



South West Freight Strategy

WP09 - July 2022

AECOM

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Foreword

Freight is a vital part of the transport sector for the South West region. It is the lifeblood for our communities and businesses – not only bringing in essential goods and commodities, but also moving the products of our many and varied businesses and services. The South West Freight Strategy reflects on the fact that this industry and its supply chains operate across a broad regional, national, and international geography with its own set of unique challenges and opportunities.

We are therefore delighted to present this joint strategy – a collaboration between Peninsula Transport and Western Gateway sub-national transport bodies. It addresses the challenges, opportunities, and priorities for the South West over the next 30 years to 2050, with objectives focussed on the environment, economy, and society. These are aimed at delivering the freight vision as part of the wider strategies and priorities for Peninsula Transport and Western Gateway and will enable the region to address the challenges, opportunities and priorities for freight in the South West.

This strategy is strongly evidence based, both from within the region as well as from good practice and case studies from further afield. It regards freight and logistics as an opportunity and not an afterthought and is centred around three sustainability pillars of environment, economy and society. It contains standalone freight-specific initiatives as well providing supporting evidence for the wider regional transport strategies that both STBs are developing.

We are very grateful for all the contributions from partners across the private and public sector who have given of their time and insights to create the compelling case for the interventions that have been identified as important to improving freight's contribution to our wider objectives. There are many that are unique to the vehicle types and usage patterns of the freight sector in the South West. These often require a bespoke set of approaches and interventions in order to maximise efficiency, but these must be harmonised with the wider transport strategy for the South West as a whole.

Peninsula Transport and Western Gateway will now seek to implement these measures by keeping engaged with those who have expressed a keen interest to be part of this journey with us and who see them as essential to achieve their visions, goals and objectives for their respective areas. Effective partnerships and strong planning are needed to implement these measures with the financial support and guidance of the Department for Transport.

The Freight Strategy supports the key goals of both STBs, seeking as it does to improve connections between people, place and businesses, enhancing resilience in the supply chain networks across all modes, supporting the health and wellbeing of local communities and, importantly, helping us along our path towards a zero emission transport system.

Looking ahead, we aim to use this strong platform and implement the recommendations of the strategy. Working through effective partnerships with all stakeholders and partners, including central government, to ensure that the future success of our communities and businesses are supported by a strong, forward looking and dynamic freight sector.

Front cover

Top left – The road network of the South West is characterised by twisty, undulating single carriageway roads with slow journey times.

Top middle – The South West has a network of ports offering services to commercial and naval interests. In this case Portland Harbour, Dorset.

Top Right – Bus and Freight Operators specify very short wheelbase vehicles to cater for narrow Cornish roads. In this case a Modern Euro VI First Kernow single deck is heading towards Truro.

Bottom Left – DB Cargo Class 66 diesel locomotive moving china clay hoppers

Middle – Plymouth Dockyard which is a busy commercial port and the largest naval dockyard in Europe

Middle Right – A Pallet Track double-deck vehicle stuck on a congested A Road. The vehicle is used to trunk pallets between the central hub in Wolverhampton and R&R Haulage depot at Redruth, Cornwall.

Bottom Middle – Short wheel-based temperature controlled lorry belonging to Plymouth Trawler Agent collecting fish from a local fishing port to take to market.

Bottom Right – Bournemouth Arcade – deliveries need to be made but lots of double yellow lines.



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1. Introduction

The development of a freight strategy for the Peninsula Transport Sub-National Transport Body (STB) was initially commissioned within the context of the wider production of the regional Transport Strategy. Subsequently, the scope of the commission was extended to include the Western Gateway STB area as the spatial interdependencies between the two regions, particularly for freight movement, had significant merit in having a joint approach.

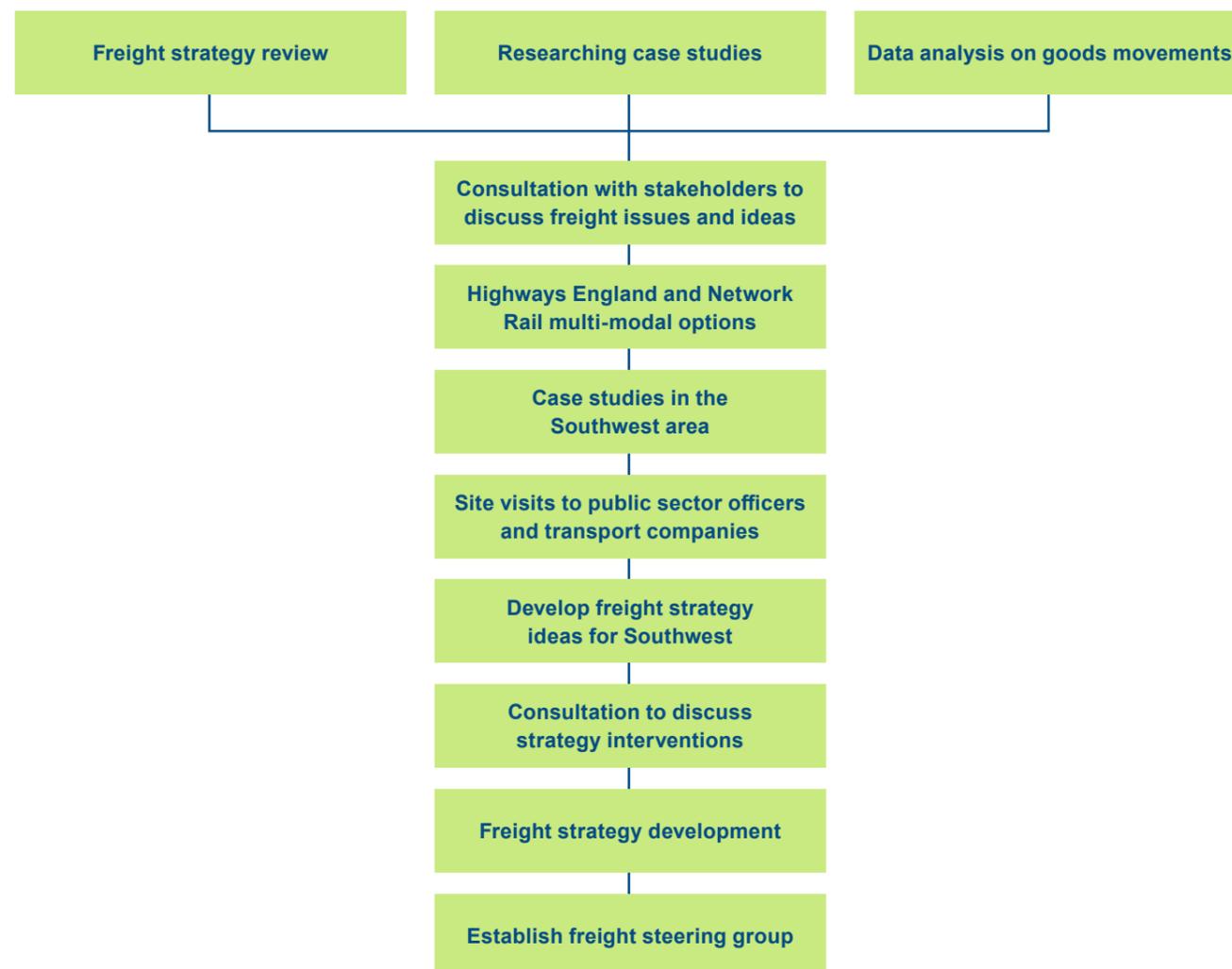
A STB is a type of statutory transport governance organisation aimed at providing strategic transport governance at a much larger scale than existing local transport authorities, by grouping councils together.

This freight strategy is a culmination of that work between the two STB's, which particularly reflects the fact that freight and the associated supply chains operate on a more regional, national and international basis than is the case for passenger movements. Peninsula Transport and Western Gateway are pleased to collaborate and put forward a freight strategy for the South West which aligns the diverse areas of the South West. This provides a holistic and joined up approach reflecting the reality of freight movements and their wider supply chains in the South West.

Whilst each STB will have their own specific priorities for their region, both will be aligned to the importance of freight. The freight vision and strategy will address the challenges, opportunities and priorities for the South West over the next 30 years – to 2050. The objectives centre around three sustainability pillars of environment, economy and society.

2. Methodology

Information and data have been collated to outline the various challenges and opportunities faced in the South West. A variety of methods and techniques have been used to develop the freight strategy to ensure it is holistic to meet the needs of the South West. This forms a critical part of how the freight strategy addresses and supports the future development of freight in the region.



Freight strategy review

To understand the common freight issues that local authorities and organisations face, 24 national and international freight strategy documents were reviewed to identify the common freight issues that are faced. Establishing an understanding of the initiatives used in other regions to help resolve these challenges aids with the development of the South West freight strategy. This process serves as a general overview before delving deeper into the specific issues and opportunities for the South West.

Data analysis

An understanding of the amount and type of freight being moved in, out and around the region is necessary. This provides an understanding of the current freight picture and will guide potential initiatives that could help support industries and provide intelligence, particularly helpful for those interested in modal shift from road freight transport.

Case studies – outside the South West

A series of freight case studies have been created as part of this work. The purpose of the case studies is to illustrate initiatives, featured outside of the South West, which have been successfully implemented to indicate opportunities for the freight strategy. The opportunity is to learn from these case studies and to implement something similar or to champion them as part of supporting the freight industry. For example encouraging uptake of low emission vehicle technology.

Case studies – inside the South West

Similar to the case studies outside of the South West, this is focused on understanding the success stories within the South West and the opportunities to promote these further.

Multi-modal options

The freight study has incorporated work being done by National Highways and Network Rail to assess the opportunities to move more freight by multi-modal options.

Consultation – issues

The freight strategy was developed with a comprehensive stakeholder consultation process. This included engaging with stakeholders to understand the core issues that they face in the South West. The engagement was either through questionnaires, one to one interviews and/or workshop consultations.

Summarising the issues and developing the initial freight strategy initiatives

This phase brings together all of the learnings from the document reviews, data analysis and comments from the stakeholder engagement phases to start to build up the freight strategy ideas. This has been in response to the issues identified and has established a number of options to help resolve those issues.

Consultation – initiatives

The initial freight strategy initiatives have been taken forward to consultation via a workshop with stakeholders to gain feedback and comments on how effective the initiatives may be and if there was scope for further development.

Freight strategy development

The feedback from the second workshop regarding the freight strategy initiatives was reviewed, adapted and developed to formalise the South West freight strategy and featured in the final report.

Establish Freight Steering Group

A freight steering group is to be set up and a meeting held by early 2022 to include representation from both public bodies and private sector freight organisations. This forum will provide an opportunity for Peninsula Transport and Western Gateway to keep track of progress on the implementation of initiatives and an opportunity for organisations to feedback on them via sub groups.

3. Overview of the South West

The South West is a region with unique geographical characteristics, marked by its extensive coastline, varied landscapes and dispersed population. In the past century its population has grown by nearly a million people and population growth is forecast to continue at or above the average rate for the United Kingdom.

Within the South West there are a number of key areas of focus, including the urban centres of Exeter, Plymouth, Taunton, Bristol, Bath and Bournemouth, the surrounding suburban areas and market towns throughout the region. Vital assets such as dockyards and MoD sites often generate enough freight traffic to be considered as distinct destinations in their own right.

Connections within the region are critical for connecting communities who are often located a long distance from the main population centres whilst land connections to other parts of the country rely on a central spine converging around Exeter and then diverging through Somerset. There are a number of vital transport corridors, including the M5 corridor, M4 corridor, A303, A386 and A350, to name a few, and all of which vary in their utilisation and capacity for freight demand. These networks hold a number of challenges and potential opportunities for the South West. The challenge for the South West is one of overcoming higher than average journey times to deliver clean, sustainable, economic growth and to ensure communities are well connected to jobs, markets and vital services.

Although rail routes in the region are limited, the utilisation and potential for key mainline rail hubs such as Exeter and Bristol are key players for the South West in how the freight industry adapts to cope with changing demands and community pressures on congestion and decarbonisation.

Unlike people trips, many goods movements are planned on a regional and national basis. This means that whilst it is useful to investigate local issues it is also important to understand wider strategic policy and operational issues as these impact the South West region. Having a freight strategy that joins up both Peninsula Transport and Western Gateway STB to form one unified South West freight strategy is critical to its success.



4. Freight strategy review

Before starting new work on understanding the freight issues in the South West and hence developing interventions, we conducted a desk-top review of a range of other Freight Strategies and other relevant project work (24 documents in total). The main reason for this was to ensure that positive ideas and good practise are considered when tackling issues in the South West. This prompted the investigation and inclusion of some case studies that are discussed briefly later in this document but are featured in full in the Appendix to the main report.

This review of freight strategies has identified several initiatives that have been used multiple times elsewhere in response to typical freight issues identified. The top five re-occurring freight initiatives identified from the 24 freight strategies are as follows including the number of documents that featured each item;



Road infrastructure - Road improvement scheme / access improvement scheme / port access improvements / designated load bays.

This solution appeared 15 times. This is in response to the challenges of increased congestion and a rise in demand for road space. This is particularly relevant to South West given the limited number of freight access corridors to / from the region and the challenging carriageway vertical and horizontal alignments particularly off the SRN. The notorious issue of congestion on the A303 / A358 corridor is one such example in a region which does not have many motorway routes. It is recognised that building your way out of problems is expensive and not always the best way forward where alternatives exist. Instead, better management of existing infrastructure to understand how it can be optimised to ensure better flow and network management. This includes establishing an understanding of how, when and where the network is used.



Better Logistics Planning - Sustainable Urban Logistics Plans / Construction Logistics Plans / Delivery & Servicing Plans / Area Freight Management Plans / Urban logistics toolkit.

This group of solutions appeared 13 times and looks to improve the efficiency of logistics to ensure that time slots and vehicles are fully utilised. These tools are used by the public sector to help create an efficient operating environment. This allows the industry to make improvements through enhanced performance allowing optimised vehicle utilisation. This also ensures that operators are using the correct routes, that avoids congestion and avoids inappropriate roads with restrictions, such as low bridges. This also includes ensuring that logistics plans are sensitive to the community ensuring that the impact of the movement of goods is minimised. The public and private sector can play a role in contributing to better logistics planning and both can play a leading role.



Technology - Safety equipment, clean/electric/low emission vehicles, remote delivery, innovation.

This type of solution appeared 13 times and includes upgrading vehicle safety equipment through to improved air quality using cleaner and more efficient vehicles. Technology has the potential to reduce the externalities on the surrounding community with less exposure to harmful emissions and the impacts of noise and visual pollution. This can also look to improve the efficiency of the logistics industry through technology such as better utilisation of freight vehicles by using online systems and apps to fulfil often empty back loads.



Freight Consolidation - Consolidation centres / holding areas / multi-modal distribution parks.

This solution featured 13 times and looks at reducing the number of sub-optimally loaded vehicles routing into central areas and consolidating them at sites on the outskirts. Aggregation of part-loads leads to reduced vehicle trips in the urban centre from better load space utilisation (weight, volume, deck length), ensuring that unnecessary journeys are avoided. The concept of micro-consolidation has emerged, and this tends to involve a full load of parcels taken into the urban area and then the last mile is done by electric van/cargo bike or walking porter. This not only helps to reduce congestion but improves the local environment with better air quality and leading to improvements community wellbeing.

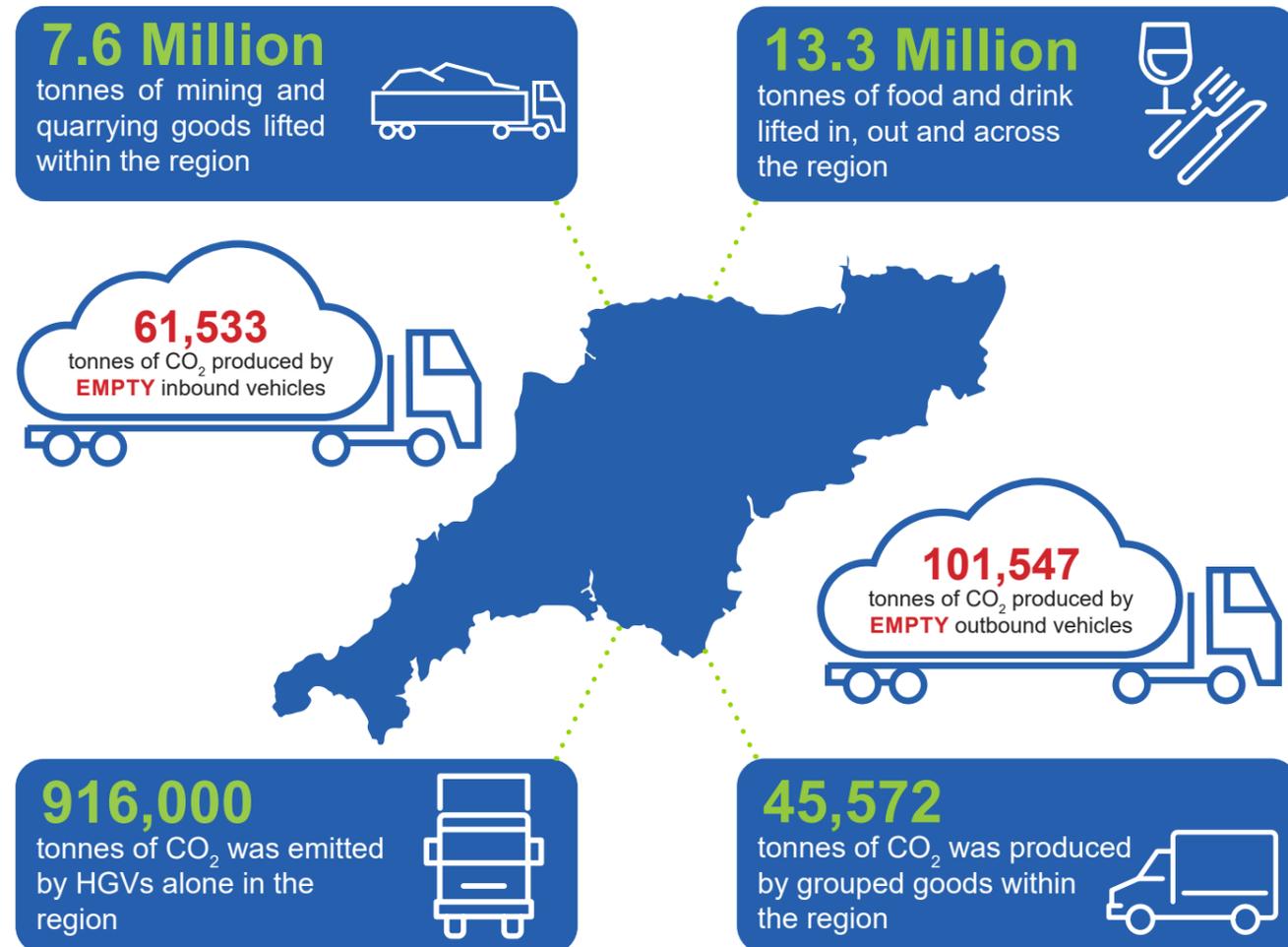


Road safety and safety initiative scheme.

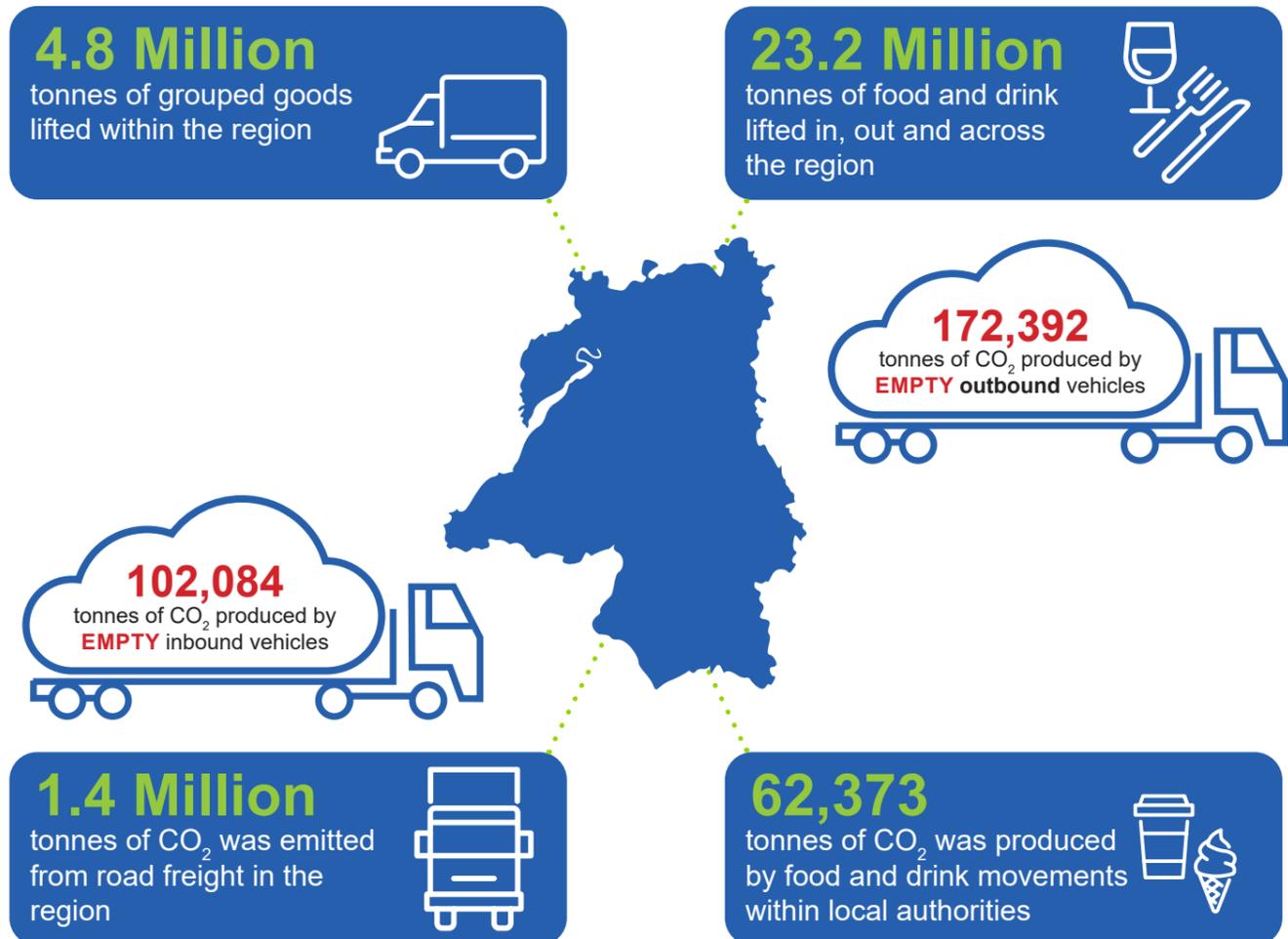
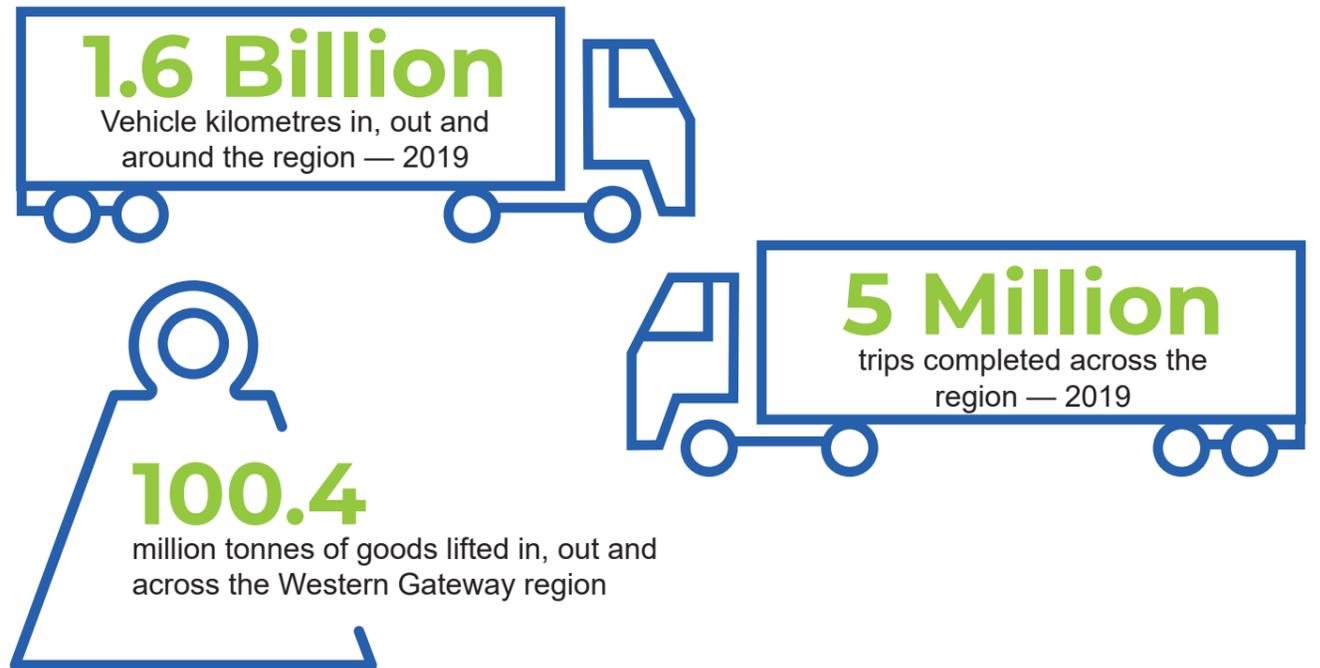
This initiative appeared six times. Safety schemes such as the Fleet Operator Recognition Scheme (FORS) and Vision Zero Action Plan are based around improving the safety elements of vehicles operating on the network and protecting vulnerable road users. The public sector can help encourage operators to join these scheme and actions plan by adopting these as part of their contracts clauses or mandating that operators must reach a level of safety before allowing them access to central urban areas. The impact is that operators become a more considered, efficient and safer organisation.

5. Freight stats Peninsula Region

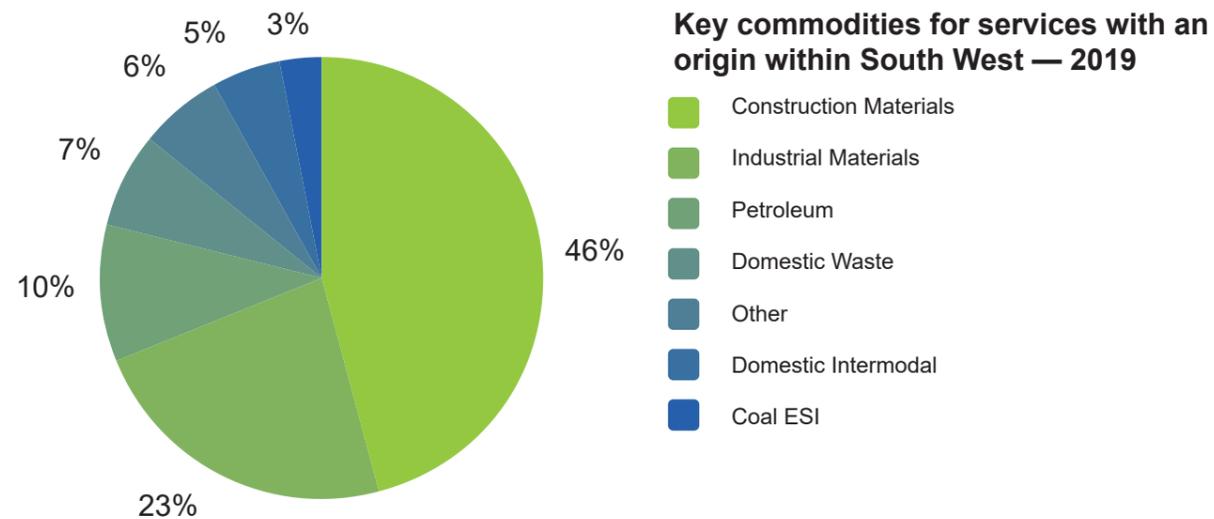
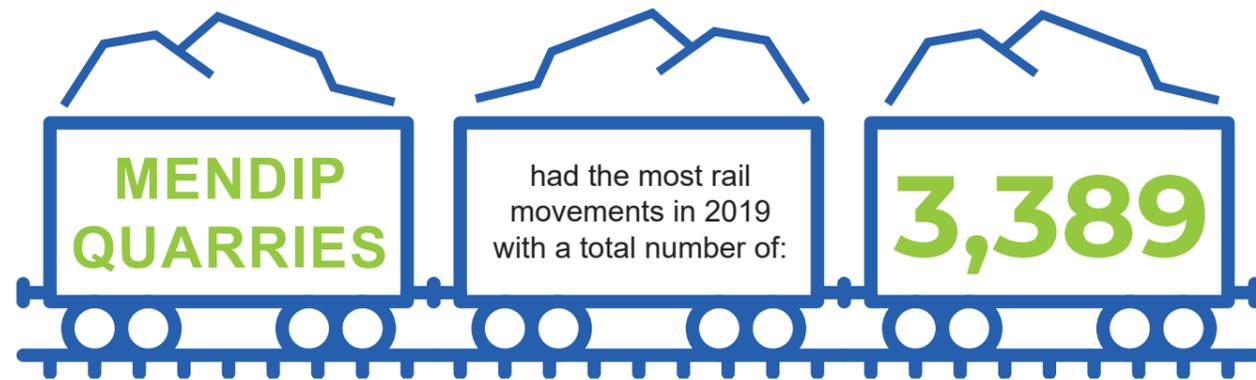
5.1 Road Freight:



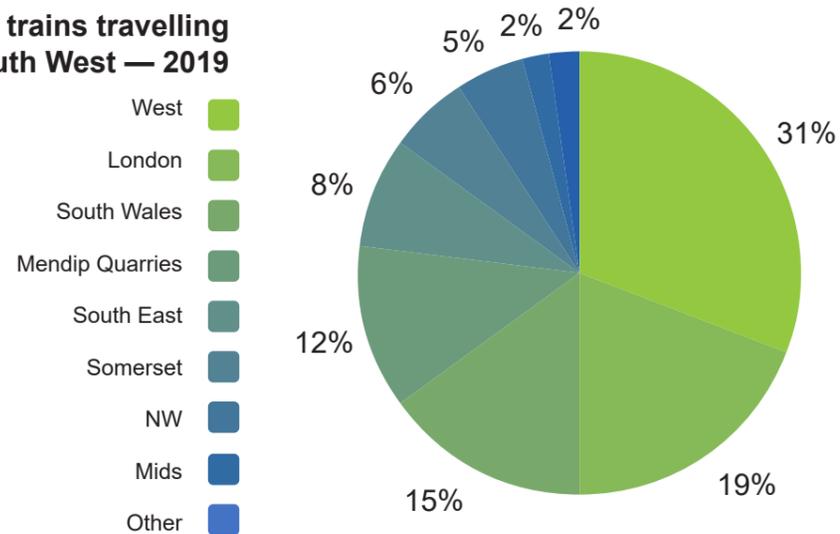
Western Gateway



5.2 Multi Modal Freight - Rail:



Origin/Destination for trains travelling in the South West — 2019

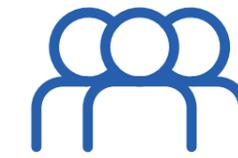


5.3 Maritime

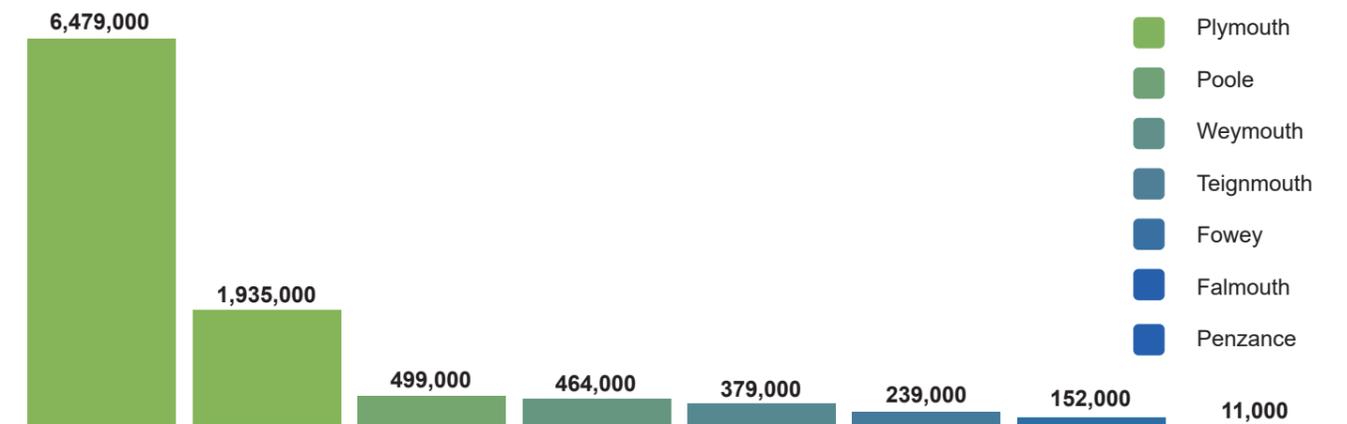
10.2 Million
tonnes handled by South West main ports



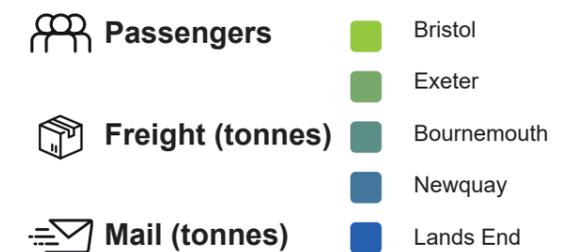
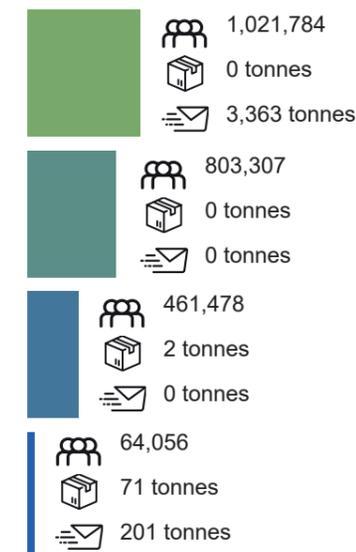
10,000
direct employees in the South West maritime industry



Goods handled by South West main ports — 2019



5.4 Aviation



6. Trends and factors affecting the freight industry

This section outlines some of the key freight insights and trends that link to many of the subsequent work packages within the South West. These insights and trends are from literature, existing knowledge of the project team and research from the scoping report in 2020.

6.1 Headline trends:

- The transport sector is a major contributor to climate change — in 2019 transport was responsible for 27 per cent of all greenhouse gas emissions in the UK.
- HGVs are the fastest growing source of global oil demand, largely due to increased demand and usage from countries such as India and China. This accounts for 40 per cent of oil demand growth by 2050 and 15 per cent of the projected increase in global CO₂ emissions.
- Covid-19 has led to an acceleration of the number of vans required in the UK as a result of the online shopping proliferating due to restrictions on visiting physical stores. Online retail reached a record proportion of total retail sales in January 2021 at 35.2 per cent.
- Based on estimates from the 2019-20 Van Statistics survey, the “delivery/collection of goods” accounted for 23 per cent of all van mileage.

6.2 Trends specific to the SW:

Major road schemes and connectivity

The nature of freight movement over roads will adapt as society, the economy and the environment will change, not least for the pressing issues such as the Climate Emergency.

There are several key connectivity issues that are prevalent throughout key strategic roads in the South West:

Main connectivity issues within the South West:

- Limited route choice in and out of the South West: Three core strategic corridors (M5/A38, A303/A30/A35, A361). This is particularly an issue in areas such as Plymouth and Cornwall, they areas that rely heavily on one strategic route.
- There is an ongoing study investigating corridors between the M4 and the Western Gateway South coast and several of the routes currently have slow journey times e.g. A350, A37 and A36.
- Variable journey times along strategic and local road networks, particularly in the summer in tourist hotspots when traffic volumes grow due to an influx of tourists. Leads to uncertainty/unreliability within the freight sector.
- Significant areas of remoteness and peripherality with poor access to areas of economic activity.

Options for future scenarios:

- Further options for consideration include North – South across Devon and the North Devon to North Cornwall axis to reflect the requirement for more effective and efficient intra Peninsula movements.
- There are options for the Western Gateway area to make connectivity better such as improvements to the A36 and A37.
- These issues mean that a strategic-level understanding of the region’s traffic profile and the impact of these issues on both freight and passenger traffic is required.

Poor Rail Connectivity

- Cornwall and Devon only have one rail mainline that provides access to the rest of England. In sections along the route (particularly at coastal towns such as Dawlish), services can be particularly prone to disruption due to bad weather and flooding.
- Similar issues in BCP - there is only one rail line east/west and freight traffic is quite limited in volume.
- There is one regular rail freight line and there are no intermodal rail terminals, impacting upon the potential for modal shift of freight goods throughout the South West.
- Due to the local topography, the route has some sharp inclines (using rail standards) and there is a lack of electrification.

Economic Issues

- There are a significant number of pages in the main report discussing the industries of the South West and the economic issues. For example peripheral locations such as Cornwall have experienced pockets of poverty and deprivation due to decline in traditional industries such as mining, fishing and agriculture.

6.3 What action is the freight industry taking to combat the Climate Emergency and accelerate decarbonisation?

- The transport sector is playing catch up with other sectors such as the UK energy sector, which has reduced its reliance on fossil fuels through the adoption of solar, hydro and wind power technologies.
- This has considerable impacts upon air and noise quality, particularly within highly populated areas within the South West.
- Local governments are trying to reduce the impact of road freight in urban areas through policies such as Low Emission Zones and Clean Air Zones (soon to be operational in Bristol and Bath)
- Local Authorities are also exploring the use of alternative fuels such as hydrogen and biodiesel and are investing in the development of electric HGVs and vans.
- Innovate UK (a non-departmental public body funded by a grant-in-aid from the UK government) has been awarded several projects geared at decarbonising the industry, such as electric truck trials, hydrogen trials, electrifying a motorway and ‘capture carbon’.
- CRAFTeD (Co-produced Route-mapping to Accelerate Freight Decarbonisation: A Transdisciplinary Learning and Decision Framework) was a collaboration between the University of the West of England (UWE) and the University of Bristol and sought to understand how far stakeholders were already knowledgeable about and engaged with freight decarbonisation.

6.4 Energy Production and Alternative Fuels

- The South West of England is a prime location for renewable energy due to the region experiencing some of the highest sunshine hours and windy conditions in the UK. Potential alternative fuels to be considered within the Peninsula include: Hydrogen, Biodiesel, Nuclear and Wind farm Electric.
- According to figures from renewable energy provider Opus Energy, their customers in areas such as Devon and Cornwall are generating enough renewable energy through solar and wind power alone to power nearly 1.2 million LED TVs or 6.5 million LED lights for a year.
- The West of England Combined Authority (WECA) in partnership with the South West of England Energy Hub supports organisations across the wider South West to identify, develop and implement energy projects.
- Cornwall has an aspiration to be an energy neutral county able to produce power from wind, solar, biomethane and maritime, which may mean the ability to run transport using net-zero carbon locally sourced energy.

Specific to freight:

- Rapid interest in the procurement of Electric Vehicles (EVs) and alternative fuelled vehicles. Many local authorities with the region have committed to decarbonising their vehicle fleets by introducing a phased programme of electric vehicle replacements.
- New diesel and petrol cars and vans will no longer be sold from 2030.
- With respect to HGVs, the sale of all non-zero emission HGVs will be from 2040 for vehicles over 26 tonnes and 2035 for smaller vehicles. As a result, the freight industry must adapt and prepare a plan of how it will decarbonise its fleets to meet these targets.

6.5 Trends in online shopping and increases in the number of vans

- Long before the onset of the Covid-19 pandemic, consumer behaviours in relation to shopping have been changing. Studies indicate that the average adult travelled significantly less for shopping in 2019 than in 2002, due to the rise of online shopping.
- At a more localised level, one of the factors which could impact upon the extent to which e-commerce continues to grow at the expense of physical travel to stores is the extent to which the different regions / communities are connected online.



7. Consultation process

7.1 What is Stakeholder Consultation?

Stakeholder consultation involves communication with relevant industry representatives in order to understand their point of view on a wide range of interests. By developing a relationship with several key stakeholders within the freight and logistics sector, a better understanding of the role they play within the South West was developed.

A wide ranging stakeholder consultation phase took place throughout the development of the freight strategy to both develop and sense check assumptions and to gather feedback on issues and opportunities. This was in various forms throughout the duration of the project including one-to-one interviews, questionnaires and workshops.

7.2 One-to-one Stakeholder Engagement

The first part of the stakeholder consultation process involved identifying and engaging with key stakeholders who would be able to provide a representative perspective on the freight industry across the Peninsula Transport and Western Gateway area. This took place between May-August 2021 and included liaising with:

- Local, regional and national freight operators
- Trade Associations
- Various local authorities; and
- Port/Airport/Rail Freight Operators

The first step of the consultation process was to produce an email template that provided an overview of who Peninsula Transport and Western Gateway are, and the aims and objectives of the study. The email enquired about stakeholders availability to participate within the study and was accompanied by a request to complete a semi structured questionnaire by email or by phone. This involved answering several questions about their role, opinions and priorities within the freight sector and what support would be desirable going forward.

Several rounds of engagement were undertaken to try and optimise the response rate. As part of this engagement, the main issues and challenges facing the freight sector in the South West region were captured and collated to inform the development of future interventions.

7.3 Stakeholder Workshops

As part of the consultation process, two stakeholder workshops were held, providing stakeholders, identified and consulted on during the one to one sessions, with an opportunity to offer further thoughts on key challenges and priorities for freight in the Peninsula and Western Gateway region moving forward. This was important for continuity and creating a robust strategy that could withstand scrutiny and the test of time.

During both workshops, breakout sessions were organised to divide individuals into relevant groups based on the organisation they represented and their interests, enabling comprehensive in-depth discussion amongst key freight players about a variety of relevant topics. These were designed to be interactive and engaging to appeal to a broad audience.

Workshop One – issues

The first workshop was held on Thursday 24th June 2021 and was attended by a large variety of employers, including universities, technology companies and local enterprise partnerships. The purpose of the first workshop was to introduce members of the project team to stakeholders, and to obtain some initial stakeholder input regarding some of the key challenges and opportunities currently facing the Freight sector across the South West.

During workshop number 1, three breakout sessions were organised to facilitate further discussion under the three following subcategories: Freight regulation, efficiency and consolidation, Innovation, decarbonisation and skills, and multi-modal. Notes were taken during these sessions and analysed to inform a set of key findings. The main themes observed and discussed by the stakeholders during this process were as follows:

- Strategic Highway Infrastructure and Issues
- Urban and Last Mile Delivery Issues
- Types of Vehicle
- Alternative Fuels
- Skills, Training and Industry Image
- Local Supply Chains & Procurement Practices
- Data Requirements
- Partnerships

This stakeholder workshop was replicated for the Western Gateway area using a similar format on Thursday 22nd July 2021. Again, there was good representation from stakeholders except for hauliers as it was a busy time for staff holidays. There were two breakout groups this time but the same themes were discussed.

Workshop Two – freight interventions

The 2nd workshop was held on Thursday 16th September 2021 and was well attended by 40 representatives from across local authorities, trade associations and interest groups. The purpose of the workshop was to describe and sense check the proposed interventions for the South West in response to previous stakeholder engagement and feedback.

During the workshop, it was important to gain feedback on the list of developed interventions to sense check their appropriateness and relevance, and to filter down a hypothetical wish list of almost 80 interventions to a prioritised package of deliverables for featuring in a more defined implementation plan.

As was the case during the first workshop, four breakout groups were established to facilitate further discussion amongst key stakeholders. Within these groups, the long list of interventions was discussed under the following headings: Rail, Maritime and Aviation, and Road Freight and Freight Trends. The breakout groups provided a chance for stakeholders to view and comment on the interventions.

The decision was taken to adopt a three layer screening approach to the final list of interventions to sift and filter down a hypothetical wish list of interventions to a prioritised package of deliverables for featuring in an implementation plan. The three layer screening approach all pivoted around the delivery of the workshop and consisted of the following analysis:

- Core Messages: The notes and feedback from discussions and debates within break out groups on the proposed long list of interventions.
- Intervention Questionnaire: Multiple scoring form completed post workshop by willing stakeholders to evaluate interventions.
- Project Team Assessment: Combining both the feedback from the intervention form and internal, qualitative based analysis of the interventions.

A fourth screening of the interventions was also undertaken which sought to compare and contrast the feedback from stakeholders and the project team. This workshop also sought to firm up the commitment and contribution by stakeholders for joining a freight forum for the South West to help define roles and responsibilities and ultimately deliver the recommendations of the strategy.



8. Case studies

Case studies have been produced to show examples of best practice within the freight and logistics sector from outside and inside the South West region. The aim of this is to demonstrate interventions that are working well within the freight sector and use their learnings to develop them further for the South West.

Case studies outside the South West

Case Study	Mode	Example Implication for South West
Port to Inland Rail Services		Develop a strategic network of terminals across the UK with a customer catchment area of an hours travel time. This presents a potential opportunity to utilise parts of the rail network in the South West that are currently not used for rail freight movements
Cricklewood Freight Terminal		With the existing plans for growth and development in urban areas, it is good to move at least a proportion of these goods by rail. This might include bulk materials such as cement, timber, steel and aggregates
Stockholm Norvik Port		This could serve as a broad 'blueprint' that port developments should aim to connect to modern rail facilities onto an existing port, highlighting expected opportunities, challenges, costs and timeframes
Tesco Supermarket Materials by Rail Freight		Several of the major supermarkets are moving goods by rail. This may provide a new avenue of adoption by Local Authorities in the South West favouring rail freight due to its environmental benefits, without requiring significant commitments to long-term support for freight services from either businesses or the authorities. This can also be suitable in areas with a Clean Air Zone or Low Emission Zone where rail transportation can help targets to be met
Doncaster iPort rail		A similar set-up in the South West located within easy reach of ports can also have direct services to Europe to help firms in the region to export to a greater extent
New Express Parcels		If New Express Parcel trials are successful and these services can be implemented, they will offer a competitive solution for the South West against road freight to enable faster deliveries and greater consolidation of goods being transported
Yara Birkeland		Coastal shipping using alternatively fuelled vessels can assist with modal shift by taking vehicles off the road as well as helping reduce the carbon footprint of freight transportation. This new Norwegian ship designed to move fertiliser around the coast of Norway aims to be an automated ship meaning efficiencies in staffing and operation
Coastal shipping of logs and aggregates in the western UK		South West ports can build on the current success of coastal shipping at Plymouth and look to involve other commercial ports in the region to increase the proportion of coastal shipping in the South West
Shoreham Eco Port		South West ports can explore the possibilities of they can achieve zero emissions through alternative fuel infrastructure to support sustainable port vehicles and port centric logistics to support the local economy and community.
Drone transport of medical supplies to the Isle of Wight		The South West is generally a highly rural area with insufficient highway capacity in many locations, meaning drones could be part of an offer for a more reliable transport method for time-critical deliveries, especially to support life-line services to islands and remote locations where the terrain is inaccessible
Zeem Manchester Cycle Logistics		Cargo bikes can help ease congestion in urban areas in the South West by improving space-efficiency and lessening the need for cars and vans. Electric and fixed gear bikes also enable a form of cleaner transport, and help the South West's aims with regards to decarbonisation
Use of backloading and load matching services		There is a significant amount of empty running of HGVs. Backloading schemes can help to improve capacity on the roads of the South West as well as potentially reduce costs for businesses and hauliers. Reducing lorry journeys will also help to cut pollution in the South West and help the region to decarbonise
Alternatively fuelled vehicles		Embracing alternatively fuelled vehicles can help the South West achieve a route to net-zero. Initiatives could also complement other measures such as encouraging modal shift and retiming of deliveries
Highways England Agreed Diversion Routes		Appropriate routing can ease congestion caused by vehicles taking inappropriate routes and needing to turn back or getting stuck and causing blockages to the road network. Bridge strikes by high sided vehicles is an ongoing problem despite the availability of technology which alerts drivers of low bridges
Quieter Waste Collections		The use of low and zero-emission waste collection vehicles can help the South West region to work towards their clean air targets. Reducing traffic noise and pollutants creates a more pleasant urban environment in which to live.

Case studies inside the South West

Case Study	Mode	Example Implication for South West
China Clay Movement		Rail represents a reliable and environmentally friendly means of moving bulk cargo throughout the South West. These services also help support regional ports such as Fowey, and demonstrate the importance of implementing rail connections to ports
Aggregates Movement		Jumbo trains operating in the South West region means more material can be carried per train, which can help to free up additional train paths and increase the carbon savings per train. Bulk rail freight operations such as these also help take trucks off the road and help the local economy by exporting out of the South West region into other areas of the UK
Timber Movement		Despite not currently running, the past reopening of the Heathfield branch has both helped to facilitate shorter journeys fully within the region, but also longer journeys from outside the region helping firms operating in the South West region
Drone Deliveries (to Isles of Scilly)		The current postal boat running between the Cornish mainland and the Isles of Scilly is weather dependent, however the drone is able to operate even in bad weather, increasing reliability of deliveries. The drone deliveries are particularly useful for time-sensitive parcels, such as medication and special deliveries
Lifeline ferry services to the Isles of Scilly		Along with flights to Lands End Airport and helicopter transfers, these transport links ensure that communities are not cut-off and can get access to essential services to benefit themselves and local economies
Zoom! Deliveries		Due to narrowness of roads, many areas in the South West area are hard to reach for conventional deliveries, especially those using vehicles weighing 7.5 tonnes or over. The use of smaller vehicles therefore helps reduce congestion in and around Falmouth, especially during the peak summer season
Somerset County Council Traffic Choices		Communities working with local councils have often said information about traffic schemes, including those for HGVs, is not easily available. Interventions such as those identified as part of Traffic Choices can help with better routing for HGVs at a local level in the South West region, and help mitigate issues associated with poor HGV routing in the region
Ginsters Food Products Logistics		The location of the Ginsters factory also helps local farmers and producers, with potatoes being transported from only 12 miles away. The factory incorporates 500 jobs on site, in addition to supporting other operations such as distribution and logistics, therefore helping to support the local economy and provide employment for a number of other local companies
Wincanton ESG Strategy		Environmental, social, and governance (ESG) criteria are a set of standards for a company's operations that socially conscious investors/users want to see. Initiatives such as these set an example to other businesses in the South West looking to decarbonise and collaborate, as well as the steps that logistics firms can take to become more socially responsible
DHL logistics consolidation		Consolidation in logistics benefits freight carriers as it makes shipments cheaper from their end, whilst shippers do not need to pay for a full container if it is not required for the delivery. Consolidation therefore means businesses in the South West are able to export in more cost-effective ways enabling their businesses to be operate more efficiently
Crest Medical PPE supplies through Bournemouth		These cargo flights have helped establish Bournemouth as a key freight base during the pandemic which it can build on going forward. These flights have generated significant positive publicity for Bournemouth and the South West, especially as part of wider positive publicity for the freight and logistics sector and the NHS. Due to streamlined operations some customers can be served quicker than through London Airports
Morocco to Poole ferry services		These services help to offer a direct service into the South West via Poole, as opposed to needing to pass through ports located further away such as Southampton or London Gateway. These services also help improve the environment as they lessen the requirement for road transport, up through Spain and France
Gloucester Motorway Service Area		Due to the location of the South West, many lorry drivers will have driven a significant distance to reach the region, therefore provision of good facilities is important for wellbeing and sustenance plus enabling drivers to comply with driver's hours requirements
ForFarmers consolidation		Investment such as that at the ForFarmers plant in Exeter is an example of businesses looking to expand and increase their productivity. It is also a benefit to have a mix of multi-national firms and small firms to increase collaboration and contribute to a healthy economy mix
Bennamann Energy		Bennamann are producing 'better than net-zero' fuel in the South West, making a significant contribution to the decarbonisation throughout the region as well as positioning the South West at the heart of transport decarbonisation
EXO-Cell		Plymouth City Bus and Plymouth City Council are trialling technology known as an EXO cell developed by Atmos-Clear Limited (www.atmos-clear.com) on 5 vehicles each, with the aim of reducing the production of toxic emissions from engines. This trial shows how Plymouth is at the forefront of the development of these new technologies to help Plymouth and the wider region to develop a route to net-zero.

9. Freight Issues

This section summarises the freight issues in the South West from the stakeholder engagement both direct and workshops, client officers and literature review sources. These have been categorised into different modes or themes.



Maritime

The region has a number of commercial ports with spare capacity and home to the largest naval base in Europe. Maritime freight can be a viable alternative to road-based long-distance haulage as part of efforts to decarbonise the freight industry and improve supply chain efficiency. There is the opportunity to explore and unlock new economic opportunities and investments through port centric and Freeport initiatives, but there are challenges to ambitions of stimulating mode shift from road to sea freight.



Aviation

The airports situated across the South West are predominantly centred around passenger traffic with minimal tonnage of air freight. There are helipads, a proposed spaceport and some airports promoting air freight such as Bournemouth. There are concerns over the environmental sustainability of current aircraft. There is uncertainty over the future role of air in the shipment of consignments perhaps through widespread use of drones, electric aircraft and pilotless technology as these operations are still in their trial phases.



Rail

The lack of active rail freight terminals in the South West is the most immediate barrier to moving more products by rail. Rail freight is growing in other parts of the UK in intermodal (both Domestic and Deepsea), Express freight and Construction and there needs to be suitable terminals to facilitate this. Closures of terminals and inappropriate development near to potential sites has impeded the development of freight modal switch to rail. There are other rail issues such as lack of alternative routes in case of incident, the absence of many electrified routes, constrained loading gauge, some steep gradients and lack of allocated train paths.



Road freight efficiency

As the South West is very reliant on road freight it is important that it is as efficient as possible. But there are several issues causing the sector to be operating sub-optimally;

Lorry driver shortage

The transport industry remains challenging for recruiting and retaining staff (most notably HGV drivers). All across Europe there are many more lorry drivers retiring than wanting to join the industry. This is leading to a skewed driver demographic (average age is nearing 50 years old) and there is a risk of not being able to recruit sufficient staff. A SME haulier at one of our workshops said that three out of their seven HGVs were parked up due to a lack of staff. Part of the problem is based on perceptions of the haulage industry, which is seen as long hours, poor pay, sometimes dirty and possibly away from home a lot with few nice lorry parks to stop at. Also, there are concerns that although there are plenty of driving jobs available now, should widespread vehicle automation occur there may be fewer driving jobs by 2040. This poor Road Freight Industry image also affects a lack of graduates wanting to join the sector in supply-chain management.

Lack of data on Freight Flows and use of Technology

There is limited data transparency to aid with making informed commercial decisions covering commodities moved/empty running/journey requirements). Our data analysis showed that empty running HGVs in 2019 accounted for 22%. It is important to understand freight flows in order to investigate potential solutions. Technology is expanding fast and being built into modern supply chains. An issue relates to level of understanding of the technology and how it can help SMEs improve their business.

Road Congestion

The road network in the South West is not as developed as in many other parts of England. The Strategic Road Network (SRN) is fairly limited in the region and there are pinch points on the network with some routes still single carriageway meaning that overtaking slow moving vehicles can be more hazardous. If incidents happen congestion tends to occur as there are few alternative routes. This can be problematic particularly in and around larger conurbations, particularly during the peak holiday season in July and August and when the weather is hot and sunny. As well as congestion there can be a lack of parking spaces in urban areas and this can result in parking on yellow lines or having to waste fuel finding a space. This contributes to poor air quality.

Lack of Connectivity

The population in the South West is growing and aging and the demand for home deliveries is expanding. A challenge with delivering to remote rural or coastal settlements is that the journey time between customer drops is often long partly due to having to use smaller lanes (impacted by seasonality), which may suffer from a lack of road maintenance. Some suppliers operate a restricted coverage so that they do not offer a service to remote locations. This is often related to a lack of commercial viability of serving parts of rural Devon, Cornwall and the Isles of Scilly and this diminishes consumer choice.



Road Freight Pollution

Although engine technology has improved significantly over the last 30 years and Euro VI HGVs are much cleaner, they still do emit a disproportionate amount of greenhouse gas and do contribute to poor local air quality. Hence the decision to halt the sale of diesel trucks in 2035 or 2040 depending on size, so suitable alternatives will need to be found.



Decarbonisation & Lack of Alternative Fuels Infrastructure

All transport modes are facing up to the challenge of how to decarbonise their sector. The availability of electric charging or gas fuelling infrastructure required to transition towards alternative fuel technologies (especially for HGVs) represents a major challenge. In general, infrastructure will be required at depots to enable charging when vehicles are not in use (for example, overnight), potentially at destinations (within logistics centres while loading/unloading) and at public charging hubs at MSAs or lorry parks. Building a supporting infrastructure will require investment and, potentially, incentives/subsidy/grants for freight and logistics operators



Engagement with the private sector

A question raised during consultation, is to define the role of Peninsula Transport and Western Gateway in addressing the issues outlined and shaping future priorities with different stakeholders; being able to demonstrate a relationship with the private sector and how the freight strategy can be delivered. As the STBs are new bodies it was asked how they could take on ownership and responsibility for facilitating and delivering schemes and projects, working in partnership with industry and build on the relationship with central government?

Common freight challenges in the South West — the need for positive change

There are also a number of broader issues that have come out of the strategy development which span across the various themes listed previously. These are shown below:

<p>Growing and ageing population located in difficult and expensive to serve areas</p>	<p>Lorry driver shortages and lack of enthusiasm to join logistics sector</p>	<p>Road sector a major polluter and clear direction needed on decarbonising the industry</p>	<p>How to tap into the range of alternative energy sources the region could produce to support the sector</p>	<p>Congestion on SRN and what more can be done to share the pressure</p>
<p>Connectivity and journey time reliability due to lack of suitability and capacity of the network</p>	<p>Few alternative routes for road and rail operators during incidents</p>	<p>Pressures of supply chain demand, improved efficiency and constantly advancing technology</p>	<p>Opportunities for rail, if supported, through rail terminals and advancements in line capabilities i.e. electrification</p>	<p>Opportunity for ports to exploit new opportunities to support sector and maximise</p>

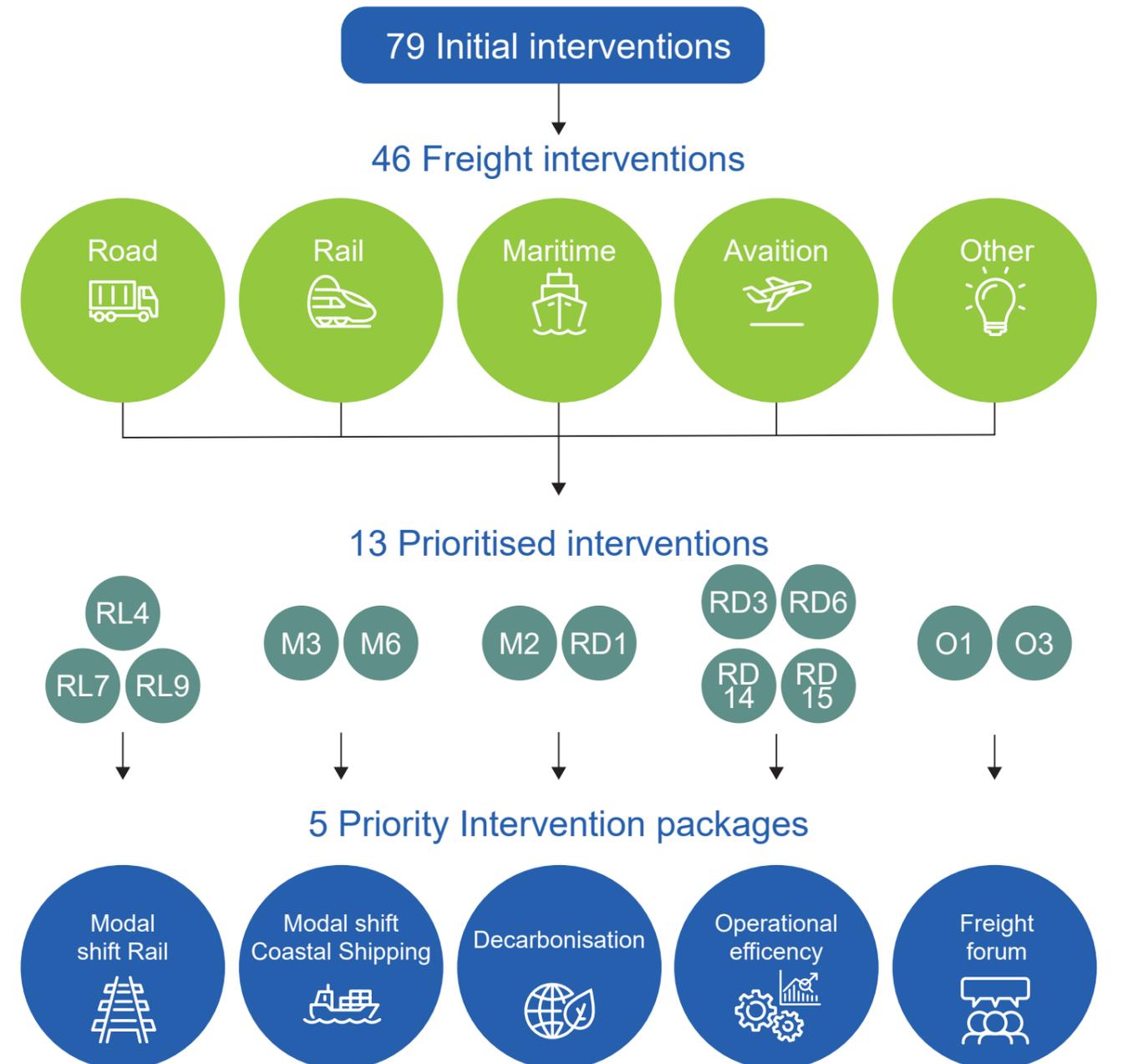
10. Interventions

10.1 Introduction

This chapter brings together packages of interventions in response to key issues, opportunities and themes under each mode of freight transport across the South West region. These interventions have been aligned to the core priorities for the South West. In each case, a concise overview is provided of the freight mode in the context of the South West followed by a description of the issues by theme. This is then followed by an interventions table laying out the recommended intervention for implementation and how it specifically tackles issues across the region.



Priorities



10.2 Intervention – Aviation

Overview of aviation in the South West

Aviation, the movement of air cargo and mail consignments, plays a limited role comparatively to other freight networks across the South West and UK more broadly. The sector is typically associated with low volumes of air cargo and air mail alongside delivering high value goods in low volumes on a Just in Time (JIT) basis serving global supply chains. There are several commercial airports based across the South West which offer a select range of passenger and freight services but limited options comparatively to other parts of the UK with higher urban densities, transport infrastructure and industry markets. There are also operational and planned helipads and spaceports serving niche roles within the community and the shipment of goods and people respectively.

Snapshot profiles of airports freight dynamics have been alluded to below:

Exeter:

- The scale of air cargo tonnage handled over the past decade has been intermittent; to the point where no freight tonnage has been recorded over the past three years. Air mail remains a mainstay due to the link with Royal Mail and is a constant revenue stream although tonnage has halved in the last decade.

Bournemouth

- Air cargo was a revenue stream for Bournemouth Airport up until 2015 having peaked in 2014 at 1,888 million tonnes annually after increasing significantly from a baseline of 304 million tonnes four years previously. Up until 2016 and the relocation of Royal Mail, the airport handled 10,828 at its peak in 2016.
- The airport is seeing a resurgence in air cargo with new dedicated services to other continents and is the base for European Cargo, a commercial operator with converted freight craft, who have been actively involved in the shipment of PPE and Covid tests kits during the COVID19 pandemic. The uncongested site is proving attractive to new suitors.

Bristol

- Despite its relative size and proximity to international gateways and larger urban populace, Bristol airport handles a small amount of air cargo. Only 16 tonnes overall were handled in 2020, all carried in the passenger aircraft and almost all being exclusively transported to/from the European Union. The airport has also handled a small amount of air mail over the last decade; approximately 3,498 tonnes in 2010 but this has declined over the decade.

Cornwall (Newquay)

- Operate nominal levels of air cargo and air mail but is the commercial base for operations under the Public Service Obligation (PSO) to deliver people and goods along routes that are vital for economic and social prosperity. The airport is the site of the proposed 'spaceport' which will be operational from 2022.

Land End (St Just)

- Lands End Airport, considered the gateway to the Isles of Scilly, is heavily utilised for transporting air mail and light goods between the Isles of Scilly having witnessed a 228% uplift in freight tonnes moved over the last decade. The Skybus service provides scheduled flights year-round during daylight hours only.

Penzance Heliport

- Currently provides no recorded freight movements on routes serving the Isles of Scilly but has recently relocated to better integrate with local transport connections on the mainland to boost patronage and access to freight markets.

Intervention ID	Interventions	Theme	Issue for the South West
A1	Support for sustainable aviation and aerospace sector		The niche role for JIT deliveries and prohibitive costs of air cargo limits the scope to specific use cases – which are crucial nonetheless to sustaining local economies and remote areas
A2	Further develop business / employment zones around airports.		Need and desire for airport diversification to support emerging aviation technologies and to offset reservations around airport expansion (and flights) on environmental grounds whilst creating new revenue streams and job growth
A3	Work with operators to understand future opportunities for carrying air cargo.		Constraints upon runway dimensions for carrying wide body aircraft (smaller regional airports) alongside the scope for regional airports and commercial operators to change business models (to carry light freight loads)
A4	Review suitability and potential locations that could benefit from drone technology.		The challenge posed for transporting goods to the more remote parts of the region, namely the Isles of Scilly and the financial viability and technological /commercial maturity of alternative options



10.3 Intervention – Maritime

Overview of ports and maritime in the South West

Maritime freight sector, in this context, encompasses coastal shipping and ports, which play a pivotal role in supporting local prosperity, addressing environmental challenges and connecting communities across the South West region and beyond.

Ports are gateways that facilitate the movement of goods and people and the point of access between sea and land-based transport; requiring the transshipment and handling of goods between different transport modes and stages of a supply chain.

Ports in the South West contribute £640m towards Gross Value Added for the UK (10 per cent of all UK port activity) and provide 10,100 jobs directly across the industry (13 per cent as a proportion of all UK ports). The types of commodities handled by ports has changed in recent years; with a decline in dry bulk and coal imports taking place concurrently with a rise in container traffic, liquid bulk and aggregate materials and burgeoning new sectors such as biomass fuels and agricultural goods. Ports are also diversifying into energy generation and developing clusters of manufacturing and logistics activity.

Overview of issues – Decarbonisation

The decarbonisation agenda is driving change across all modes of freight transport including mode shift away from long distance road haulage and towards the use of coastal shipping for carrying bulk materials domestically. This is especially pertinent to reduce empty running (road haulage) out of the region and HGV volumes travelling strategically across the UK.

There is real potential for ports, especially those that cannot compete on volume to create diversify into energy production and renewable energy as an exercise in saving operational costs longer term and creating new revenue streams. All ports should be planning for providing alternative fuels for vessels (whether bunkering facilities, green hydrogen or shoreside power whilst berthed) using accreditation standards (such as PERs and Eco-Port Status for smaller ports) to source resources for making the transition. Freeport status at larger ports also offers a unique chance to use a streamlined planning system to provide a range of infrastructure in place to cater for vessels, road and rail transport re-fuelling.

Overview of issues – Information and awareness

There is a general lack of quality data and knowledge available within the public domain that accurately describes the types of goods being moved across the region, particularly by road haulage. This lack of supply chain visibility impacts the ability for freight operating companies across the rail and maritime sector to provide services that could compete with road haulage. Equally, prospective customers seeking to move goods over longer distances, may not be aware of the advantages offered by coastal shipping; both financially and in terms of journey reliability, especially in the current climate.

Overview of issues – Infrastructure

Ports are having to change in response to a decline in the transportation of conventional commodities, such as coal and oil, and the rise of aggregates, biomass fuels and animal feed which are the product of the local economy. Infrastructure, including storage areas, handling equipment and on-site energy generation, must all be updated in response to the transition. This presents a huge opportunity to decarbonise and provide local employment in the process as well as appealing to new markets.

Poor access to ports by road and rail has an impact on the competitiveness of maritime transport and the opportunity to carry greater volumes of freight reliably and efficiently. Many ports across the region rely on road connections in the absence of direct rail links but there is an appetite to reinstate lines to help shift the movement of goods from road to rail and overcome issues of traffic congestion and traffic mixing on local roads. Whilst some ports have introduced Vehicle Booking Systems (VBS) and lorry holding areas, broader consideration of future demand and a more holistic view needs to be taken around investment in the 'last mile'.

Overview of issues – Operational efficiency

There is a risk that without effective planning legislation, safeguarding of wharf infrastructure and strategic planning that port environments and activities are constrained in the future. Small ports especially across the region are situated in close proximity to local communities and so reducing externalities is important to reduce visual and noise pollution. The designation of freeports, namely Plymouth, presents an opportunity for port centricity; the clustering of logistics and freight activity that boosts local prosperity and supply chain benefits through economic agglomeration. Managing access to ports will require partnership working between different parties. Incentives will be needed to develop new infrastructure and technologies.

Intervention ID	Interventions	Theme	Issue for the South West
M1	Develop business case for coastal feeder services to help remove road vehicles.		Unlocking opportunities for strategic, longer distance movements of freight commodities domestically, that are currently undertaken by road (e.g. biomass fuels, agribulk etc.)
M2	Explore opportunities to diversify ports into renewable energy production.		The need to transition towards alternative fuels (shoreside power) and electrification of onsite handling equipment in response to fuel duty changes to red diesel and net zero ambitions
M3	Awareness campaign of coastal shipping opportunities for supply chains.		Lack of awareness and quality data to help convey and communicate the virtues of coastal shipping and new market opportunities for prospective customers.
M4	Develop and expand growth into new sectors at ports.		Declining historical sectors (such as conventional fuels) with the rise of alternative fuels and bulk commodities that take advantage of the regions natural resources and economic markets
M5	Investigate improvements in road and rail links to Port terminals.		Traffic congestion and constrained access points to ports impact journey time reliability. Enhanced rail access has huge potential to stimulate mode shift away from long distance road haulage
M6	Review of ports in the South West (Already done for WG).		Developing a clear case for managing movements through ports depending on the scale and type of activity and tailored to growth aspirations and local economic and site based growth proposals
M7	Review of ports planning guidance.		Planning for the expansion of logistics and freight related infrastructure through safeguarding and planning for increased capacity using the planning system and land use designations



10.4 Intervention – Rail

Overview of rail in the South West

The volume of freight that moves by rail in the South West is relatively low, relative to the size of the addressable market and rail's market share of goods movement in the rest of the UK. However, of note is the nationally significant movement of aggregates from the Merehead and Whatley Quarries, Somerset, principally to the London Area for the construction sector. In 2019, 3,389 freight trains (10 million tonnes) left these Mendip Quarries, and some the so-called "jumbo trains" carry the heaviest weight in the UK. Another notable flow was the 282 china clay trains arriving at Fowey Dock from the local Cornwall quarries. The high reliance of the region on road transport for the movement of freight highlights the opportunity for modal shift to rail. There are addressable markets for rail freight, including bulk aggregates and intermodal which have been expanding by 3% per annum in other parts of the UK and express parcels.

Overview of issues – Connectivity

Issues include a lack of rail connection to key ports e.g. Plymouth and Poole and a lack of services where rail connections are present. Rail connectivity and gauge clearance, especially for deep-sea ports, is crucial for the growth in containers and automobile sector. However, whilst investment in direct rail connections into ports could help unlock future opportunities, they require significant investment in on site capacity. Feasibility studies will form an important part of looking to increase connectivity. Another issue is the lack of alternative rail routes if an incident closes a line. Robust alternatives are required to reassure freight forwarders that rail is reliable.

Overview of issues – Decarbonisation

Rail freight emits 76 per cent less carbon and hence additional use of rail would help to address air quality issues and carbon reduction targets. Rail is even better when the services are operated by electric locomotives. So, a key issue for decarbonisation of freight in the South West is the lack of electrification of the 'main line spine', meaning that most rail freight in the region could only be served by diesel locomotives. Failure to electrify more of the network could be a barrier to significant modal shift and the competitiveness of the area. A way of making diesel locomotives cleaner during the transition to Net Zero is to use Hydro-treated Vegetable Oil (HVO). Trials by DB Cargo UK estimated that 90 per cent of a train's carbon emissions can be eliminated by using HVO fuel compared to traditional red diesel.

Overview of issues – Information and awareness

There is a lack of understanding of the needs of different parties particularly at a strategic level and this is hindering development. This is particularly important to address and consider because of how comparatively new the South West STBs are. A freight forum will also enable Local Authorities and private business to better understand the role of the STBs and their general priorities regarding rail- freight. There is also a lack of awareness of business and industry regarding the possibilities of rail freight. Signposting to specialist resources can help organisations see how rail freight can work. The newly created Great British Railways will also have a duty to promote rail freight.

Overview of issues – Infrastructure

The key infrastructure issue is a lack of rail freight terminals and this is limiting potential growth of the intermodal market as there are no active terminals within the study area. A former site at Bristol could potentially be brought back into regular use but this would not serve much of the South West. There is a need to identify and safeguard sites with the potential for rail freight development across the South West. This needs collaboration with local planning authorities, Network Rail and Local Economic Partnerships to bring forward an intermodal terminal network in the South West. Another issue is the restrictive loading gauge (with the exception of the Great Western Main Line / Hants & Berks Line) as this can limit the movements of high cube containers which are important in the establishment of viable intermodal traffic flows. If gauge cannot be improved particularly in the short-term there are wagons with small wheels that may be an interim solution.

Overview of issues – Operational efficiency

This issue focuses on a lack of freight paths within and connecting to the south west, particularly important given the single track running of some lines. Potential paths need to match to the type of freight flow be it Class 1 Express Freight (Parcels 100mph), Class 4 Intermodal (75mph) of Class 6 Bulk (60mph).

Intervention ID	Interventions	Theme	Issue for the South West
RL1	Feasibility study to operate intermodal container trains from deep seaports to intermodal sites.		Looking at the options for modal shift to enable more freight to be moved by rail to its final destination through for last mile logistics. In particular, this should consider the operation of an intermodal container train between Southampton and other deep-sea ports to appropriate new terminal(s) in the South West.
RL2	Support electrification and gauge enhancement of the core rail network.		Looking to ensure W12 / S45 standards for all current W10 cleared routes and diversionary routes. These enhancements will help increase the potential of rail freight within the South West region.
RL3	Pursue rollout of new alternative fuel locomotives and wagon technology.		Alternative fuel locomotives include use of HVO and hydrogen. Infrastructure enhancements should also be considered to help support these transitions. Consideration should also be given to how rail can support other modes of transport and the movement of alternative fuels.
RL4	Support and signpost businesses and local authorities to transition to rail freight.		Engagement with Rail Freight Operators should look to feed into this as well as promotion of training opportunities. Support can also be given to local businesses to help establish new services by rail by signposting them to specialist resources that can help them make the modal shift to rail.
RL5	Understand the availability of grants to help facilitate modal switch to rail.		In particular, this should include raising awareness of the strategic importance of these grants and highlighting the positive impacts they have on the industry. Collaboration with Network Rail will also form an important part of this.
RL6	Partnership working with stakeholders to promote South West priorities.		This will include collaboration with a number of bodies such as Great British Rail, local rail teams, core freight units, councils, Sub-National Transport Bodies, local government and the Department for Transport. This will enable a joined-up approach to help promote rail freight in the South West.
RL7	Encourage the establishment of rail freight terminals with a catchment of 1 hours' drive time by HGV. Indicative locations might include; Bristol, Westbury, Poole, Bridgewater, Exeter, Plymouth and Bodmin.		Considerations should include safeguarding existing sites to bring them back online as well as identifying new sites including sites with connections to ports. Collaboration should be sought with Network Rail, Local Economic Partnership and Local Authorities to exploit freight terminals and look to bring forward an intermodal kick starter terminal network in the South West.
RL8	Safeguard rail freight sites through developing Supplementary Planning Guidance.		This should consider adequate land in urban and industrial areas within the south west to promote rail freight consolidation. It should also account for how sidings on the network could be adapted to support intermodal rail freight.
RL9	Allocate sufficient freight train paths on the main line and diversionary routes.		This should consider the growing market for intermodal, bulk and parcels and identifying alternative freight train routes to avoid hotspot areas. Minimum path allocations for key routes should form part of this, such as Birmingham to Bristol and Bristol to Exeter.

10.5 Intervention – Road

Overview of road in the South West

Road freight is the dominant means by which goods are moved domestically across the region. This will be the case moving forward irrespective of mode shift towards rail, a localisation of supply chains and the emergence of the decarbonisation agenda. In 2019 road transport moved around 170 million tonnes of goods of which 36 million tonnes was food and drink.

Overview of issues – Decarbonisation

There is a national debate ongoing around selecting and investing in alternative fuels across the road haulage sector and HGVs and how this manifest in the short and long term - including the delivery of low carbon and zero emission fuels respectively. The costs of producing and thereby purchasing alternative fuels is currently prohibitive to scaling up interest whilst the infrastructure to store, transport and fuel vehicles hasn't reached commercial maturity. There are promising signs, such as the development of a hydrogen hub in Swindon and proposals for a hydrogen car filling station network as well as the use of biodiesel, a 'drop in fuel', using agricultural waste and Hydrogenated Vegetable Oil (HVO) that can be sourced locally. The densification of the EV charging network, particularly around urban areas, will aid with the uptake of EV vehicles.

Overview of issues – Information and awareness

The multiple factors potentially influencing and shaping the road haulage sector of the future demands close cooperation with the industry. The pace of change and announcements regarding bans to the sale of Internal Combustion Engine (ICE) vehicles alongside attempting to offset more bespoke issues with routing and bridge strikes in particular, need wider promotion and publicity – with support from trade bodies. The need to decarbonise, coupled with the driver shortage should pave the way forward for a constructive dialogue between road and rail sectors to shift the focus away from long distance haulage towards a hub and spoke approach.

Overview of issues – Infrastructure

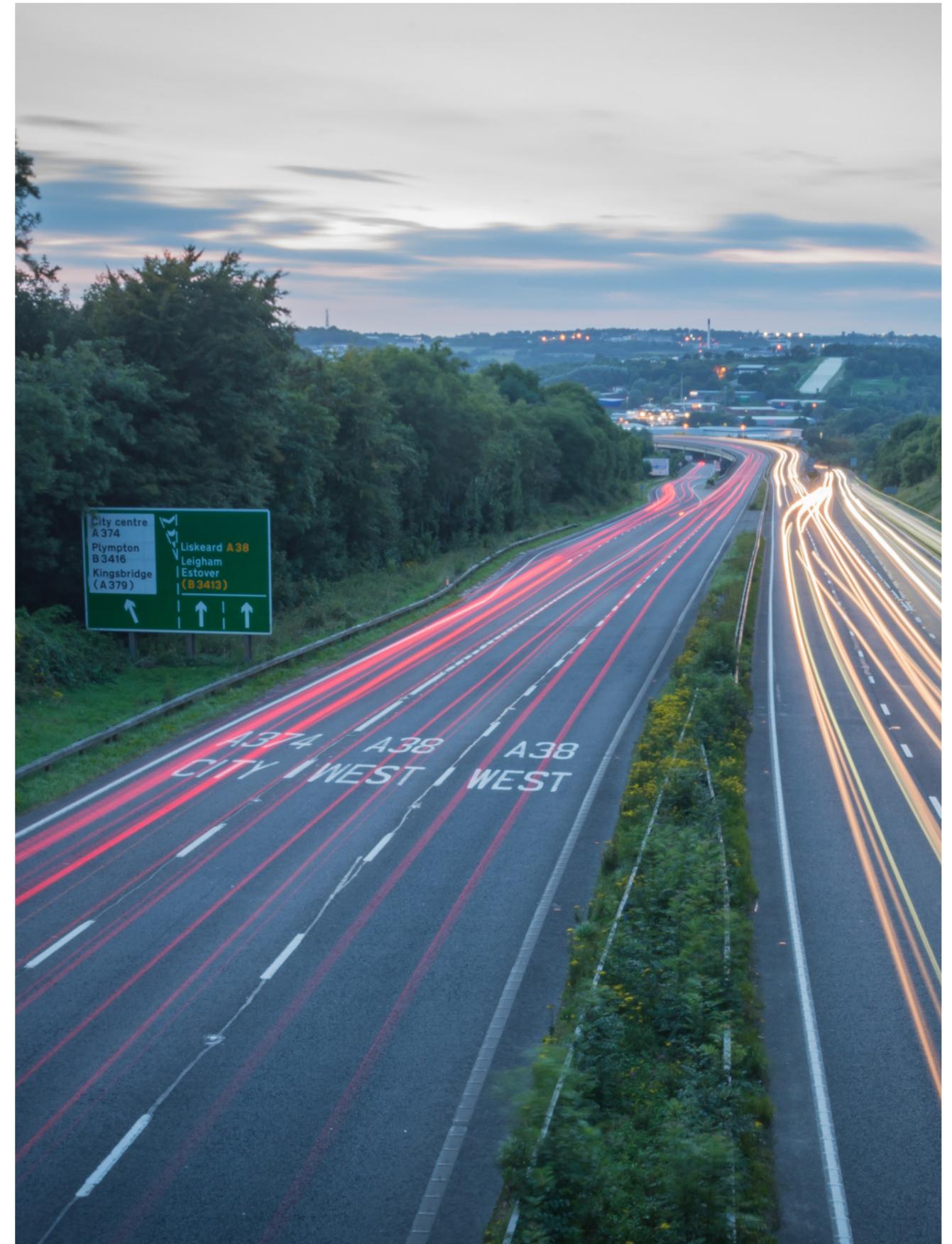
Infrastructure is key for the safe, efficient and sustainable movement of goods across the region. The provision of new roads and upgrading of existing trunk routes is subject to agreement by key delivery partners. Previous dualling of A roads through the Peninsula Transport area has been popular to improve journey time reliability with continued maintenance and upgrades to junctions (to address pinch points) along core arterial routes being key to future road freight efficiency and unlocking new logistics activity in peri urban locations. Congestion can also be problematic around larger conurbations namely Plymouth, Exeter and Bristol, especially during the summer period, whilst facilities for drivers undertaking long distance haulage is patched in parts and requires a review.

Overview of issues – Operational efficiency

Foodstuffs and mined materials (e.g. aggregates) are key materials exported from the Peninsula Transport area, with a higher density of parcels, lighter goods and manufactured materials being moved around by road around larger conurbations across the Western Gateway (relatively across the South West). Long distance haulage and empty running are two key subjects requiring attention through interventions targeted at reducing freight (HGV miles) and optimising vehicle use regionally and within the context of urban and rural areas. Hauliers travelling into the South West from National Distribution Centres (NDCs) in the Midlands are covering prolonged distances and travelling back partially loaded or running empty in the absence of a formal hub facility to capture journeys whilst the same principle applies to 'local journeys' within the region. Hauliers are increasingly running off fine operational margins with minimal contingency and have had to compete with non UK hauliers for custom (offering lower prices)

Overview of issues – Technology

Trials of technology, deployed in a freight context, have been limited across the South West to date. The use of technology, despite its apparent and obvious virtues, must be aligned with regulatory changes across the industry, such as the operator licence policy and behavioural shifts – namely fostering a culture of data sharing between sectors and across industry. There is huge scope for consolidation, which only takes place informally across the region (with the notable exception of the Bristol/Bath consolidation centre operated by DHL, providing technology can be matched with willing customers, capital outlay (pump priming) and better supply chain visibility.



Intervention ID	Interventions	Theme	Issue for the South West
RD1	Strategically plan network of alternative fuel stations and promote existing sites. Development of new sites by private sector.		Scale of capital investment required to build up a substantial network that caters for both local trip journeys by LGVs and strategic journeys on the SRN and to deliver this at speed to aid with efforts to decarbonise the road freight industry.
RD2	Promote resources and training to help operators avoid bridge strikes.		The South West has two of the twenty most struck bridges in Britain – in Wilton, Wiltshire and Twerton, Bath. This causes substantial disruption to road and rail networks and requires better advanced signage and diversionary routes
RD3	Promote solutions to driver shortages.		A national issue that has manifested over time due poor perceptions of the industry, reliance on foreign labour and road haulage dependency. The current situation is a trigger for mode shift and forging a complementary freight network.
RD4	Work with hauliers to understand how they can be supported in the uptake of alternatively fuelled vehicles.		Rising to the challenge of transitioning towards net zero for smaller hauliers (less than 8 vehicles in a fleet) who make up the greatest proportion of HGVs travelling regionally. Similarity providing clarity for the industry to inform investment short and long term (low carbon v zero emission fuels)
RD5	Review of current lorry parking facilities in the South West.		The quantity and locations of facilities is highly relevant to cater to long distance haulage and in response to the geography of the region and inter drop distance and supply chain activity. Better visibility and quality of existing stops needed.
RD6	Support for infrastructure improvements and investment where suitable.		This is to include engagement with National Highways on the Road Investment Strategy 2, future Road Investment Strategy 3, local authority road schemes and route study schemes for HGV alignment and width easement
RD7	Continue support for routine road maintenance activities but broadcast plans so hauliers can better plan.		This in response to hauliers requiring information to forward plan schedules around planned upgrades to avoid disruptions and to adjust delivery programmes accordingly.
RD8	Identify cluster locations where logistics plans are needed along with facilities for last mile logistics.		Focusing in on reducing freight miles and tailoring vehicles to navigate sensitive urban areas and access remote rural communities using the levers of the planning process and development conditions set for each local authority
RD9	Promote use of swap trailers to reduce demands for long distance trunking between regions.		Reducing long distance haulage and empty running up to the Midlands through interchanging at hub locations (e.g. Exeter or Bristol). This is in response to the region's role as a net importer and the isolated geography of the study area.

Intervention ID	Interventions	Theme	Issue for the South West
RD10	Feasibility study on consolidation sites for last mile logistics.		Aimed at minimising sub optimal deliveries from larger vehicles in sensitive areas that can effectively serve multiple operators and be embedded with operator supply chains. This is also important for exploring zero emission deliveries and micro depots to hit emissions targets and to improve road safety
RD11	Promoting suitable alternative routes in the event of adverse weather.		Network resilience is a particularly acute challenge across the Peninsula Transport area with accidents and delays across the M5, A30 and A38 having implications on freight flows, especially in the absence of diversionary routes
RD12	Review options to deliver smarter during quieter periods of the day or week.		The re-timing of deliveries and re-moding of vehicles accessing sensitive parts of an urban area can aid local authorities across the region to address air quality challenges, peak period congestion and improve the quality of life of local communities.
RD13	Support improvements to strategically important roads that require better journey time reliability.		There are a number of A roads (A30, A38) acting as vital arteries across the region to serve local freight generators (and trips) and trunking activity. Speeds across the Peninsula Transport network alone along the SRN drop from 90km/h overnight to 70km/h during the day on average.
RD14	Review suitability of technologies from trials and their potential for the South West.		Presenting the South West Region as a future freight zone that is open to trialling innovative, yet workable solutions. The region is bypassed currently but would benefit from investigating autonomous technologies and alternative fuels
RD15	Promote a trial of the use of a load and vehicle matching exchange to reduce empty running for 10 hauliers for a year.		Empty running of HGVs contributes 208,000 tonnes of CO ₂ emissions and over 20% of the total HGV mileage across the region. Platforms, such as the Haulage Exchange exist but need greater promotion and publicity and changes to operating licences and regulations.
RD16	Explore collaboration between delivery companies to service hard to reach areas.		Inaccessible roads and challenges navigating rural lanes serving remote communities is a key issue; especially where there are pockets of deprivation (coastal communities especially) and rising demand for goods and grocery orders.



10.6 Intervention – Other

Overview of General in the South West

A key challenge for the freight and logistics industry moving forward is understanding and earmarking the roles and responsibilities of key actors. STBs are new entities providing strategic oversight and input but who will come to rely on forging relationships across public, private and third sector organisations to leverage investment and steer priorities. There is an appetite to bring together key stakeholders under a unifying voice and a common platform to avoid a silo mentality from taking hold but, more importantly, to deliver tangible changes, unlock future markets and respond to freight trends.

Overview of issues – Connectivity

There is a need to provide greater visibility over potential market opportunities and prospective customer interest in infrastructure developments, such as multimodal interchanges, to be able to plan ahead and shape future investment strategies. This will require bringing together different stakeholders and fostering data sharing across different freight sectors on a case-by-case basis but also encouraging multi modal partnerships for fulfilling identified freight movements.

Overview of issues – Decarbonisation

The recent UK Decarbonising Transport plan pushes through more radical action to address the climate emergency. Local authorities have the opportunity to be trailblazers in addressing their carbon impact and working towards their aim of becoming carbon neutral by greening fleets and procuring sustainably. Many authorities across the region have carbon neutral targets for 2030.

Overview of issues – Information and awareness

There are a number of immediate challenges with shaping the future freight discourse, investment strategies and priorities across the region; many of which pivot around bringing together key partners and publically communicating the role and responsibilities of STBs. The STBs, alongside partners, will need to help address regional challenges around trunking etiquette by agricultural vehicles and promoting local sourcing and procurement across local authorities, including supporting local economic generators, namely local energy suppliers/network. The poor image and perceptions of the freight industry, which is a national issue, requires a coordinated response working with DfT and industry.

Overview of issues – Operational efficiency

There is a challenge presented by numerous sectors, that to explore new markets and improve the efficiency of goods carried, greater transparency and supply chain visibility is needed. However, the commercial sensitivities around data sharing have long been an issue that has stemmed efforts to improve wider network operations.

Concerns have been raised around regulatory compliance and standards of different operators (road haulage) which runs parallel to concerns about road safety in and around urban areas and delays on the SRN from accidents. Company accreditations (road haulage) and procurement have been used sparingly as levers to help raise standards across the region.



Intervention ID	Interventions	Theme	Issue for the South West
O1	Develop engagement on logistics schemes and partnerships.		Break down silo approach to scheme and strategy development and the competition between road and rail (for example) that stifles complementary supply chain activity for long distance trips.
O2	Lead by example by implementing low or zero emission vehicles in local authority fleets.		Improving the efficiency of local authority fleets as part of the broader decarbonisation agenda and the need to address the climate emergency (acting as trailblazers in this respect)
O3	Establish and promote a South West Freight Steering Group.		The lack of insight, information (data) exchange and collective planning between key strategic decision makers industry operators and trade associations
O4	Agree the role of Sub-national Transport bodies with regards to the freight industry. Once established carry out an awareness campaign.		Lack of awareness and knowledge of STBs role in shaping the transport discourse and leveraging investment. There is difficulty understanding and defining its purpose alongside other actors
O5	Assist with targeted recruitment campaigns for the freight industry.		Recruiting and retaining employees and tackling the poor image associated with the industry. This also includes upskilling for new careers in emerging technologies and logistics roles
O6	Guidance for agricultural operators on the use of the road network during busy periods.		Congestion and delays associated with heavy plant machinery travelling prolonged distances on the SRN, especially during peak periods. This situation also reduces trade for local hauliers.
O7	Promote sourcing from local businesses.		Minimising travel demand, freight miles and the scale of empty running (as a net importer). The region is also one of the most deprived in the UK and has a fragile seasonal economy.
O8	Undertake sector supply chain audits.		Lack of supply chain visibility over the type and full door to door journey of different loads across the region including aggregates, agricultural produce etc. to help plan future freight needs
O9	Consider creating an information sharing platform in conjunction with the Freight Steering Group so that for example best practice case studies can be featured.		The need to raise standards across the road haulage industry to improve operational efficiency, road safety and to ensure compliance with regulations (via Traffic Commissioner)
O10	Exploring collective procurement with local anchor institutions for purchasing 'essential' goods.		Costs of procurement and missed opportunity to work across larger public and private organisations to reduce environmental impact from supply chains and support local SMEs.

11. Implementation of interventions

The interventions will need to be led and developed by a number of primary and secondary owners. Their role will be to deliver or support and of the 46 interventions there are 10 suggested for the STBs to lead. The strategy has been structured modally and for some of the implementations the STBs should consider a cross modal picture to leverage maximum benefits across all modes. Each of the interventions will vary in the timescale and costs as shown below.

Timescale	Definition – year brackets	Issue for the South West	Cost
🕒	2022 – 2024	£	£0 – £ 100,000
🕒🕒	2025 – 2029	££	£100,001 – £1million
🕒🕒🕒	2030 +	£££	£1million +

11.1 Aviation

ID Number	Interventions	Primary owner and role	Secondary owner/s and role	Timescale	Cost
A1	Support for sustainable aviation and aerospace sector	Airports and air freight operators - deliver	STBs - support	🕒🕒	££
A2	Further develop business / employment zones around airports.	LAs - lead in conjunction with private developers	Airports and Freight Steering Group – support. STBs to support	🕒🕒🕒	£
A3	Work with operators to understand future opportunities for carrying air cargo.	Operators - deliver	Airports and STBs to influence and support	🕒	£
A4	Review suitability and potential locations that could benefit from drone technology.	Air freight operators and technology providers - deliver	STBs - support	🕒🕒	££

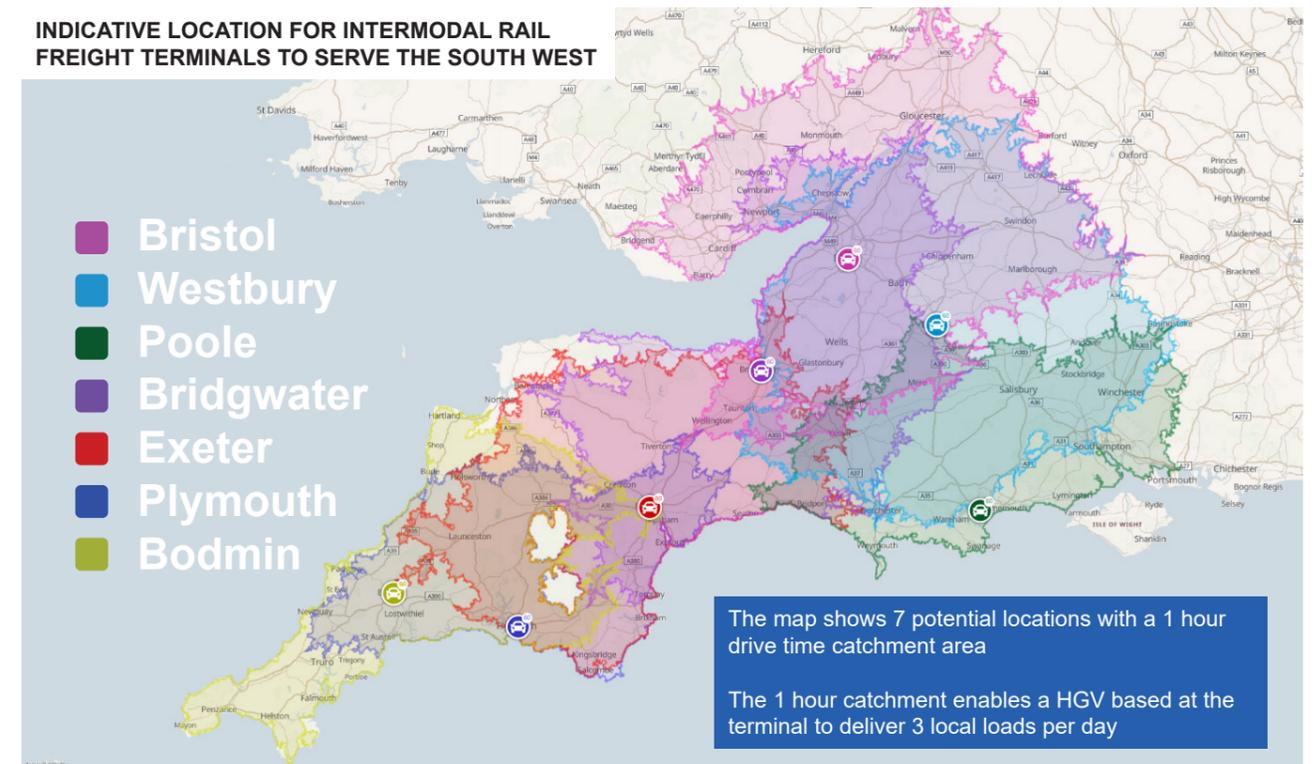
11.2 Maritime

ID Number	Interventions	Primary owner and role	Secondary owner/s and role	Timescale	Cost
M1	Develop business case for coastal feeder services to help remove road vehicles.	Port authorities - deliver	STBs - support	🕒	£
M2	Explore opportunities to diversify ports into renewable energy production.	Port authorities - deliver	Energy generators - support	🕒🕒	£££
M3	Awareness campaign of coastal shipping opportunities for supply chains.	Port authorities - deliver	STBs - support	🕒	£
M4	Develop and expand growth into new sectors at ports.	Port authorities - deliver	STBs - support	🕒🕒	££
M5	Investigate improvements in road and rail links to Port terminals.	Port authorities, highway authorities and Network Rail - deliver	STBs - support	🕒	£
M6	Review of ports in the South West (Already done for WG).	STB's - deliver	Port authorities, National Highways and Network Rail - support	🕒🕒	£
M7	Review of ports planning guidance.	LAs – lead and deliver	Port authorities & STBs - support	🕒	£

11.3 Rail

ID Number	Interventions	Primary owner and role	Secondary owner/s and role	Timescale	Cost
RL1	Feasibility study to operate intermodal container trains from deep sea ports to intermodal sites.	Network Rail and FOCs - deliver	STB's - support	🕒	£
RL2	Support electrification and gauge enhancement of the core rail network.	Network Rail and FOCs- deliver	STB's - support	🕒🕒🕒	£££
RL3	Pursue rollout of new alternative fuel locomotives and wagon technology.	Network Rail and FOCs - deliver	STB's - support	🕒🕒🕒	£££
RL4	Support and signpost businesses and local authorities to transition to rail freight.	STBs - deliver	Network Rail and FOCs - support	🕒	£
RL5	Understand the availability of grants to help facilitate modal switch to rail.	Network Rail and FOCs - deliver	STBs - support	🕒🕒	£
RL6	Partnership working with stakeholders to promote South West priorities.	STBs - deliver	All interested stakeholders - support	🕒	£
RL7	Encourage the establishment of rail freight terminals with a catchment of 1 hours' drive time by HGV. Indicative locations might include; Bristol, Westbury, Poole, Bridgwater, Exeter, Plymouth and Bodmin.	Network Rail and FOCs - deliver	STB's - support	🕒🕒🕒	£££
RL8	Safeguard rail freight sites through developing Supplementary Planning Guidance.	LAs - deliver	Network Rail, FOCs and STBs - support	🕒🕒	£
RL9	Allocate sufficient freight train paths on the main line and diversionary routes.	Network Rail - deliver	STB's - support	🕒🕒	££

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



11.4 Road

ID Number	Interventions	Primary owner and role	Secondary owner/s and role	Timescale	Cost
RD1	Strategically plan network of alternative fuel stations and promote existing sites. Development of new sites by private sector	Private sector - deliver	Energy generators - deliver STBs - support	🕒🕒🕒	£££
RD2	Promote resources and training to help operators avoid bridge strikes.	Network Rail – deliver	Technology & training providers – support. STBs - support	🕒	££
RD3	Promote solutions to driver shortages.	Logistics UK and RHA - deliver	STBs - support	🕒🕒	££
RD4	Work with hauliers to understand how they can be supported in the uptake of alternatively fuelled vehicles.	STBs - deliver	Energy generators - support	🕒	£
RD5	Review of current lorry parking facilities in the South West.	LAs with private developers - deliver	National Highways – support STBs - support	🕒	££
RD6	Support for infrastructure improvements and investment where suitable.	National Highways - deliver	STBs - support	🕒🕒🕒	£££
RD7	Continue support for routine road maintenance activities but broadcast plans so hauliers can better plan.	National Highways - deliver	STBs - support	🕒🕒	££
RD8	Identify cluster locations where logistics plans are needed along with facilities for last mile logistics.	STBs - deliver	Local authorities - support	🕒	£
RD9	Promote use of swap trailers to reduce demands for long distance trunking between regions.	Logistics UK and RHA - deliver	STBs - support	🕒🕒	££
RD10	Feasibility study on consolidation sites for last mile logistics.	Local authorities and logistics operators - deliver	STBs - support	🕒	£
RD11	Promoting suitable alternative routes in the event of adverse weather.	National Highways - deliver	STBs - support	🕒	£
RD12	Review options to deliver smarter during quieter periods of the day or week.	Local authorities and logistics operators - deliver	STBs - support	🕒	£
RD13	Support improvements to strategically important roads that require better journey time reliability	National Highways - deliver	STBs - support	🕒	£
RD14	Review suitability of technologies from trials and their potential for the South West.	National Highways - deliver	STBs and technology providers - support	🕒🕒	££
RD15	Promote a trial of the use of a load and vehicle matching exchange to reduce empty running for 10 hauliers for a year.	STB's - deliver	Freight Steering Group and logistics operators - support	🕒	£
RD16	Explore collaboration between delivery companies to service hard to reach areas.	Logistics operators - deliver	STBs - support	🕒	££

11.5 Other

ID Number	Interventions	Primary owner and role	Secondary owner/s and role	Timescale	Cost
O1	Develop engagement on logistics schemes and partnerships.	STB's - deliver	All interested stakeholders - support	🕒🕒	££
O2	Lead by example by implementing low or zero emission vehicles in local authority fleets.	LA - implement	STBs - support	🕒🕒	££
O3	Establish and promote a South West Freight Steering Group.	STB's - deliver	All interested stakeholders - support	🕒	£
O4	Agree the role of Sub-national Transport bodies with regards to the freight industry. Once established carry out an awareness campaign	STB's - deliver	All interested stakeholders - support	🕒	£
O5	Assist with targeted recruitment campaigns for the freight industry.	Logistics UK and RHA - deliver	STBs - support	🕒	££
O6	Guidance for agricultural operators on the use of the road network during busy periods.	Logistics UK and RHA - deliver	STBs - support	🕒	£
O7	Promote sourcing from local businesses.	Local business groups - deliver	STBs - support	🕒	£
O8	Undertake sector supply chain audits.	Private sector - deliver	Interested stakeholders and STBs support	🕒	£
O9	Consider creating an information sharing platform in conjunction with the Freight Steering Group so that for example best practice case studies can be featured.	STB's - deliver	Transport Commissioner and local authorities - support	🕒	£
O10	Exploring collective procurement with local anchor institutions for purchasing 'essential' goods.	Local authorities and logistics operators - deliver	STBs - support	🕒	£



12. Freight Steering Group

One of the key steps for this strategy is to establish a Freight Steering group with representatives from Trade Bodies, hauliers, ports, rail freight and shippers to take forward actions discussed as part of the freight strategy development. It is important that these stakeholders buy-in to what Peninsula Transport and Western Gateway are aiming to achieve and hence help provide evidence and guidance to the process. It is also important to assemble a group of stakeholders who are a mix of representatives from various public and private sector interests, with a cross section from representative sectors.

The overall function of the Freight Steering Group will be to drive forward the Freight Strategy development by considering and implementing interventions developed as part of the Freight Strategy. The group will meet regularly throughout the life of the project to drive forward the recommended implementations and consider the practical nature of how measures can be introduced.

The stakeholder engagement process gave a number of opportunities for individuals to indicate whether they would be willing to serve on a Freight Steering Group. This included questions as part of stakeholder interviews and questionnaires, as well as during the stakeholder workshops. It is positive to report that there is an encouraging number of volunteers from a variety of different stakeholder groups. In many cases, the project team built meaningful relationships with stakeholders during the stakeholder engagement phase and have continued to engage with them following the questionnaires, interviews and workshops.

It is expected that a freight steering group is to be set up in 2022 and will include representation from both public bodies and private sector freight organisations. Following the freight strategy development this forum will provide an opportunity for Peninsula Transport and Western Gateway to keep track of progress on the implementation of initiatives and an opportunity for organisations to feedback on them. The STBs will benefit from this level of support in promoting uptake of the initiatives.

It is also expected that the delivery plan of chosen initiatives will be integrated into the respective STB delivery implementation plans. It is yet to be determined if these will be separate freight sections as there are expected to be a significant number of interventions which are cross boundary and even national in nature which would benefit from an all STB approach and plan – particularly for the integration with the planning work being undertaken by National Highways / Network Rail for RIS3 / CP7. Examples of joint national infrastructure planning such as Solent – Midlands Study (Phase 1) are likely to become more common place.



13. Concluding remarks

This freight strategy is a culmination of the work between Peninsula Transport and Western Gateway which has looked to reflect the fact that freight and the associated supply chains operate on a more regional, national and international basis than is the case for passenger movements. This South West Freight Strategy regards freight and logistics as an opportunity and not an afterthought. It is centred around three sustainability pillars of environment, economy and society. This strategy contains standalone freight-specific initiatives as well providing supporting evidence for the overall transport strategy. Due to the reliance of the freight sector on key assets such as ports, rail terminals, airports and highway corridors, the freight strategy is aligned with relevant strategies and policies beyond the South West. There are links to the 2020 Port Access Study produced for Western Gateway which contains more specific locational detail and it also links to the forthcoming Peninsula Transport WP12 International Gateway work too.

The stakeholder engagement process was conducted successfully and has provided a strong platform for next steps, including the forming of a freight steering group, to help implement the strategy. This was evidenced by the positive feedback received from stakeholders and the willingness of most to take part in further development. The success of the workshops was also assisted by the variety of stakeholders that took part as well as their input and discussions during the sessions. This process has set out the key freight interventions that are a priority for implementation. This will help to deliver the freight vision as part of the wider strategies and priorities for Peninsula Transport and Western Gateway and will enable the region to address the challenges, opportunities and priorities for freight in the South West over the next 30 years – to 2050. The five priority intervention packages are shown below along with the Vision Statements for the STBs. Peninsula and Western Gateway are now in a position to implement measures by keeping engaged with those who have expressed a keen interest to be part of this journey. Effective partnerships and strong planning is needed to implement these measures with the financial support and guidance of the Department for Transport.

Priority intervention packages



STB's Vision Statements

“
 Transforming transport across the Peninsula, enabling our society and economy to thrive and our unique and outstanding environment to flourish. The vision is underpinned by the five key goals. Improving connections between people, businesses, and places, to enhance resilience of the transport network, to deliver affordable, zero-emissions transport for everyone, to help to improve the health and wellbeing of communities in the peninsula and to help the peninsula to be a great place to live and work.”

“
 The Vision of the Western Gateway STB is to enable sustainable economic growth by identifying a long-term investment programme designed to deliver a well-connected, reliable and resilient strategic transport system; that closes productivity gaps and makes the Gateway area more competitive, while respecting its world class natural and built environments.”



