

FEBRUARY 2019

Freight and Servicing Action Plan

Pre-launch briefing

Confidential draft for discussion



1. The purpose and scope of the action plan
2. Engagement with our partners
3. Overview of the Freight Action Plan
4. Publication
5. Next steps



Freight and Servicing Action Plan: Purpose and scope

Our city is set to transform as we deliver the Mayor's vision for Healthy Streets.

Achieving this vision will significantly change the operating environment by reallocating roadspace to walking, cycling and public transport and introducing new regulations to make vehicles cleaner and safer.

The Freight and Servicing Action Plan is the fourth daughter document to the MTS and will include:

1. Freight in London: key trends
2. Evidence-based actions on:
 - a) Safe freight
 - b) Clean freight
 - c) Efficient freight
 - d) Protecting land for freight
3. Future of freight



Stakeholder engagement

We have carried out wide-ranging engagement including discussions with:

- ✓ The Freight Policy Advisory Panel
- ✓ The Freight External Partners Group
- ✓ The Freight Forum
- ✓ Borough workshops and a review session with London Councils

This has helped us develop a shared ambition for freight in London and actions that are designed to overcome real barriers to safe clean and efficient freight.

Our final document has responded to insightful feedback including:

- Compiling all actions and activities related to freight in London in one place
- More in-depth understanding of what has been driving trends in freight activity in London e.g. van growth
- Setting a consistent approach for London to help operators make the case for investing in clean, safe and efficient vehicles and practices
- A focus on the challenge of land for logistics in the right place
- The need to change consumer behaviour, as operators react to customer/supplier demands
- Integration of freight within wider Healthy Streets policies, schemes and campaigns
- Case studies and best practice to help scale up local trials



Freight is important to London and is growing fast

London is a growing city, creating an increasing demand for construction, deliveries and servicing, especially using vans:

- Half of the value of household expenditure in London (£79 billion in 2013) relies on freight
- Freight and servicing vehicles made up 19 per cent of vehicle kilometres in 2017 (comprising 3 per cent HGVs, 16 per cent vans)
- Van kilometres are expected to grow by 43 per cent on 2015 levels by 2041. By contrast. HGV numbers are expected to continue a steady decline.
- Changes to the economy, land use, purchasing habits, new technology and the growth of the servicing sector are contributing to changing freight and servicing patterns,
- A lack of the right land in the right places is seen as a barrier to improving efficiency
- We know the freight and servicing industry has made a lot of progress to make operations safer and cleaner, but we need to go further and want to support you to do so

Figure 5: LGV vehicle kilometres growth, normalised to 2015

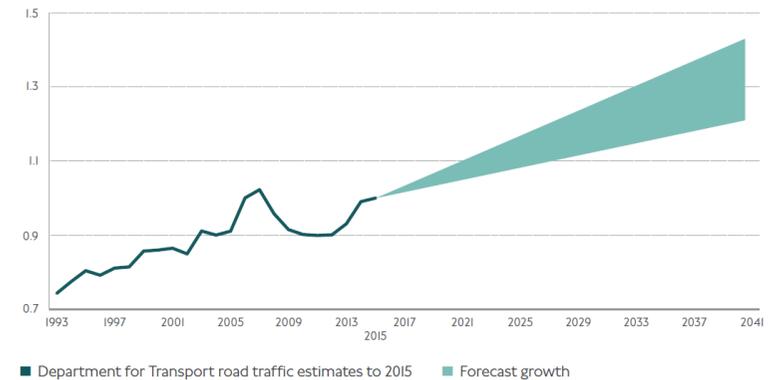
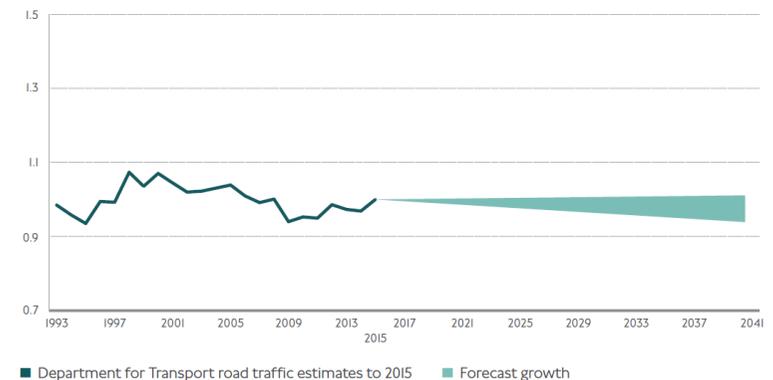


Figure 6: HGV vehicle kilometres growth, normalised to 2015



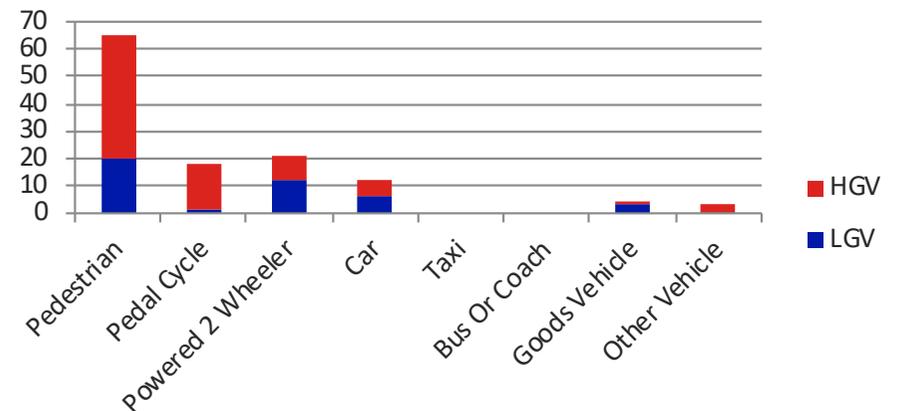
Safe Freight

Freight vehicles in the UK are the safest they have ever been and new DVS standards will further improve the safety of HGVs.

However, in London between 2015 and 2017 HGVs were involved in 63 per cent of fatal collisions involving cyclists and 25 per cent of fatal collisions involving pedestrians.

This is despite HGVs only making up four per cent of the overall miles driven in the capital.

Fatalities involving a goods vehicle 2015-17



To tackle road danger from freight, we will undertake the following actions:

Safe vehicles:

- Consult on and launch world's first Direct Vision Standard permit scheme from 2019
- Drive compliance with DVS through our contracts

Safe speeds:

- Encourage the fitting of safety technology including Intelligent Speed Assistance

Safe streets:

- Reduce conflicts through delivering Safer Junctions and using the Healthy Streets Check for designers

Safe behaviours

- Drive the highest standards of safe driving through enhancements to FORS, including a new pedestrian safety module, the Van Smart training course and Beyond CBT for motorcyclists.
- Continue to deliver the innovative Exchanging Places programme

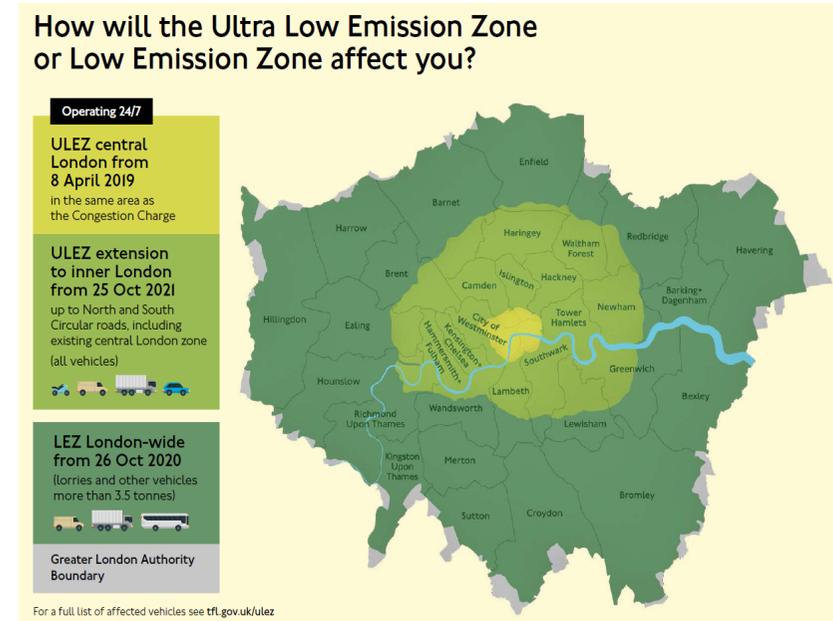


Clean Freight

We know the freight industry has already made big efforts to reduce emissions from their fleet and comply with the Low Emission Zone. But freight and servicing vehicles still contribute to a significant proportion of transport emissions in London:

- 33 per cent NO_x emissions
- 29 per cent of PM_{2.5} emissions
- 23 per cent of CO₂ emissions – c1.5 million tonnes

We need work together to reduce this impact.



To tackle emissions from freight, we will undertake the following actions:

- **Support the industry to comply with ULEZ:**
 - Clearly communicate ULEZ requirements, ramping up coverage until Go Live in April
 - Launch a new van scrappage scheme, targeted at micro-businesses, to support a switch to cleaner vehicles
- **Support HGV and LGV drivers and operators to switch to zero emissions:**
 - In the EV Infrastructure Task Force Delivery Plan, set out proposals for supporting freight ULEVs
 - Publish guidance for local Zero Emission Zones by Spring 2019
 - Continue to call on central government to ensure all new cars and vans are zero emission by 2030 at the latest

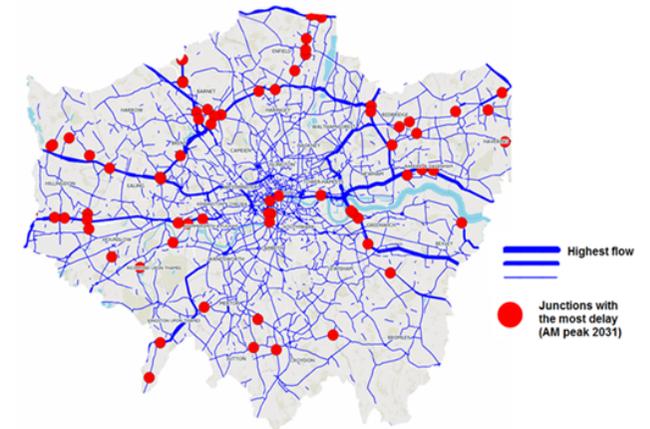


Efficient freight (1) – Improving access into London

Freight operators run their businesses as efficiently as possible to meet customer demand and within the constraints of local and national regulations, restrictions and road conditions.

Congestion increases the costs of doing business – in 2017 it was estimated to cost the capital £9.5 billion from direct and indirect costs (INRIX, 2017).

The most severe delays tend to occur at locations on routes with the highest freight vehicle flows and this is forecast to continue



To tackle inefficiency at the network level, we will undertake the following actions:

Through our operations, pursue opportunities for an enhanced level of service for clean, safe and efficient freight

- Identify key strategic corridors for freight and review signal times along these routes
- Minimise disruption to freight through real-time management of the road network in our Network Management Control Centre
- Work with our partners to provide an enhanced level of service for certain movements and retime trips to quieter times
- Collaborate and share data with freight operators and routing software providers

Support mode shift to rail and water

- Work with stakeholders to protect and re-activate wharves and include these, alongside railheads and Construction Consolidation Centres in a Freight Infrastructure in London toolkit
- Work with Network Rail to take advantage of opportunities to grow rail freight where it will not detrimentally affect residents with noise and re-route rail freight not directly serving London

Reduce the impact of construction through Construction Logistics Plans

Efficient freight (2) – Improving access into local areas

Growth in online shopping in London and has increased demand for kerbside space.

Between 200,000 and 400,000 office-based deliveries take place each day in London.

60 per cent of vehicle time on multi-stop parcel delivery rounds is spent parked at the kerbside.



To tackle inefficiency at the local level, we will undertake the following actions:

- Promote responsible consumer choices such as click and collect (including at stations) through our air quality and cycling and walking marketing campaigns
- Work with businesses to encourage them to offer sustainable delivery options (e.g. 'green' delivery slots)
- Deliver workshops and promote our Efficient Deliveries toolkits to support business to reduce the impact of their deliveries and servicing
- Scale up successful last mile trials and initiatives such as re-timing and micro-consolidation including promoting the Healthy Streets for Business fund
- Produce guidance for Area Freight Management Plans to enable planning for clean, safe and efficient deliveries, collections and servicing in TfL and borough schemes



Efficient freight (3) – Consolidation

We know that consolidating freight is an important part of many logistics chains. It allows for improved load utilisation and can reduce delivery vehicles numbers and kilometres.

Consolidation can vary in scale from large regional distribution centres served by international and national freight flows to small, last-mile micro-consolidation facilities, click and collect and locker banks.

Examples in London demonstrate that shared procurement and last mile micro-distribution centres can be commercially successful and supports increased use of zero emission deliveries.



To promote consolidation as one of a combination of measures to support efficient freight we will undertake the following actions:

- Complete the demonstrator projects and sharing results by mid-2019
- Continue with further pilots to refine the most efficient consolidation models
- Upscale proven successful consolidation models, such as collective procurement



Efficient freight (4) – Restrictions and regulations

Across London, a wide range of regulations and restrictions exist that influence where and when different vehicle types can go and where they can park. They are designed to reduce the impact of freight and have safety, environment, noise or streetscape benefits.

However, freight and servicing operators tell us these can be difficult to navigate and they sometimes make it more difficult to deliver goods in an efficient and low-impact way.



To improve clarity for operators, we will undertake the following actions:

- Work with boroughs to review and update access and loading regulations and restrictions, particularly when implementing TfL-funded schemes to achieve a consistent approach to regulations.
- Work with London Councils, boroughs, residents and community groups, the industry and its customers to take forward the recommendations of the London Lorry Control Scheme 2017 review
- Share and making our data available so that it can be used by operators and software developers to develop online look-up tools and work with partners to find innovative ways to digitise London's kerbside



Land for freight

We know from our engagement that increasing cost of land is forcing some operators to relocate to more affordable locations, especially away from central London.

Between 2000 and 2012, the proportion of industrial floorspace fell by almost 20 per cent, while retail and office floor space grew by approximately 5 and 10 per cent, respectively.



DPD have introduced an all electric local distribution centre in Westminster and on TfL land

To protect land for freight, we will undertake the following actions:

Safeguarding industrial land

- Ensure no net loss of industrial floor space on designated sites and direct certain boroughs to find more capacity
- Work with the London Boroughs to ensure that they consider the demand and provide sufficient capacity for B8 storage and distribution, alongside other industrial uses, in their Local Plans.

Plan for freight and servicing in new development, particularly Opportunity Areas

- Update Delivery and Servicing Plans and Transport Assessment Guidance
- Ensuring adequate land and infrastructure is provided for consolidation and loading
- Identifying land on the TfL estate for distribution centres and collection points and encourage boroughs to do the same



Publishing the plan

We will publish the Freight and Servicing Action Plan on 8 March (date TBC)

The Deputy Mayor for Transport will attend a press launch event at a key stakeholder location

We will convene a special meeting of the Freight Policy Advisory Panel in April to thank the group for their invaluable input and to discuss how we can work together to maintain momentum and deliver the immediate actions in this plan (see next slide)

Publishing this Action Plan is only the first step in an ongoing process. By continuing to work with our partners, we will ensure our strategy evolves in response to future changes in technology, industry innovations and consumer purchasing behaviour.



Next Steps

We want to work with you to identify how we can deliver all of the actions in this plan and have identified the following actions that to work to achieve over the coming year:

- SAFE: Launch DVS to improve road danger
- CLEAN: Launch ULEZ and support the industry to comply
- CLEAN: Provide guidance for boroughs on local zero emission zones to ensure consistency of zero emission requirements across London
- EFFICIENT: Deliver an awareness and behaviour change campaign targeted at changing customer sentiment and encouraging 'green' delivery slots to improve efficient logistics planning
- LAND: Identify small parcels of TfL land for distribution centres and click and collect points; and expand the number of sites with collection lockers, and the number of lockers at existing sites

Your support for this plan and your continued commitment to working with us to deliver it will be vital to achieving safe, clean and efficient freight that serves a growing city.

