

West Midlands Regional Assembly Regional Freight Strategy

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West Midlands
Regional Assembly
Speaking out for the region

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Every effort has been made to verify and check the contents of this report including all figures and tables. However the West Midlands Regional Assembly can not accept any responsibility for errors or inaccuracies.



Foreword

The West Midlands Region is home to more than 5 million people – a major market for buying and selling goods and services and at the heart of the nation’s strategic road and rail network. The sustainable distribution of freight through and within the West Midlands is vitally important.

The West Midlands Regional Assembly’s Transport Partnership is responsible for the Region’s Transport Strategy and it is in this capacity that the Assembly has coordinated the development of this Regional Freight Strategy, working in close partnership with local, regional and national stakeholders. Aimed at stakeholders with an interest in efficient freight distribution and services, the strategy identifies the key issues that need to be addressed and provides a robust framework for more efficient and sustainable freight movements in the Region.

The Regional Freight Strategy seeks to support national and regional objectives for the sustainable movement of goods and services and to improve economic efficiency. This must however, be done in a way which correctly balances the growing environmental concerns around climate change with the need for this necessary development and growth.

Fundamental to this recognition is the relationship between spatial planning and transportation. The Regional Freight Strategy has been developed from the West Midland’s Regional Spatial Strategy’s policies and objectives, particularly with respect to reducing the need to travel, by encouraging developments which generate significant freight movements to locate in suitable places. The West Midlands Regional Freight Strategy is also closely aligned with our Regional Economic Strategy’s objectives, particularly to create the conditions for growth.

While this has been very much a collaborative effort with regional partners, special thanks must be made to officers from Birmingham City Council, without whom the production of this Strategy would not be possible.

Olwen Dutton
Chief Executive, West Midlands Regional Assembly

Background

1.1 The West Midlands Region lies at the heart of the UK with the second largest concentration of people in the UK, being home to some 5.3 million people. At the centre of the Region is the West Midlands conurbation, made up of England's second largest city, Birmingham, together with the Black Country, Solihull and Coventry, and in the north Stoke, and a network of smaller cities and towns. In contrast, a significant proportion of the Region is rural in nature, with some Areas of Outstanding Natural Beauty.

1.2 With nearly 10% of the UK's population the West Midlands is a major market for buying and selling goods and services, sustainable freight is critical for our economic well being and supporting our quality of life.

1.3 Of the 2.4 million working population in the Region, nearly 600,000 (25%) are employed in manufacturing. The Region accounts for 11% of UK manufacturing and 25% of manufacturing exports. As a result, the Region generates significant volumes of freight for transport within the West Midlands and to other locations in Britain and abroad. There is also a significant service and knowledge-based economy in the Region. Increasing levels of consumption in these sectors, combined with the large logistics sector present within the region - due to its strategic location - also result in large inward flows of freight.

1.4 Distribution accounts for around 9% of all jobs in the Region. Many of the major retailers and logistics providers have located large distribution centres in the West Midlands to serve both the regional and national market. In 2000 approximately 160 million tonnes of freight was carried in the West Midlands for delivery in the Region and to other UK and international markets. Two-thirds of these had a destination within the West Midlands. Therefore the Region regards keeping the costs of freight movement under control as important to regional competitiveness.

1.5 In addition to the large volumes of freight the Region generates and attracts, a significant volume of UK freight passes through the Region. Freight flows between the other large producing/consuming regions of Britain i.e. North West/Scotland to/from the South East have to pass through the West Midlands. In 2002 around 14 million tonnes of goods passed through the Region by road in each direction between the North West/Scotland and the South East. Consequently Britain's most important national transport infrastructure is centred on the West Midlands region.

1.6 The M6 motorway is the primary north-south trunk route through the Region for freight moved by road. The section of the motorway through Birmingham is one of the most heavily used motorways in Europe. The 'M6 Toll Road' was built to provide extra capacity at this section of the national road network, but it currently carries relatively few Heavy Goods Vehicles (HGV's). The M6 Toll traffic comprises 7% HGVs compared with a typical 30% on the "parallel" M6.

1.7 The West Coast Mainline (WCML) is the primary north-south trunk rail route through the Region. As well as linking locations where rail freight can provide cost competitive solutions it has the most generous loading gauge available on the British network, therefore it attracts large volumes of intermodal freight. Concerns have been raised about key constraints on this route, particularly capacity and bottlenecks affecting reliability e.g. the North London Line. In excess of 100 freight trains per day pass through the West Midlands en-route between other regions, a significant proportion of which pass through the Trent Valley on the WCML.

Why the West Midlands needs a Regional Freight Strategy

2.1 The Regional Freight Strategy for the West Midlands sets out to identify the key issues that need to be addressed and seeks to provide a robust framework to bring about more efficient and sustainable freight movements in the Region. The Strategy is aimed at those stakeholders, in the Region and beyond, who have an interest in efficient freight distribution and services.

2.2 The vision for the Regional Freight Strategy is: 'To create a framework for freight movements within the West Midlands which nurtures the development of regional and national economies in a sustainable manner, whilst recognising the wider current and long-term needs for efficient distribution and protecting the environment.'

Policy Context

2.5 The West Midlands Regional Spatial Strategy (RSS) was published in June 2004. The RSS includes the Regional Transport Strategy (RTS) and provides the strategic framework for the preparation of local development frameworks and transport plans (to 2021) so that they can deliver a coherent framework for regional development. The RSS informs the development of strategies and programmes, and provides the long term planning and land use framework for the Regional Economic Strategy (RES). One of the key features of RSS is the role it plays in addressing the links that exist between economic, social and environmental issues, and the importance of developing an integrated policy response.

2.6 The RSS states that 'The overall vision for the West Midlands is one of an economically successful, outward looking and adaptable Region, which is rich in culture and environment, where all people, working together, are able to meet their aspirations and needs without prejudicing the quality of life of future generations'. Specifically in terms of transport, the vision looks forward to a region with an efficient network of integrated transport facilities and services which meets the needs of both individuals and the business community in the most sustainable way.

2.3 Local authorities in the West Midlands have developed Local Transport Plans which consider freight issues. However, by their very nature, these plans focus on fairly localised areas. In contrast, many freight issues demand a wider perspective. For example, key constraints on the rail network are not limited to localised effects, but have wider impacts, both for logistics within the Region and for the region's role within the national network e.g. the key roles of the M6 and WCML.

2.4 This Strategy aims to develop an understanding of current and likely future freight movements and associated infrastructure, and identify appropriate regional actions.

2.7 The RSS has therefore provided the background and context against which the West Midlands Regional Freight Strategy has been developed, particularly:

Policy T1: Developing Accessibility and Mobility within the Region to Support the Regional Spatial Strategy - states that accessibility and mobility will be achieved by "measures to improve national road and rail networks to ensure that strategic links to external markets are maintained and the Region does not become a transport bottleneck undermining national economic growth"

Policy T2: Reducing the Need to Travel - encourages "those developments which generate significant freight and commercial movements to locate close to suitable inter-modal freight terminals, rail freight facilities, or roads designed and managed as traffic distributors;

Policy T9: The Management and Development of National and Regional Transport Networks - to enhance the competitiveness of the Region by providing journey time reliability; and

Policy T10: Freight - stresses the importance of freight movements to the prosperity of the Region and encourages a modal shift from road to more sustainable modes of transport such as rail and inland waterways. The RSS points out that freight encompasses the business sector e.g. office supplies, as well as the heavy freight movements generated by manufacturing, construction and retail sectors.

2.8 RSS paragraph 9.83 states that the implementation of Policy T10 (see below) will be based around the development of a Regional Freight Strategy, local freight strategies in Local Transport Plans, and Freight Quality Partnerships.

Policy T10: Freight

- A. The reliable movement of goods and services is the lifeblood of the West Midlands economy. Development plans, local transport plans and the economic strategy should aim to improve the efficiency of freight movement and support the development of Regional Logistics Sites (PA9), by:**
- i) addressing problems for freight vehicles on the Primary Route Network to improve the reliability of journeys;
 - ii) addressing delivery and servicing problems through traffic management;
 - iii) encouraging the development of local and Regional Freight Quality Partnerships;
 - iv) encouraging the use of rail and inland waterways for freight;
 - v) safeguarding existing and disused railway lines and sidings which could be used for rail traffic in the future;
 - vi) encouraging the development of new rail freight terminals and improving access to existing terminals;
 - vii) encouraging developments that generate significant amounts of freight in locations that have good access to the rail network; and
 - viii) encouraging local sourcing
- B. Local authorities and other agencies should co-operate to develop a Regional Freight Strategy covering all forms of freight transport i.e. road, rail, water and air taking into account the Regional Rail Freight Strategy.**

2.9 Sustainability is key to this strategy and links it with a wide range of policy areas, including the development/revision of the Regional Spatial Strategy, Regional Economic Strategy, Regional Waste Strategy and Local Development Documents. Environmental concerns need to be addressed in a holistic manner e.g. sustainable freight policies have an important role in tackling climate change.

Consultancy Commission

2.10 MDS Transmodal/Mott MacDonald produced a West Midlands Regional Freight Study which sought to:

- Develop and complete the regional freight profile;
- Present objectives and relevant policies linked to the Regional Spatial Strategy and Regional Transport Strategy (RSS/RTS);
- Highlight the key trends and issues for freight in the West Midlands;
- Present regional and sub-regional data in a clear, concise and understandable manner, sourcing data from stakeholders and directly from the freight industry;
- Generate a proposed plan; and
- Identify potential short, medium and long term strategic interventions.

2.11 Drafts of the report were circulated amongst the core stakeholder group (see Appendix A) by way of preliminary consultation, with comments incorporated in the final report.

2.12 The consultant's report included:

- Results of a freight forecasting exercise undertaken to inform the strategy development;
- Proposed Regional Strategies for all modes;
- Potential funding sources; and
- Proposed action plan.

2.13 RSS Policy PA9: Regional Logistics Sites, identifies the need to make provision for Regional Logistics Sites. In parallel to the production of this Regional Freight Strategy, regional partners commissioned a study to examine the relationship between the logistics sector in the West Midlands and its economy and land use issues.

2.14 The Regional Logistics study provided a clear picture of the logistics sector in the short, medium and long term; and identified robust criteria for assessing and choosing regional logistics locations.

2.15 The study's main conclusion, in terms of specific site assessment criteria, recommended a minimum of 50 hectares, with good motorway access, capable of offering high bay warehousing, located away from incompatible neighbours and preferably have access to rail.

2.16 The study also stated that Regional logistics locations should, as far as possible, be accessible by public transport (for staff) and include secure lorry parking facilities. Regional logistics facilities should not compromise safety and capacity on the trunk network or feed traffic directly onto junctions that are already experiencing operational problems.



Development of the Regional Freight Strategy

3.1 Development of the Regional Freight Strategy was overseen by a Steering Group comprising representatives from local authorities, Freight Transport Association, Road Haulage Association, Advantage West Midlands, and West Midlands Regional Assembly/ West Midlands Local Government Association.

3.2 The full list of stakeholders who contributed their expertise to the development of the consultant's technical study is shown in Appendix A. Consultation on the Draft Strategy was undertaken with stakeholders and the strategy was revised in the light of comments received.

3.3 In July 2006 the Department for Transport (DfT) published the West Midlands Regional Planning Assessment (RPA). The objective of the RPA is to develop an understanding of the challenges and options for the development of the railway over the next twenty years for passengers and freight. The RPA is an important component of developing the Regional Freight Strategy.

3.4 In September 2006 Network Rail consulted on the national Freight Rail Utilisation Study (RUS). Regional partners took an active role in the consultation process. The Freight RUS was published earlier this month and it is acknowledged that the rail action plan (section 4.3) may need to be reviewed.

3.5 The RPA and Freight RUS both provide a focus for stakeholders to take this strategy forward, particularly with respect to the longer term future for rail, to be set out in the DfT's High Level Output Statement, expected in Summer 2007.

3.6 The Regional Freight Strategy could be reviewed following the completion of the RSS revision process, or on the advice of partners. In particular, it may be necessary to review the strategy and the Action Plans in the light of the RSS Phase 3 Revision which will address regional environmental policy. The Regional Freight Strategy will be monitored to make sure the Action Plans are being progressed and to inform partners of what still needs to be done.

Key Regional Issues

4.1 Introduction

4.1.1 The Freight Strategy has considered key regional trends and issues for each of the following modes of freight transport: Road, Rail, Air, Pipelines and Inland Waterways.

4.1.2 The Freight Strategy identifies Regional objectives that are intended to add value to, and ensure a consistent and integrated approach between work which is being undertaken sub-regionally and locally; and also ensure alignment with other national and regional strategies and policies.

4.1.3 The Freight Strategy also sets out Action Plans which identify the regional partners that will deliver the integrated, positive changes required to achieve a more sustainable and efficient movement of freight.

4.1.4 Key to this is the establishment of an Assembly led Regional Freight Advisory Group to monitor and oversee progress of the Strategy.

4.1.5 Major capital funding is critical for the successful delivery of the strategy, notably the DfT's Transport Innovation Fund (TIF) for 'Productivity'. The current TIF process is considering three freight proposals that provide national and regional benefits i.e. Nuneaton to Felixstowe and Southampton to the West Coast Main Line rail enhancements and Active Traffic Management on the 'Birmingham Motorway Box'.



4.2 Road Freight

4.2.1 The Road Freight Strategy is consistent with RSS Policy T9: The Management and Development of National and Regional Transport Networks, particularly:

- C. Local Authorities, the Highways Agency, transport operators and other agencies should work together to provide and maintain a strategic transport system which:**
- i) enhances the competitiveness of the Region by providing journey time reliability;
 - ii) provides improved links and accessibility both within the Region and to other UK and European regions and beyond; and
 - iii) supports the Spatial Strategy, particularly by providing improved accessibility in those parts of the Region in greatest need of regeneration.
- D. In bringing forward detailed policies, proposals and programmes, consideration should be given to:**
- i) optimising the use of existing infrastructure across all modes;
 - ii) ensuring capacity is safeguarded by appropriate selection of development location, minimising the need for local movements to use the strategic network (T1);
 - iii) adopting the priorities for investment in strategic networks (T12) to support the objectives and policies of RPG, and ensuring the investments are not undermined by inappropriate development;
 - iv) ensuring that motorways and trunk roads are managed and improved to operate effectively as part of the national transport network, including the use of appropriate demand management techniques to improve journey time reliability;
 - v) road building only after all other solutions have been examined and where proposals support other objectives of the RPG; and
 - vi) ensuring the Region is provided with an improved and integrated rail network to encourage greater use of rail, particularly for long distance travel both within the region and beyond.

Current Position

4.2.2 In order to identify the major highway routes where the level of service should be improved, journey speed data has been scrutinised to consider routes on the Primary Route Network (PRN) against the following criteria:

- Urban Links with average off peak speeds <40kph and greater than 1000 HGVs /12 hour day (7am-7pm).

- Rural links with average off peak speeds <50kph and greater than 250 HGVs/12 hour day (7am-7pm).
- These were added to a uniform treatment of the motorway network of speeds <60mph and greater than 1000 HGVs/12 hour day.

4.2.3 Figures 1 and 2 show the results.

FIGURE 1: FLOW-WEIGHTED HGV NETWORK STRESS LEVELS URBAN LINKS 2003

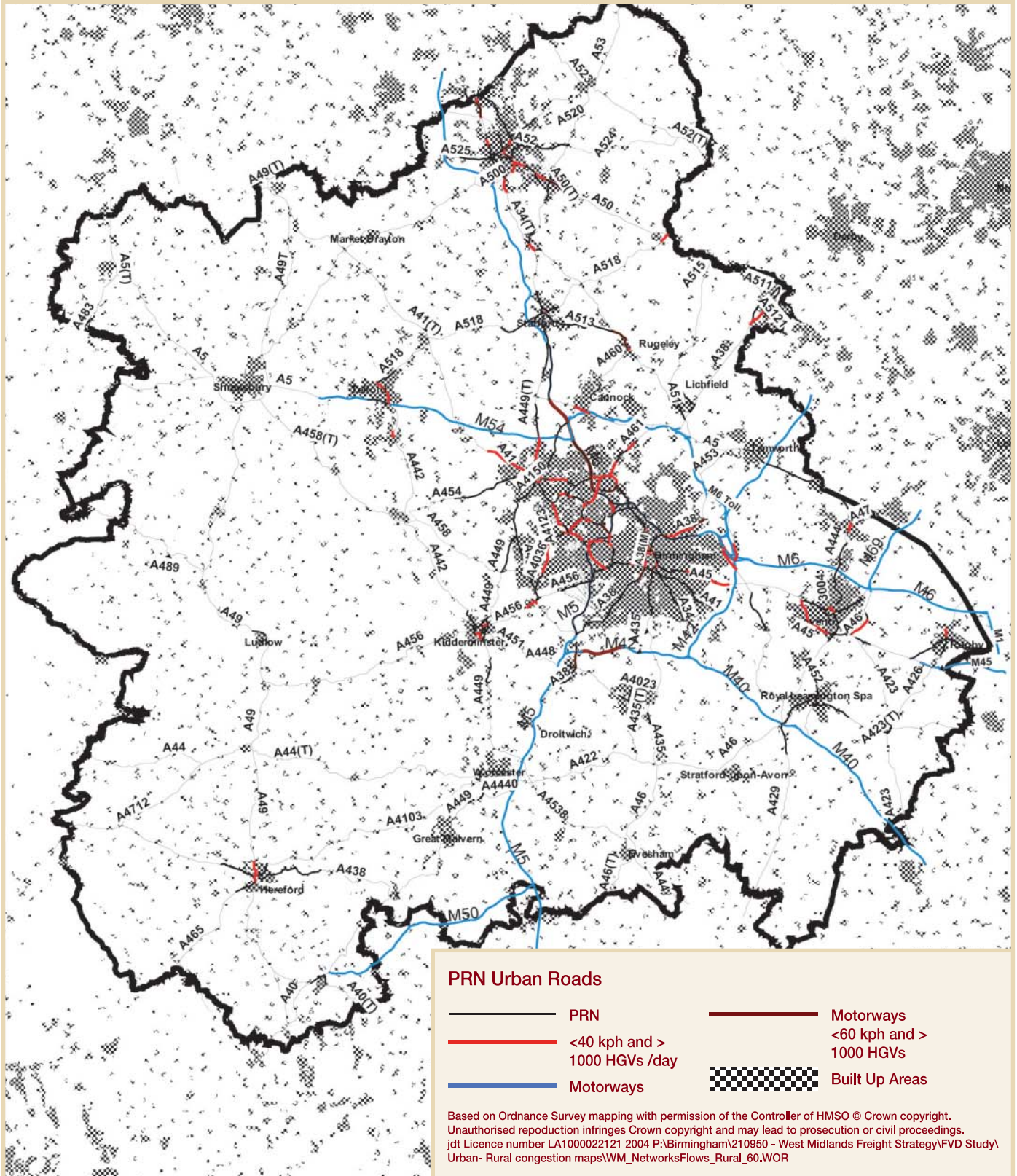
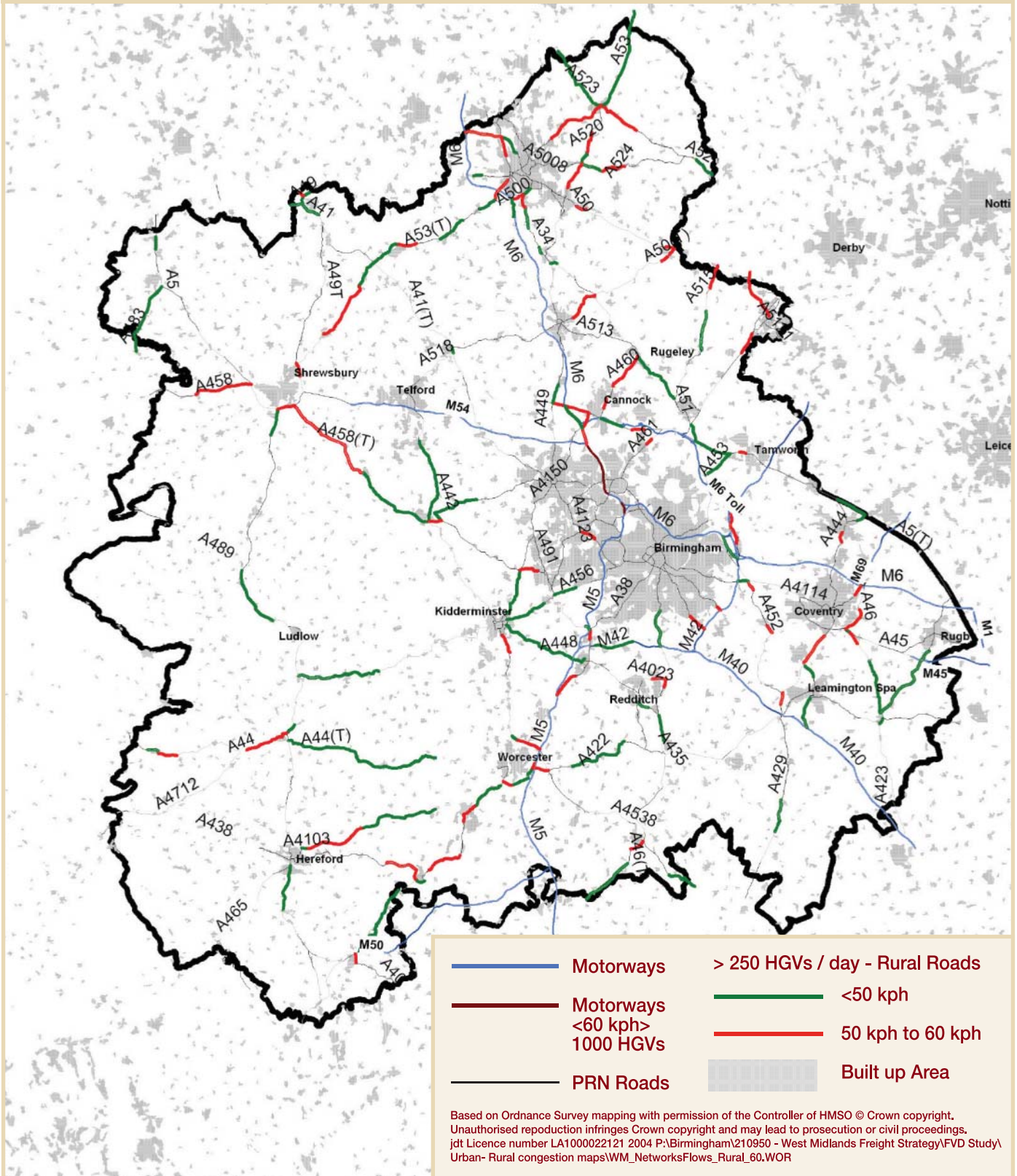


FIGURE 2: FLOW-WEIGHTED HGV NETWORK STRESS RURAL LINKS 2003



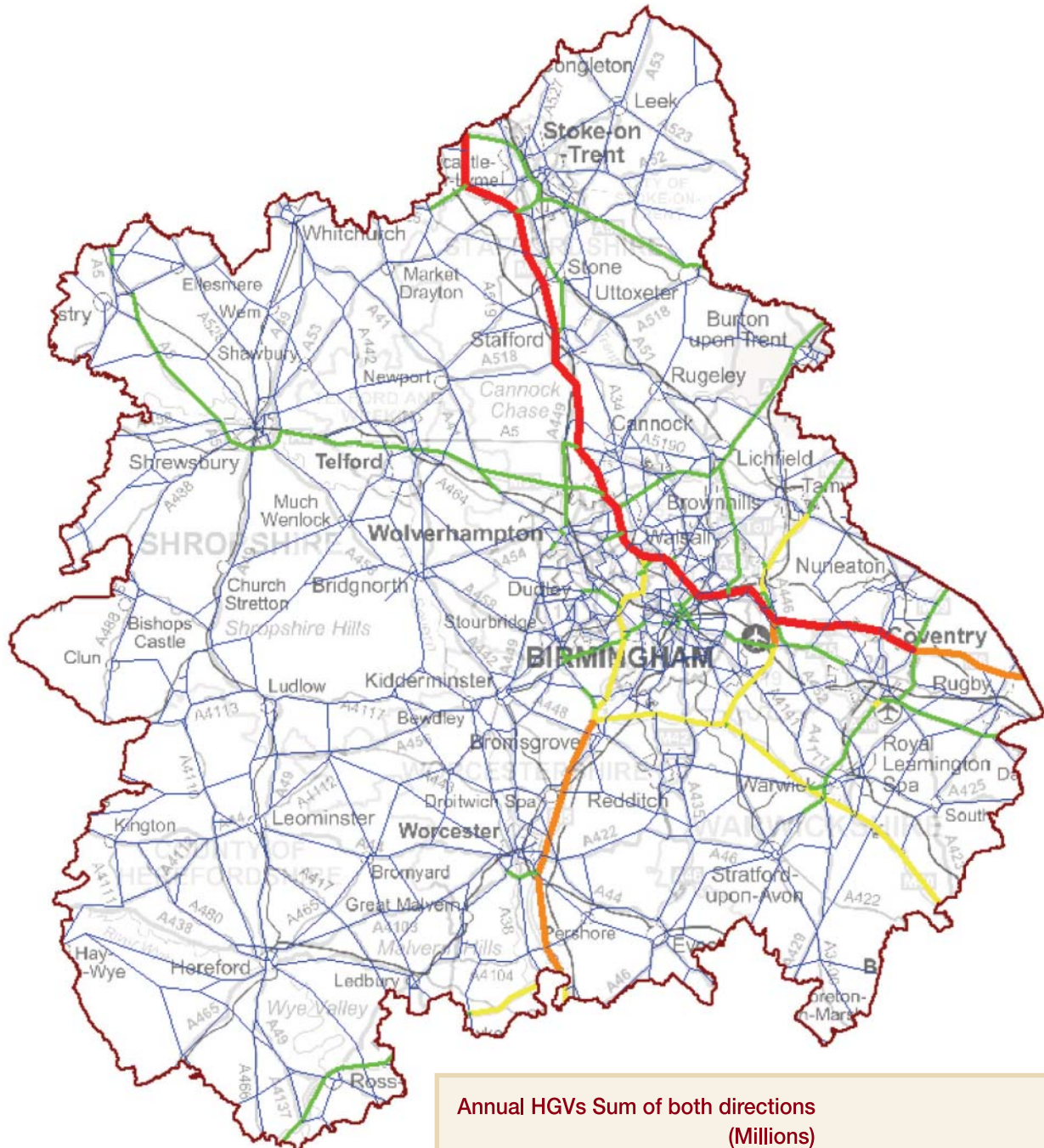
Future Forecasts

4.2.4 Forecasts taken from trends and known influences help to identify the main freight flow trends to, from and via the West Midlands region up to 2021. Table 1 presents a summary of total forecast road freight for the West Midlands in 2011 and 2021, compared to 2002 actual tonnes lifted.

TABLE 1: SUMMARY ROAD FREIGHT FORECASTS 2011 AND 2021 COMPARED TO 2002			
	000's Tonnes		
	2002	2011	2021
Goods Delivered in West Midlands - from Other Regions	62,000	70,000	82,000
Goods Collected in West Midlands - to Other Regions	55,000	64,000	77,000
Goods Collected/Delivered Intra West Midlands	102,000	95,000	86,000
Total	219,000	229,000	245,000

4.2.5 Figures 3 and 4 (pages 12 and 13) show the forecast tonnages as vehicle numbers, modelled as annual numbers of goods vehicles allocated to the West Midlands highway network, including those flows which 'transit' via the West Midlands (they are shown as annual two-way flows i.e. both directions added together).

FIGURE 3: FORECAST ANNUAL HSV'S BY ROUTE WEST MIDLANDS 2011

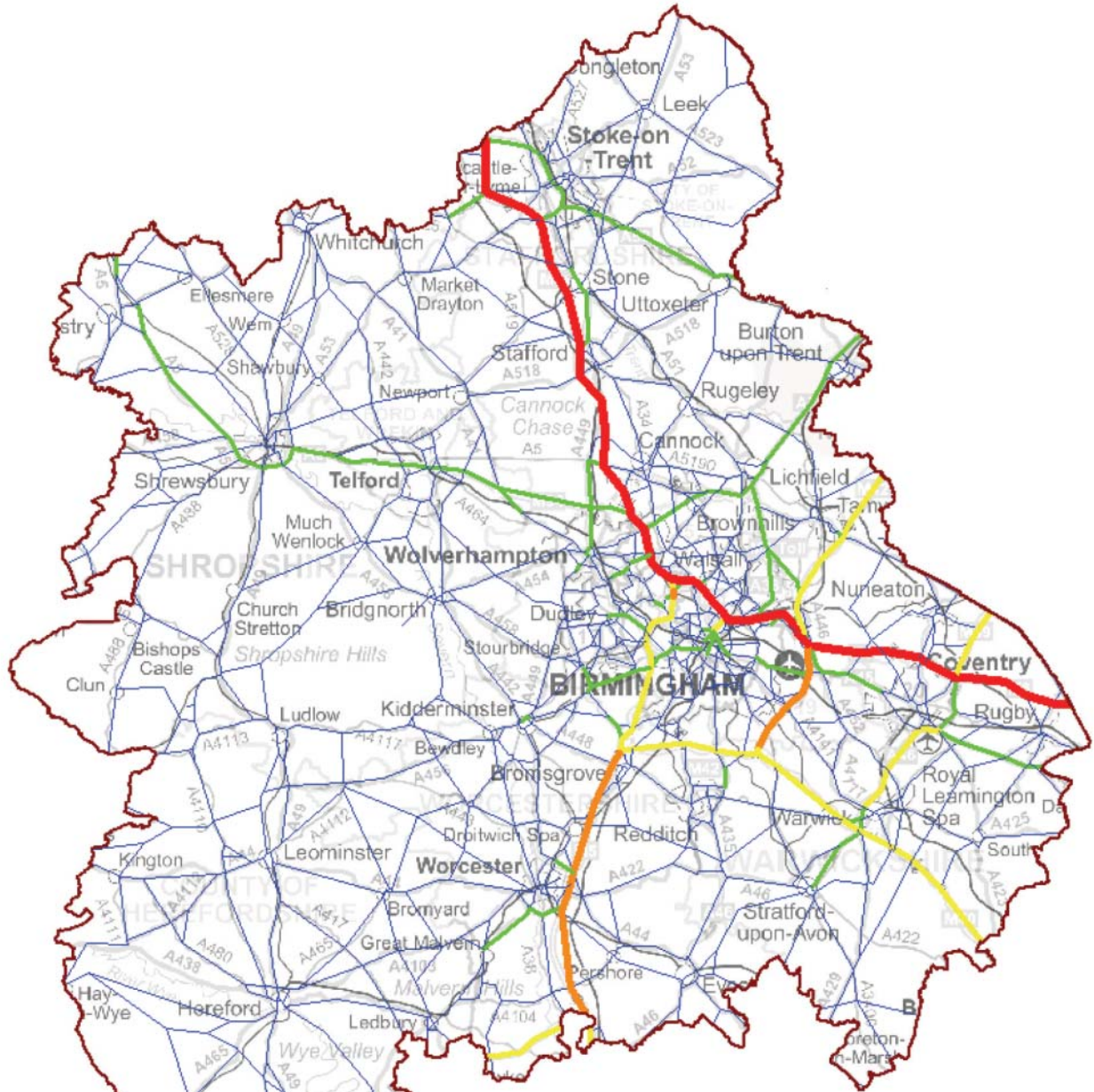


Annual HGVs Sum of both directions
(Millions)

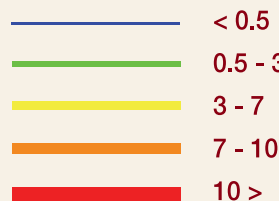
- < 0.5
- 0.5 - 3
- 3 - 7
- 7 - 10
- 10 >

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FIGURE 4: FORECAST ANNUAL HGV'S BY ROUTE WEST MIDLANDS 2021



Annual HGVs Sum of both directions
(Millions)



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Key Issues for Road Freight

4.2.6 For heavy goods vehicles the most stressed links occur in and around the West Midlands conurbation, with over 75% of all congested urban links within the Region. Of these, by far the largest proportion is concentrated within the Black Country.

4.2.7 In rural areas, there is a relatively consistent distribution of stressed links across the Region, but with no obvious concentrations within specific areas.

4.2.8 There is a greater concentration of highway network stress in urban areas for light goods vehicles (LGV), reflecting the essentially local nature of LGV operations. The two major conurbations in the Region, the West Midlands and North Staffordshire experience traffic congestion and network stress. This reflects their concentrations of commerce and industry, and the nature of the existing highway capacity.

4.2.9 To meet road freight industry requirements whilst also tackling congestion, reducing the environmental impact of freight distribution, and encouraging a shift from road to more sustainable modes of freight transport, there is a need to address the following issues:

- Particular local bottlenecks on road transport links to, from and through the Region to improve greater efficiency and reliability;
- Improved journey times and reliability;
- The use of inappropriate roads by HGVs, sometimes a result of bridge or weight conditions;
- Poor signage between trunk routes and freight generating locations;
- Need for better traffic management to make the best use of existing highway capacity;
- Parking of HGVs in inappropriate locations;
- Lack of parking for HGVs and driver amenities;
- Shortage of appropriately qualified drivers and the need to recruit/retain more qualified drivers;
- High cost to individuals of HGV training and the reluctance of industry to pay for training schemes;
- Young people being lost to the industry due to the 21 years old qualifying age;
- Willingness of employers / haulers to pay the M6 toll fee;
- HGV crime and
- Encouraging local sourcing to address the trend of increasing trip length.

4.2.10

The regional objective and actions to address the key issues facing road freight are outlined in Table 2.

TABLE 2: REGIONAL OBJECTIVE – TO IMPROVE THE EFFICIENCY OF ROAD HAULAGE (RH)

Action Plan	Suggested Lead Agency and Partners
RH1: Support the schemes contained within RSS Policy T12: Priorities for Investment and regard their early implementation as a priority (see Appendix B).	Highways Agency Local Authorities Regional Strategic Partnerships Regional Freight Advisory Group (RFAG)
RH2: Support improvements to local freight routes in key manufacturing and commercial centres aimed at improving network capacity and journey time reliability for goods vehicles.	Local Highway Authorities Highways Agency Freight Quality Partnership
RH3: Develop a lorry routing strategy identifying suitable HGV routes to enable consistency of approach across the Region.	Regional Freight Advisory Group Local Authorities Highways Agency Freight Quality Partnership
RH4: Improve the utilisation of road space and capacity to enable increased efficiency and reliability for goods vehicle operations through the implementation of appropriate traffic management measures.	Highways Agency Local Highway Authorities Freight Quality Partnership
RH5: Increase the availability of safe lorry parks with driver amenities in appropriate areas of the West Midlands.	Local Authorities Highways Agency Freight Quality Partnership Developers
RH6: Promote HGV driving as an attractive career option, including promoting the upskilling of drivers to address the shortage of qualified drivers.	Skills for Logistics Learning and Skills Councils Freight Quality Partnership Freight Transport Association Road Haulage Association Advantage West Midlands
RH7: Identify land for warehousing / distribution / other logistics purposes from alternative development pressures, particularly sites close to suitable inter-modal freight terminals, rail freight facilities, or roads designed and managed as traffic distributors.	Local Authorities Freight Quality Partnership Developers

4.3 Rail Freight

4.3.1 The Rail Freight Strategy is consistent with RSS Policy T9: The Management and Development of National and Regional Transport Networks, particularly:

- D. vi) ensuring the Region is provided with an improved and integrated rail network to encourage greater use of rail, particularly for long distance travel both within the Region and beyond.**

Current Position and Future Forecasts

4.3.2 Analysis for rail freight uses 2003 data when detailed work was conducted. The rail freight forecasts for 2015 and 2021 are shown in Table 3. The forecasts are consistent with those undertaken for the Strategic Rail Authority (SRA) to support the preparation of their Strategic Rail Freight Interchange Policy document. The National Freight Strategy forecasts that total non-bulk rail freight lifted in 2015 will be 66 million tonnes. Bulk rail freight in the same year is forecast to be 135 million tonnes.

4.3.3 Network Rail's nationwide Freight Route Utilisation Strategy (RUS) incorporates the DfT's Regional Planning

Assessments and complements the West Midlands Regional Freight Strategy, by providing national rail-specific proposals, and analysing freight flows which affect the Region.

4.3.4 The Freight RUS shows a more up to date picture of the volume of freight services, due in part to a recent increase in inter-modal traffic. This reinforces the objectives and actions set out in the West Midlands Freight Strategy, with the rail freight market in the Region continuing to grow.

TABLE 3: SUMMARY FORECAST RAIL FREIGHT FOR THE WEST MIDLANDS 2015 AND 2021 COMPARED TO 2003

	000's Tonnes		
	2003	2015	2021
Origin West Midlands - to other regions	2,200	4,900	5,500
Destination West Midlands - from other regions	7,600	14,600	15,400
Intra West Midlands	1,200	1,300	1,300
Total	11,000	20,800	22,200

4.3.5 Table 4 shows these forecast volumes by freight train type i.e. non-bulk and bulk/conventional for 2015 and 2021.

TABLE 4: FORECAST RAIL FREIGHT 2015 AND 2021 BY FREIGHT TRAIN TYPE COMPARED TO 2003			
	000's Tonnes		
	2003	2015	2021
Origin West Midlands			
Non Bulk*	900	3,300	4,000
Bulk/Conventional	1,300	1,500	1,500
Total	2,200	4,900	5,500
Destination West Midlands			
Non Bulk*	1,300	4,700	5,500
Bulk/Conventional	6,300	9,900	9,900
Total	7,600	14,600	15,400
Intra West Midlands			
Bulk/Conventional	1,200	1,300	1,300
TOTAL	11,000	20,800	22,200

* including Maritime Containers, Channel Tunnel, Domestic Intermodal and Auto

4.3.6 Clearly the largest growth in rail freight traffic to/from the West Midlands is forecast to be non bulk sector. Figures 5 and 6 detail the forecast non-bulk rail freight volumes for the West Midlands by traffic type.

FIGURE 5: FORECAST NON BULK RAIL FREIGHT VOLUMES, ORIGIN WEST MIDLANDS

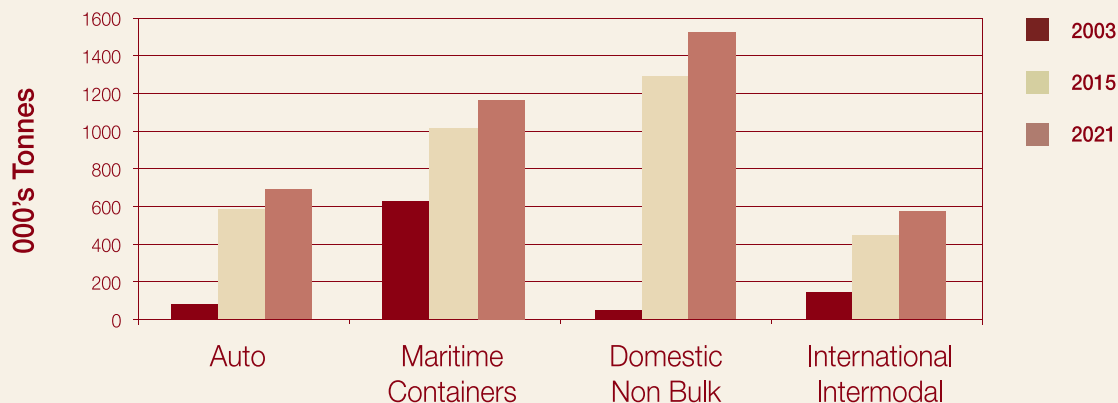
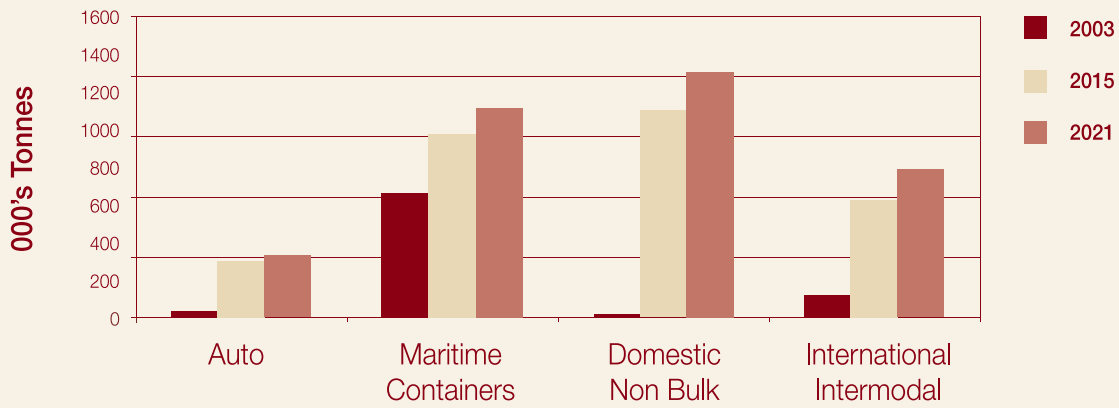


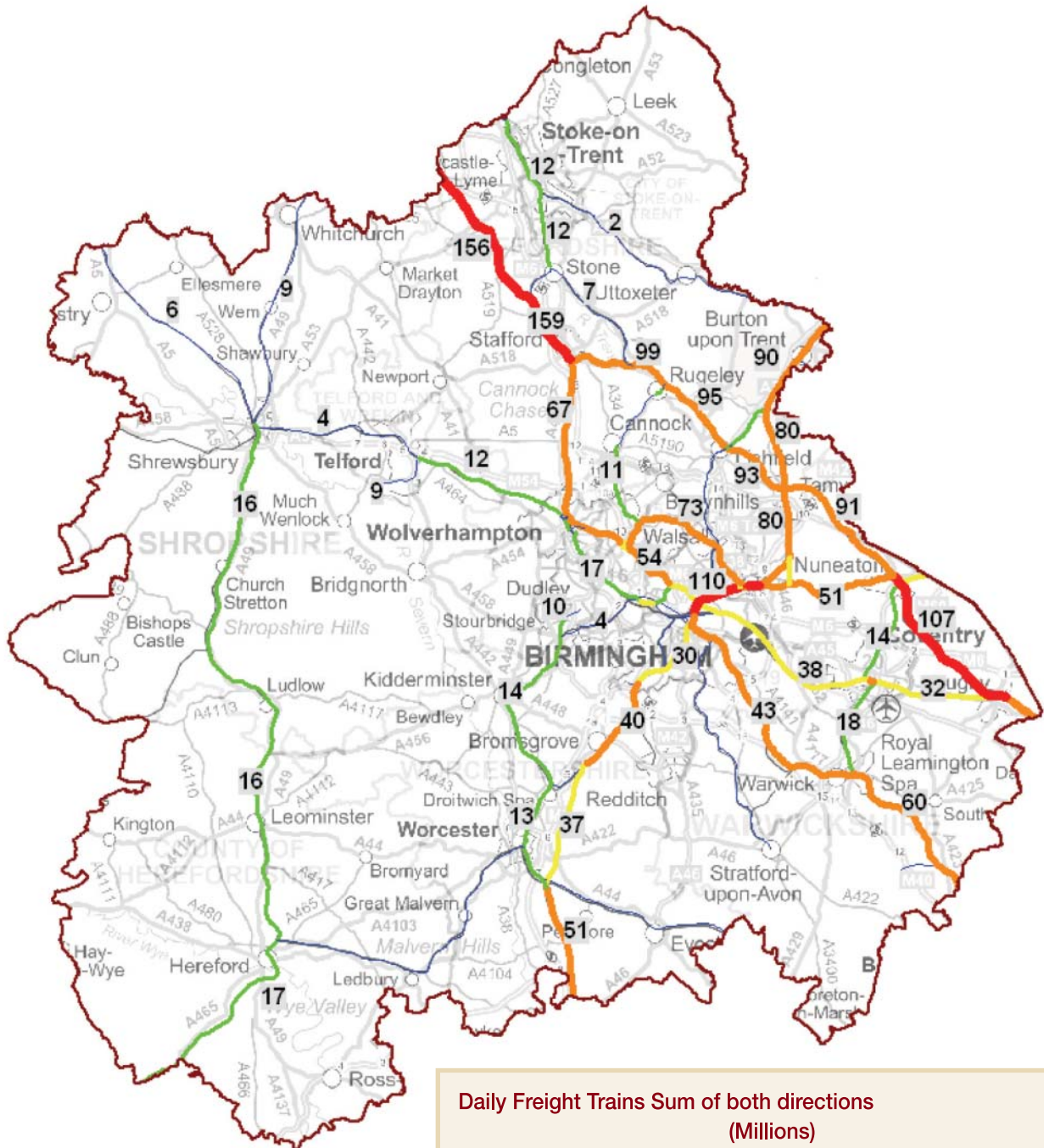
FIGURE 6: FORECAST NON BULK RAIL FREIGHT VOLUMES, DESTINATION WEST MIDLANDS



4.3.7 Figure 7 shows 2015 forecast rail freight paths for the West Midlands region.



FIGURE 7: 2015 FORECAST FREIGHT PATHS



Daily Freight Trains Sum of both directions
(Millions)

- < 10
- 10 - 19
- 20 - 39
- 40 - 49
- 100+ >

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4.3.8 The promotion of modal shift, where appropriate, from road to rail, is based on the following factors:

- EU and national Government White Papers and legislation and the RSS encourage growth in the volume of goods moved by rail freight;
- Rail freight offers operational benefits in that it has the capacity to haul large volumes in one move and over a short time period;
- Rail's potential to be more cost competitive than road haulage;
- Rail freight produces lower environmental impact (including emissions, energy use and accidents), in comparison with freight carried by road transport.
- Increasing volumes of goods being sourced from international markets, and the consequent increase in deep sea container trade through British ports works in favour of rail freight and provides further opportunities for growth in rail volumes nationally;
- Larger distribution centres generate the volumes required to operate full length trains;
- Other policy driven factors, such as the Working Time Directive, distance based road user charging and driver shortages add to road industry costs;
- There are wider economic benefits in shifting cargo from road to rail.

Key Issues for Rail Freight

4.3.9 The key issues identified that need to be addressed are:

- Restricted loading gauge is prevalent on a number of strategically important routes;
- The availability of freight train creates capacity 'bottlenecks' and key constraints on major corridors, particularly Rugby Station, Nuneaton Station, Stafford Station and the Trent Valley section of the West Coast Mainline;
- Limited inter-modal terminal capacity and distribution warehousing located on rail linked sites; and
- Wide range of public private stakeholders driven by differing imperatives and timescales.

4.3.10 The regional objective and actions to address the key issues facing rail freight are outlined in Table 5.

TABLE 5: REGIONAL OBJECTIVE – TO IDENTIFY AND PROMOTE APPROPRIATE OPPORTUNITIES FOR MODAL SHIFT FROM ROAD TO RAIL FREIGHT (RF)

Action Plan	Suggested Lead Agency and Partners
RF1: Promote modal shift from road to rail, where appropriate, for goods flows to, from and via the West Midlands region.	Regional Freight Advisory Group Local Authorities Advantage West Midlands Department for Transport Network Rail
RF2: Promote EU and Government initiatives that support an open and competitive market for rail freight service provision in the Region and beyond.	Local Authorities Advantage West Midlands Department for Transport Network Rail
RF3: Support rail freight schemes identified in the RSS, including upgrading rail freight routes to Felixstowe and Southampton.	Network Rail Local Authorities
RF4: Support infrastructure improvements to allow longer trains to operate to, from and through the West Midlands.	Network Rail
RF5: Maintain and, where practical, provide additional freight capacity on a range of primary freight routes through the Region, including the WCML, the South West-North East corridor, and Coventry-Stechford-Bushbury route, recognising the need for the local rail network to also cater for projected passenger growth.	Network Rail
RF6: Promote and assist an increase in rail freight terminal capacity in appropriate locations.	Private developers Local Authorities Advantage West Midlands Network Rail
RF7: Safeguard former railway lines for freight use, particularly the Stourbridge Junction to Lichfield via Walsall line.	Local Authorities

4.4 Air Freight

4.4.1 The West Midlands region is not effectively served by air freight. Whilst air freight activity takes place at Birmingham International and Coventry airports, the volume of freight has declined since the early 1990's as a result of changes in the UK freight market, with operators concentrating on other airports. Other airports are considered close enough to some parts of the West Midlands Region, to provide freight services for the Region, particularly the freight hub at East Midlands.

4.4.2 There are generally three types of air freight:

- Belly-hold – in scheduled long haul intercontinental passenger flights. This forms the majority of air freight flown into and out of the UK;
- Express service providers – operating their own dedicated freighter aircraft on a 'hub and spoke' basis, specialising in moving high value, time sensitive consignments on a Just in Time basis; and
- Freighter aircraft specially chartered for the consignment of large consignments.

4.4.3 Table 6 presents a summary of air freight volumes in the UK for selected UK airports.

TABLE 6: AIR FREIGHT VOLUMES UK SELECTED AIRPORTS

Airport	Tonnes	Growth/(Decline) 1993-2003
Gatwick	223,000	26,000
Heathrow	1,223,000	377,000
Luton	23,000	2,000
Stansted	199,000	138,000
East Midlands	227,000	198,000
Manchester	123,000	39,000
Liverpool	12,000	(4000)
Birmingham	12,000	(5000)
Coventry	3,000	(18,000)

Key Issues for Air Freight:

4.4.4 The key issues identified that need to be addressed are:

- The lack of long haul belly-hold capacity in the West Midlands requires significant volumes of freight to be transported by road to the South East and Manchester;
- The role of ‘transit sheds’ at or close to airports to support any increase in air freight capacity for belly-hold traffic;
- Environmental impacts of night time flights for chartered and dedicated freight services; and
- Importance of links with Nottingham East Midlands airport as a key hub for express service providers.

4.4.5 The regional objective and actions to address the key issues facing air freight are outlined in Table 7.

TABLE 7: REGIONAL OBJECTIVE - TO PROMOTE APPROPRIATE DEVELOPMENT OF AIR FREIGHT (AF) CAPACITY WITHIN THE WEST MIDLANDS	
Action Plan	Suggested Lead Agency and Partners
AF1: Reduce the level of airfreight that has to be transported by road haulage through promoting, in line with the Air Transport White Paper, additional long haul passenger services from Birmingham Airport.	Birmingham International Airport Advantage West Midlands Department for Transport Civil Aviation Authority
AF2: Support Coventry Airport’s continued freight role, with future growth in the volume of freight traffic carefully managed to limit disturbance to the environment and local people.	Coventry Airport Local Authorities Department for Transport Civil Aviation Authority
AF3: Promote and support the continued development of express air freight services at Nottingham East Midlands Airport, subject to appropriate environmental and surface access targets approved by the East Midlands Regional Assembly.	Nottingham East Midlands Airport Department for Transport Civil Aviation Authority East Midlands Regional Assembly

4.5 Pipelines

4.5.1 Nationally, freight moved by pipelines has remained fairly stable over the last twenty years. The share of goods moved by pipeline is now 4% compared with 6% in 1980.

4.5.2 As a form of transport, pipelines provide a sustainable way of transporting large volumes of liquids over long distances. However they are very expensive to construct and operate, hence they are only economically viable as a form of transport where large regular volumes need to be moved between fixed locations, and

consequently they are confined to the primary distribution of refined petroleum products to the Region.

4.5.3 An extensive pipeline network already exists and serves six petroleum distribution depots in the Region. It is recognised that additional capacity to this network is unlikely to be required in the foreseeable future. However the Region should continue to support and promote the existing pipeline network and promote additional pipeline capacity when it is required and justified.

Key Issues for Pipelines

4.5.4 The key issues identified that need to be addressed are:

- Sustainable method for transporting large volumes of liquid over long distances;
- Very expensive to construct new pipelines; and
- Continued support is beneficial to the Region.

4.5.5 The Regional objective and action to address the key issues facing the delivery of ‘strategic’ pipelines are outlined in Table 8.

TABLE 8: REGIONAL OBJECTIVE – TO SUPPORT ROLE OF STRATEGIC PIPELINES (SP) TO DELIVER SAFELY AND EFFICIENTLY.

Action Plan	Suggested Lead Agency and Partners
SP1: To support and promote the existing pipeline network serving the West Midlands.	Pipeline operators Storage depot operators

4.6 Inland Waterways

4.6.1 National policy supports an increase in the amount of freight carried on the UK commercial waterways. Inland waterways have the capability to take HGV's off local roads and reduce the environmental impact of freight distribution in terms of both energy and pollution.

4.6.2 While an extensive network of inland waterways exists, in the West Midlands, the majority of this network comprises narrow canals - classified as 'non commercial' and therefore deemed not currently capable of carrying freight commercially. Large scale use of canals is therefore currently not realistic or economically viable.

4.6.3 The 1968 Transport Act designates "commercial waterways" as those "principally available for the commercial carriage of freight". In the West Midlands there is one - the 38km section of the River Severn between Stourport and Gloucester.

4.6.4 The River Severn has potential e.g. there are larger craft moving aggregates in Worcestershire and to Gloucester, although wharf availability is an issue. The river is also used by coal carriers and the navigation authorities in transporting waste items and building materials for repair of structures and dredging.

4.6.5 Whilst freight opportunities for the large scale use of the inland waterway network is very limited, potential flows which have recently been identified or trialled are shown below:

- Waste paper and card on the Birmingham canal;
- Baled rags and bricks on Black Country canals;
- Cereal pellets on Trent and Mersey canal;
- Recycled clothing on Stratford canal;
- Household waste from North Worcestershire to Wolverhampton; and
- Canal side recycling plants in Birmingham and Wolverhampton.

Key Issues for Inland Waterways

4.6.6 The key issues identified that need to be addressed are:

- Need to protect and enhance existing wharf locations;
- Lack of suitable waterside freight handling facilities;

- HGV access to wharf locations for transshipment; and
- Pressure for development of other land uses.

4.6.7 The regional objective and actions to address the key issues facing inland waterways are outlined in Table 9.

TABLE 9: REGIONAL OBJECTIVE – TO PROMOTE THE SUSTAINABLE USE OF INLAND WATERWAY (IW) FOR FREIGHT MOVEMENT

Action Plan	Suggested Lead Agency and Partners
IW1: Promote the use of the inland waterway for freight, where practical and in a manner consistent with avoiding adverse environmental impact, while recognising the importance of waterways for leisure use within the Region's Tourism Strategy.	Local Authorities British Waterways Navigation authorities Regional Freight Advisory Group
IW2: Preserve and enhance existing wharf facilities and inter-modal freight transfer points in order to encourage their use for water based transport.	Local Authorities British Waterways Navigation authorities
IW3: Examine potential utilisation of the Canal Network or the commercial section of the River Severn for potential freight flows in the West Midlands.	Local Authorities British Waterways Navigation authorities Inland Waterways Association Commercial Boat Operators Association

Delivering the Strategy

5.1 A number of local authorities in the Region, either individually or working in collaboration with adjoining authorities, have already established Freight Quality Partnerships (FQPs). However, during the consultation on

Regional Freight Advisory Group (RFAG)

5.2 The Regional Assembly will facilitate the establishment of the Regional Freight Advisory Group (RFAG) to coordinate the implementation of the Regional Freight Strategy. RFAG will be an officer group that will report to the Regional Transport Partnership via the Regional Transport Officer Group.

5.3 The precise membership and terms of reference for the RFAG will be determined by regional partners. Based on responses to the Region's Freight Strategy consultation, it is envisaged that RFAG will seek to add value to the work of existing local and sub-regional FQP's by:

- Coordinating and monitoring the implementation of the Regional Freight Strategy;
- Encouraging consistency of approach in the work of FQP's;
- Ensuring alignment of other regional strategies and policies, particularly with respect to environmental concerns;
- Providing a forum for FQP's and other stakeholders in the Region;
- Identifying and commenting on infrastructure projects; and
- Seeking to ensure consistency of approach to the management of freight on local networks.

5.4 It is envisaged that the newly established RFAG will develop a detailed action plan and timetable to progress the key regional actions for all modes during 2007/8.

the Regional Freight Strategy partners have indicated their support for the establishment of a regional group to oversee the successful delivery of the strategy.

5.5 To assist with the monitoring the RFAG would need to identify the key freight indicator and make arrangements to gather that information. Key indicators could include:

- Proportion and growth of freight moved by all modes;
- HGV flows;
- Reliability/journey speeds/journey times/carbon emissions;
- Lorry parking spaces; and
- Number and size of freight transfer facilities.

5.6 Suggested core partners of the RFAG are:

- Local Authorities;
- Highways Agency;
- Network Rail;
- Freight Transport Association;
- Road Haulage Association;
- Rail Operators;
- Air Operators;
- British Waterways;
- Chambers of Commerce;
- Advantage West Midlands;
- Government Office for the West Midlands; and
- West Midlands Regional Assembly.

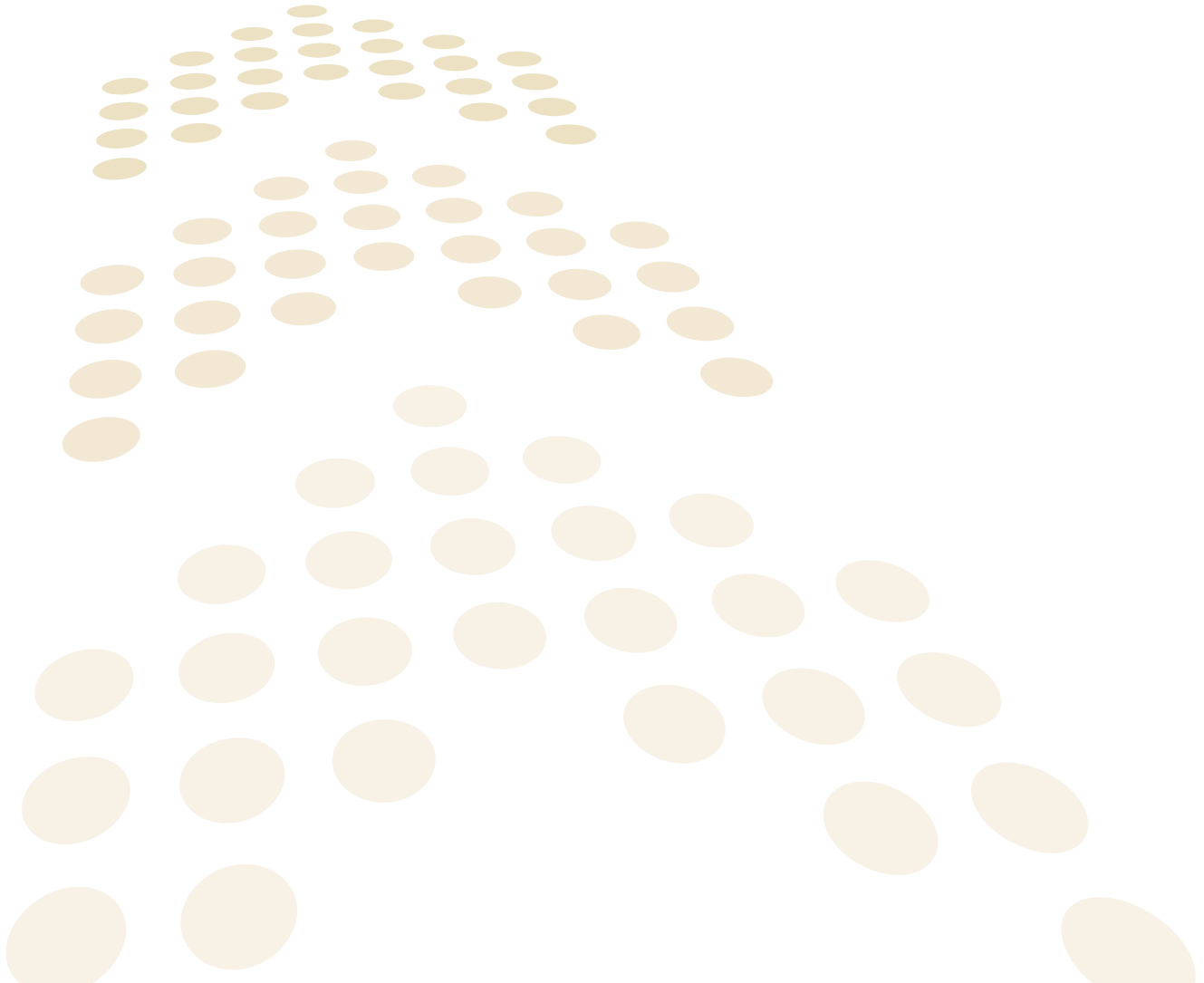
5.7 Additional relevant stakeholders would be determined by core partners. The Regional Freight Advisory Group should also aim to be as geographically representative as possible, in addition to representing a comprehensive breadth of stakeholder interests.

Appendix A

Stakeholder Groups / Organisations Contributing To Consultants Technical Study

- Advantage West Midlands
- Birmingham City Council
- Coventry City Council
- Dudley MBC
- EWS Railway Ltd
- Freight Transport Association
- Freightliner Ltd
- Herefordshire County Council
- Highways Agency
- Network Rail
- Regional Freight Quality Partnerships
- Road Haulage Association
- Sandwell MBC
- Shropshire CC
- Solihull MBC
- Staffordshire CC
- Stoke on Trent Council
- Strategic Rail Authority
- Telford and Wrekin Council
- Walsall MBC
- Warwickshire CC
- West Midlands Local Government Association
- West Midlands Regional Assembly
- Wolverhampton MBC
- Worcestershire CC

The opportunity to comment on the emerging Regional Freight Strategy from a wide range of regional partners was provided during the preparation of the draft Strategy through presentations and consultation in Spring 2006.



Appendix B

Policy T12: Priorities for Investment

National and Regional Priorities

Programme of measures aimed at achieving behavioural change

West Coast Mainline Strategy

Upgrading rail freight routes to Felixstowe and Southampton

M6 widening J11a – J19

M40 J15 Longbridge Improvement

M42 Active Traffic Management Pilot

M42 widening J3-7

M54 – M6/M6 Toll link

Active Traffic Management for M5/M6/M42 motorway box

A5 Weeford – Fazeley Improvement

A38 Streethay – A50 Improvements

A45/A46 Tollbar End Improvement

A483 Pant & Llanymynech Bypass

A500 City Road & Stoke Road Junctions

Various route management strategies, including the A46

West Midlands Rail Short/Medium term capacity/performance enhancements

Passenger capacity enhancement Birmingham New Street

West Midlands Rail Strategy – long term capacity needs

Local congestion charging studies

West to East Midlands MMS (W2EMMS) recommendations

BIA, improved surface access, especially public transport

Sub-regional Priorities – Within Major Urban Areas (MUAs)

Bus showcase / Quality bus networks development

Bus Super Showcase / High Quality bus networks

Red Route network development

Metro extensions (Birmingham City Centre to Five Ways and Wednesbury to Brierley Hill)

Further Metro extensions in Birmingham/Black Country conurbation

A50 Trentham Lakes Junction

Strategic Park & Ride, including Brinsford

Improved transport networks within the Black Country

Improved public transport network in North Staffordshire

Improved access to regeneration sites

Sub-regional Priorities – Outside MUAs

Retention and development of local services, including links between Local Regeneration Areas and areas of opportunity

Enhancement and development of rural public and community transport, particularly links between market towns and their hinterlands

Development of improved road network management and prioritisation, including between nodes in High Technology Corridors

Worcester Parkway Strategic Park & Ride

Improved access to regeneration sites

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