

Existing Evidence

A review was carried out of the available strategies and plans for the UK as well as for the North specifically. This includes documents from Network Rail, National Highways, Department for Transport and other partners including Local Authorities. The benefit of closely analysing the available documents are that they show a consulted view of the freight and transport world that TfN can review progress against as well as providing with an initial list of interventions and programmes that either have been delivered or require delivering.

Key emerging Road themes

The common road themes for the North include:

- The strength of the north relies on its potential to increase multi-modality with prospect of a shift from road to rail being one of the priorities in the agenda.
- The North's eleven ports can play an equally important role in the intermodal domain, and expand their market share dependent on the accessibility constraints both on the road and rail sphere being resolved.
- Impact of Brexit on southern ports might open an opportunity to increase the activity on Northern ports, which may result in additional pressure in the road network.
- Congestion and reliability are the main issues experienced by road freight in the Northern road network, particularly in the East-West connection due to limited capacity of the current infrastructure.
- The freight market in the North is heavily dominated by road with 87% of the tonne kilometres transported.
- Freight market in the North is expected to grow by over 30% until 2050 across all modes.
- There has been considerable recent growth in light goods traffic, driven by increases in online delivery. Cleaner, well integrated and more efficient last mile freight movements are a priority, particularly in urban areas.
- There are very few road enhancement schemes with a primary objective of supporting freight – the business case for most road enhancements is driven by time savings of individuals. This is unlike some rail enhancements which can in some cases can be almost exclusively driven by the needs of freight.

Network Congestion - Road

The key issue for road freight is network congestion. On all highway routes road freight is a minority user even though over 90% of the North's freight is moved on the road network. However, there is no existing appetite for building freight only highways or converting existing highways to freight only.

Road enhancement schemes are considered as part of a wider business case that is usually dominated by non-freight road traffic benefits. The highway schemes are for all different vehicles and are not solely proposed as freight schemes. However, TfN included some schemes within the initial Investment Programme that were freight schemes. Now there has been amendments to the Green Book process, the building of business cases is more heavily focused on developing the 'strategic' case for investment. This helps freight and logistics schemes increase their chance of securing public funding.

Highway intervention locations

Key areas of the highway network where interventions would benefit freight flows that are currently constrained include:

East West Trans-Pennine movement on:

- M62
- A66 from Tees Valley to Penrith – particularly vulnerable to weather conditions

North-South connection through:

- M1 around Sheffield
- A1 east of Doncaster
- A1 Newcastle - Gateshead Western Bypass
- A19 in the Tees Valley and North East – particular pinch point at Tees crossing
- M6 in Cheshire and Warrington

Access to 'constrained' ports:

- A5036 to the Port of Liverpool
- A63 to the Port of Hull

Freight connectivity

- Access to and from Intermodal Terminals (at Trafford Park, Leeds, Garston, Doncaster iPort Rail and Widnes) and International Airports (particularly Manchester and Newcastle)

River and estuary crossings

- Connectivity between major distribution centres and sensitive industrial clusters

Major Road Network:

- Air quality interventions in major urban centres
- Growth of last-mile distribution including to all newly allocated Freeports