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Civitas Portis Work Package 4

An Initial Assessment of Freight in Aberdeen & Aberdeenshire

Survey Results 2018

Nestrans
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Overview of the respondents & the results

Nestrans is a partner in the North east Freight Forum and works in collaboration with local authorities, business organisations and the haulage industry to deliver efficiencies through an agreed Freight Action Plan. Nestrans are leading on the Freight workpackages in the Horizon 2020 project Civitas Portis, part of which will be to enhance the efficiencies of freight movement in and around Aberdeen. To further inform this work, it was decided to gauge business attitudes and seek further information from hauliers through a survey distributed to members of the Freight Forum, other major players and via Transport Organisations.

In order to gain insight from a wide variety of hauliers and companies associated with the haulage industry, a large number of companies were contacted inviting them to respond to a survey and to join the North East Freight Forum. From this process, there were 28 respondents from 27 companies. A summary of the respondents is available in appendix B.

For the most part reasonable conclusions could be formed from answers to the questions and some initial patterns have emerged. These can be used to track progress during the course of the project, with the intention of conducting a similar follow-up survey at the end of the four year period of the Portis project.

However, some difficulties with the data have emerged. Whilst some of these provide their own answers, others mean that the available information may need to be taken with caution due to the nature of survey responses and the potential for human error.

One of the biggest issues was the number of questions that were either only partially responded to, or were not responded to, by all participants who were able to do so. 52% of questions were answered by all participants, meaning that, in some areas, firm conclusions are limited. Questions were made optional in order to encourage participation but this has created some difficulty in obtaining a baseline. However, if relations with hauliers are improved and questions are more fully answered at the end of the project, then this will be an indication of success in itself.

The section with the highest potential for uncertainty is 'Fleet Details'. With a number of respondents answering part of the questions and not others, the information forms only an indication and cannot be used as quantifiable data. Additionally it is difficult to reach solid conclusions as, particularly, the vehicle details and the euro class details do not add up with companies choosing to omit vehicles included elsewhere. It is hoped that we can be provided with more specific information later in the project as relationships are formed and direct contacts are made.

Of the 28 respondents, 61% showed a willingness to be added to a stakeholder list in order to be contacted in the future about other parts of the project. This equates to 17 of the 28 respondents. Given the relatively small pool of respondents, this is a limited number to take forward. It is hoped that more companies can be encouraged to take part in the work packages moving forward with the assistance of our freight advisor.

Out of the 28 respondents, 18 were aware of the existence of the North East Freight Forum, with 9 having previously attended. Additionally, there was good variety in the location of respondents. Whilst 36% listed themselves as being based in Aberdeen and a further 25% in Aberdeenshire, 39% classed themselves as being primarily based elsewhere, with 11% elsewhere in the north of Scotland, 21% in the central belt, and 7% elsewhere in the UK.

Four organisations or companies responded to the survey who did not have use of vehicles. These have been omitted from the majority of the survey, where questions relate specifically to an operator.

The survey, as well as a summary of the responses, is available is appendix A.

Fleet Details

As noted previously this is the area where the information is the least conclusive. Despite this, some conclusions can still be made.

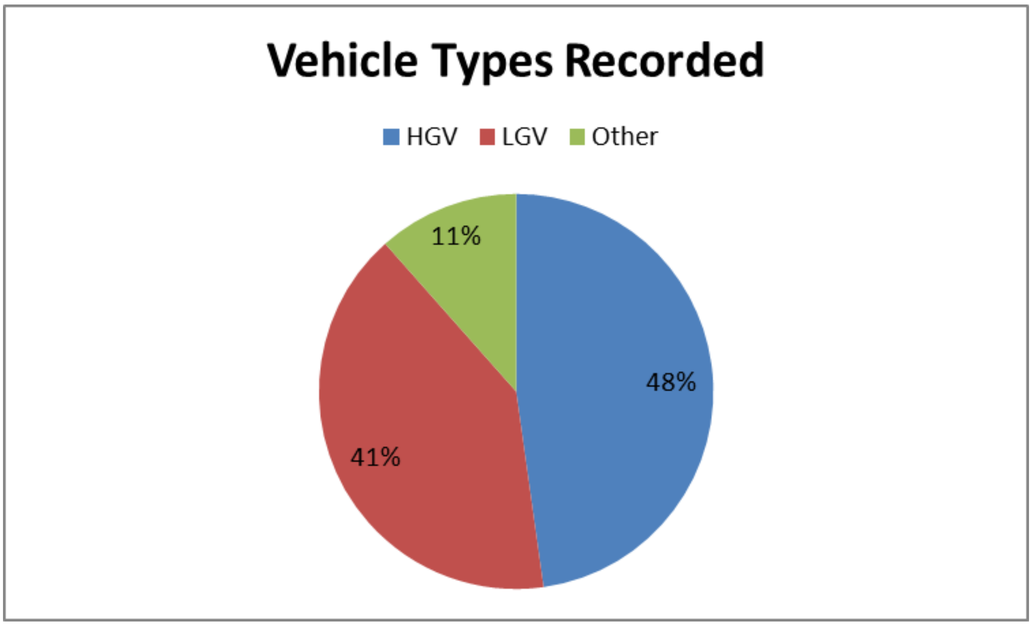
It should be noted that the numbers provided do not necessarily add up and some assumptions have been made. Where the number 100 has been entered but this was more than the number of vehicles declared, it has been assumed that this was intended as a percentage rather than a figure. One operator's vehicle information switched the number of HGVs and number of LGVs between the vehicle type question and the euro classification question. For purposes of clarity, the first answer – that to the vehicle type question – has been taken forward as the number of vehicles of each type and so the HGV and LGV data in the Euro class question has been switched. However, in order to ensure the validity of information it is recommended that this is followed up on and clarified with the company since the company's fleet is one of the largest amongst the companies who responded to the question.

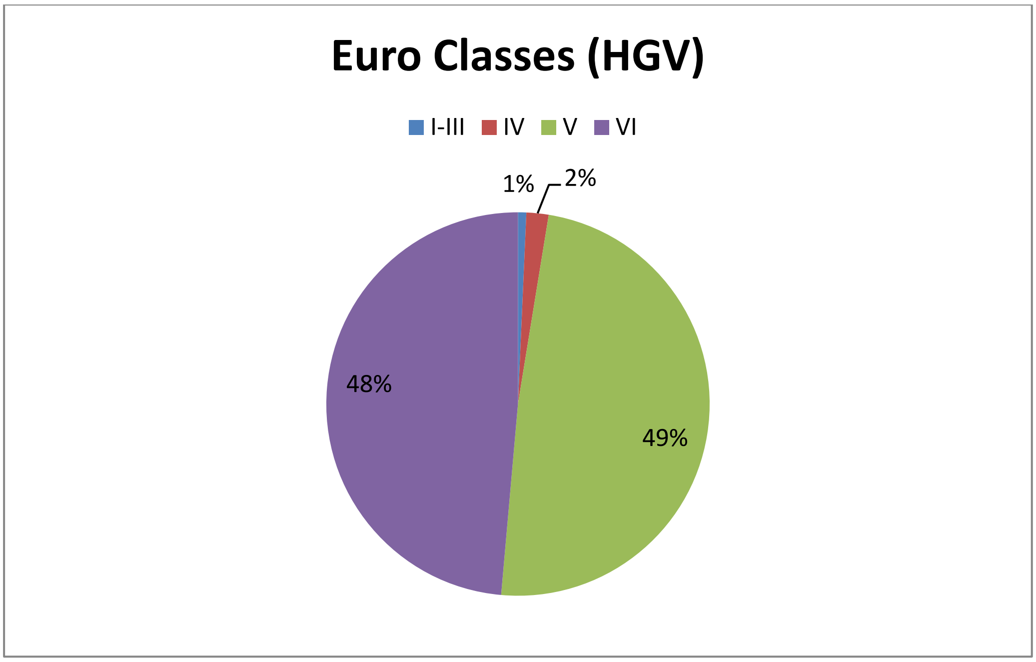
In a number of instances, companies either did not answer certain areas of the question or omitted a number of vehicles from their euro class answers. In these cases, an estimation has been made.

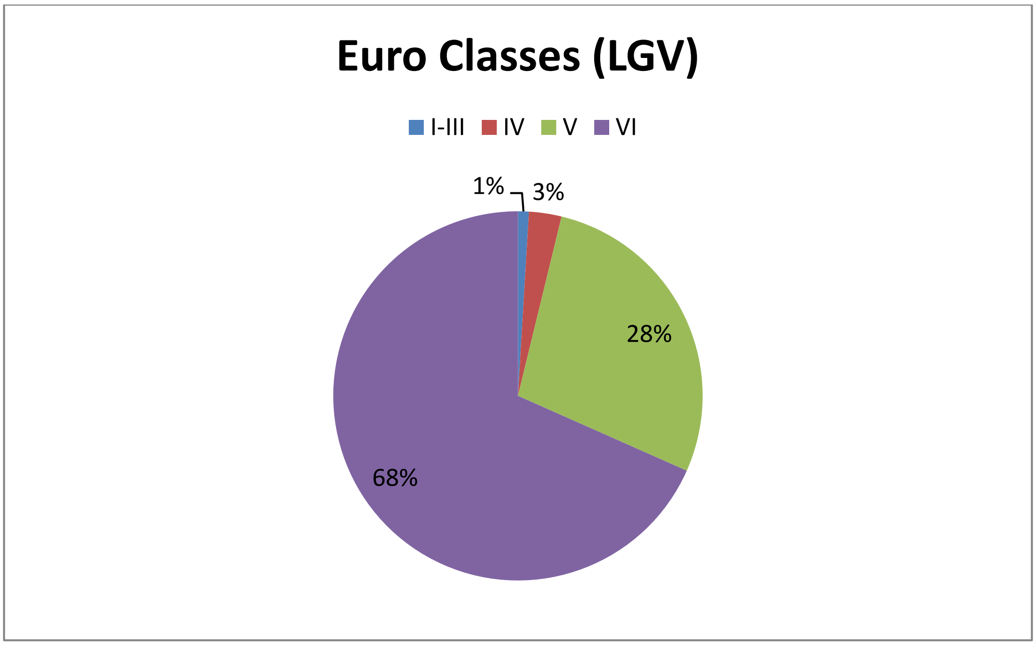
Of the 23 companies that declared vehicles, the majority of these were listed as HGVs, although LGVs and 'other' combined made the majority. Whilst 11% of the vehicles were classed as 'other', no company elaborated on what these vehicles were.

Four companies answered yes as to whether they owned or had access to HGV/LGV vehicles, but did not provide any numbers for vehicle types. One commented that this was due to none of the vehicles being primarily based in Aberdeen.

Figure 1







Looking at the information provided regarding Euro Class breakdowns, HGVs show a relatively even split of Euro 5 and Euro 6 vehicles, whilst LGV suggest a greater number of Euro 6 vehicles. In both cases, the number of vehicles stated to be less than Euro 5 are minimal, with only 11 HGVs recorded (out of a total of 428) and 12 LGVs (out of a total of 316).

Looking at a breakdown of the companies, it was identified that there were six companies that could be classed as 'large', with a criteria of more than 40 vehicles declared. 17 companies listed less than 40 vehicles. This definition will help to assess whether 'larger' companies with more vehicles had different practices and opinions than those with fewer vehicles.

In terms of Euro Class break down, five out of the six companies defined as 'large' had 100% of HGVs registered as Euro 5 or higher, with two out of six with 100% HGVs classed as Euro 6. Four of the six companies had over 80% of their HGVs registered as Euro 6, with only one company registering no

Euro 6 HGVs, and one company registering under 50% of their HGVs as Euro 6. The Euro standards of engines amongst LGVs were equally high with four out of six companies registering 100% of LGVs as Euro 5 or higher, and two registering 100% of vehicles as Euro 6. All six companies responded to the questions, although two companies had vehicles unaccounted for and one company did not provide any Euro Class information relating to their LGVs.

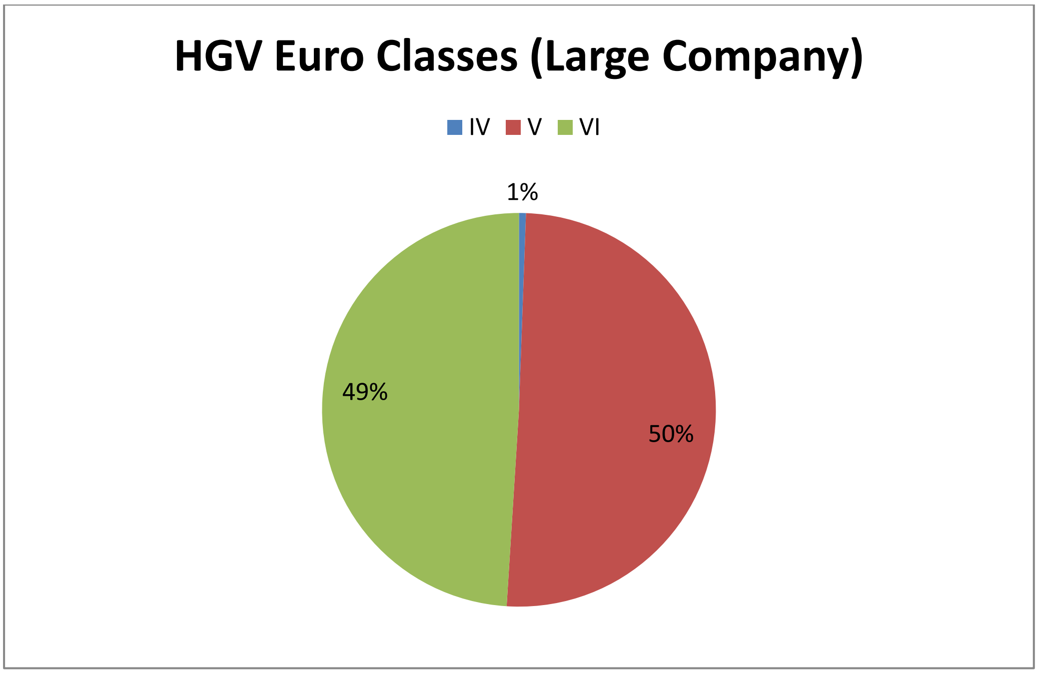
Amongst the companies defined as ‘small’, there were similarly large numbers of vehicles classed as Euro 5 or higher, although a large proportion of respondents either did not respond or omitted some vehicles from their response. Regarding HGVs, four out of 17 companies stated that 100% of their vehicles were Euro 5 or higher, with a further five companies stating they had over 50% of their vehicles as Euro 5 or higher. One company registered 100% of their vehicles as Euro 6, with another two companies with over 50% of HGVs registered as Euro 6. Seven companies elected not to respond to this part of the question.

Regarding LGVs, four companies did not declare any LGVs. Out of the 14 that did, two companies had 100% of their LGV vehicles registered as Euro 5 or higher, with one registering 100% Euro 6. Four companies had at least 50% of their LGVs classed as Euro 5 or higher. Eight companies did not respond to this part of the question. Out of those that did, five companies omitted some vehicles.

Looking back at this question, some of the omissions in part are from vehicles classed as ‘other’ that were not included in the Euro Class information. It was not expected for companies to include ‘other’ vehicles in this section but some did. This could be clarified better when the survey is repeated.

Additionally, one company combined their LGVs and HGVs into one Euro Class section. Whilst this means that all their vehicles were accounted for, it is not possible to determine which vehicle types fall under which Euro Class.

Figure 2: HGV Euro Classes



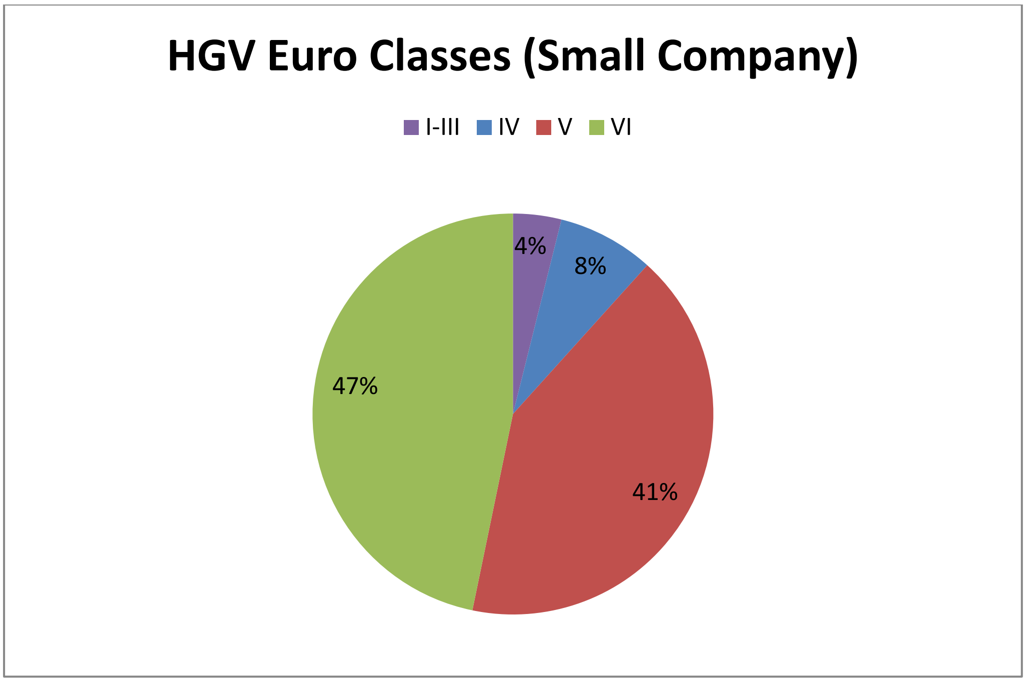
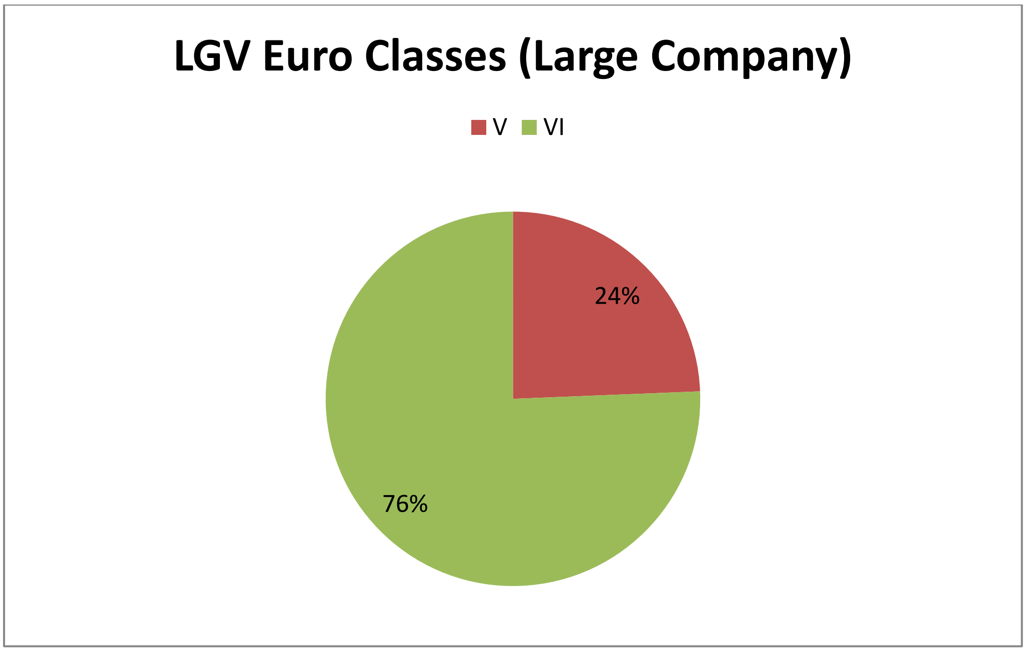
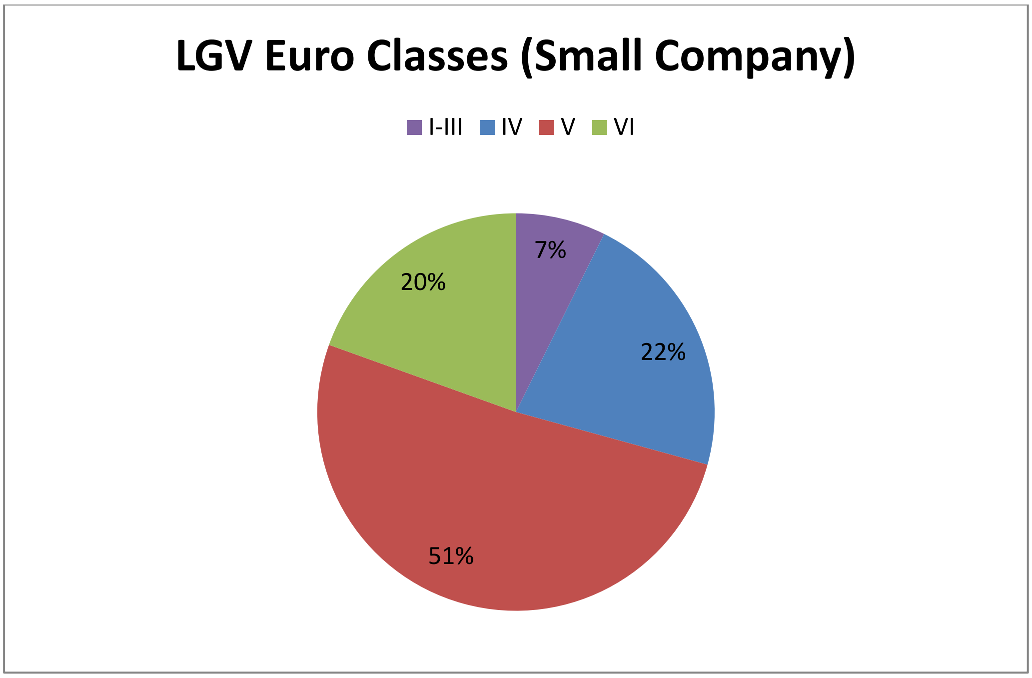


Figure 3: LGV Euro Classes





Looking at the above charts, it is apparent that the companies classed as ‘large’ have a higher proportion of Euro 6 vehicles as well as very limited numbers of vehicles classed as under Euro 5. For companies classed as ‘small’ the mix is more eclectic, although vehicles classed as Euro 5 and higher still dominate. It should be noted particularly amongst HGVs that there is little difference between the proportion of Euro 6 vehicles stated by both ‘large’ and ‘small’ companies. However, the difference in Euro 6 vehicles is far more pronounced for LGVs.

Of course, this is only from the information that is provided. Whilst this should be taken at face value, the aforementioned omissions by both groups of companies could be taken to suggest that the vehicles noted in ‘vehicle type’ category were possibly omitted from the Euro Classification in order to ‘present a positive image’. Due to this, it cannot be ruled out that there may be more vehicles classed as under Euro 5 that were not provided in the survey.

In the survey fuel type was also provided by all companies. Diesel was the only fuel type provided by companies, accounting for 100% of the fuel mix for 25 out of the 27 companies. The two companies where there was less than 100% of vehicles using diesel was due to the number provided totalling less than the number of vehicles stated under vehicle type. Either the fuel type for these vehicles was not listed in the survey, or these vehicles were omitted for another reason.

One comment was provided regarding fuel mix stating that “no European manufacturer yet makes a truck that is as cost effective as diesel.” However they did also comment that this will likely change in the near future and mentioned the Honda Clarity as an example.

Major Flows

This section was well responded to overall by the 23 companies who classed themselves as having access to HGV/LGV vehicles or similar.

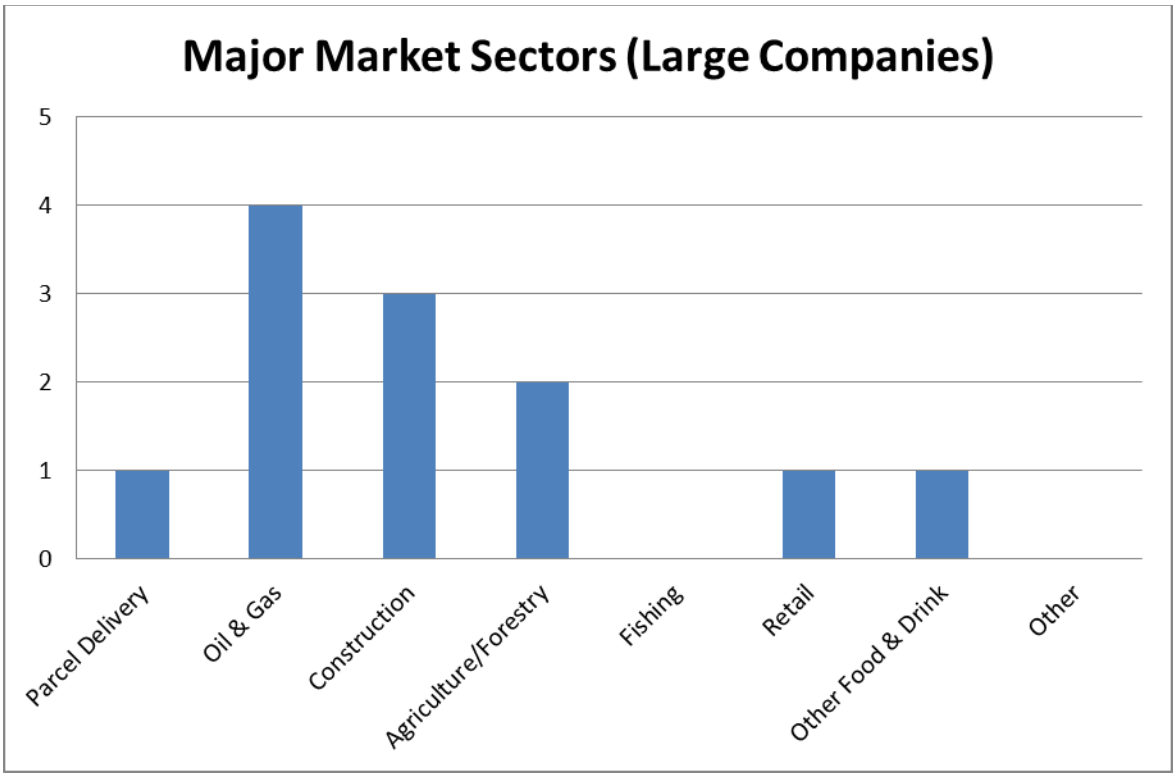
Regarding major market sectors, the majority of companies who responded stated ‘Oil & Gas’ as one of their key markets. At this stage construction companies were not primarily targeted for the purposes of the survey, which may have skewed the results. Regardless, it appears that these two sectors are likely to have a large market share in Aberdeen. However, it can be noted that ‘Fishing’ rated low on the list of market sectors, although this could be attributed to the small pool of respondents.

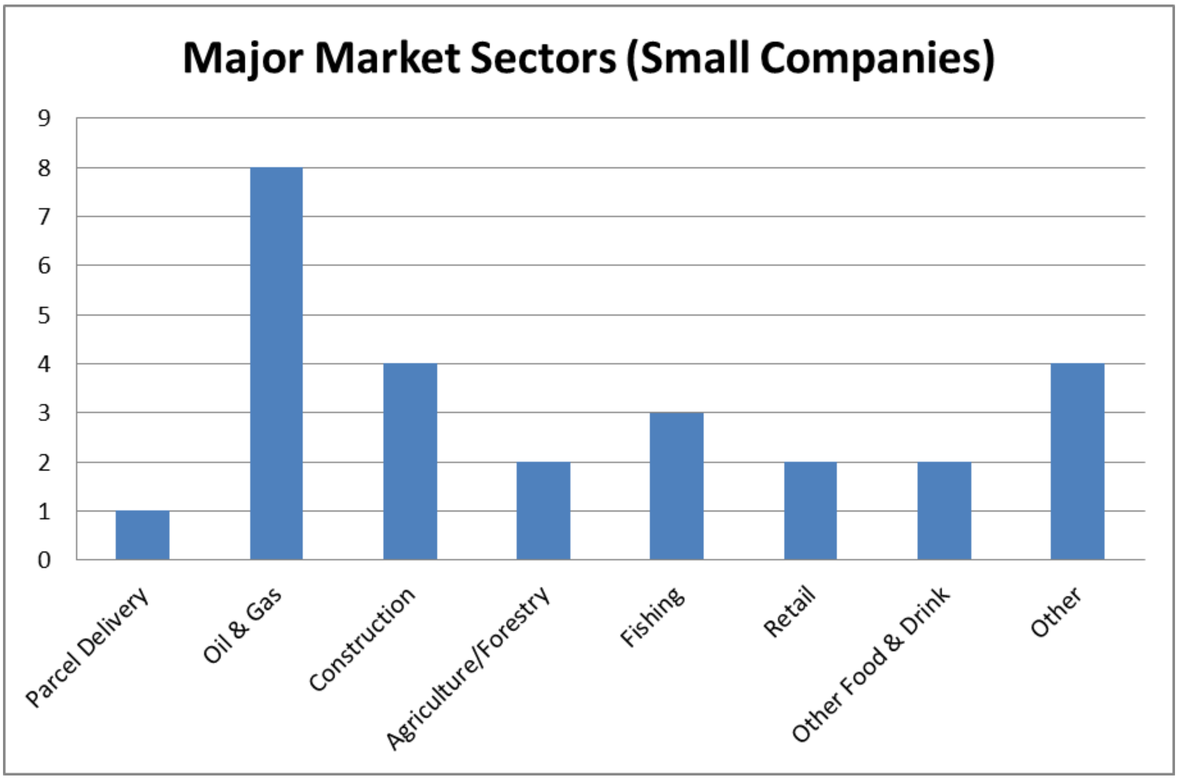
Figure 4

It should also be noted that the majority of companies in the survey (71%) stated that they worked for a single sector. This split was not markedly affected when the companies were split into ‘small’ (72%) or ‘large’ (67%) as defined previously.

Splitting the companies by size also did not markedly affect the split of major market sectors, although it does show a more diverse range of sectors supplied by the ‘small’ companies. However this is likely to be due to the higher number of respondents in the ‘small’ company category, given that the majority of both company types noted a single market served.

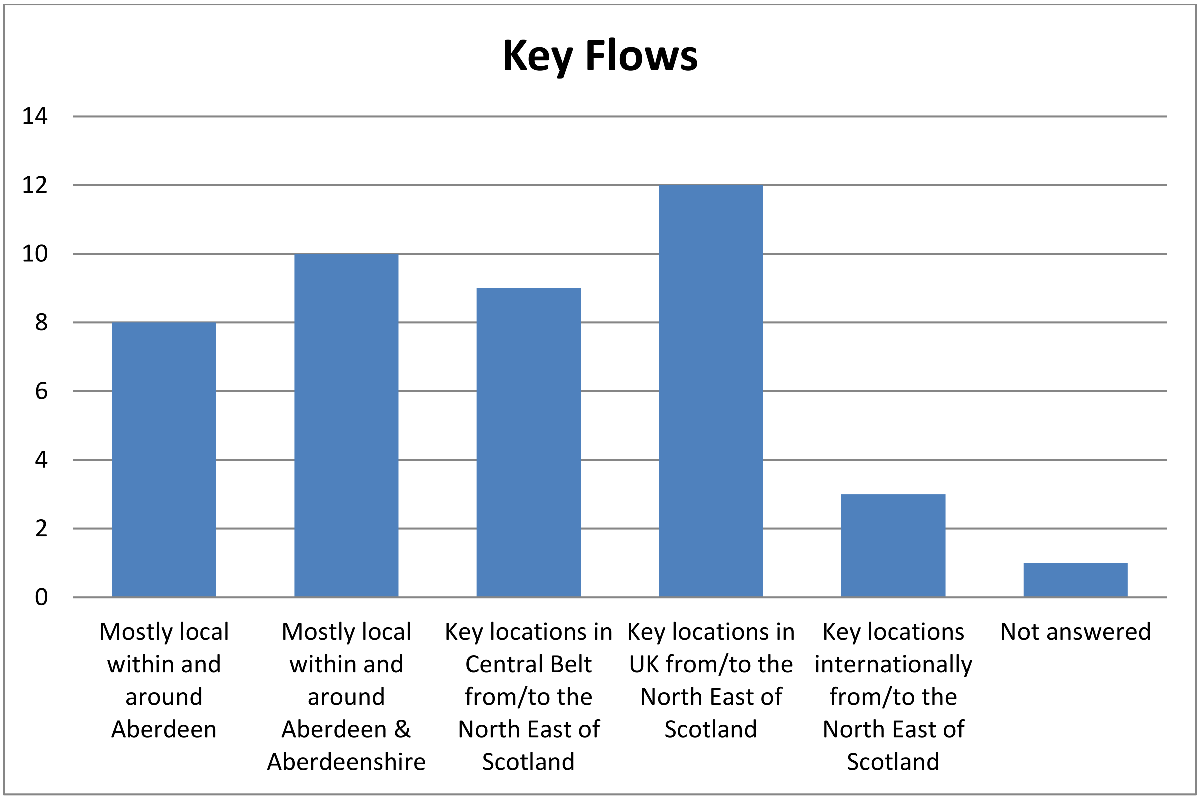
Figure 5





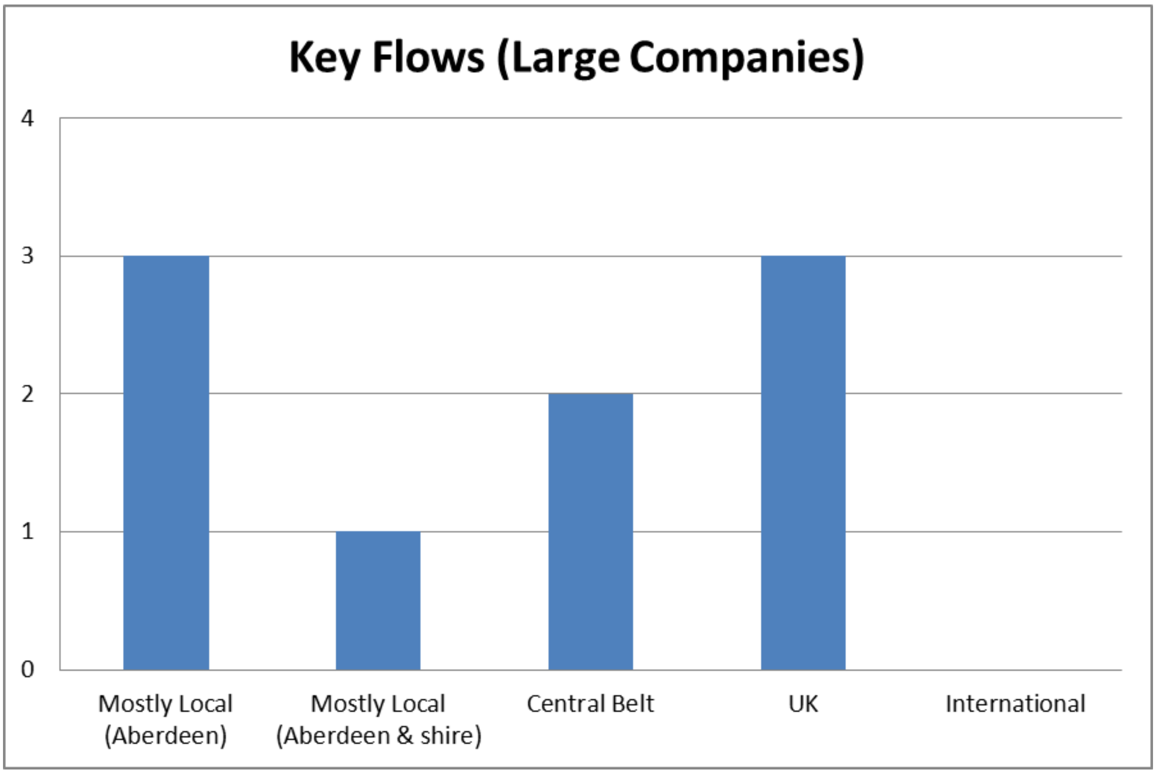
Regarding key flows, the majority of companies (54%) specified a single location. However, locations were split between each option with the majority of companies specifying a flow between the UK to the North East of Scotland.

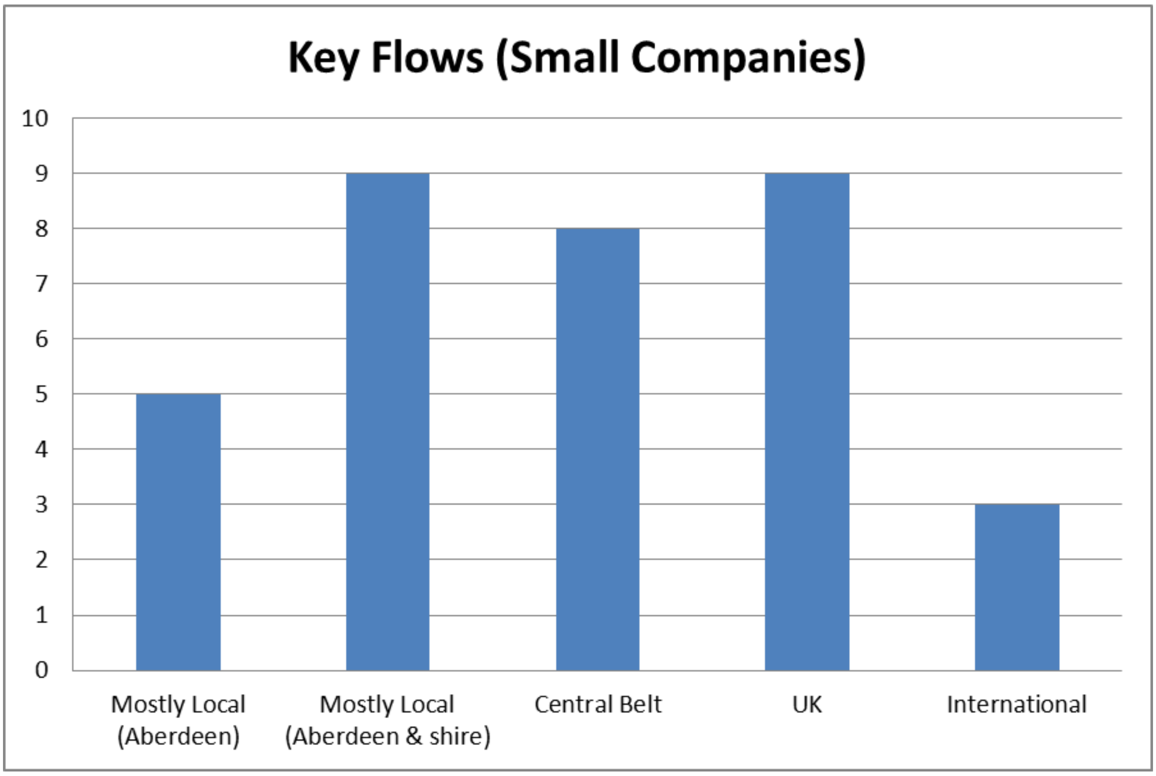
Figure 6



As seen in the figure above, whilst the largest number of companies mentioned flows between the rest of the UK and the North East, this was by a slim margin, with only international flows showing limited numbers. Further breakdown of the responses was carried out to see if there was a difference in locations served by size of company.

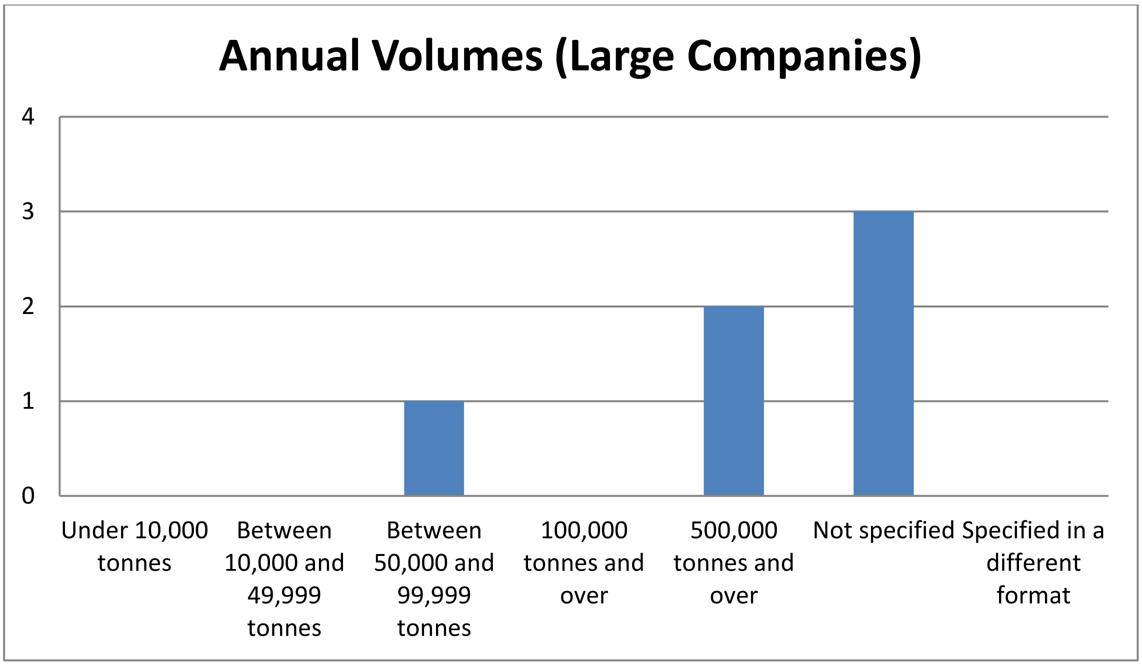
Figure 7

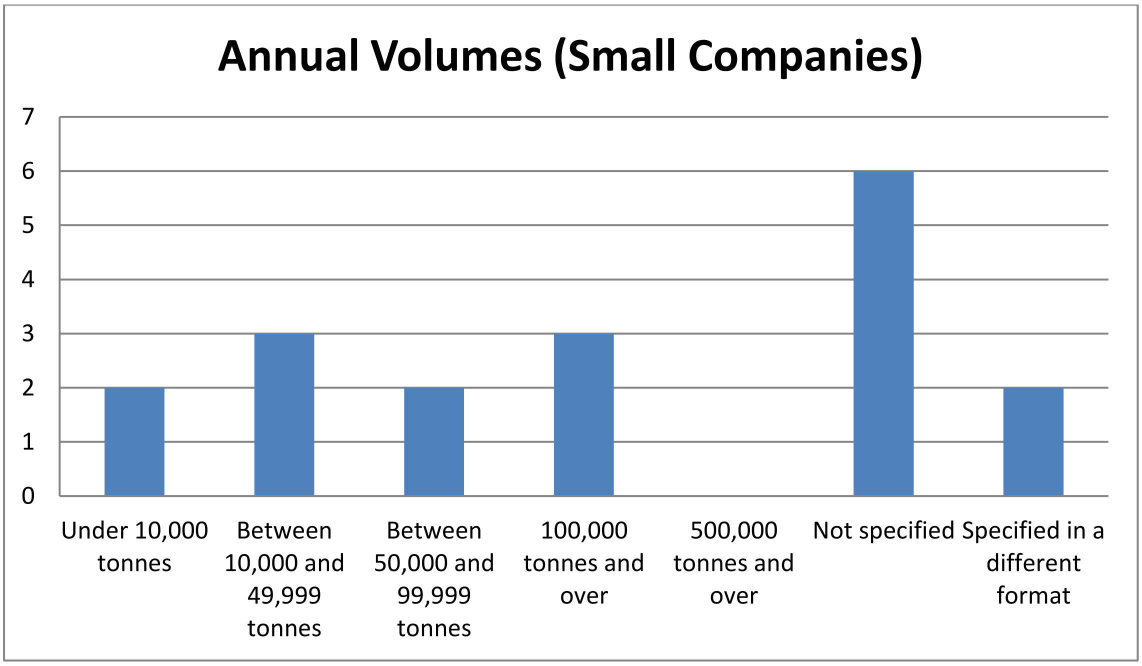




As can be seen above, the ‘large’ companies stated their most significant flows to be either within Aberdeen or from the UK to the North East. However, the ‘small’ companies have more variety of flows, with the majority being within the North East or from the rest of the UK to the North East. It is also only the companies classed as ‘small’ that stated they have international flows. Whether this is done directly by themselves, or is an interpretation of receiving international goods from other forms of freight is a question. It should also be noted that the small pool of 'large' companies may have skewed the lack of variety in the result.

Figure 8





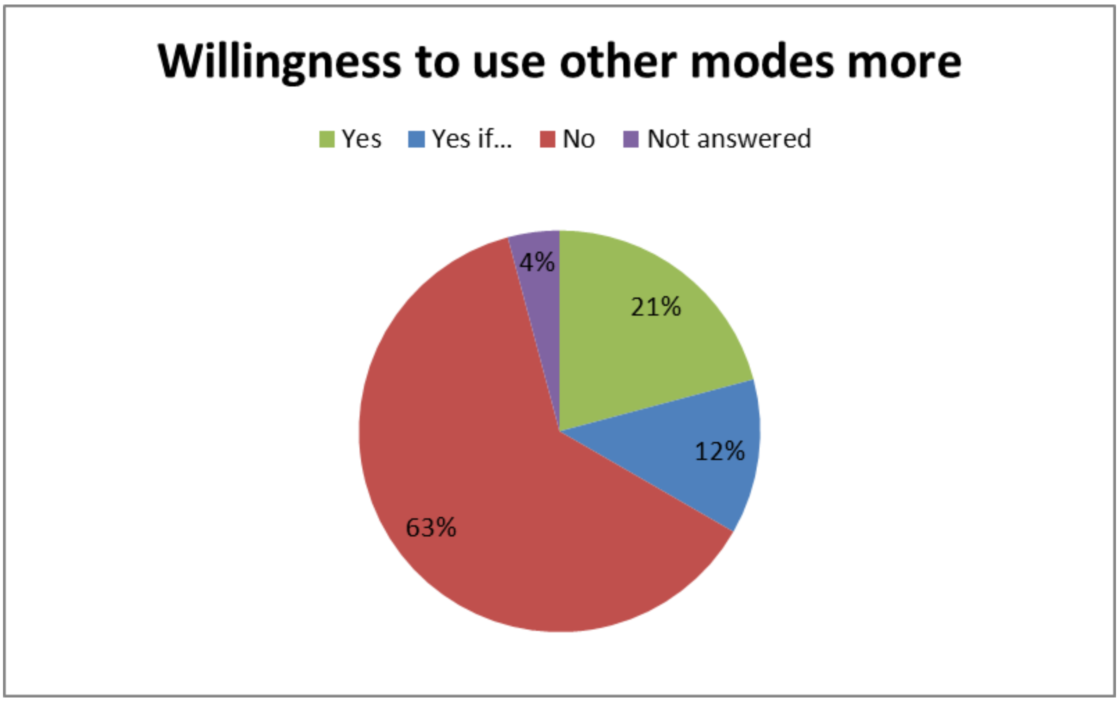
Whilst there is an identifiable spread of volumes, the numbers in each band remain small due to the large number of companies who did not respond to this question. Additionally, whilst a specific unit was not required in the question (in an effort to encourage answers), the two respondents who answered in a different format were unable to be compared to the other companies. Despite this, from the limited information provided there is an identifiable difference between what can be transported by 'large' companies versus 'small', which makes sense when the definition of a company size as done here is through the number of vehicles in use. Given the limited nature of the data, the only key finding is that there is a large variety in the volumes transported by each of the companies, even amongst companies where the number of vehicles are reasonably similar – although in general, and unsurprisingly, as the number of available vehicles rise, so does the annual tonnage.

Alternative Transport

The next section of the survey asked respondents to list any additional forms of freight transport that they used in addition to road transport, and whether they would be willing to use other modes of transport to supplement road freight.

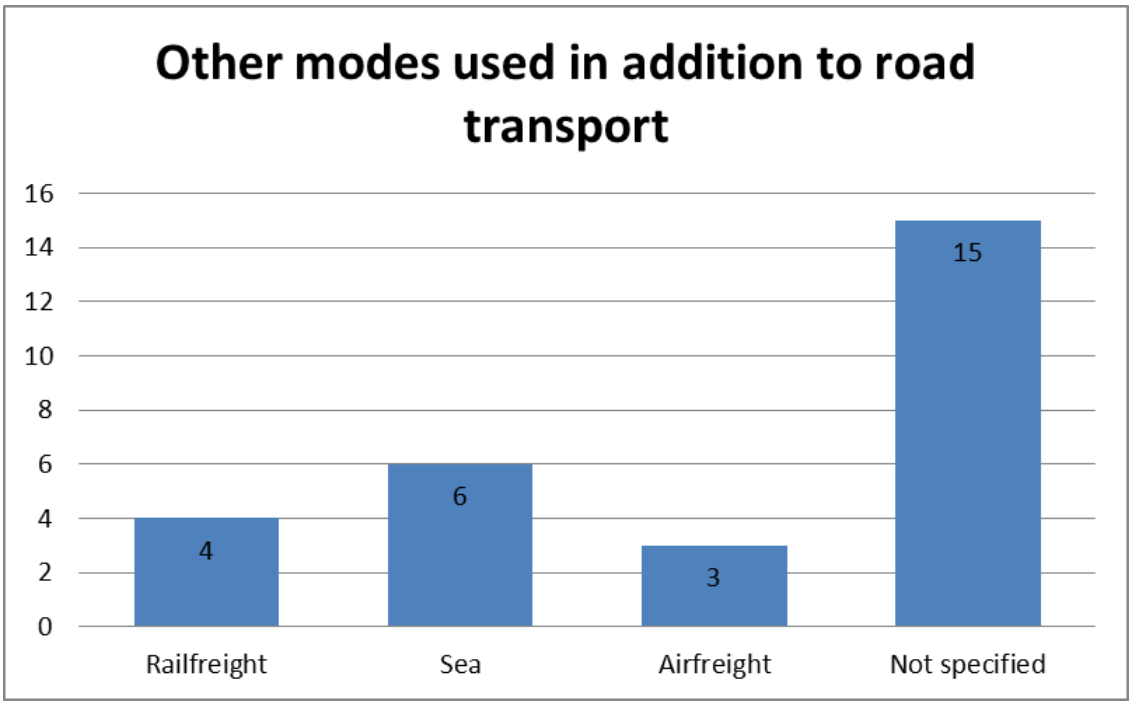
In general, the willingness towards alternative forms of transport was low, with 63% of all respondents answering that they would not be willing to use other modes more.

Figure 9



However, it should be noted that nine out of 27 respondents did already use at least one other mode of transport in addition to road freight, and three companies stated that they used multiple modes of transport in addition to road freight.

Figure 10



Breaking this information down further, out of the companies previously defined as ‘large’, four out of the six companies stated that they use other modes in addition to road transport. The two who did not say that they used other modes, either said that they were uninterested in doing so, or did not answer the question on willingness. Two of the companies who said that they did currently use other modes answered that they were not prepared to use other modes more.

Four out of 17 of the companies previously defined as ‘small’ said that they use other modes in addition to road transport. Ten of the 13 companies who did not use other modes answered no to the question regarding willingness to use other modes more. Two of the companies who said that they did currently use other modes answered that they were not prepared to use other modes more.

Five out of 17 ‘small’ companies said yes to the potential for using other modes more compared to two of the six ‘large’ companies.

The reasoning behind not being amenable to using other modes of transport more, or what it would take to do so, was well answered. The majority of the responses regarding cost, time constraints and the location of their business/destinations as the key factors limiting the use of other modes of transport besides road transport.

Some of the comments were as follows:

“Completely impractical for our type of business. We deliver/collect machinery throughout Aberdeen and Shire”.

“We distribute small, medium and large packages with our own fleet of vans and trucks with short lead times which would not work with sea or rail”.

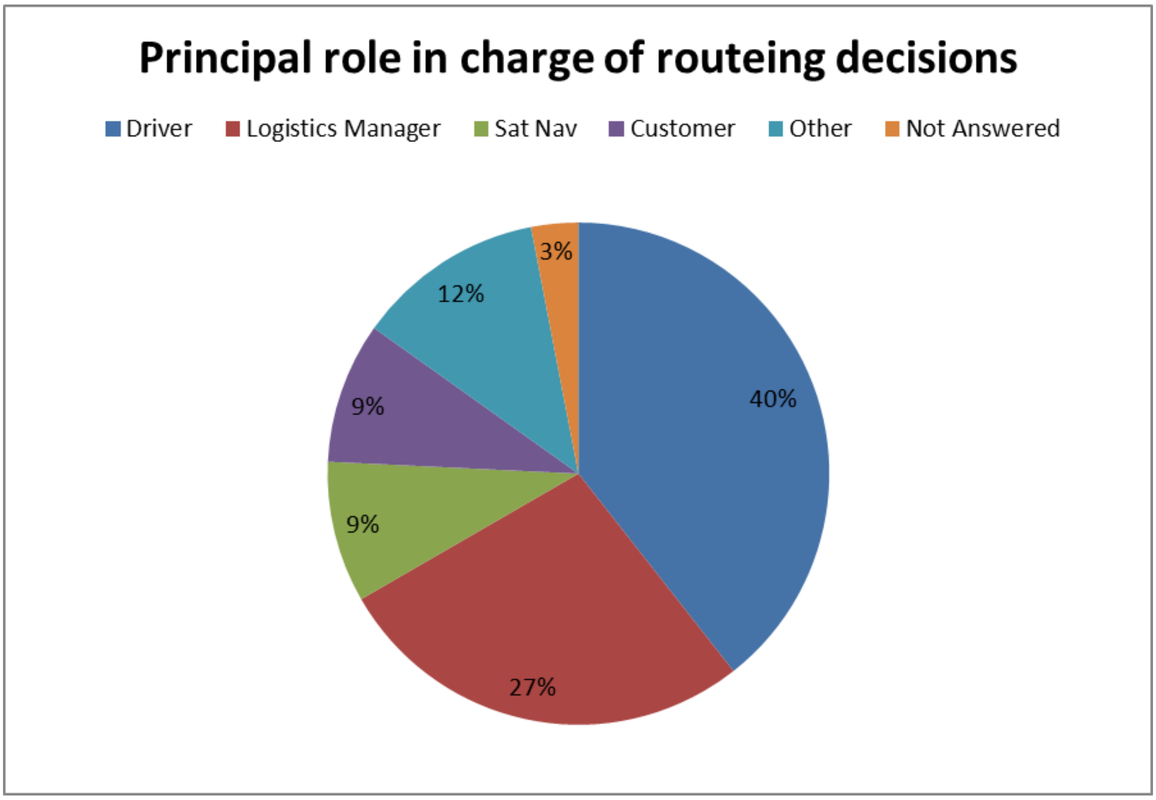
“Too costly and complicated to transfer goods over from customer to building site”.

“If rail was available in the Peterhead area, this would provide a fast method of inland distribution”.

Routeing Considerations

This section provided some detail with regards to who makes routeing decisions. By far the highest response was that routeing decisions were primarily made by the driver, with 13 of the 27 respondents listing driver as one of the key people in charge of routeing decisions. This is compared to only nine companies detailing a Logistics Manager as one of the key people in charge of decisions.

Figure 11



Breaking this down further, it becomes clear that there is little difference between 'small' companies and 'large' companies, with driver being listed as one of the route decision makers by four out of six 'large' companies. The Logistics manager was listed as making routeing decisions by only two out of the large companies.

Alternatively Sat Navs, which were indicated by three companies overall, were listed as one of the key decision makers by two of the six 'large' companies. The 'large' company who listed none of these options commented that 'it depended on the destination'.

Not all respondents listed only one option, with seven of the 17 companies picking multiple options regarding who makes routeing decisions. From the six 'large' companies, two provided multiple options with one saying both driver and sat nav played a part, whilst another listed all of the options as playing a part in the decision making process.

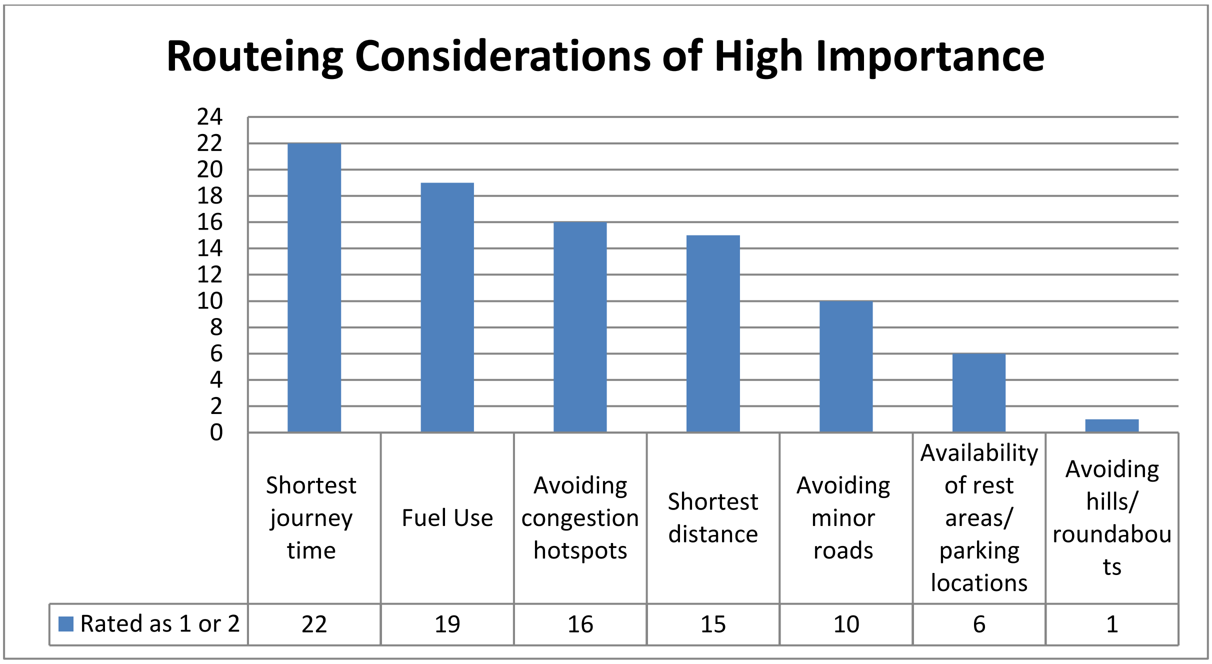
Looking at this breakdown, this has the potential to create some extra barriers in relations with operators and creating new routes for Aberdeen and Aberdeenshire. This is due to the majority of consultation likely being with those involved with companies at a higher level. If it is the drivers who do ultimately make the decisions regarding routeing, then this will need to be considered in future engagement. As commented by one of the respondents “Drivers have preferred routes. You can dictate a route but it’s another story if they actually follow that”.

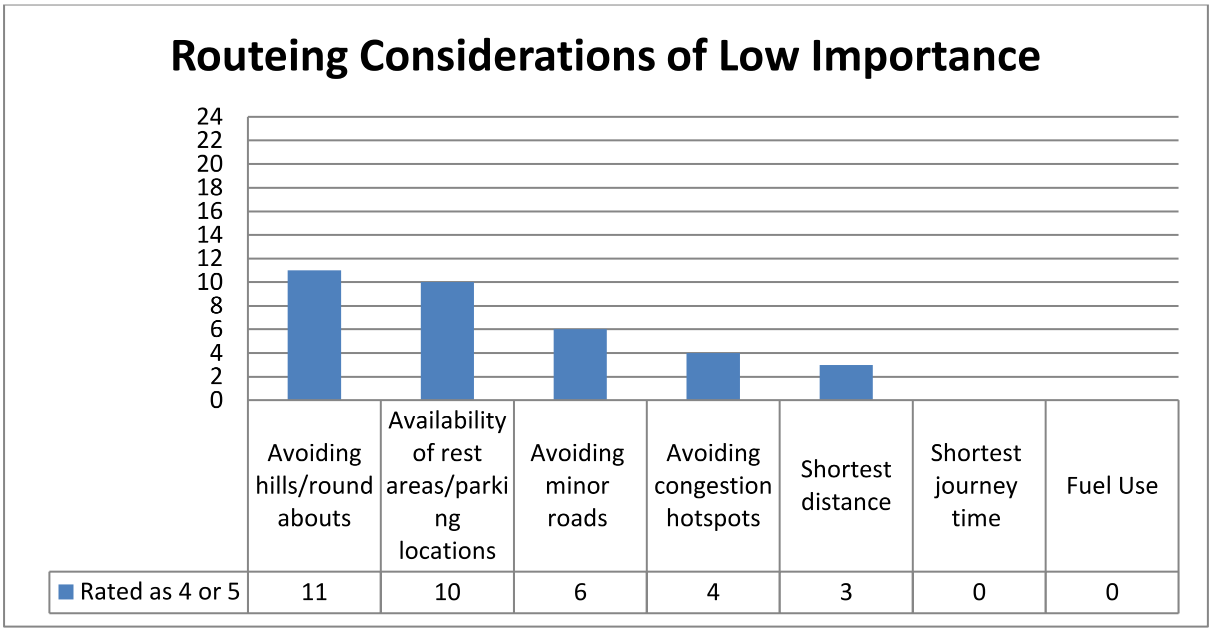
Looking at the importance of factors determining routeing, some assumptions were made in order to make conclusions from the data.

A number of companies rated multiple answers the same, allowing for more than one factor to be given a particularly high or low rating. In order to assess this data, the numbers were put into three bands: 1 and 2 meaning that the factor was particularly important, 4 and 5 meaning that the factor was particularly unimportant, and 3 meaning that the factor did not provide enough of a strong reaction (and so was disregarded).

Using this method, the following graphs were generated and some clear patterns emerged.

Figure 12





Shortest journey time was rated almost unanimously as being one of the most important considerations on routeing, followed by fuel use. Alternatively, avoiding hills/roundabouts was considered as being of particularly low importance, followed by the availability of rest areas.

Breaking this down more, all six ‘large’ companies listed fuel use and shortest journey times as particularly important factors in routeing, whilst avoiding congestion hotspots was identified as particularly important by four out of the six companies. Meanwhile, shortest distance was also considered important, with five out of six large companies considering it as particularly important.

As to what was not important, this was less evident in the ‘large’ companies as they had a tendency to score more strongly in what they favoured, rather than what they didn’t favour – using the middle ground of 3 where some of the ‘small’ companies scored more strongly against. One of the six ‘large’ companies indicated that avoiding hills and roundabouts was particularly unimportant, although one ‘large’ company also considered it to be particularly important.

Similarly, two of the six ‘large’ companies indicated that the availability of rest stops was particularly unimportant, whilst two regarded it as being particularly important.

Following from this, whilst there are a couple of outliers, the key message was that most companies felt more strongly about what was important to them on the whole, rather than about what was less important. This makes sense given that all of these considerations still have the potential to positively or negatively affect a journey.

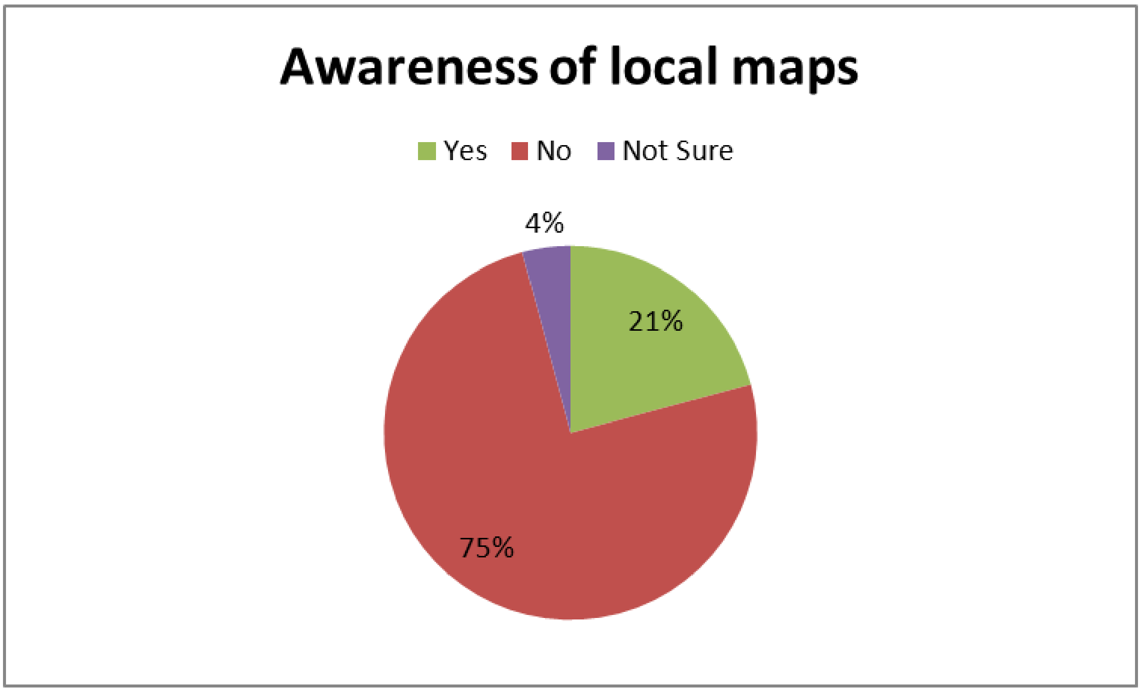
Whilst shortest distance was an important factor, the fact that there was a clear highest score for shortest journey time is very positive with regards to the proposed AWPR. Whilst the AWPR may result in some longer journeys, it has the potential to greatly reduce journey times when traffic can avoid the city centre. The results of this question provide an indicator that this may be welcomed by drivers, despite longer distances, as long as the shorter journey time is highlighted from the outset.

Route Maps

This section of the questionnaire provided mixed results and unfortunately respondents elected to provide minimum information regarding their specific routes. Due to this, there was not much information gleaned from this section and so further information on freight routes may need to be confirmed by other means.

Regarding awareness, the level of awareness was low overall, with 75% of all respondents unaware of the existence of the current route maps.

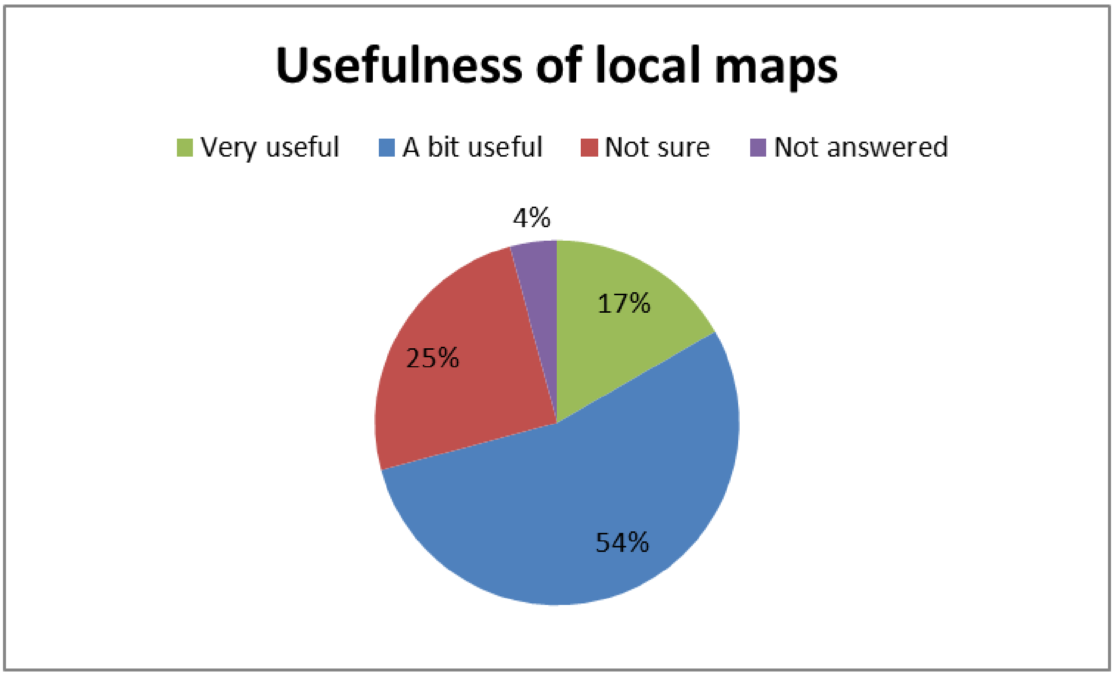
Figure 13



Breaking down the figures more, three of the six companies previously defined as ‘large’ were aware of the current route maps, whilst only two of the 17 companies previously classed as ‘small’ were aware. This suggests that any future freight routing maps should be more widely and more regularly promoted, although how best to do this remains to be seen. Given the success that the Road Haulage Association and the Freight Transport Association had in providing additional contacts in the freight industry, these could provide good starting points for promoting any new freight routeing strategy in the north east of Scotland.

Whilst awareness was low, there was a tentatively positive response to the existence of freight routeing maps, with no companies acknowledging the maps as being ‘not useful’. All except one of the respondents answered the question, with 71% of the respondents stating that local maps were or could be in some way useful.

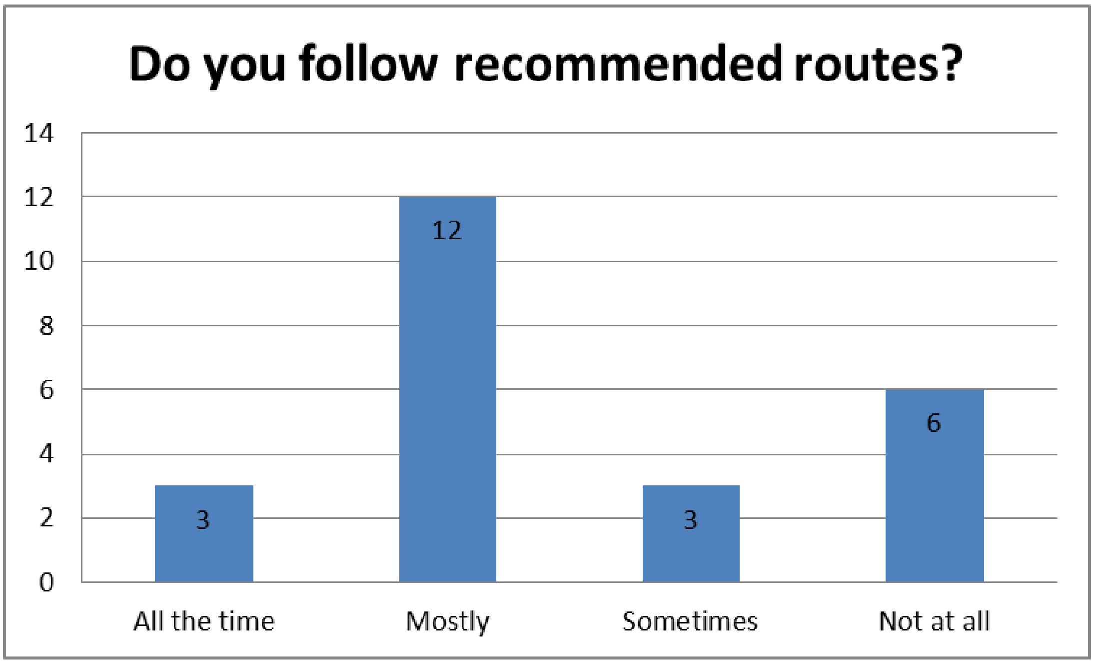
Figure 14



This was agreed by both the ‘small’ and ‘large’ companies, with four of the six ‘large’ companies rating the maps as either ‘very useful’ or ‘a bit useful’, whilst 13 out of 18 small companies rated the maps as either ‘very useful’ or ‘a bit useful’. One company did comment that the maps could be improved by providing a more detailed city map of recommended routes, whilst another company commented that the influence their customers have on delivery locations limits the effectiveness of any routeing maps.

Whilst any specific information regarding routeing was limited, the majority of respondents did agree that they followed the recommended routes either ‘all of the time’ or ‘most of the time’. However, this is likely due to the recommended routes currently being the main routes into the city. Also, without further information it is difficult to confirm this.

Figure 15



Breaking down the information, there was no correlation to following the routes depending on fleet/company size, with two 'large' companies saying that they never follow the recommended routes, and four 'small' companies admitting to never following the recommended routes. Likewise two 'large' companies said that they follow the recommended routes 'all the time', whilst one 'small' company said that they also follow the recommended routes 'all the time'.

Whilst specific information was not provided by any company, some comments were added, with one company commenting that they did not use the recommended routes at all because "our vehicles are mainly used around the port area. Logistic companies delivering to and from the port". Also in justification as to why another company did not follow the recommended routes, they added "because we were unaware they existed". On the other hand, another company who noted that they followed the recommended routes 'all the time' added that "some of the clients have requested that certain roads throughout the city are not used by the HGVs." This company in question admitted that they were not initially aware of the recommended route maps. As such it should possibly be followed up as to whether the routes that clients have requested HGVs not to use follow the recommended routeing, or whether there are additional routes that have been blacklisted by certain clients, and if so why.

Not many respondents provided an answer to the question asking to provide a description and reason of any routes they used that were not recommended in the maps. The comments that were provided included:

"The routes taken are varied depending on delivery location. The highlighted routes shown are only for through traffic".

"Unable to describe as the nature of our business sends us to various locations off the main routes".

"Drivers have preferred routes. You can dictate a route but it's another story if they actually follow that".

“There are almost no routes in the UK that Road Hauliers will not nor cannot use, as it is the customer who dictate where we deliver to”.

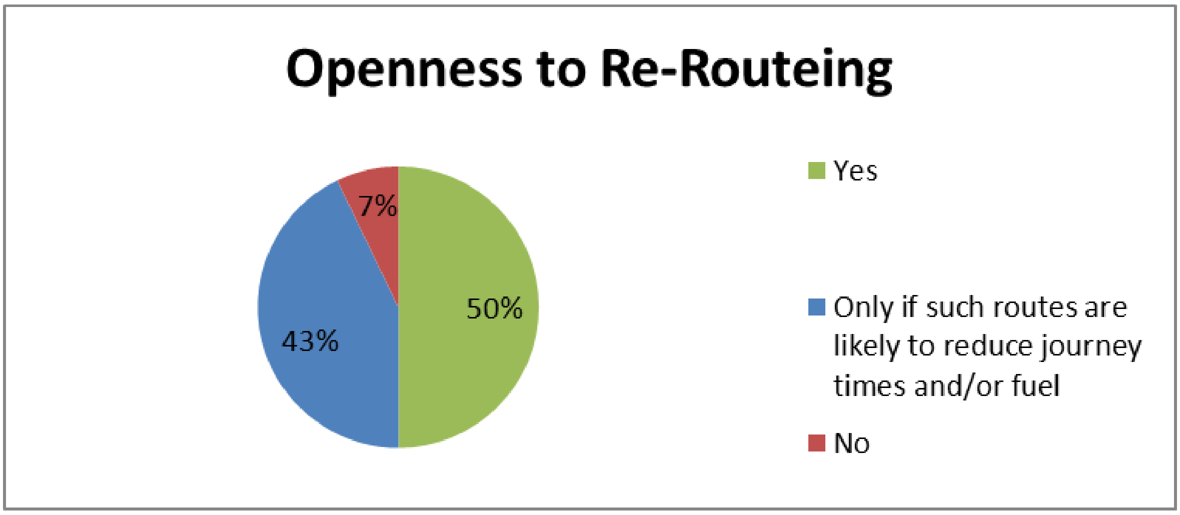
Looking at the comments above, the key indication appears that a lot of the routeing depends on where the client is based, or where the client requires the goods to be delivered. This also suggests that not all of the operators are delivering to the key city centre locations all of the time, or are simply passing around the city. Without more information, it is difficult to make definite conclusions, but it could be argued that in order to ensure that operators follow recommended routes then these routes need to ensure flexibility. Looking at the responses, particularly in light of the majority of routes being dictated by customers or drivers, then operators cannot feel restricted in the paths that they take. Any attempt to force operators onto particular routes around or into the city may be met with opposition and be difficult to enforce.

AWPR & Re-routeing

In order to ensure that companies who used freight hauliers but may not have access to vehicles themselves were involved in any routeing process, this section was opened up to all respondents. It should be noted that looking at the previous assertions of emphasis on routeing being partly on the customer, that in hindsight the previous section on route maps may have been advantageous to being opened up to all respondents as well. This is an angle that could be taken forward in future engagement.

Looking at the breakdown of all responses, the initial response to re-routing is positive, with 50% of all respondents open to the concept of re-routeing after the opening of the AWPR, with a further 43% open to the concept as long as the routes are likely to reduce journey times and/or fuel consumption.

Figure 16

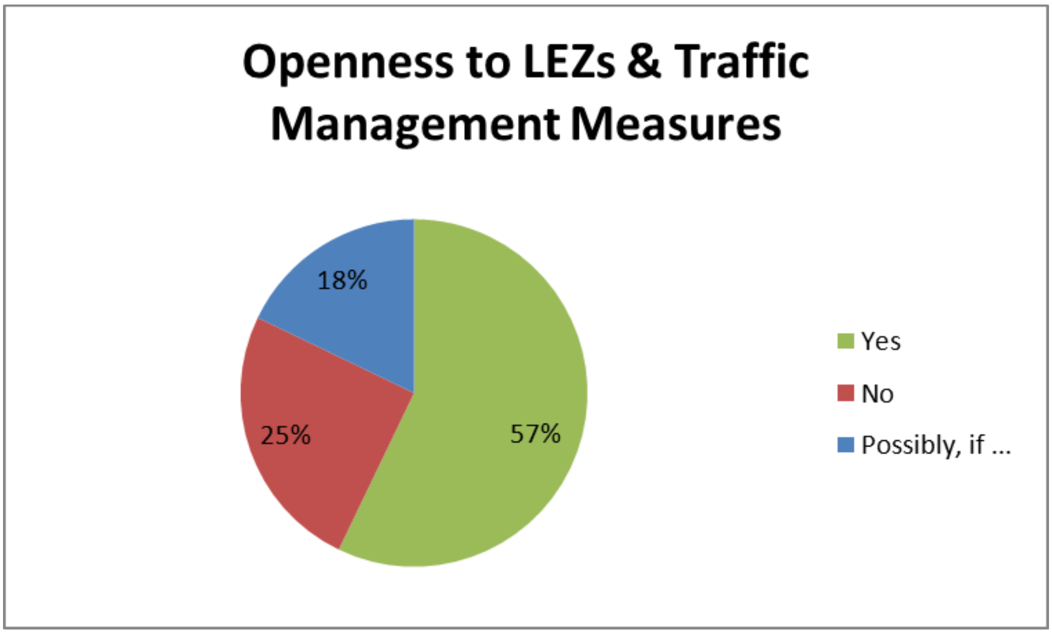


Breaking down by size, all of the companies previously identified as 'large' were willing to re-route, with three identifying that they would consider doing so but only if such routes were likely to reduce journey times and/or fuel.

Out of the four companies who did not have access to their own vehicles, two were not willing to re-route any vehicles they were involved with, and were the only respondents that answered as such. Both were harbour based and commented that the location of the harbour restricted any routeing changes that could be made, with routes affecting them still needing to be made via the city centre.

Openness to LEZs and traffic management measures was also positive, although many comments were also added. Several of these involved the location of the harbour.

Figure 17



Over half of the respondents again stated that they would be open to such measures, with a further 18% open to the measure but dependent on certain factors. Four out of five companies who chose this option stated their reasons, with factors including that it should not only target freight vehicles, that impact to operators must be reasonable and that any changes did not subject companies who needed to enter the city centre (particularly the harbour) to undue penalties.

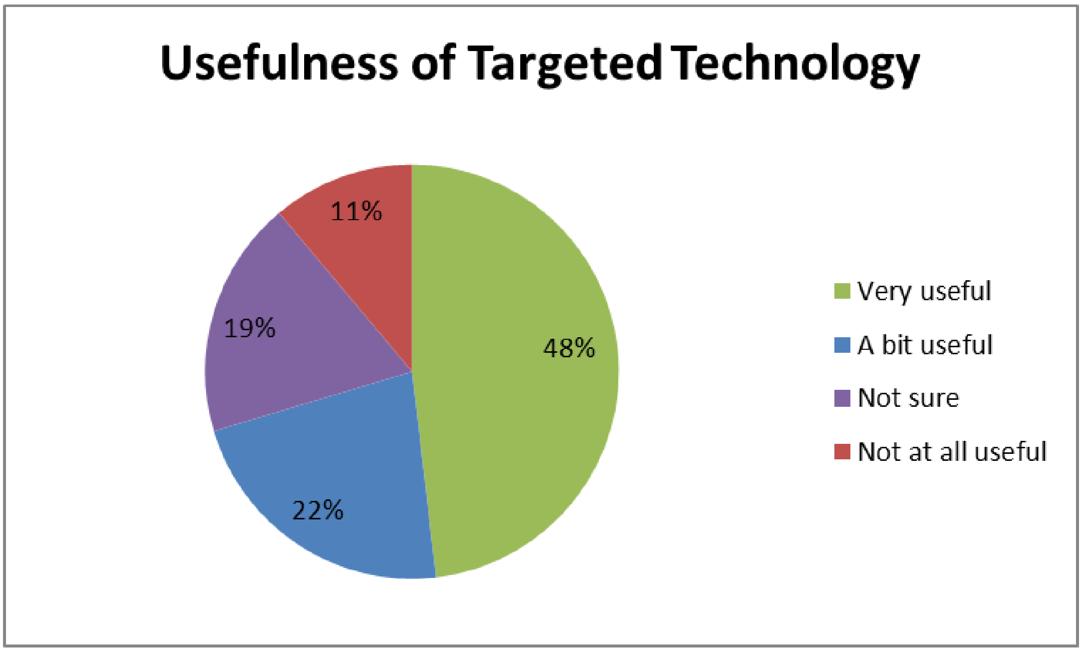
Breaking the answers down further found that five of the six 'large' companies would support potential measures to encourage traffic onto the AWPR and one said that they would not. However, no comments were added by any of these companies stating reasoning for these answers.

Out of the organisations/companies who do not have direct access to vehicles, only one was opposed to all measures, with both companies who were opposed to re-routeing being open to other measures, although they did not comment on any factors or reasoning that would affect this decision.

The respondent that did not support any measures commented that this was due to the potential for them increasing delivery cost without cutting journey times.

Usefulness of targeted technology was a more mixed response, although nearly half of respondents (48%) felt that it could be very useful.

Figure 18



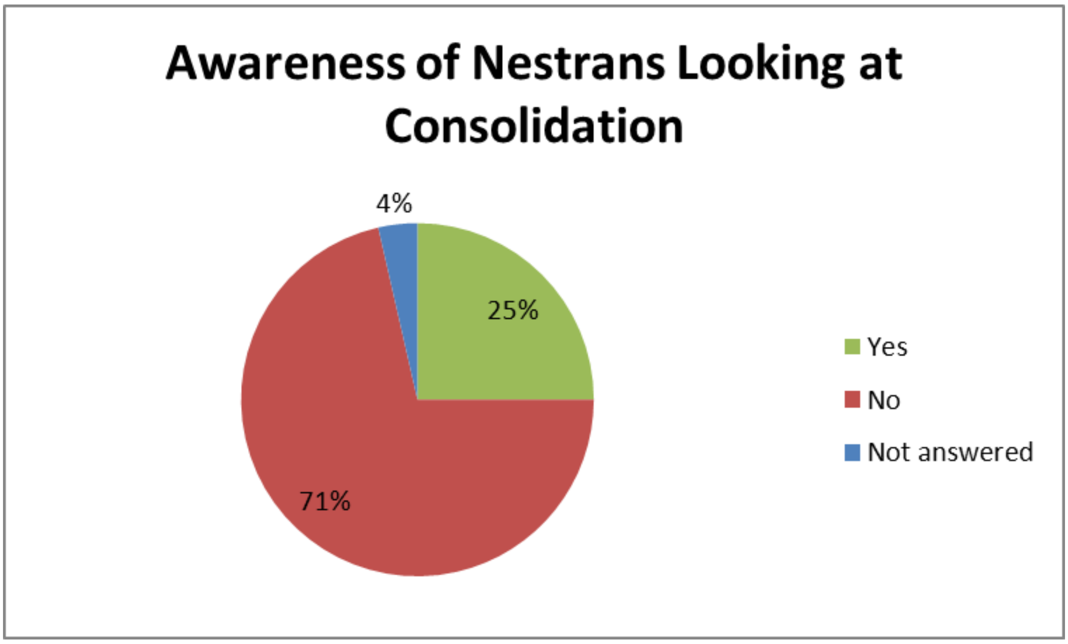
Of the companies previously described as 'large', half felt that targeted technology such as an app or sat nav could be very useful. None thought that it would be not at all useful, although two were not sure as to the potential usefulness of such local technology.

Of the organisations/companies who did not have access to vehicles, they felt that it could either be a bit useful, or we not sure. Three of the companies previously defined as 'small' regarded local targeted technology as being not at all useful, with one company commenting that "this would not help our business but might aid transport from other areas visiting the city".

Consolidation & Low Emissions Vehicles

As a whole, the prospect of consolidation was met with primarily negative responses. However, it should be noted that as no concept of how this consolidation would take place or whether it would be a physical structure, this may be a factor. This is in line with the generally negative responses to physical consolidation centres in studies elsewhere. Care should be taken moving forward to take comments on board for designing how such a policy or physical facility would function, and what industries it would look to appeal to.

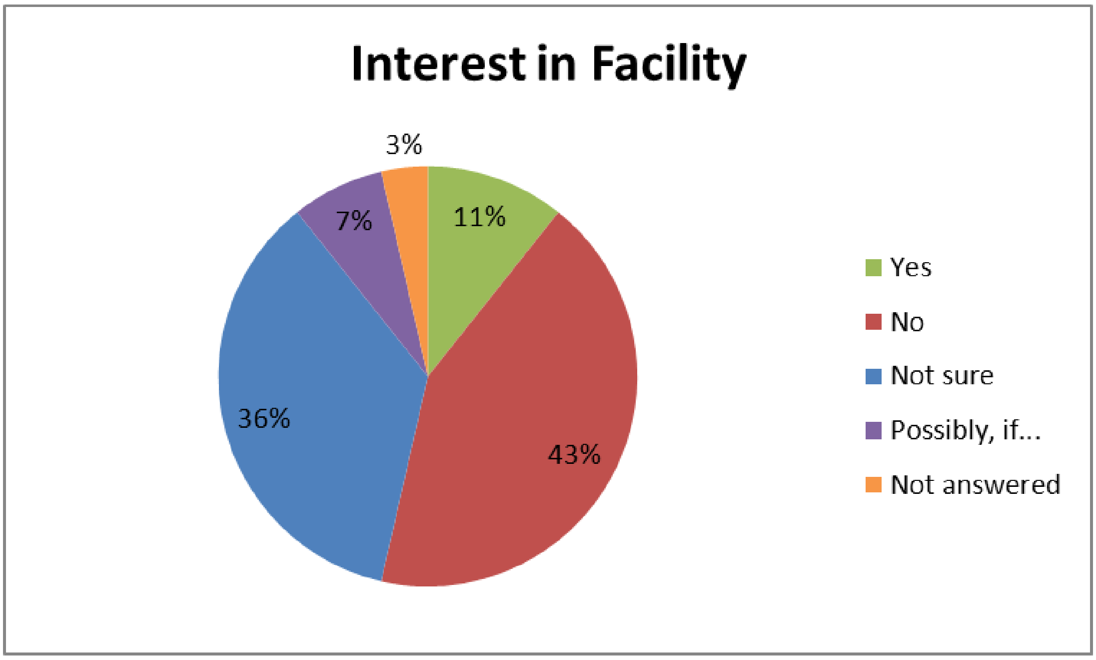
Figure 19



The awareness that Nestrans was looking at consolidation as an option for freight was low. This is possibly because of the limited contact most hauliers have had with Nestrans until now. Of the seven companies that were aware, this consisted entirely of companies that have been previously involved with the Freight Forum.

Regarding a possible interest in consolidation, 11% of the respondents said 'yes', compared to 43% answering 'no', and a further 36% answering 'not sure'. In numbers this corresponds to three saying 'yes', 12 saying 'no' and 10 saying 'not sure'.

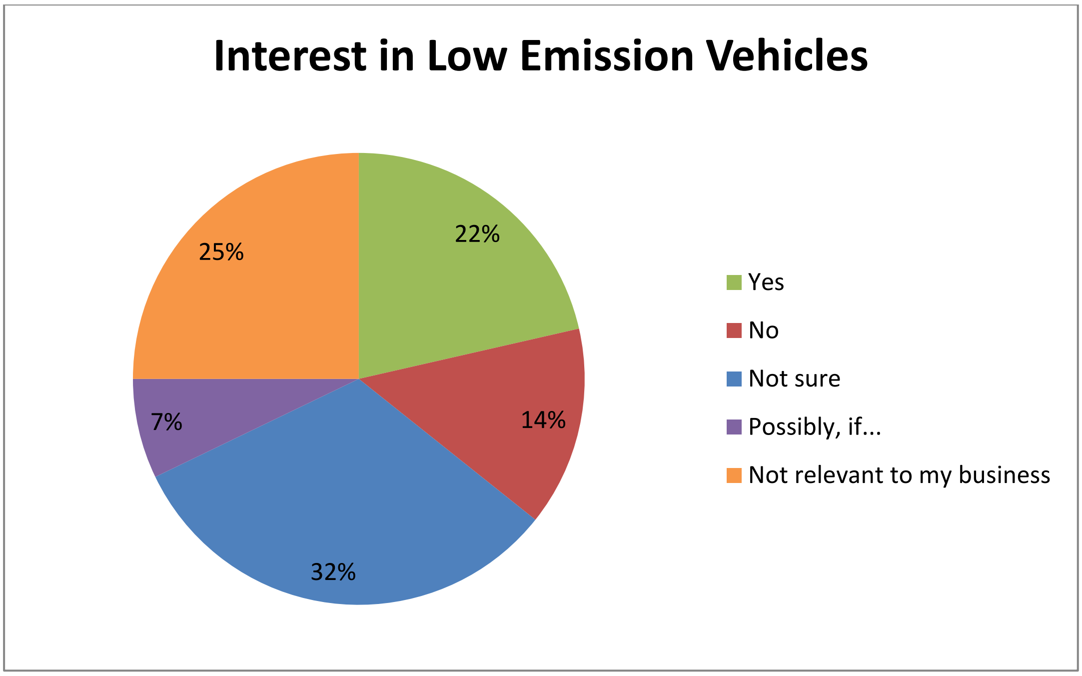
Figure 20



Breaking this down further, three of the six ‘large’ companies said they were not sure whether they would be interested in consolidation, with two saying ‘no’ and one saying ‘possibly’. All of the non-vehicle operating organisations/companies were unsure as to whether they would be interested, whilst all three of the affirmative answers came from the companies classed as ‘small’. The majority of focus was on the potential for increased cost caused by such a facility, with one respondent adding that a single large Euro 6 vehicle is likely to be less polluting that numerous vans.

Interest in the use of low emission vehicles was mixed, but generated a more positive response than consolidation. 29% of respondents were potentially interested in low emission vehicles, compared to 14% who were not interested. It would be useful to confirm why the 25% who felt that it was not relevant to their business felt this way, as it could be that there are options that have not been considered by the respondents.

Figure 21



Breaking this down further, again the majority of companies most open to the possibility were those who were classed as ‘small’, with smaller fleets. Out of the companies defined as ‘large’, four answered ‘not sure’, one said ‘no’ and one said ‘possibly’. Similarly, of the companies who said they did not have direct access to vehicles, one said they would be interested in low emission vehicles, one said ‘not sure’ and two said that low emission vehicles were not relevant to their business. Of these two companies who said it was not relevant, one was the Grampian Timber Transport Group since timber can only be transported by certain types of vehicles. Given that low emission vehicles currently do not cover vehicles such as those designed to transport timber, this makes sense. However, as technology changes it could be a topic to revisit with this industry in the future.

There were limited comments regarding low emissions vehicles specifically, with the majority of companies preferring to comment on the potential for a consolidation centre. However, from those who did comments, the issue of cost was again brought up. Another company also commented that “whilst we would be happy to consider the use of low emission vehicles, there are safety concerns when loading within a fuel terminal”. Speaking of alternative fuels in general, another company commented that they have previously tried many variants of alternative fuels and so far have not been happy with the results. This comment in particular could be good to follow up on, in order to gain a better understanding of why this operator did not feel that alternative fuels worked for their business.

Respondents were finally invited to provide final comments about consolidation or anything that they felt was important and that had not been covered in previous sections. Of particular note, the Freight Transport Association commented that both consolidation and low emissions vehicles “need to be considered as part of potential solutions of environmental issues, rather than being presupposed as the solution”.

Aberdeen Harbour Board, whilst they commented that they were unable to influence the delivery pattern to the harbour, were positive to the general idea of consolidation, commenting that:

"Aberdeen Harbour Board own the facility known as the Nord Centre. This facility has excellent warehousing and ability to accommodate multi-vehicle drop offs. Close proximity to the city too. I would like Nestrans to consider this location and respond".

Conclusions

As noted previously, it is difficult to form firm conclusions from such a small sample of respondents, particularly with a large variety of industries and sizes. However, a key point that can be taken from this survey is that, overall, hauliers are not necessarily resistant to change. The majority of operators were open to changing their routeing, as long as they did not feel that it had a particularly negative effect on their business, whilst a number were also open to the idea of either consolidation and/or using more low emissions vehicles if appropriate.

The comment by the Freight Transport Association is key: that none of the ideas posed in the questions should be taken as a solution on their own, rather that a package of measures is going to need to be designed in order to meet the needs of the variety of businesses in the north east of Scotland. With the focus of some of the operators being on the decisions made by their clients, it is important to ensure that good engagement is made with these clients, starting with the retail industry as a first point of contact. An initial approach to the Scottish Retail Consortium has been made, and these responses prove that it is important to ensure that retailers are on side.

There was also a lack of responses from construction companies to the survey. Given that they have been open to the idea of consolidation in studies undertaken elsewhere, as well as the large amount of construction currently ongoing in the north east of Scotland, this is an important industry to collaborate and engage with moving forward.

Finally, looking at the comments made by those that responded to the survey, it is important to emphasise that none of the actions due to be designed and implemented will be done with the intent of negatively impacting the freight industry. Despite providing open questions where possible, many comments show an air of suspicion over what will happen once the AWPR opens, particularly with regards to harbour access and routes through the city centre.

These appear to be two of the most contentious areas and will need careful consideration due to the number of vehicles and volumes that require access to the harbour, as well as its proximity to the city centre, as well as the current air quality management zones. It is important to understand not only which companies require access to the harbour, but also what direction they need to travel from and whether there are additional locations served. In order to achieve this understanding, further engagement is required although there is scope that this could be more productive with some preliminary designs in place that stakeholders can comment on.

Appendix A: Survey & Responses

Initial Assessment of Freight in Aberdeen & Aberdeenshire

General Information

Company Primary Location:

Aberdeen	10
Aberdeenshire	7
North of Scotland	3
Central Belt	6
Other UK	2

Are you are aware that Nestrans and the local authorities work in collaboration with freight interests in the north east of Scotland to try and ensure channels of communication and provide a voice for freight (through the North East Freight Forum)?

Have you, or a colleague, attended North East Freight Forum meetings in the past?

28 responded
18 aware of the North East Freight Forum
9 have previously attended the North East Freight Forum

Fleet

For the purpose of clarity, the terms in the following questions are as follows:

HGV = Heavy Goods Vehicles >3.5 tonnes
LGV = Light Goods Vehicles <3.5 tonnes

Do you own, or have use of, HGVs, LGVs or vans?

28 responded
24 respondents own or have use of above vehicles

Approximately how many vehicles in your fleet are based in Aberdeen or Aberdeenshire?

4 respondents did not specify vehicle type, or did not have any vehicles in area				**16.7%**
HGVs:	>100	1	company	
	40 - 99	3	companies	
	20 - 39	2	companies	
	<20	14	companies	
LGVs:	>100	1	company	
	40 - 99	1	company	
	20 - 39	1	company	
	<20	17	companies	
Other:	40 - 99	1	company	
	20 - 39	1	company	
	<20	18	companies	

Of these, what proportion are of the following fuel type?

3 respondents did not specify fuel mix			**12.5%**
Diesel (total vehicles):	>100	4	companies
	40 - 99	2	companies
	20 - 39	2	companies
	<20	13	companies
No CNG vehicles			
No LPG vehicles			
No hydrogen vehicles			

Do you know the Euro rating of the engines? Please indicate number in each category.

Total HGVs	Euro I-III: 3
	Euro IV: 8
	Euro V: 209
	Euro VI: 208

Total LGVs	Euro I-III: 3
	Euro IV: 9
	Euro V: 88
	Euro VI: 216

7 respondents did not specify Euro class			
HGVs:	All Euro 5 +	10	companies
LGVs:	All Euro 5 +	7	companies
11 respondents did not list owning or using any LGVs			
2 respondents did not list owning or using any HGVs			

Are you aware of the ECO Stars fleet recognition scheme? *Circle as appropriate*

Aware of ECO Stars	13
Not aware of ECO Stars	11

Are you a member of ECO Stars? *Circle as appropriate*

Member of ECO Stars	8
Not a member of ECO Stars (but aware)	5

Volumes

Can you describe the sectors which are your major markets?

Oil & Gas	13	companies
Construction	7	companies
Agriculture/Forestry	4	companies
Other	4	companies
Fishing	3	companies
Retail	3	companies
Other food & drink	2	companies
Parcel Delivery	2	companies

Are there key flows which are of particular importance to your business?

Mostly local within and around Aberdeen	8	companies
Mostly local within and around Aberdeen & Aberdeenshire	10	companies
Key locations in Central Belt from/to the North East of Scotland	9	companies
Key locations in UK from/to the North East of Scotland	12	companies
Key locations internationally from/to the North East of Scotland	3	companies
Not answered	1	company

Within Aberdeen, are there any key locations? *Circle as appropriate*

City Centre	2	companies
Harbour	6	companies
New harbour (Bay of Nigg)	0	companies
Other	3	companies

Can you give an indication of annual volumes to/from Aberdeen/Aberdeenshire (ex. over 23 tonnes per annum)?

Under 10,000 tonnes	2	companies
Between 10,000 and 49,999 tonnes	3	companies
Between 50,000 and 99,999 tonnes	3	companies
100,000 tonnes and over	3	companies
500,000 tonnes and over	2	companies
Not specified	9	companies
Specified in a different format	2	companies

Mode

Do you use modes of transport other than road transport?

Railfreight	4	companies
Sea	6	companies
Airfreight	3	companies
Not specified	15	companies

Would you be prepared to use rail or sea more, and if so what might encourage you to make the shift?

Yes	5	companies
Yes if…	3	companies
No	15	companies
Not answered	1	company

Routeing Strategy

Who normally makes the decision on the route that a vehicle will make between pick up and delivery (both directions)?

Driver	13	companies
Logistics Manager	9	companies
Sat Nav	3	companies
Customer	3	companies
Other	4	companies
Not Answered	1	company

What are the most important considerations regarding these decisions (please number from 1 = most important to 5 = least important.

Importance of routeing considerations (rated 1 or 2):		
Shortest journey time	22	companies
Shortest distance	15	companies
Avoiding minor roads	10	companies
Avoiding hills/ roundabouts	1	company
Avoiding congestion hotspots	16	companies
Fuel Use	19	companies
Availability of rest areas/ parking locations	6	companies

Importance of routeing considerations (rated 4 or 5)		
Shortest journey time	0	companies
Shortest distance	3	companies
Avoiding minor roads	6	companies
Avoiding hills/roundabouts	11	companies
Avoiding congestion hotspots	4	companies
Fuel Use	0	companies
Availability of rest areas/parking locations	10	companies

Route Maps

Are you aware that Nestrans and the Freight Forum has developed local maps with recommended routes, lorry parking facilities and restrictions/constraints on the network (which we are now looking to update)?

Yes	5
No	18
Not Sure	1

Do you find such maps useful?

Very useful	4
A bit useful	13
Not sure	6
Not at all useful	0
Not answered	1

Do your company vehicles primarily stick to these recommended routes or not necessarily?

All the time	3
Mostly	12
Sometimes	3
Not at all	6

Road Hierarchy/Signing Strategy

Aberdeen City Council are working to develop a road hierarchy and signing strategy to encourage traffic to travel around the city boundaries, making best use of the AWPR once open, rather than across the City Centre. Would you be amenable to re-routeing to minimise your vehicles' impact on the City?

Yes	14
Only if such routes are likely to reduce journey times and/or fuel	12
No	2

Would you support measures to encourage traffic onto the AWPR, such as restrictions in the City Centre, traffic management, Low Emission Zones or similar means?

Yes	16
No	7
Possibly, if ...	5

Do you think that an app, satnav or online tool providing recommended routeing in Aberdeen and Aberdeenshire would be of use?

Very useful	13
A bit useful	6
Not sure	5
Not at all useful	3

Break Bulk / Consolidation

Are you aware that Nestrans and partners have been considering the potential for a distribution hub, where long distance freight could be broken into smaller loads for local delivery?

Yes	**7**
No	20
Not answered	1

Do you think that such a facility would be of interest to your business?

Yes	**3**
No	12
Not sure	10
Possibly, if...	2
Not answered	1

If a local delivery service was available using Low Emission Vehicles, would you be interested in learning more and considering whether it might be suitable for your business?

Yes	**6**
No	4
Not sure	9
Possibly, if...	2
Not relevant to my business	7

Freight Advisor

Nestrans are in the process of appointing a Freight Advisor to improve our understanding of goods movement in the north east and to develop policies and measures to ensure the effective and efficient movement of goods to, from and around the area. Would you be prepared to meet with the Freight Advisor and discuss your needs, concerns and ideas?

Yes	**17**
No	11

Appendix B: List of Respondents

Groundwater Lift Trucks	Stonehaven
Fraserburgh Harbour Commissioners	Fraserburgh
Carntye Transport	Glasgow
Melrose Haulage	Banff
Russell	Coatbridge
MacGregor Industrial Supplies Ltd	Inverness
Freight Transport Association	Tunbridge Wells
RA Howie {Sauchen} Ltd	Kintore
John Mitchell Haulage & Warehousing	Grangemouth
Castlecroft Sec Ltd	Perth
MNT TRANSPORT	ABERDEEN
Grampian Timber Transport Group (GTTG)	Aberdeenshire and Moray Council areas
J W Suckling Transport Ltd	Grangemouth
The Shore Porters Society	Aberdeen
William Nicol (Aberdeen) Limited	Portlethen
Peterson (United Kingdom) Ltd	Aberdeen
Aberdeen Harbour Board	Aberdeen City Centre
ARR Craib Transport Ltd	Dyce, Aberdeen
Elricks Transport	Turriff
M.A. Ponsonby Ltd	Lichfield
Dyce Carriers Ltd	Aberdeen
Russell	Coatbridge
Kuehne + Nagel	Aberdeen
Royal Mail	Aberdeen
Peterhead Port Authority	Peterhead
ASCO	Peterhead
Michael Gall Transport	Aberdeen
Serco NorthLink Ferries	Orkney