

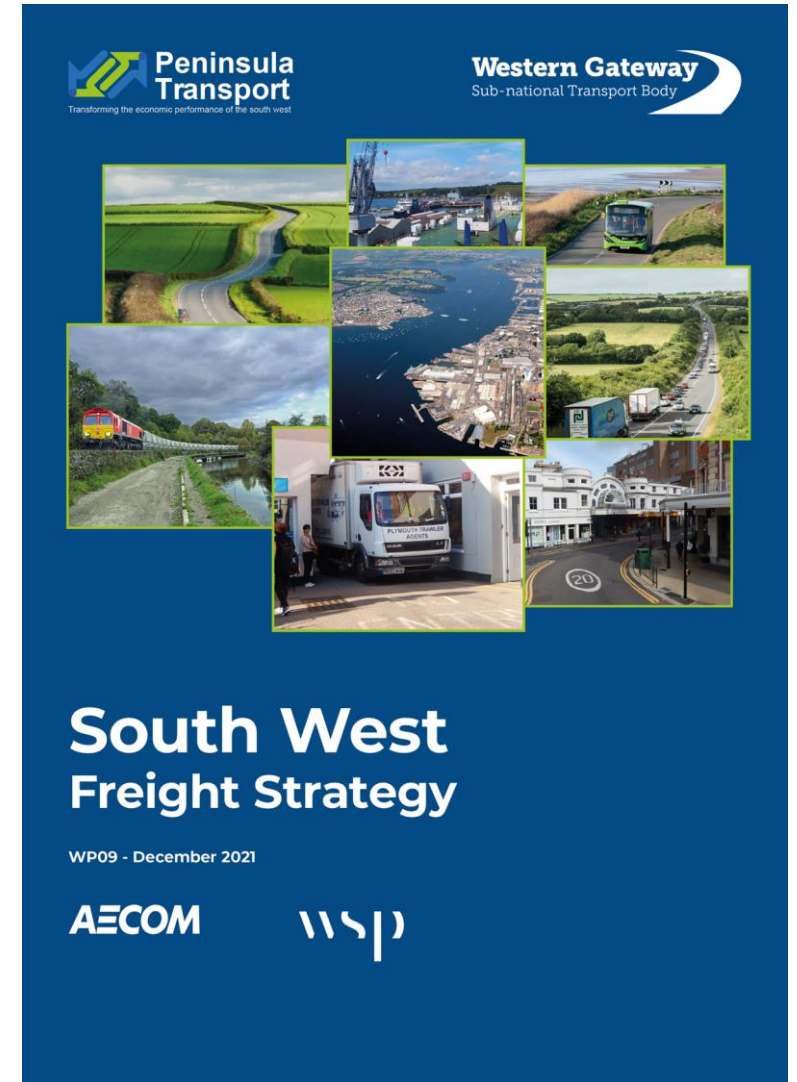
South-West Freight Strategy

Western Gateway STB



and

Peninsula Transport STB



SW Freight Strategy – Why an STB strategy?

- Freight - traditionally left to the private sector.
- Commercially sensitive information – lack of data transparency.
- Challenging to plan optimally for freight in purely competitive market.
- Lack of collaboration can lead to sub optimal provision e.g. warehouse sharing/hubs not delivered that serve wider good across multiple stakeholders.
- STB can take a strategic, regional view and convey agreed, regional priorities to DfT, National Highways and Network Rail through a joined up strategy.
- Propose a multi modal package of interventions that will improve freight efficiency, reduce freight journey times, reduce congestion, reduce carbon emissions and support economic growth.



South West Freight Strategy – Why?

- First joint Freight Strategy for the South West
- Private sector freight operators view SW as a region – not STB boundaries
- Brings together private and public sector stakeholders on a regional basis
- Approach favoured by DfT, National Highways and Network Rail
- Aligns the diverse areas of the South West and provides joined up approach to freight in the region reflecting the reality of freight movements
- Vision and strategy will address the challenges, opportunities, and priorities for the South West over the next 30 years – to 2050.



South West Freight Strategy – High level Findings

- Food and Drink, Quarrying and Mining (Peninsula) are the largest commodity categories imported and exported from the area.
- Quarrying industries provide raw materials across the UK for manufacturing and construction sectors.
- Strong case for expanding heavy rail freight and mode shift away from long distance road haulage of bulk goods.
- Benefits –
 - less congestion on the roads (plus more capacity for other road freight movements),
 - a reduction in environmental damage caused by HGVs and
 - greater efficiencies within the freight industry.
- Intermodal terminals opportunities identified
- Reduce 'empty running' HGVs (22% of HGV journeys)

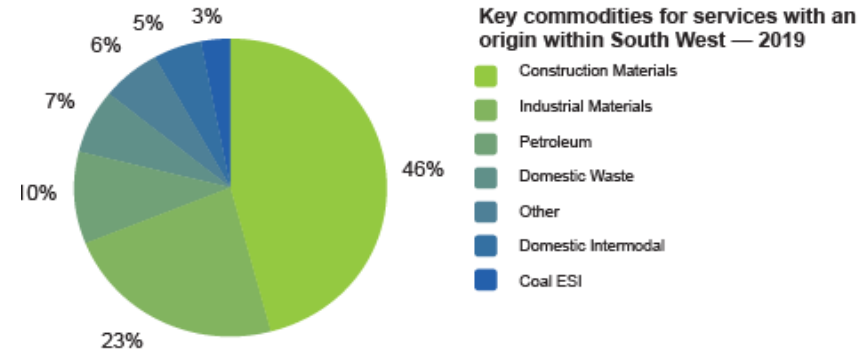
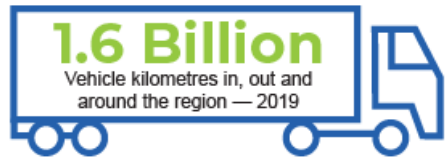


- Bespoke data analysis – inc large dataset provided by DfT,
- Case study learnings – rail, road, maritime and aviation,
- Extensive stakeholder engagement including:
 - One to one interviews with key stakeholders
 - Two online workshops – over 60 participants
 - Stakeholder questionnaire on draft interventions
- Freight interventions development
- LA and STB Officer, Key agencies and DfT peer review and feedback

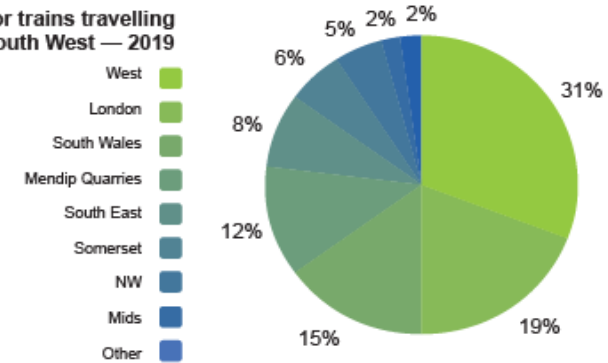


South West Freight Strategy – WG key Facts

Western Gateway

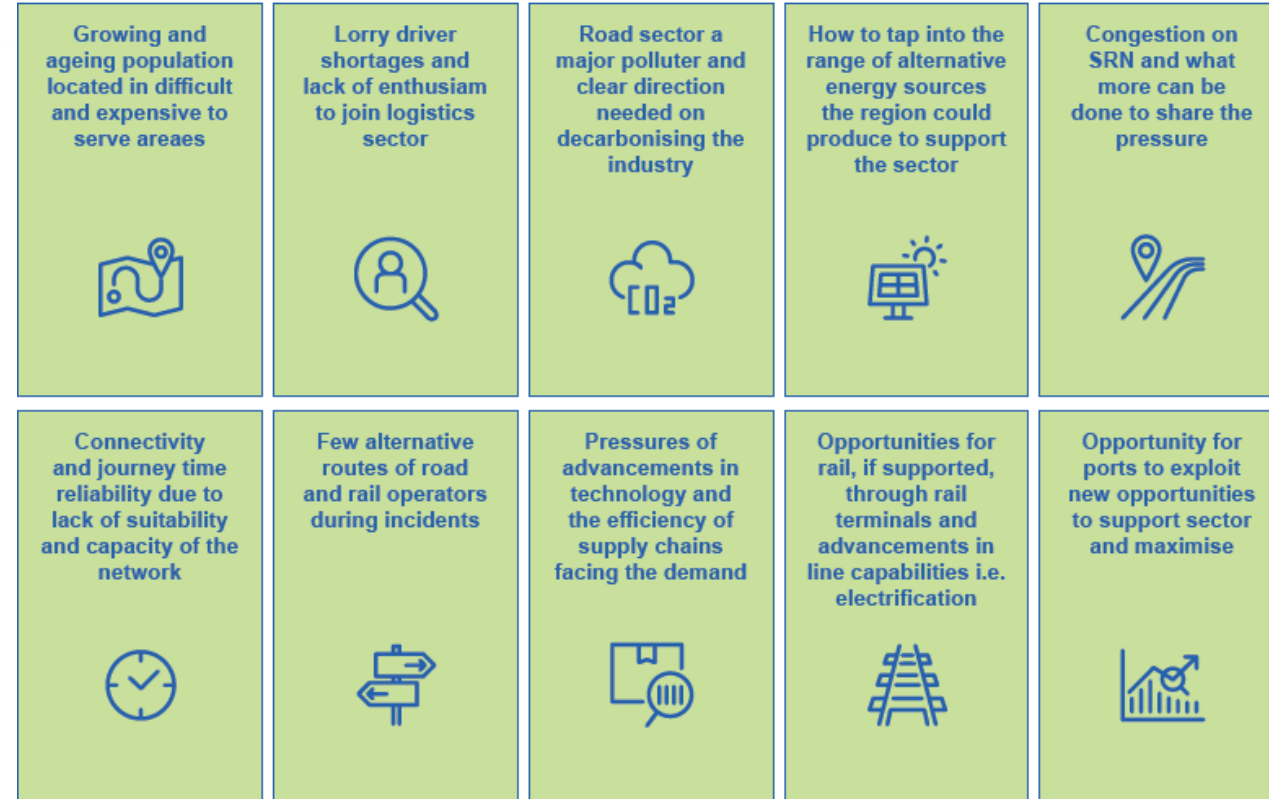


Origin/Destination SFCs for trains travelling within the South West — 2019



SW Freight Strategy – Issues

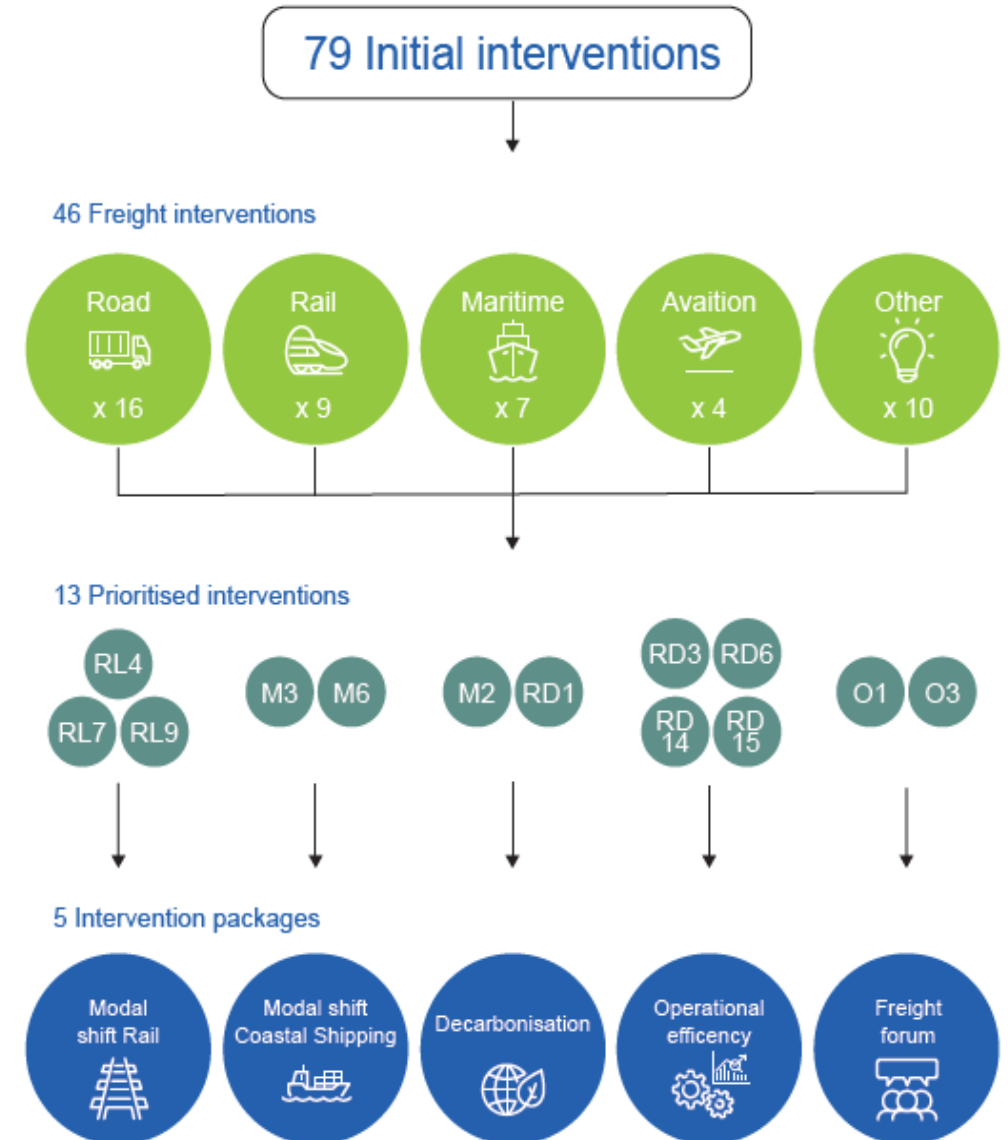
- SW dependent on road based freight
- Lorry driver shortage, national issue;
- Road congestion – SW strategic road network is less developed than elsewhere – pinch points;
- Road freight – cleaner now but still high pollution levels;
- Availability of electric charging or gas fuelling infrastructure
- Questions over the role of STBs in addressing the issues outlined and shaping future priorities with different stakeholders;
- Region has commercial ports with spare capacity;
- Airports focussed on passenger traffic with minimal tonnage of air freight;
- Lack of active rail freight terminals is main barrier against moving more products by rail;



SW Freight Strategy – Interventions

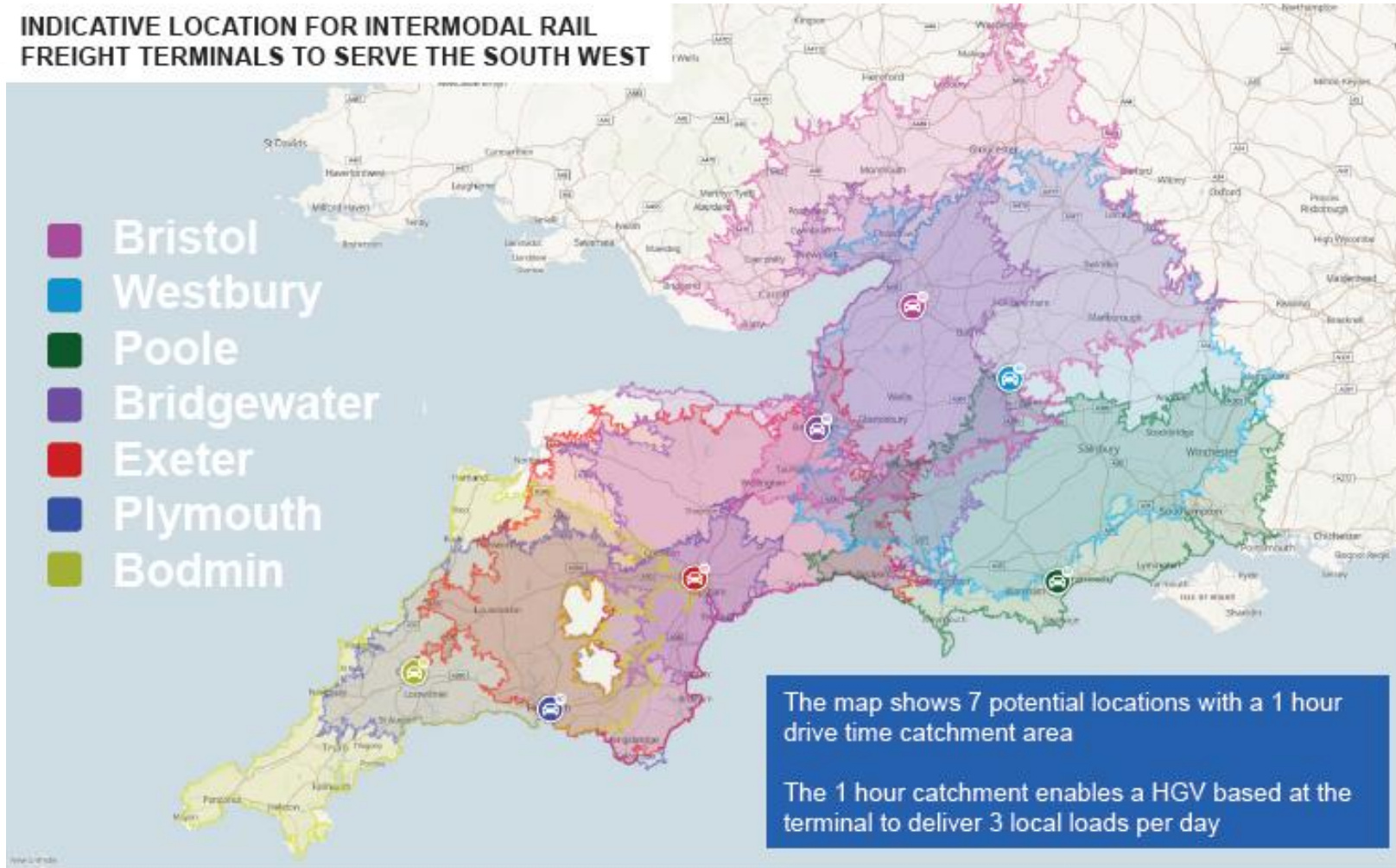
Strategy proposes 46 interventions packaged into 6 themes, split into 5 modes:

- Connectivity
- Decarbonisation
- Info and awareness
- Infrastructure
- Operational efficiency
- Technology



SW Freight Strategy – Implementation example

INDICATIVE LOCATION FOR INTERMODAL RAIL FREIGHT TERMINALS TO SERVE THE SOUTH WEST



- Indicative locations for potential rail freight terminals
- Freight Steering Group will discuss and prioritise accordingly in partnership with member LAs, industry, Freight Operating Companies (FOCs), key agencies and DfT
- Local issues will have to be overcome on a case by case basis and business cases developed.



Questions?

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- Covid-19 has led to an increase in the number of vans required in the UK
- Online retail reached a record proportion of total retail sales in January 2021 at 35%.
- 2019-20 Van Statistics survey - “delivery/collection of goods” accounted for 23 % of all van mileage.
- Limited route choice in and out of the South West: Three core strategic corridors (M5/A38, A303/A30/A35/A31, A361).
- RIS2 National Highways study investigating corridors between the M4 and the Western Gateway South coast – addressing fact that routes currently have slow journey times and poor resilience e.g. A350, A37, A338 and A36.

