



Freight Transport Association

Waterworld - Is better use of the UK's inland waterways a viable way to address delivery of goods into city centres? If so, what will encourage this modal shift?

Freight in the City

March 2017

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About Freight by Water



Freight by Water is the leading UK network for the promotion of water freight

Picture: Port of London Authority

Guidance and policy work

- Freight by Water has produced guidance and information on the benefits of water freight.
- In 2016 we took a closer look at the potential and barriers to growth of water freight in the Thames
- In 2017 we plan to repeat this exercise for the North of England
- Next public seminar – pencilled in for June 2017
- See www.fta.co.uk for more info



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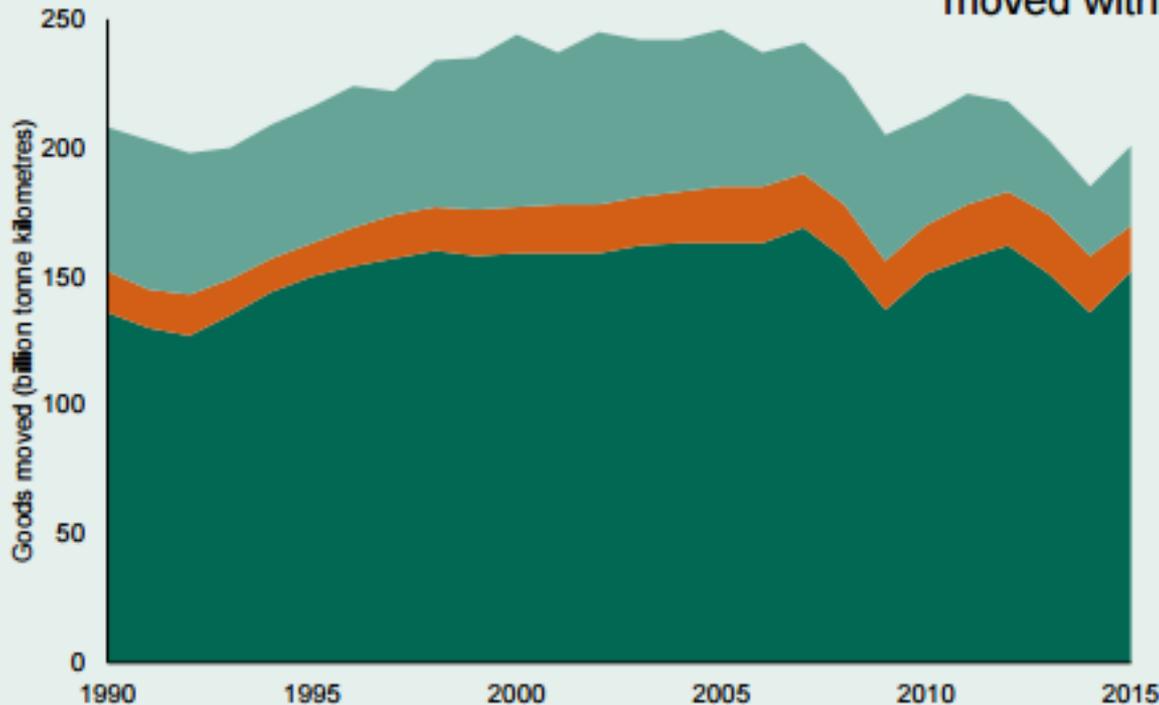
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Water freight – national picture

Domestic Freight [TSGB0401](#)

Domestic freight, goods moved by mode: 1990 to 2015

■ Road ■ Rail ■ Water



201 billion

tonne kilometres of domestic freight was moved within the UK in 2015 of which ...

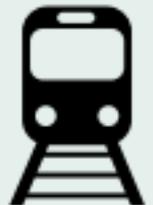
152 billion

tonne kilometres moved by road (76%)



18 billion

tonne kilometres moved by rail (9%)



31 billion

tonne kilometres moved by water (15%)



Percentages not comparable with TSGB0403

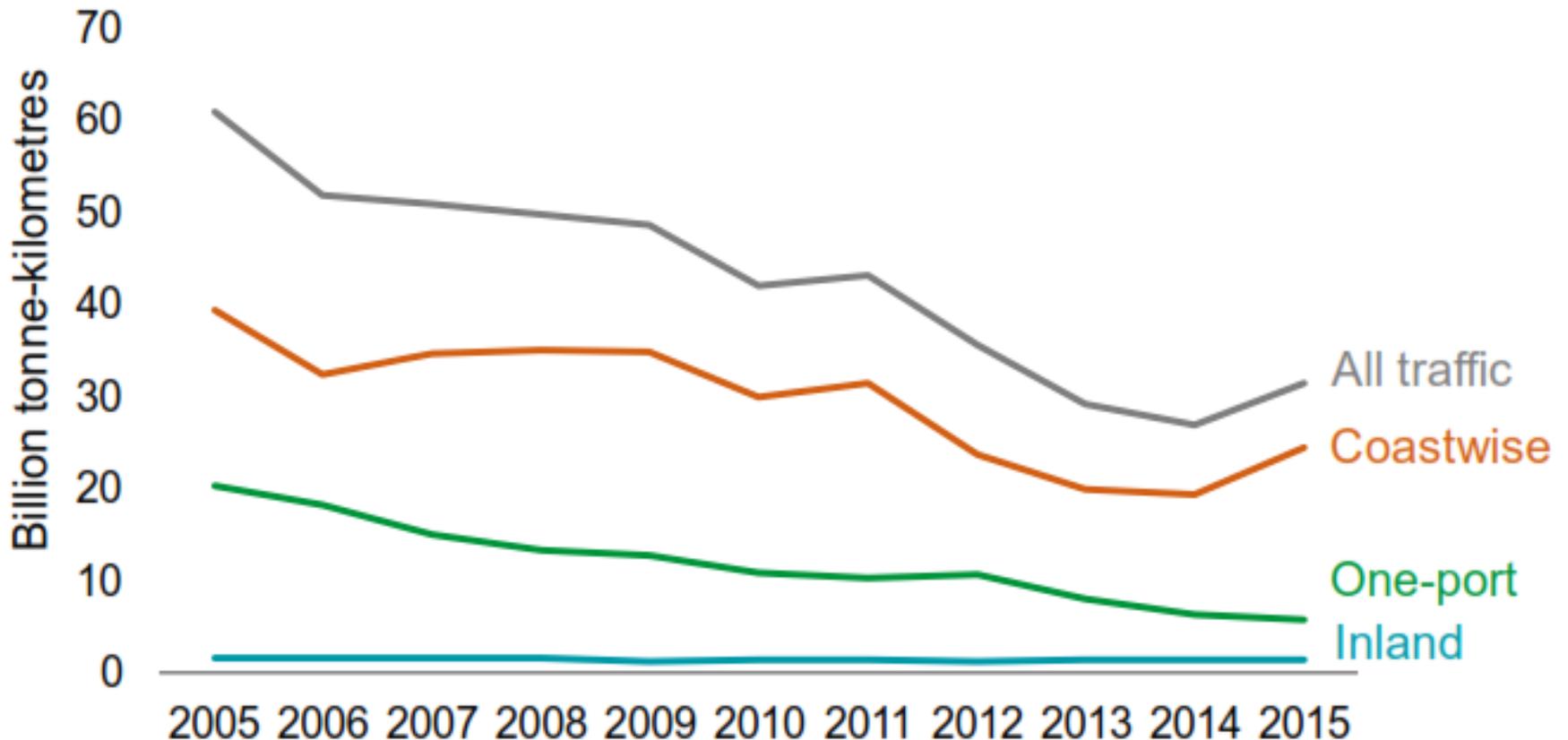
UK water freight – more detail

Domestic waterborne freight goods moved and lifted, 2015

| | Goods Moved (bt-k) | | | Goods lifted (mt) | | |
|---|--------------------|------|-------------------|-------------------|------|-------------------|
| | 2014 | 2015 | Percentage change | 2014 | 2015 | Percentage change |
| Inland waters  | 1.5 | 1.5 | → 0% | 46.9 | 47.0 | → 0% |
| Coastwise  | 19.4 | 24.5 | ↑ +26% | 40.0 | 42.6 | ↑ +6% |
| One-port  | 6.4 | 5.8 | ↓ -9% | 17.9 | 18.7 | ↑ +5% |
| Total | 27.0 | 31.4 | ↑ +16% | 94.9 | 98.1 | ↑ +3% |

Water freight – trend over time

Domestic waterborne freight goods moved 2005 - 2015



Inland waters traffic, by cargo category and area, 2015



a) Goods lifted

Million tonnes

| Region | Liquid bulk | Dry bulk | Unitised traffic | General cargo | Total |
|----------------------------|-------------|-------------|------------------|---------------|-------------|
| Thames and Kent | 8.7 | 8.4 | 5.6 | 1.4 | 24.1 |
| Scotland East Coast | 6.0 | 0.2 | 2.1 | 0.1 | 8.4 |
| Lancashire and Cumbria | 3.9 | 1.2 | 0.2 | 0.2 | 5.5 |
| Humber | 0.1 | 1.8 | 0.0 | 1.9 | 3.8 |
| Haven | 0.1 | 2.1 | ~ | 0.3 | 2.4 |
| Scotland West Coast | 0.5 | 1.3 | ~ | 0.1 | 1.9 |
| Bristol Channel | ~ | 0.8 | 0.0 | 0.1 | 0.9 |
| Wash and North East Anglia | 0.0 | ~ | 0.0 | 0.1 | 0.1 |
| North East | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total | 19.2 | 15.7 | 8.0 | 4.1 | 47.0 |

Inland waters traffic, by cargo category and area, 2015



b) Goods moved

Billion tonne-kilometres

| Region | Liquid bulk | Dry bulk | Unitised traffic | General cargo | Total |
|------------------------|-------------|------------|------------------|---------------|------------|
| Thames and Kent | 0.3 | 0.3 | 0.2 | ~ | 0.8 |
| Scotland East Coast | 0.1 | ~ | ~ | ~ | 0.2 |
| Humber | ~ | 0.1 | 0.0 | 0.1 | 0.2 |
| Lancashire and Cumbria | 0.1 | ~ | ~ | ~ | 0.2 |
| Scotland West Coast | ~ | 0.1 | ~ | ~ | 0.1 |
| North East | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total | 0.5 | 0.6 | 0.2 | 0.2 | 1.5 |

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Water Freight in the City

- Material delivered or collected by barge can remain on board until needed, enabling loading and unloading to take place at the most convenient times, avoiding traffic disruptions.
- Barges on the Thames are capable of carrying up to 1,000 tonnes, while one HGV can carry 20 tonnes and a van can carry just 7 tonnes.
- Over 2.8 million tonnes of freight were transported on the Thames in 2013. These services help keep over 120,000 lorry movements a year off London's roads.

Case Study: London Construction Link

- Established in 2014
- Major collaboration between London`s major port and major river freight operator
- Championing the use of Construction Consolidation For major construction projects in the capital
- Providing support for major infrastructure projects (e.g Thames Tideway Tunnel)
- Providing a joint consolidation and river freight package



Case Study: Trafford Park

- Esprit has spent ~£250k renovating Trafford Park warehouses and site, and the location was made secure and brought up to food standard warehousing by September 2015.
- The company also had to wait for the MSC to be dredged to a more suitable depth, which was recently completed, leaving Esprit ready to handle consignments of up to 4500 tonnes of customers' freight via the MSC.



<http://www.espritgroup ltd.com>

Case Study: Utrecht



- For a number of years Utrecht in Holland has been using its waterways to deliver beer and other goods to 60 catering businesses located along its canals.
- Known as the 'Beer Boat' this service is owned and run by the city authority using an electric powered craft and funded from the air quality budget

Case Study: Paris

- A leading supermarket chain, Franprix, has used the river to make the initial part of the delivery to its central Paris stores since 2012.
- Standard 20-foot containers are loaded onto barges and moved from a depot located on a tributary of the Seine to the centre of Paris, where they are transferred to lorries for the 'last mile' of the delivery journey.
- Franprix stocks 135 of its 350 stores in the city and says that using the river takes 2,600 lorries off the road each year, the equivalent of 300,000km of lorry journeys

Case Study: Thames Clippers

Learning from Thames passenger services

Although this paper concerns the freight sector, it is useful to briefly summarise the recent success of passenger services on the Thames and see what lessons can be learned.

MBNA Thames Clippers is the fastest and most frequent fleet on the river with departures from major London piers every 20 minutes. Services stretch from Putney to Royal Arsenal Woolwich, and cater for all, from early morning commuters to families wanting a day out on the river.

Having grown from a one-boat operation in 1999 to a fleet of 15 catamarans, they now carry over 3.8 million passengers a year in a comfortable, relaxed environment. While the success of the Clippers service can be attributed to many different factors, the following three issues can offer learning points for the freight sector.

- 1 Infrastructure investment in piers has improved connectivity, as part of the Mayor's River Action Plan, which is vital in attracting passengers
- 2 Targeted operating subsidies have been employed in the short term to allow time to establish the customer base and refine the service offer. All the established services are now almost entirely self-funding
- 3 The River Concordat Group, a body including the PLA, British Waterways, boat operators, pier owners, London boroughs and Transport (TfL), addresses strategic issues on the River Thames in order to grow London's river passenger services

For more information, please see www.thamesclippers.com

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Planning recommendations

- Water freight as part of planning consent
- Enforcement during development
- Scrutinise applications to change safeguarded wharves to protect against deliberate non-use
- Ensure new developments do not compromise support services (e.g. boatyards and supply)

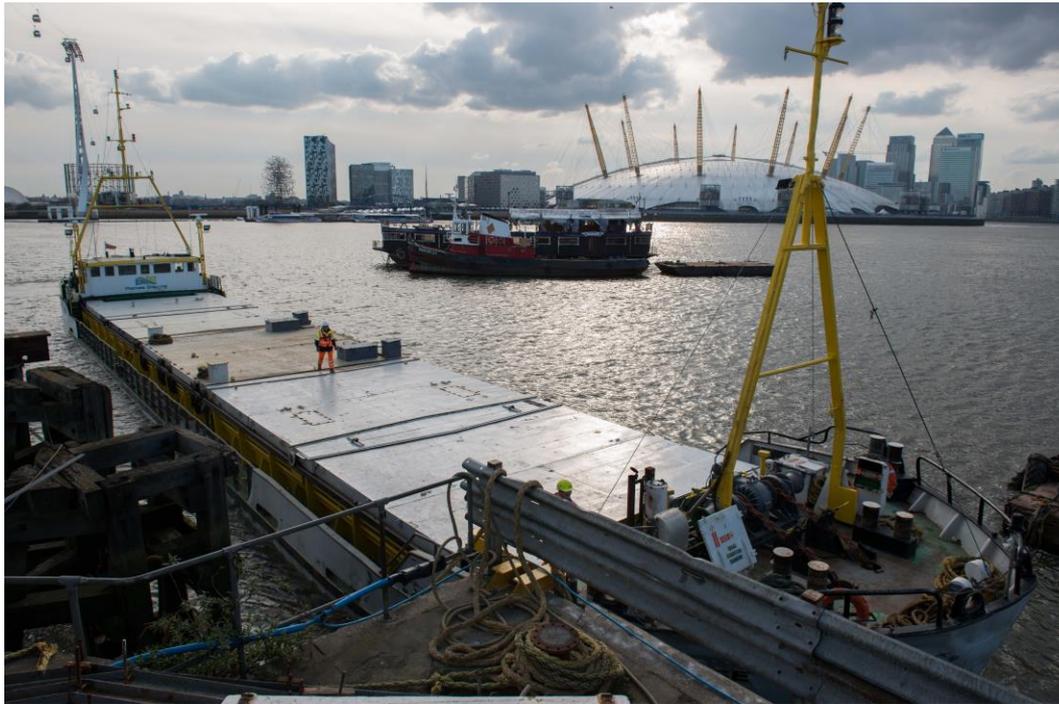


Local, regional and national authorities

- Local and regional
 - Develop a regional strategy, using London as an example
- National
 - Transport authorities should champion water freight
 - Freight grants should give provide equal support to water & rail
 - Promote careers & qualifications to address the skills gap

| Period | Approximate numbers holding both towing and passenger vessel qualifications | Average loss of qualified personnel per year |
|-----------|---|--|
| Pre 2007 | 700+ | |
| 2007–2012 | 500 | 40 |
| 2013–2017 | 250 | 62.5 |
| 2018– | <150 | 100 |

Planners, public authorities & promoters



- Recognise water freight can be used as part of an urban supply chain
- Investigate what other cities are doing to use water transport in solving environmental issues
- Consider developing projects through nationally or jointly funded projects

Conclusion: A Strategic Water Network?

- The UK should consider the case for a national Strategic Water Network to
 - Facilitate targeted investment & improve interchange with road and rail
 - Clarify which river facilities have strategic priority and should be protected through the planning system.
- Freight by Water members are ready to engage with all stakeholders to develop this concept



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