

London Logistics

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Crown Estate - Regent Street

- Looking for improvements to urban environment
- Linked to reducing the number of deliveries
- Arup undertook survey to benchmark the consolidation centre and set out further proposals

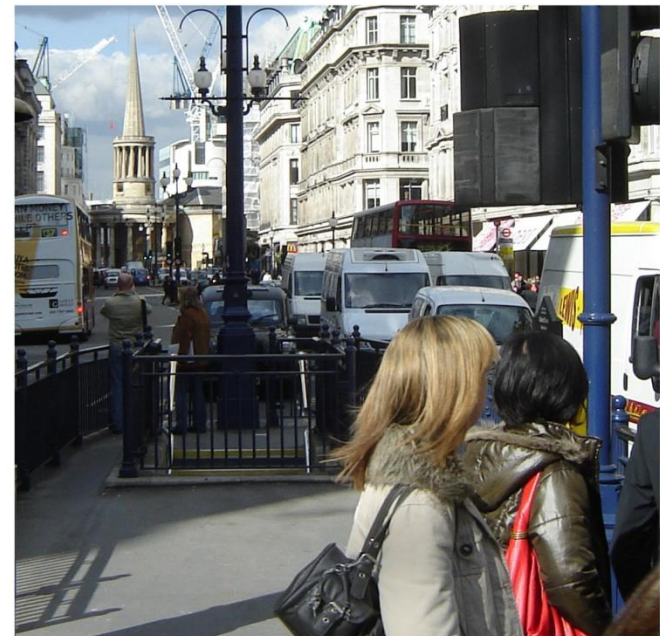


Crown Estate – Survey results

- 26,700 vehicles/day – 5,560 goods vehicles
- 20% associated with Regent St
- 39% offices, 28% hospitality, 19% retail
- 76% LGV, 3% HGV



REGENT STREET – DELIVERY AND SERVICING

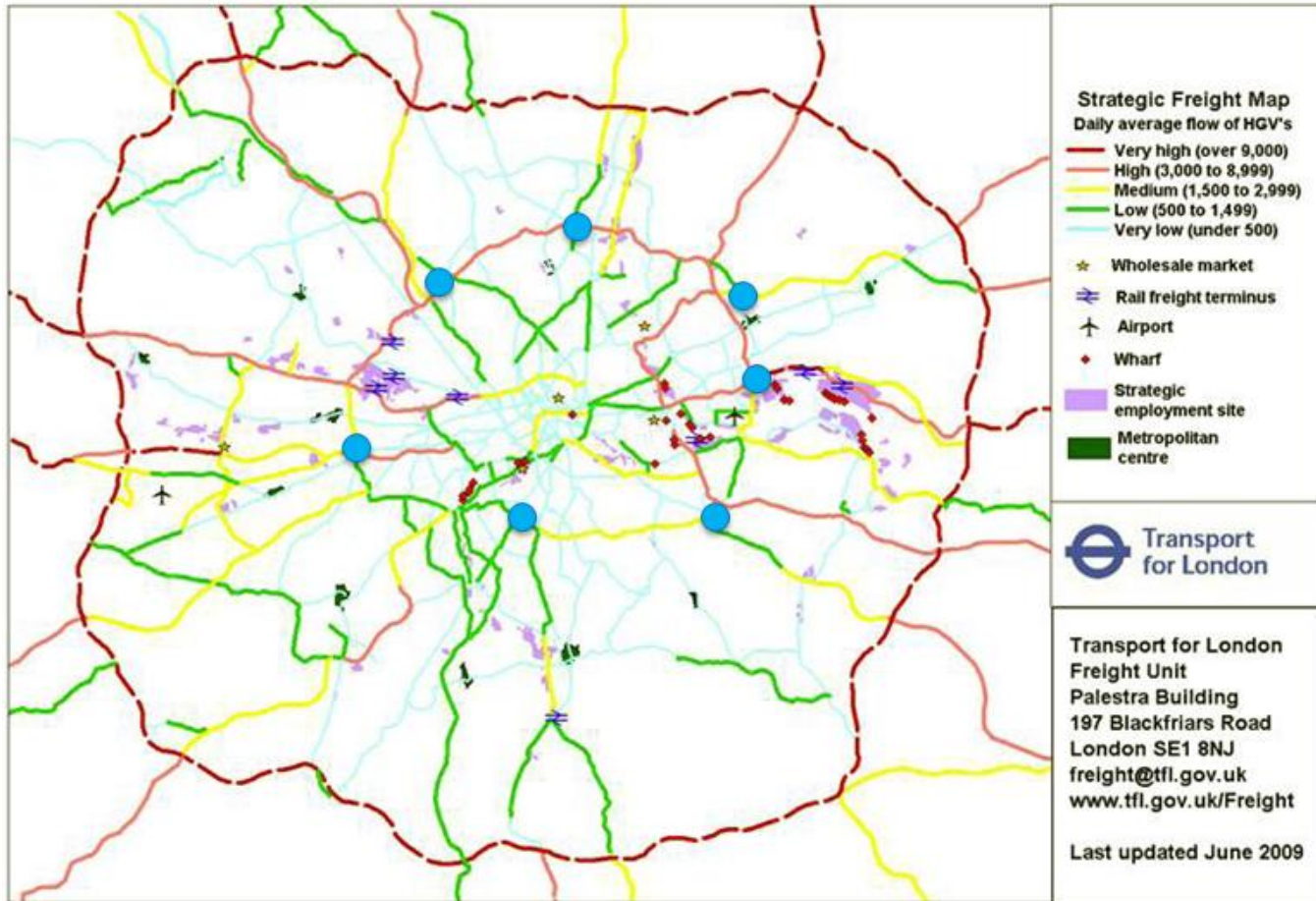


Crown Estate - Proposed remedial actions

- Implementation of a consolidation centre
 - Clipper appointed in 2009
 - Currently 13 retailers and achieving 85% reduction
 - Electric truck planned for May 11
- Preferred suppliers
- Hands free shopping
- Central waste contract
- Use of Delivery and Servicing Plan
- Central drop off points

London Consolidation Proposal

- Network of consolidation centres around London



Market Segmentation

- 100,000,000 LGV deliveries per year
- 30% are collections / deliveries
- Some segments are more suitable for CC than others

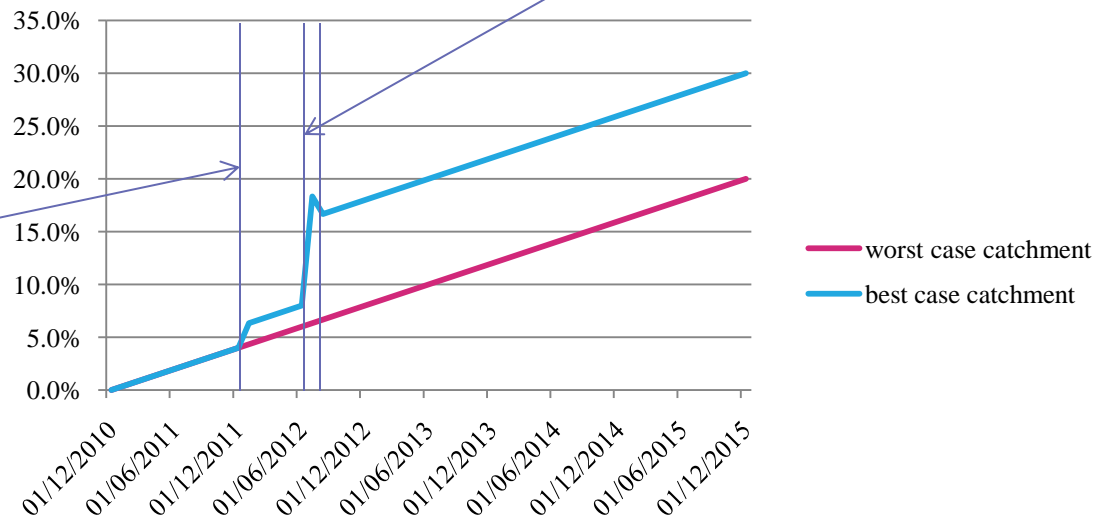
		LGV	% suitable for CC	Numbers
Couriers	Express	10%	0%	0
	Next day	10%	25%	1059
	Others	10%	50%	2117
Food	Non perishable	5%	50%	1143
	Perishable	25%	0%	0
Retail	Own fleet	2%	25%	159
	Outsourced	2%	50%	318
Offices		7%	50%	1376
Construction		8%	50%	1694
Others		22%	50%	4658
TOTAL		100%		12524

- Target market is 12,500 trips per day

* Data from TfL Freight

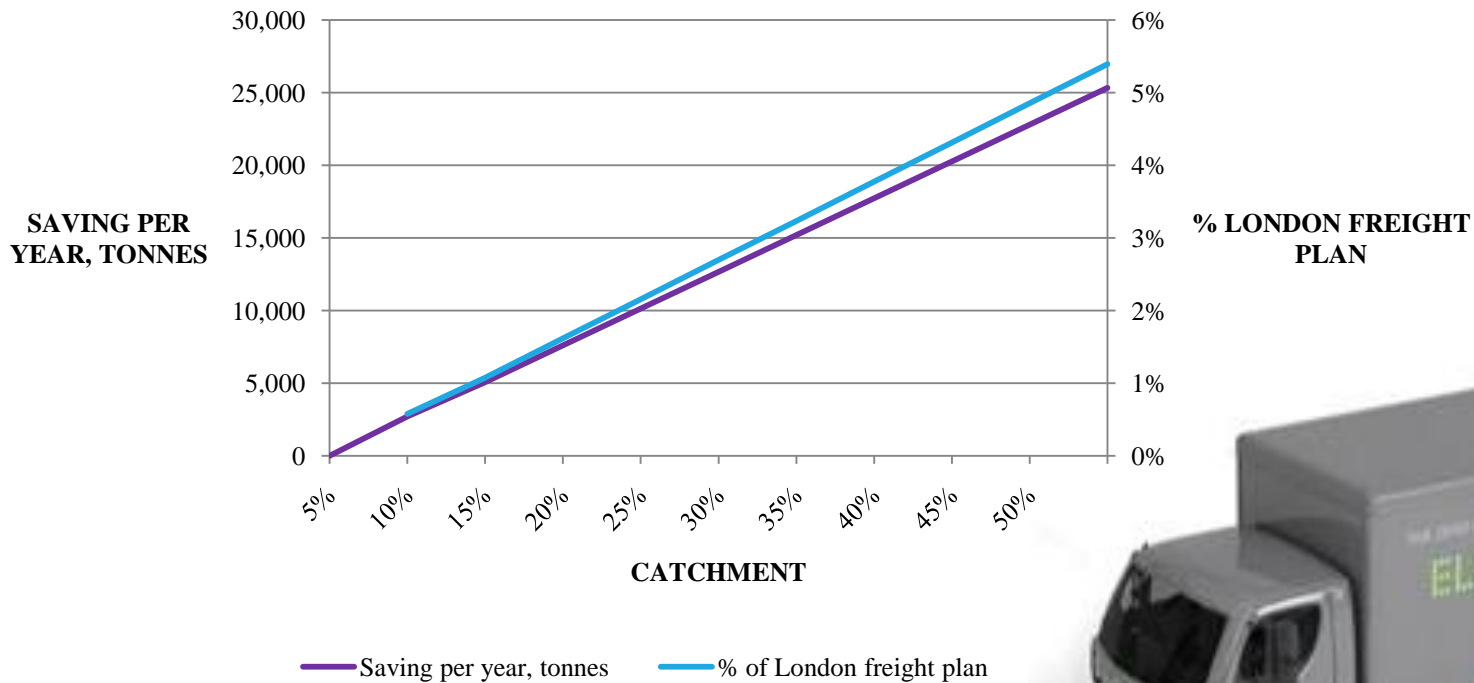
Catchment with Time

- Projected catchment growth rate: 4%/ year,
- Best case catchment figures include:
 - 2% increase in Jan 2012 due to LEZ introduction
 - 10% increase in July 2012 during the London Olympics
 - 2% drop in August 2012 after Olympics

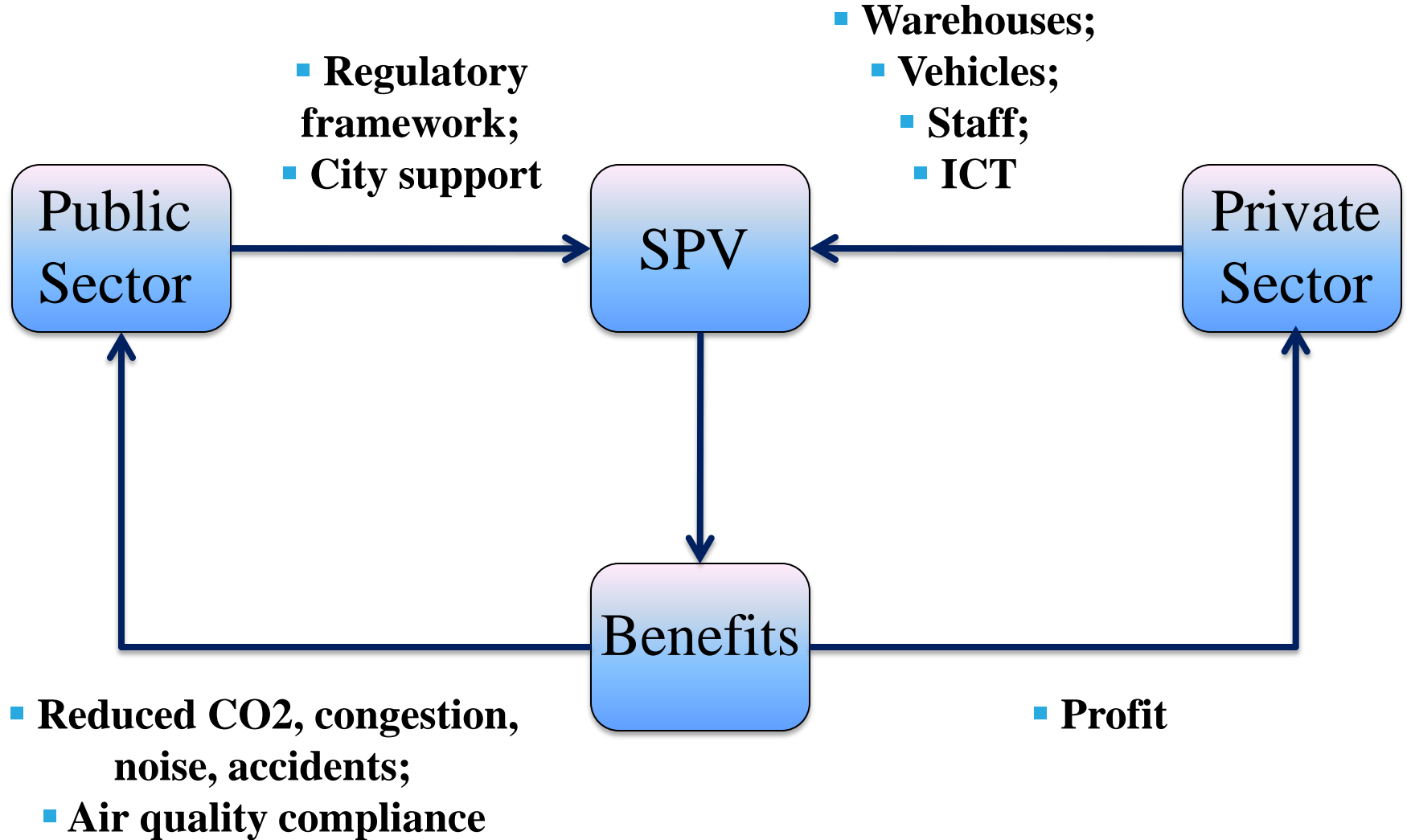


CO₂ Benefits

- London freight plan: reduce CO₂ emissions by 470,000 tonnes by 2015



Structure



Legislation

- Changes to Congestion Charge pricing
- Use of LEZ
- Time restrictions
 - Tighter on CO₂ emitting vans / Leaner on electric vehicles
- Moderate PCN's on vehicles
- London Control Scheme on Curb/ Laybys
- Public Sector to use scheme

Next phase

- Finalise partners and funding for set up phase
- Project set up
 - Business model
 - Legal framework
 - Financial model
 - ICT
 - Operational model
 - Stakeholder engagement
- Have companies signed up in March 11
- Operational readiness programme
- Operational by Jan 12