

Demographic Change, Economic Restructuring and Transport Demand towards 2060

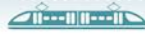
A Regional Review

TØI Report 2150/2026 • Author: Wiljar Hansen • Oslo 2026 • 32 pages

The report shows that long-term changes in demography and economic structure will lead to clear regional differences in transport demand towards 2050 and 2060. The main findings can be summarised as follows:

- Continued centralisation will generate the strongest growth in transport demand in and around the largest urban areas, particularly in Eastern Norway, and will reinforce the importance of the main transport corridors.
- Population ageing and a declining share of working-age residents will change the composition of transport demand, with relatively weaker growth in commuting and greater importance of trips related to health, care, services, and everyday mobility.
- The Norwegian economy is expected to become less dependent on petroleum and more service- and knowledge-based, with the strongest growth in health and care, private services, and knowledge-intensive industries.
- The transition away from the petroleum economy will have major regional impacts, especially in Southern and Western Norway, both through direct effects in the petroleum sector and indirect inter-industry effects through supply chains and labour markets.
- Place-bound industries will remain important for value creation and transport activity in rural areas, and long-distance freight flows related to seafood, aquaculture, fisheries, agriculture, and industry will continue to play a central role in the transport system.

This report has been prepared as part of the knowledge base for the work on the National Transport Plan (NTP) 2029–2040. Its purpose is to shed light on how long-term changes in demography, economic structure, and technology may affect transport demand towards 2050 and 2060. The report is based on a synthesis of existing analyses, in particular projections produced with the regional general equilibrium model NOREG 2, as well as population data and population projections from Statistics Norway (SSB). The analyses are structured by four major regions: Northern Norway, Central Norway, Western Norway and Southern Norway, and Eastern Norway.



The report shows that Norway will continue to be characterised by persistent centralisation, with population growth occurring mainly in and around the largest urban areas, particularly in Eastern Norway. At the same time, the population will age significantly, and the share of the population of working age will decline in many counties and municipalities, especially in less central areas. Population growth towards 2050 is largely driven by immigration. Without net immigration, national population growth would have been close to flat. Regional differences are substantial: The counties of Akershus, Oslo, and Østfold are expected to experience the strongest growth, while Nordland is the only county projected to see a slight population decline in SSB's main alternative. In Northern Norway and several other rural areas, the main challenge is the decline in the working-age population, even where the total population remains stable.

The projections of economic development point to a Norwegian economy that gradually becomes less dependent on petroleum and increasingly characterised by services, health and care, knowledge-intensive industries, and green industry. At the national level, the health and care sector is expected to become both the largest and the fastest-growing sector towards 2060, driven by population ageing. At the same time, growth in private services is expected to be strongest in the major urban regions, particularly Oslo and Akershus. The transition away from a petroleum-based economy will have major regional impacts, especially in Rogaland and Vestland, but also in parts of Møre og Romsdal county and Northern Norway. The downsizing of the petroleum sector will not only have direct effects on oil- and gas-related activities, but also indirect inter-industry effects through supply chains, lower consumption, and changes in regional labour markets.

At the same time, the report shows that regional industry profiles will remain diverse. In Northern Norway, seafood, aquaculture, energy, and resource-based industry will remain central, but growth opportunities are constrained by small labour markets, long distances, and shortages of labour and skills. In Central Norway, Møre og Romsdal county remains a stronghold for industry and marine activities, while Trøndelag has a broader basis for growth through a combination of aquaculture, agriculture, knowledge environments, and services. Western Norway and Southern Norway face the strongest restructuring pressures as a result of the petroleum downturn, but at the same time have favourable conditions for new growth in areas such as energy, maritime industries, and green industry. Eastern Norway has the strongest growth prospects, especially in Oslo, Akershus, and Buskerud, driven by knowledge-intensive services, technology, and logistics.

These development trends have important implications for transport demand. Demographic growth and centralisation shift transport demand towards the largest urban areas and the main corridors between them, increasing pressure on commuting, peak-hour traffic, leisure travel, and freight deliveries. At the same time, population ageing will alter the composition of transport demand, with relatively weaker growth in traditional work trips and greater importance of trips related to health, care, services, and everyday mobility. In rural areas, transport needs will to a greater extent be linked to access to services and jobs over longer distances.

Changes in economic structure imply that passenger transport, business travel, and urban distribution will become increasingly important, while heavy raw-material-based transport will become relatively less important in the economy as a whole. At the same time, long-distance freight flows will remain crucial for value creation in large parts of the country, particularly for seafood, aquaculture, fisheries, agriculture, and other place-bound activities. Continued centralisation and population growth in Eastern Norway, together with proximity to Sweden and good transport connections, also suggest that Akershus, Østfold and the wider Oslofjord region will play an increasingly important role as a national warehousing and distribution area.



Overall, the report shows that future transport demand will increasingly be shaped by where people live, how labour markets and the economy develop, and how production and distribution are organised. For transport policy, this implies a need for a transport system that can both accommodate strong growth in the most central regions and at the same time safeguard accessibility, mobility, and value creation in rural areas.