

# South West Freight Strategy

## Activity Report 2024/25



**December 2025**

Prepared by Peninsula Transport and Western Gateway STB Officers

# 1 Introduction

In 2021/2022, the [South West Freight Strategy](#) was developed with the aim of shining a spotlight on the importance of freight to communities and businesses in the South West. Its aim was aligned to helping address the challenges, opportunities and priorities facing the freight sector in the South West over the next 30 years – up to 2050. Its guiding principles anchored around the three sustainability pillars of environment, economy and society.

The strategy is a joint project between Peninsula Transport and Western Gateway Sub-national Transport Body and is unique amongst other regions in developing interventions over a number of modes of transport – aviation, maritime, rail and road, as well as a range of ‘other’ interventions which include connecting and bringing stakeholders together in sharing the learnings from the Freight Strategy work.

This report represents the third year of the Freight Strategy implementation phase, delivered slightly differently than the previous years in that it was taken in house with STB officers leading the work, whilst the first 2 years were delivered by AECOM.

- Year 1 summary report- [South West Freight Strategy - Year 1 Monitoring-Report](#)
- Year 2 summary report- [South West Freight Strategy - Year 2 Monitoring Report](#)

Peninsula Transport and Western Gateway wish to take the opportunity to thank AECOM for their contribution and work in delivering the freight strategy and delivering the interventions during the first two years of the implementation phase.

## 2 Freight Forums

2024 and 2025 saw the continuation of the South West Freight Forums with STB Officers organising a mix of full forums and numerous mode specific sub groups. The sessions were well attended with a wide range of speakers:

### *15th October 2024 Road Sub Group*

Matt Smith from Atkins Realis presented on their findings from their research done on [understanding The Road Freight Market](#) with DfT, National Highways discussed the Strategic Road Network Economic Review and Transport Exchange Group gave an update on the Southwest Backloading Trial – a pilot that the two STBs jointly funded.

### *5th December 2024 Aviation & Maritime*

We welcomed Brian Murphy (CEO) and Phil Armstrong (Harbour Engineer) from Poole Harbour Commissioners to present their Port [Masterplan](#).

### *6th Feb 2025 Rail Sub Group*

Steve Freeman from RailX- a tech platform that provides easy access to UK rail services across all freight operating companies and Ralph Goldney from Rail Freight Consulting who work with client organisations to improve their business through the use of rail freight and provided some useful context around rail freight in the South West.

### *20th May 2025 Full Forum*

National Highways discussed the M48 Severn Bridge 7.5t Weight Limit, WSP presented highlights from the freight awareness raising sessions with local authority officers and members, and we welcomed Katherine Oliver from the Future Transport Zone team within WECA to discuss the sustainable urban freight and people as Passengers project.

### *25th September 2025 Full Forum*

Polaris consultancy presented the Avonmouth feasibility study results, Nick Radcliffe from FrieghtArranger presented the work they are doing aggregating freight loads from multiple small shippers, Network Rail provided an update on Tavistock junction yard, and Peninsula Transport (in the absence of Port of Falmouth Representative) gave an update on the Port of Falmouth on the creation of a potential freight terminal.

## 3 Project progress

### 3.1 RD15 – Backloading Trial with Transport Exchange

Intervention RD15 in the South West Freight Strategy set out an aim to reduce HGV empty running, which is a significant issue for the logistics industry in the UK with up to a third of HGV journeys running empty. This refers to when trucks are running without a load, either because they are going to pick up or have just dropped off a load or are positioning, for example between depots.

This intervention was started in year 2 where the STBs offered a trial scheme to provide 10 small to medium sized operators in the South West a one-year free trial access to Transport Exchange Group's (TEG) backloading platform. The aim was to monitor the use of the platform by the hauliers to see if they could reduce their empty running.

The first 5 companies joined the pilot during January, February and March 2024, with the remaining joining during July and November 2024.

Over the course of 12 months there were:

- 11,380 kg calculated total of CO<sub>2</sub> saved
- 13,667 miles distance covered
- Average CO<sub>2</sub> saving of 122 kg per load
- Average booking distance of 112 miles

The trial has demonstrated a behavioural shift towards collaboration as members are increasingly willing to contract out work when it aligns with their operating patterns, reducing empty miles, lowering costs, and supporting a more vehicle-light operating model. The most successful pilot members, who generated meaningful revenue, were typically already familiar with the platform or actively considering joining.

The trial also provided some useful lessons to be shared with others considering running a similar pilot:

- Recruitment proved more challenging than anticipated as offering the platform free of charge can sometimes create scepticism or unintentionally de-value the proposition, as there is no direct investment from the business.
- Several of the organisations were operating vehicle types (e.g. mixers or tankers) that sit outside core platform requirements. This mismatch likely contributed to lower engagement and weaker renewal outcomes.
- Onboarding process includes stringent and biometric checks, alongside ongoing compliance documentation which discouraged some organisations from joining.
- Where value was not fully realised during the pilot, renewal pricing was viewed as high, reinforcing the importance of early activation and measurable wins.

Out of the 10 organisations who accepted the free 12-month period, three of the organisations have renewed their membership with TEG and have financed this themselves.

Further results and information about the pilot will be shared at the next South West freight forum, scheduled for spring 2026.

## 3.2 Demystifying Freight

One of the 'Other' interventions recommended in the strategy was to carry out an awareness raising campaign for STB members and local authority officers to try and help them understand the impact of freight to the local area, what their roles might be and the value of the industry.

WSP were commissioned to undertake a series of workshops along with producing learning materials that would be used by members going forward.

### How was this delivered?

An initial online survey was carried out to establish a baseline of the knowledge and what the understanding levels were of the local authority officers of freight. This survey found that the average level of understanding out of a score of 5 was 2.37 and most officers noting that currently their role was more passive; playing no role, observing, corralling or unknown, and had limited or no contact across the different parts of the freight 'system'. These survey results help structure the contents of the workshops and accompanying learning materials.

During February and March 2025, four officer workshops took place outlining some basic aspects of the freight industry; on how supply chains work, where industry sits on decarbonisation and 'freight futures'. Rural & Last Mile sessions were held. These sessions also explored key enabling roles within local authorities and how the public sector organisations can support private sector industry.

There was a workshop specifically aimed at elected members, providing a higher-level summary of freight and supply chains but getting more of a 'on the ground' view of their experiences and interests.

Tailored materials were shared, speaking to the type of support that officers are looking for by providing rural case studies, freight family tree and datasets etc. The aim of these was to help support internal capacity building for plans/projects.

Towards the end of 2025, STB officers continue to work with WSP to create a survey aimed at private sector organisations. The objective of the survey is to gather information across five themes that resonate with the freight industry to see where local authorities could play a role.

The five themes identified were:

- **Skills in Logistics:** What are the skills required, where are the gaps geographically and what are the impacts this has on supporting a thriving logistics industry in the region?
- **HGV Overnight Parking:** Where is the need outside of current available provision, what does this look like and what is the impact of substandard quantity/quality of provision?
- **Road Network Maintenance:** Where exactly is poor road surfacing, local access concerns (reasons varying) and challenges with resilience on the local road network in the region?

- **Fleet Decarbonisation:** What and where are the big blockers to the infrastructure for charging or refuelling, how you have experienced support and why is this necessary?
- **Space for Logistics:** What type of space would you be interested in and where? What are the blockers for you?

The survey results will be shared with all stakeholders in Spring 2026, and any specific actions will be discussed with the relevant local authority to consider ways that we can improve collaboration between the public and private sector, and better support logistics sector in the South West.



## 4 Presentations and Meetings

### 4.1 Interchange/STB conference

At the Interchange Conference, in Manchester in March 2025, Western Gateway and Peninsula Transport STB officers were joined by Logistics UK to present in a session on how STBs can add value and support delivering government missions. The officers decided to focus on the Kickstarting Economy & Growth agenda with a focus on Freight and Logistics.

This session highlighted the joint South West freight collaboration between Western Gateway and Peninsula Transport, showcasing the Backloading Project and its impact on efficiency and sustainability. The panel discussed key lessons learnt and engaged in an open conversation with Logistics UK on how STBs can better collaborate with the freight industry and private sector to tackle challenges and co-develop effective solutions.

The questions below were discussed amongst the panel:

1. What are the biggest transport and logistics challenges currently facing the UK, particularly the South West region?
2. What lessons have been learnt from the South West Backloading project so far, and how can they be applied to future freight initiatives?
3. How can STBs work more effectively with Logistics UK and the private sector to address key freight challenges?
4. How can government policy better support sustainable and efficient freight movements?

### 4.2 SW Logistics UK

Officers from Peninsula Transport and the Western Gateway were invited to speak at the Logistics UK South West of England Freight Council meeting on 15 January 2025 at the Haynes Motor Museum in Somerset. The meeting was well attended with operators from across the South West. We provided an update on the activities of the two Sub-national Transport Bodies with a focus on our respective Strategic Investment Plans and schemes of interest to Logistics UK, our South West Freight Forums, backloading pilot and the alternative fuels for freight tool (ALFFI). The feedback from the Logistics UK members was invaluable, particularly around a very real example of the lack of EV charging points in North Devon and North Cornwall and how in certain parts of the industry, the word 'backloading' is tarnished.

For us it was also informative to listen into items on speed limits, 20mph zones and the need to consider on a case by case basis bridge strikes, road regulation issues, the use and weight of EV battery vans, hydrogen, and HVO as alternative fuels and industry apprenticeships.

The STBs have been invited back to speak at the Logistics UK event on 14 January 2026 and we are grateful for the opportunity to continually engage with operators through this forum.

## 4.3 Rail Freight Group

Western Gateway was invited to speak at the Rail Freight Group's Spring meeting on Wednesday 21 May 2025 in Melksham. Speaking to an audience of rail freight operators and consultants, Network Rail and other industry representatives, we outlined how the Western Gateway and Peninsula Transport Sub-national Transport Bodies are delivering on our joint South West Freight Strategy. Delegates were particularly interested to hear of the Western Gateway's feasibility study into a new multi modal rail freight terminal at Avonmouth and our advocacy work on freight awareness. Useful contacts were made throughout the day and there were excellent presentations on digital freight, parcels, research on enabling faster and longer freight trains and the opportunities for hydrogen powered locomotives. We are grateful to the Rail Freight Group for the opportunity to speak and look forward to working closely with them in the future.

## 4.4 National STB Freight Group

Officers from all seven STBs across England meet on a quarterly basis to provide updates on any specific freight work being undertaken or explored in their regions. It also provides opportunity for updates and feedback to be provided to DfT, Network Rail or other key stakeholders. During previous meetings, updates have been provided around the Backloading pilot, the Avonmouth rail freight terminal feasibility study and the freight awareness work with other Local Authorities.



## 5 Ongoing and Planned Activity

### 5.1 Rail Freight

Interventions RL4 and RL7 set out in the freight strategy both aim to promote the modal shift of freight from road to rail. More specifically RL7 looks to encourage the establishment of rail freight intermodal sites, and the strategy identified a number of possible locations. Those highlighted in green are sites where positive progress has been made:

- Gloucester Yard
- Swindon
- Chittening
- **Avonmouth Docks**
- Portbury Docks
- Gravity Park
- **Poole Harbour**
- Exeter Gateway
- **Exeter Riverside**
- **Tavistock Junction**
- Goonbarrow
- Burngullow
- **Falmouth Docks**

Extensive research was carried out as part of the strategy development to consider potential demand and key origins & destinations for different types of loads that should be reviewed and updated.

As government policy is moving towards more freight by rail, it would be an opportunity to work with the key stakeholders to explore the possibility of building a case for investment in to any of the sites listed above.

Further government policy can be found:

- [Railways Bill factsheet: rail freight - GOV.UK](#)
- [Freight sector calls on government to supercharge rail freight growth to support delivery of the UK government's national missions](#)
- [Rail freight - Network Rail](#)
- [Rail Partners - Freight Expectations - How rail freight can support Britain's economy and environment.pdf](#)

The potential rail freight terminal sites that have seen progress made throughout 2024 and 2025 are:

- **Avonmouth RFTI**

Western Gateway commissioned Polaris consultancy to conduct a feasibility study for a rail freight terminal in Avonmouth. The study was concluded in October 2025 [Avonmouth-Rail-Freight-Feasibility-Study-v1.2.pdf](#). It confirms that an RFT would be viable at Avonmouth, and identifies a preferred location for the terminal. The report highlights some obstacles that need to be overcome before creating a business case; and Western Gateway are working with partners to address these and take the proposal forward.

- **Tavistock Junction Yard**

Tavistock junction yard historically was important for freight but has been under a long-term lease, limiting usage, and utilisation has been low. Network Rail has recently regained full control of the yard to enable development and marketing. Vegetation clearance has been carried out via arrangement with a contractor using part of the yard for laydown. There is now a much greater area available for use. The Yard expected to be fully cleared and available for use by spring (April–May) 2027.

- **Falmouth Docks**

Falmouth Docks have led discussions with the STB and other key stakeholders such as Network Rail around the feasibility of re introducing rail freight access to the site.

Any progress on the identified sites will be noted and shared with key stakeholders via the South West Freight Forums.

## 5.2 Road Interventions

During the past year, relationships with the industry have been developed and have been very positive. There are several interventions that need co-operation from the industry which will continue to be explored, such as through the survey, as hauliers and logistic companies are the ones that are on the road, their views and thoughts on areas such as potential sites for consolidation centres or facilities for last mile logistics would prove valuable.

Other potential subject areas are adequate and safe parking facilities, transition to alternative fuels and accessibility to rural areas.

## 5.3 Rural Freight

Western Gateway and Peninsula Transport STB published the South West Rural Mobility strategy in 2022 - [South-West-Rural-Mobility-Strategy.pdf](#)

The report identifies that 33% of the population across the two regions live in rural areas, and is made up of nearly 20,000km<sup>2</sup> of land outside of the major urban centres. Whilst the rural areas in the STBs brings major benefits such as tourism, it can also result in challenges. The two STBs have committed to funding rural mobility pilots across the region and more details can be found on the website - [Rural Mobility](#).

Freight and logistics play a critical role in sustaining rural economies. They provide the infrastructure necessary to move agricultural, forestry, fishing, mining, and quarrying products, while also supporting the rapid expansion of e-commerce and online retail. Beyond these core functions, freight networks underpin broader economic activity by ensuring goods, services, and materials reach rural communities and businesses. However, there is a significant risk that rural areas may be disadvantaged without timely investment such as lack of charging infrastructure available to support the transition to low-carbon logistics.

The continued growth of e-commerce presents both opportunities and challenges. While it may reduce the need for personal shopping trips, it is likely to drive further growth in freight activity, both from local producers shipping goods out and in the delivery of products to households. Agricultural intensification is another factor shaping freight demand. In some areas, this leads to heavier and more frequent transport of goods, increasing strain on rural roads and logistics systems.

Key opportunities for innovation and improvement include:

- **Local freight consolidation hubs:** Establishing community-based spaces to accept and consolidate parcels, facilitating efficient first- and last-mile delivery. These hubs could integrate services such as e-cargo bike distribution, centralised parcel lockers, and support for reverse logistics (returns and refuse collection).
- **Passenger on freight transport:** Exploring dual-use models where passenger services operate within existing freight systems, making better use of spare capacity and strengthening connectivity in sparsely populated areas.
- **Drone freight services:** Low-level air transport (drones) is emerging as a practical solution in remote rural and coastal areas. With trials already underway in the UK and internationally, drones offer a viable way to serve dispersed communities and offshore islands. Continued private sector investment suggests strong potential for expanded operations in regions such as the South West.
- **E-cargo bikes:** Electrically assisted cargo cycles (with two, three, or four wheels) offer a sustainable option for local deliveries. Their flexibility and low environmental impact make them particularly suitable for last-mile logistics within rural settlements and smaller towns.

Together, these innovations highlight the evolving landscape of rural freight. The STB will do all it can to ensure the region balances rising demand with sustainability goals, help rural communities not get left behind in the transition to low-carbon and help create resilient logistics and freight systems in the South West.

## 6 Conclusion

The STB Officers are pleased to share this report which highlights the key activities and outputs achieved throughout 2024 and 2025. Further information can be found on our websites, or further discussions can be had with individuals who would like to find out more about anything mentioned above.

The South West Freight Forums will continue into 2026, and we welcome the opportunity for any guest speakers. The STBs are currently in a position of seeking funding confirmation from the DfT before finalising any future business plans to detail other freight work, but STB officers will continue to work with key stakeholders such as National Highways and Network Rail, Local Authority Officers and the private sector to ensure the South West is maximising the efficiency, benefit and opportunities of the freight and logistics sector in the South West.