



Lowering Emissions
from Commercial Vehicles

ANNUAL CONFERENCE

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Kempton Park
Racecourse

Delivered by:



Session 1

Planning For A Low-Carbon Future

Supported By:





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BearingPoint



Lowering Emissions
from Commercial Vehicles

The Rise and Rise of Vans in Cities

Some facts and their policy implications

Alan Braithwaite

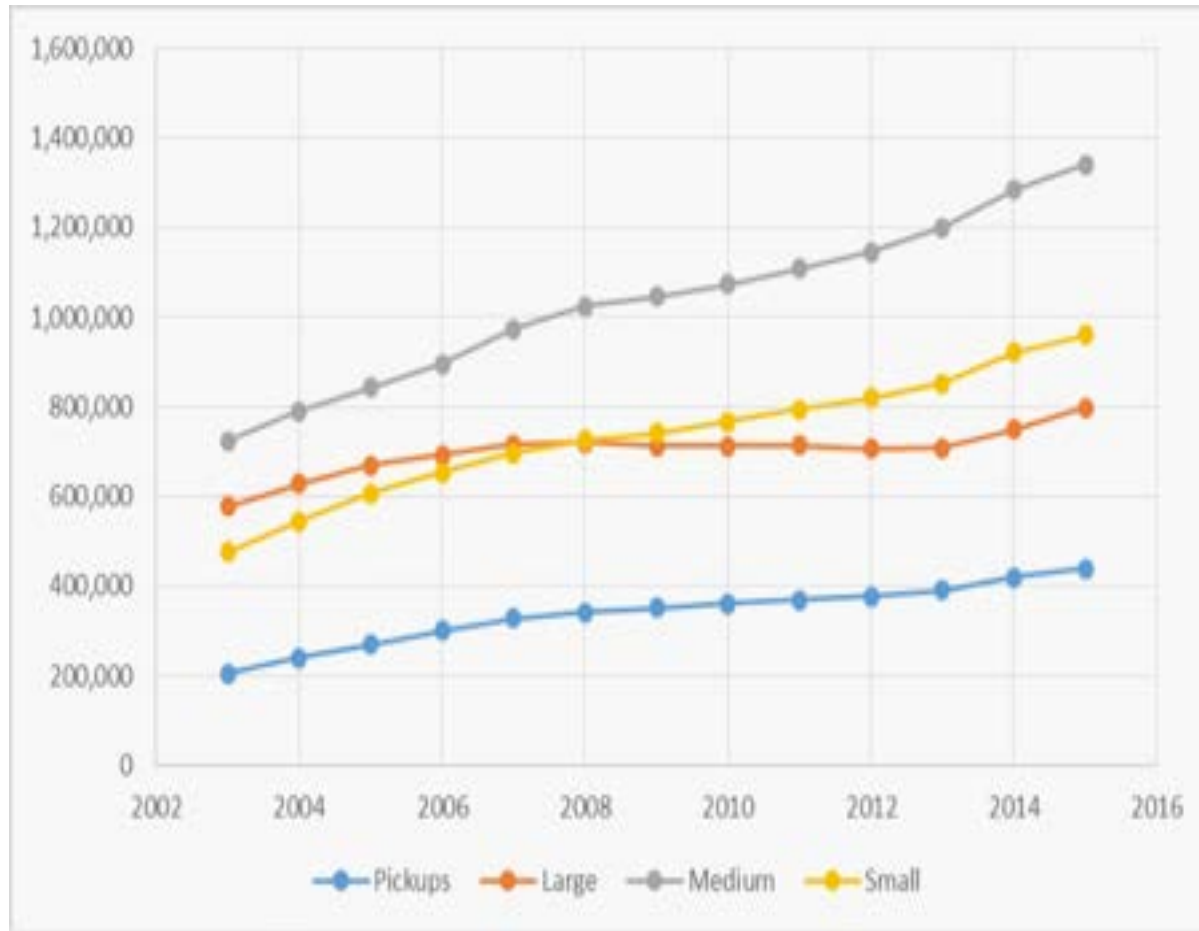
September 5, 2018

Content

- ❑ Some high level statistics on vans
- ❑ What vans are doing on the ground
- ❑ Policy implications
- ❑ Emerging solutions
- ❑ Questions

Some Van Statistics

Vans are growing fast - above the rate of the economy

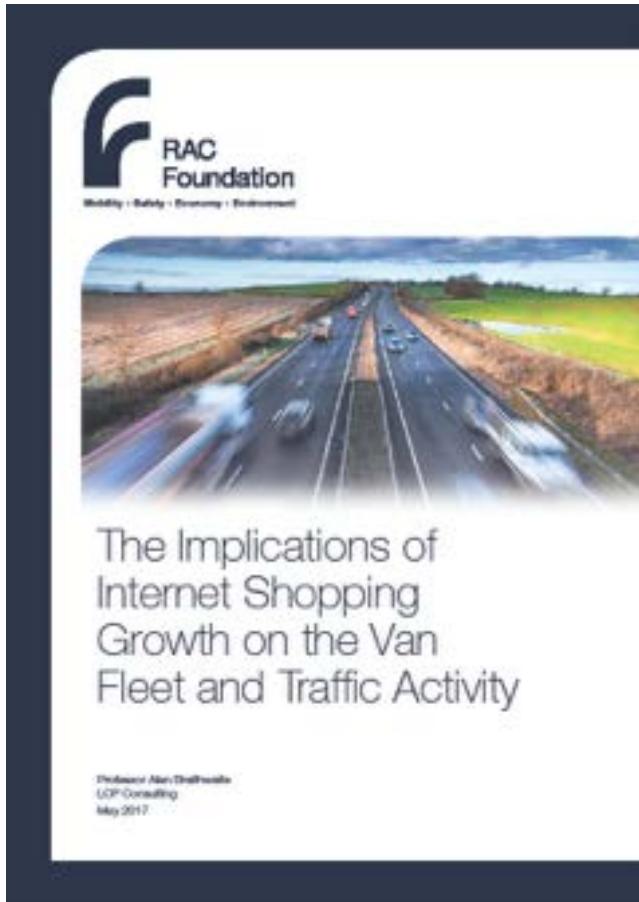


Vans are the fastest-growing traffic segment in the UK, with 70% growth in road miles over the last 20 years, compared to 12% for cars and 5.5% for lorries

The van fleet (parc) is growing fast. Historic growth rates in vans on the road of around 5% annually which is greater than annual growth in van mileage of 3.5%

E-Commerce is not the root cause of van growth

Unfairly demonised - and not the major factor in congestion



e-Commerce parcel volumes are growing at 9% annually ~ a rate that is expected to fall to 6% a year over the next four years

The vans in use by package and grocery e-commerce delivery operators < 4% of the van parc and make up close to 10% of van traffic

In overall traffic terms, vans used to service internet shopping orders account for only 1.5% of traffic in London where congestion is the worst in the country

On-line retail means we travel less to shop

So e-commerce may be a benefit? Replaced by education and social travel



Shopping travel

- ❖ 19% of trips / 12% distance
- ❖ Declined by 20% and 18%

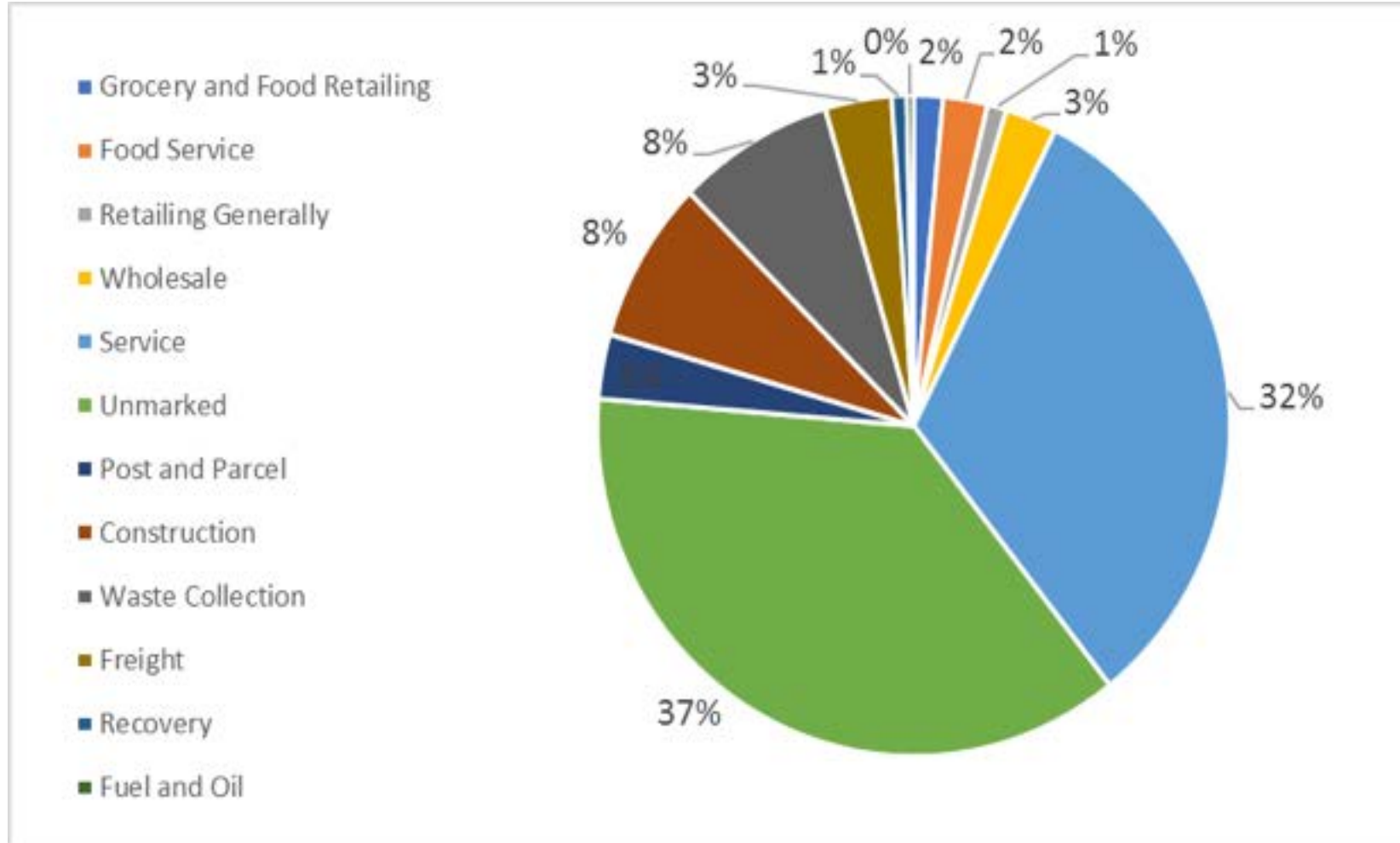
National Travel Survey 2015

- ❖ 17% make fewer trips
- ❖ 23% of these cite shopping online as the reason

Ipsos MORI 2016

So what are vans actually doing?

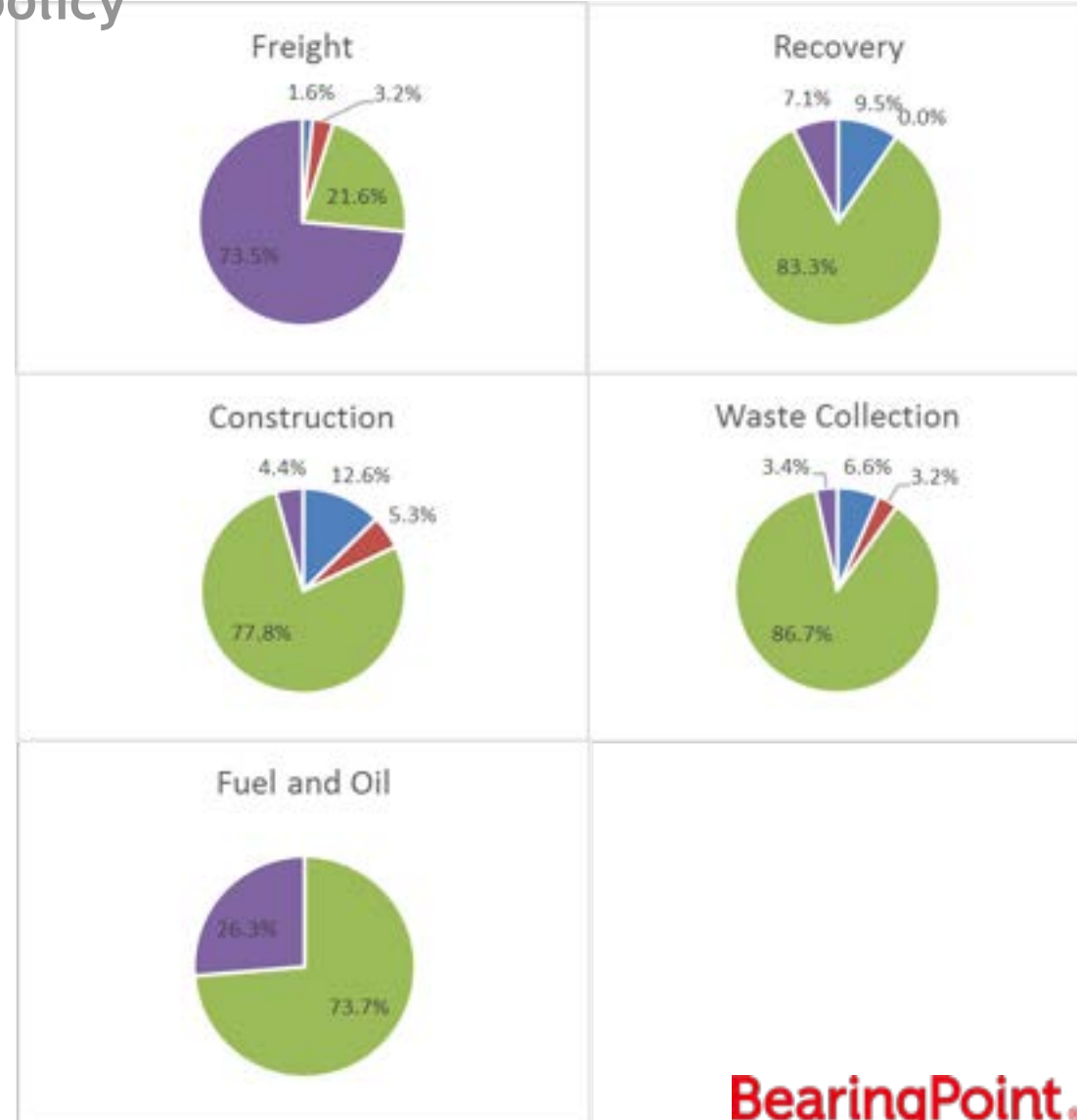
Research in London Borough of Barking and Dagenham



- Remarkable diversity
- Vans for applications not interchangeable
- Service activities cover a huge range
- Food is only a maximum of 7% including wholesale
- Parcels are consistent with RACF

The mix of vehicle size varies by application...

Clear variations which are interesting in terms of policy



The question remains: Are the last miles by van sustainable?



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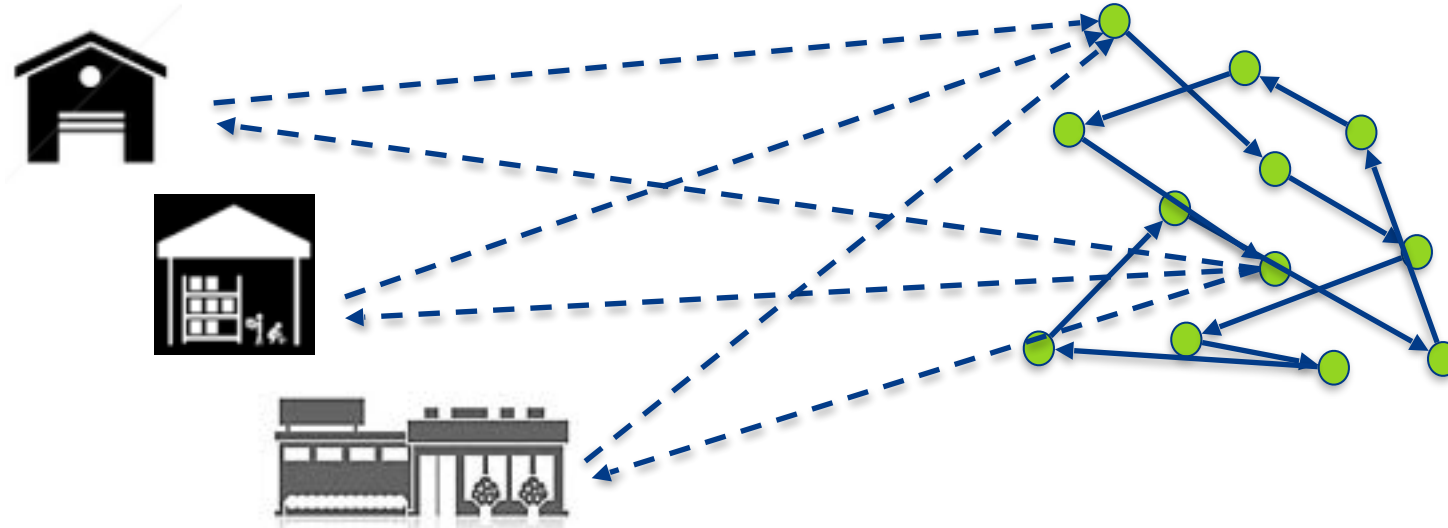


Policy Implications...

- ❑ The long term outlook of business as usual is not sustainable, but ...
- ❑ One size regulation and design will not fit all situations
- ❑ Cluster concept is right - different profiles in different clusters
- ❑ Have to look over borough boundaries to understand the 'system'
- ❑ TfL strategy exactly right:
 - Avoid journeys by combining flows
 - Re-time journeys to avoid peaks and congestion
 - Mitigate the impact - EVs, fuel cells, cargo-bikes
- ❑ Integrated incentives and penalties will be needed - by segment

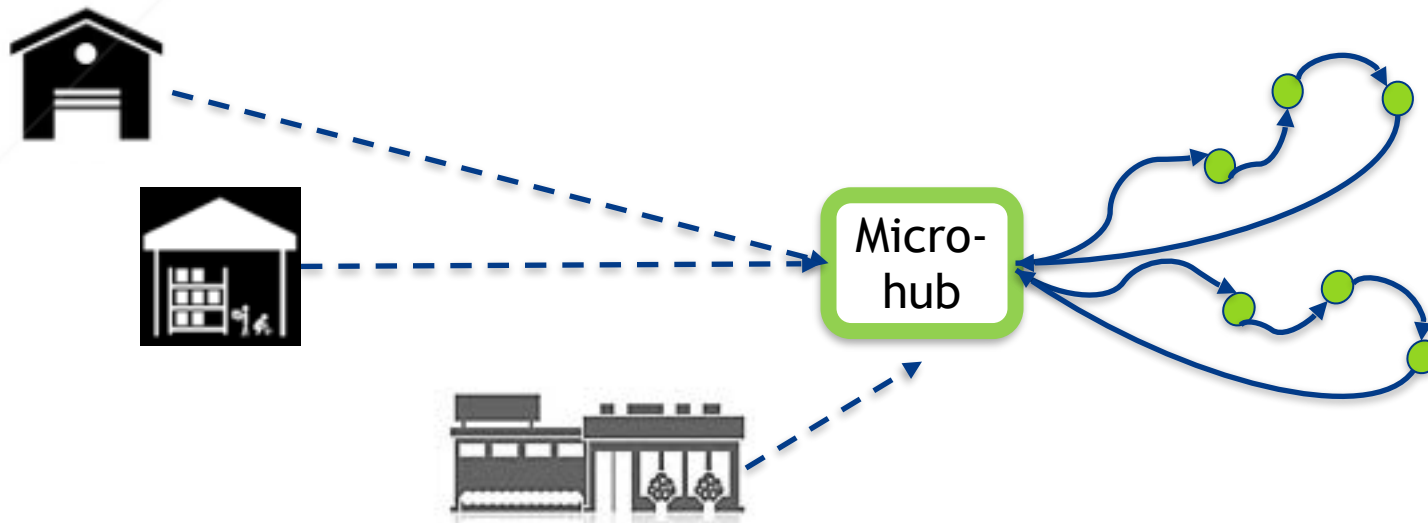
The last mile revolution requires infrastructure planning

Cluster based
Micro-hubs



Industry specific

Support
combining, re-
timing and
mitigations



Based on micro-hubs - there is huge potential for Micro-Vans and e-cargobikes



Scalability...

- ❑ Applies across most sectors including 'servicing'
- ❑ Micro-hubs not always internally compatible - need separate sites
- ❑ New business models and authority lead
- ❑ Every last mile needs a 'first mile' ~ supply chains will need to change
- ❑ National productivity opportunity through new business models
- ❑ Based on London Mayor's Transport Strategy, wake up and smell the coffee....



Thank you!

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