmental responsibility and accelerates infrastructure delivery through private investment. Toll-financed motorways relieve taxpayers while generating significant fiscal returns for governments. In 2024, ASECAP members contributed over €6 billion in VAT, supporting broader social priorities.

### ASECAP Fatality Rate 2019 — 2024



more than  
€36  
billion  
toll revenues



more than  
€6  
billion  
generated for  
VAT alone



more than  
€7.5  
billion  
ASECAP  
companies  
investment



more than  
€13.5  
billion  
allocated to  
any other  
social priorities



ASECAP is the European Association of Operators of Toll Road Infrastructures, including motorways, bridges, tunnels and other toll roads. They operate, maintain, manage a network of more than 82,700 km across 17 countries with a long-term vision that ensures highest quality standards to make the road infrastructure safest targeting vision zero fatality and moving toward net zero carbon thanks to the user/payer principle providing sustainable financing. ASECAP has also 3 Advisory Industry Partners.

2024 Sustainability Report



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