eCommerce + Last Mile Delivery

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eCommerce + Last Mile Delivery

Estimated Quarterly U.S. Retail E-commerce Sales as a Percent of Total Quarterly Retail Sales: 1st Quarter 2009 – 4th Quarter 2018

Source: US Census Bureau
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• Last mile supply chain is difficult + expensive
• Urban areas will see at least 3 changes
  • More trucks on the road
  • Increased demand for small urban distribution centers
  • Alternatives pick-up
    • *Click + Pick* at brick + mortar retail
    • Parcel collection lockers
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- Logistics has employment benefits
- Logistics has nuisance reputation
- Implications for city form + environment
  - Congestion + emissions increase
  - Competition for limited, rapidly decreasing industrial space
  - Wear + tear on road infrastructure
  - New requirements for urban logistics: lockers, pick-up points or curb management
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- Are cities planning for these changes?
- Atlanta Case study plan review
  - Atlanta CDP
  - Selected NPUs
  - Beltline Subarea plans
  - Zoning code
  - Transportation plans
Reviewing plans
City of Atlanta: Comprehensive Development Plan 2016

• Economic Development Chapter
  • revitalize key business districts
  • Increase low-skilled jobs
  • freight, logistics and cargo transportation

• Proposed I-MIX Industrial mixed-use code
  • Requires 30% industrial uses
  • Distribution and retail allowed

• NPU chapters
  • Enforce and implement zoning
CDP Character Areas Industrial
Reviewing plans
BeltLine Subarea Plans

• 2010 - eight years old
• Significant Land Use changes proposed
• Industrial “compatible with live/work”
• Overlay, arguably forcing out light industrial and distribution due to competitive land uses with higher returns
BeltLine Sub Area 1: Includes Neighborhood Planning Units V, T, and S

Beltline source
Reviewing plans
Transportation + Freight

• *Connect Atlanta Plan*, City of Atlanta 2008
  • Comprehensive transport plan,
  • Calls for new freight route map

• *Atlanta Regional Freight Mobility Plan*, ARC 2008
  • Regional plan – moving goods from Atlanta area
  • Calls for a new freight route map

• *Cargo Atlanta*, City of Atlanta 2015
  • New freight route map!
  • Identified improvements

• *#SupplyChainCity*, MACC 2018
  • Regional, logistics and through-put freight focus

• All about through-put freight
• No mention of last mile delivery impacts
Conclusions

• Planning not addressing Last mile
• Logistics focus on through-put freight
• Opportunity for small urban distribution facilities
• Identified Industrial districts
• I-MIX zoning *could* help
• Other uses driving up prices
• **Careful** integration required
• Early movers are commercial real estate