



SUGAR

***Joint Planning Exercise
SWOT Analysis
Municipality of Palma***

SWOT Matrix and Analysis

SWOT ANALYSIS OF FREIGHT TRANSPORT IN THE MUNICIPALITY OF PALMA	
STRENGTHS	WEAKNESSES
-S1: REGULATORY FRAMEWORK	- W1: LACK OF FREIGHT TRANSPORT DATA
- S2: CITY SPATIAL DISTRIBUTION	-W2: URBAN MORPHOLOGY
- S3: TERRITORIAL COVERAGE	- W3: LOCATION OF THE PORT
- S4: DELIVERY ROUTES OF THE GOODS SUPPLIERS	- W4: PALMA'S PORT AS A GATE TO THE WHOLE ISLAND
- S5: FLEXIBILITY	- W5: SEASONALITY
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	- W7: POLICE CONTROL AND SIGNING
	- W8: COMPETITION FOR SPACE IN THE CITY CENTER
	-W9: WEATHER CONDITIONS
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OPPORTUNITIES	THREATS
- O1: SPECIALIZED COMMERCIAL AREAS	-T1: JUST IN TIME DELIVERIES
- O2: NEW APPROACHES FOR THE TIME WINDOWS	- T2: B2C
- O3: UNDERGROUND CAR PARK AVAILABILITY	- T3: URBAN PLANNING
-O4: NEW ROAD INFRASTRUCTURE	- T4: FAILURE OF THE INDUSTRIAL ESTATES
- O5: INCREASE TRAFFIC AND FREIGHT CONTROL	- T5: ON STREET LOGISTICS
- O6: MOBILITY TRENDS	- T6: RESISTANCE TO MOBILITY CHANGES
	- T7: SPECIALIZED COMMERCIAL AREAS

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STRENGTHS

-S1: REGULATORY FRAMEWORK

Existence of a relatively developed regulatory framework regarding loading/unloading activities, having thus a good basis for targeting future actions. This includes different access regulations (time windows, loading/unloading time), dedicated areas for on-street loading/unloading, granting of loading/unloading authorizations, warehousing and commercial building regulations, lorry routes and signing.

- S4: DELIVERY ROUTES OF THE GOODS SUPPLIERS

Existence of distribution companies with their own consolidation platforms (within or outside the island), from which the goods are delivered following defined routes. Many large companies have consolidation platforms in the mainland, trucks arrive in the morning to Palma's port and leave in the evening after delivering the goods.

- S2: CITY SPATIAL DISTRIBUTION

The dimensions of the city and the spatial distribution of some commercial areas and warehousing areas are ideal for the implementation of pilot testing projects, reducing the risks of unexpected failures.

- S5: FLEXIBILITY

Existence of many different time windows for delivering (flexibility). This optimizes the road space, adjusting the schedule to the natural balance of each type of good and allowing private car parking during the rest of the day.

- S3: TERRITORIAL COVERAGE

Availability, a priori, of a good territorial coverage of loading and unloading bays with an average of 1,2 L&U zones/lineal km. In more specialized commercial areas the coverage can reach more than 2 L&U zones/lineal km.

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WEAKNESSES (1/2)

- W1: LACK OF FREIGHT TRANSPORT DATA
Insufficient data on the logistics needs for both retailers and distributors. This situation prevents an optimal planning of the L&U zones and time windows, the implementation of consolidation areas (UCC), etc.

-W2: URBAN MORPHOLOGY
The urban morphology in certain commercial areas, especially those located in the old city (streets from the medieval period), is characterized by winding and narrow streets, with many obstacles like street furniture. This situation complicates the circulation of vehicles and the transportation from the vehicles to the final destination. In some steep tourist areas nearby the coast there are similar complications (eg. Cala Major).

- W3: LOCATION OF THE PORT
The main logistics center of the city and the island, the port of Palma, is located inside the city urban limits. This fact, is somehow forcing the movement of heavy vehicles in the coast line, where leisure and touristic activities also take place.

- W4: PALMA'S PORT AS A GATE TO THE WHOLE ISLAND
The "macrocephaly" of the port of Palma, concentrating and generating movement and traffic of freight, is not only an answer for the city's goods demand but also for the whole island.

- W5: SEASONALITY
The freight traffic shows a strong seasonality, closely related to tourist activity. This situation leads to an increase of congestion in some areas as well as a higher demand for loading/unloading bays. There is a need to optimize the loading rate especially during the summer season in order to prevent the impacts of freight.

- W6: MANAGEMENT AND PLANING OF LOGISTICS
Absence of a clear policy-oriented management and planning of urban and regional logistics. There is a need to integrate different operators with common requirements and procedures, as well as to carry out a homogenization of the regulatory frameworks in the metropolitan scale (integration of different municipal regulations).

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WEAKNESSES (2/2)

- W7: POLICE CONTROL AND SIGNING

Traditional failure of a control action and penalties on inadequate practices in terms of loading and unloading, and actions in compliance with local regulations (especially in industrial areas), in both police control and administrative terms. Private car drivers and freight distributors take advantage of this situation and many times they don't hesitate to break the rules.

- W9: WEATHER CONDITIONS

Weather conditions sometimes prevent the normal development of the port operations, leading to congestion and failure of urban freight transport. This weakness is impossible to prevent, but there might be some ways to reduce its consequences.

- W8: COMPETITION FOR SPACE IN THE CITY CENTER

The strong competition for space in the center precludes the existence of storage in shops, resulting in a proliferation of these functions beyond the city limits, increasing thus the distance for freight transport. In economical terms, the center is certainly inefficient for storage because the premises are more profitable for other purposes (bigger shops, restaurants, etc.).

- W10: SOCIAL BEHAVIOR TOWARDS MOBILITY

Many people from Mallorca tends to minimize walking distances when using their private cars, leading to an unnecessary search for the most suitable parking place in the streets. It is normal to find non authorized cars in loading/unloading areas, normally related to fast errands. This behavior is common in distributors as well, who sometimes decide to practice loading/unloading activities in non designated areas next to the final destination. Furthermore, shopkeepers are normally demanding L&U areas in front of their premises.

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OPPORTUNITIES

- O1: SPECIALIZED COMMERCIAL AREAS

Trends in the concentration of commercial activity in areas is in some cases remarkable. There are streets or areas specialized in a particular sector (restaurants, textile, night clubs...), which can create certain economies of scale in terms of provision of goods.

- O2: NEW APPROACHES FOR THE TIME WINDOWS

Establish non-traditional distribution systems, such as delivery during off-peak hours, night deliveries,... Waste collection takes place at nights, meaning that there already exist noisy activities on streets during this periods.

- O3: UNDERGROUND CAR PARK AVAILABILITY

There are underground car park facilities with available space, giving the possibility of implanting micro-logistics platforms for subsequent urban distribution (last mile). This last stretch can be performed using more efficient vehicles from the energetic point of view, mainly in the old town where there are many pedestrian streets and the circulation of heavy vehicles is complicated.

-O4: NEW ROAD INFRASTRUCTURE

The planned "second city ring" for connecting accesses to Palma will improve accessibility to major industrial estates (and Can Valero Son Castelló) and prevent the heavy traffic that is registered nowadays in the current city ring. This infrastructure and other planned interventions in major junctions of the current city ring will help to reduce congestion in the accesses to the city, making possible a more fluid freight traffic.

- O5: INCREASE TRAFFIC AND FREIGHT CONTROL

The actions on control and signing (enforcement) can be a suitable way to improve the current situation in certain areas of the city where violations occur very often. The economical and political barriers are the main reason why the enforcement isn't as hard as it could.

- O6: MOBILITY TRENDS

The enlargement of ORA areas (during 2009 the regulated street parking has been doubled), the improvement of bike circulation (during 2009 the bike lane network has been established in the city) and the increase of public transport provision (52 new municipal buses) can reduce traffic congestion in the centre, and benefit a rapid distribution of goods.

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THREATS

-T1: JUST IN TIME DELIVERIES

During last years there has been an increase of "Just in Time" deliveries, thereby generating more travel, more kilometers and costs. The main cause is the lack of storage facilities due to the high prices of the land.

- T5: ON STREET LOGISTICS

In the industrial estates, although most of the companies should have loading docks inside their premises, the general trend observed is the execution of the logistic operations in the roadway. This hampers the movement and circulation of other vehicles.

- T2: B2C

Continuous increase of "B2C" (business to consumer, "e-commerce") consumption, resulting in a greater number of courier operations, producing several externalities/impacts.

- T6: RESISTANCE TO MOBILITY CHANGES

Regarding the urban area, there are also recurring bad practices, when car drivers, taxi drivers and freight vehicles occupy bus lanes and cycle lanes. A part of the residents consider these specialized lanes as a loss of their former status (car freedom) and take advantage of the insufficient police control.

- T3: URBAN PLANNING

The trend of urban/territorial planning tends to separate land uses and leads to greater mobility flows and a sustained growth of the rate of motorization. The spatial separation of homes, jobs, leisure activities, shops, warehouses, etc. creates road congestion and increases the length of the freight delivery routes. Therefore, the mobility system has poor effects on life quality and the environment, as well as on safety.

- T7: SPECIALIZED COMMERCIAL AREAS

Even though logistics are usually well resolved in the malls (specialized large commercial centers), their location in the periphery of the city (Ocimax, IKEA, Festival Park, ..) creates road congestion due to the common use of private cars to access them (linked to the availability of parking lots and poor public transport coverage). The impact of freight transport is lower because they are located outside of the city center and loading rates are supposedly high.

- T4: FAILURE OF THE INDUSTRIAL ESTATES

Clear failure of the planned land to logistic activities, given the fact that the existing industrial estates are becoming essentially spaces for providing services. This situation increases congestion in the accesses as well as in the inner streets of the industrial estates, leading to an increase of inefficiency in logistic operations.