



# eCommerce + Last Mile Delivery

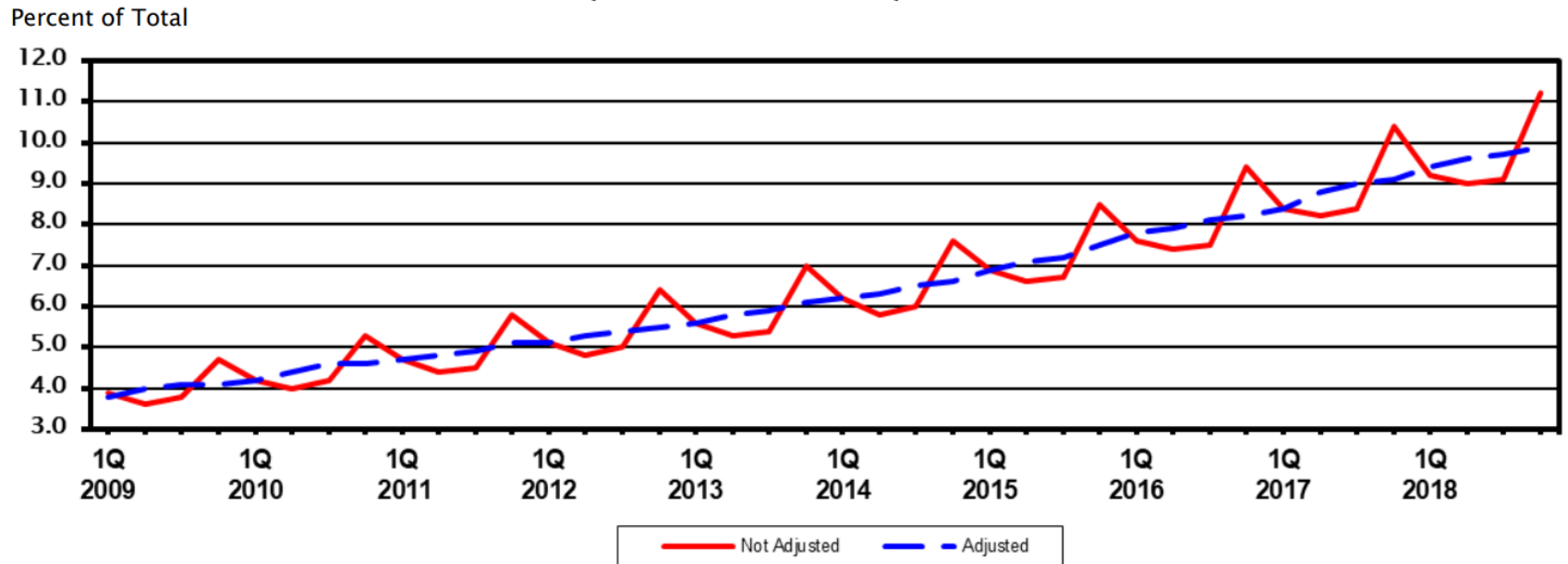
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# eCommerce + Last Mile Delivery

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



# eCommerce + Last Mile Delivery

- 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



# eCommerce + Last Mile Delivery

- 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



# eCommerce + Last Mile Delivery

- Are cities planning for these changes?
- Atlanta Case study plan review
  - Atlanta CDP
  - Selected NPUs
  - Beltline Subarea plans
  - Zoning code
  - Transportation plans



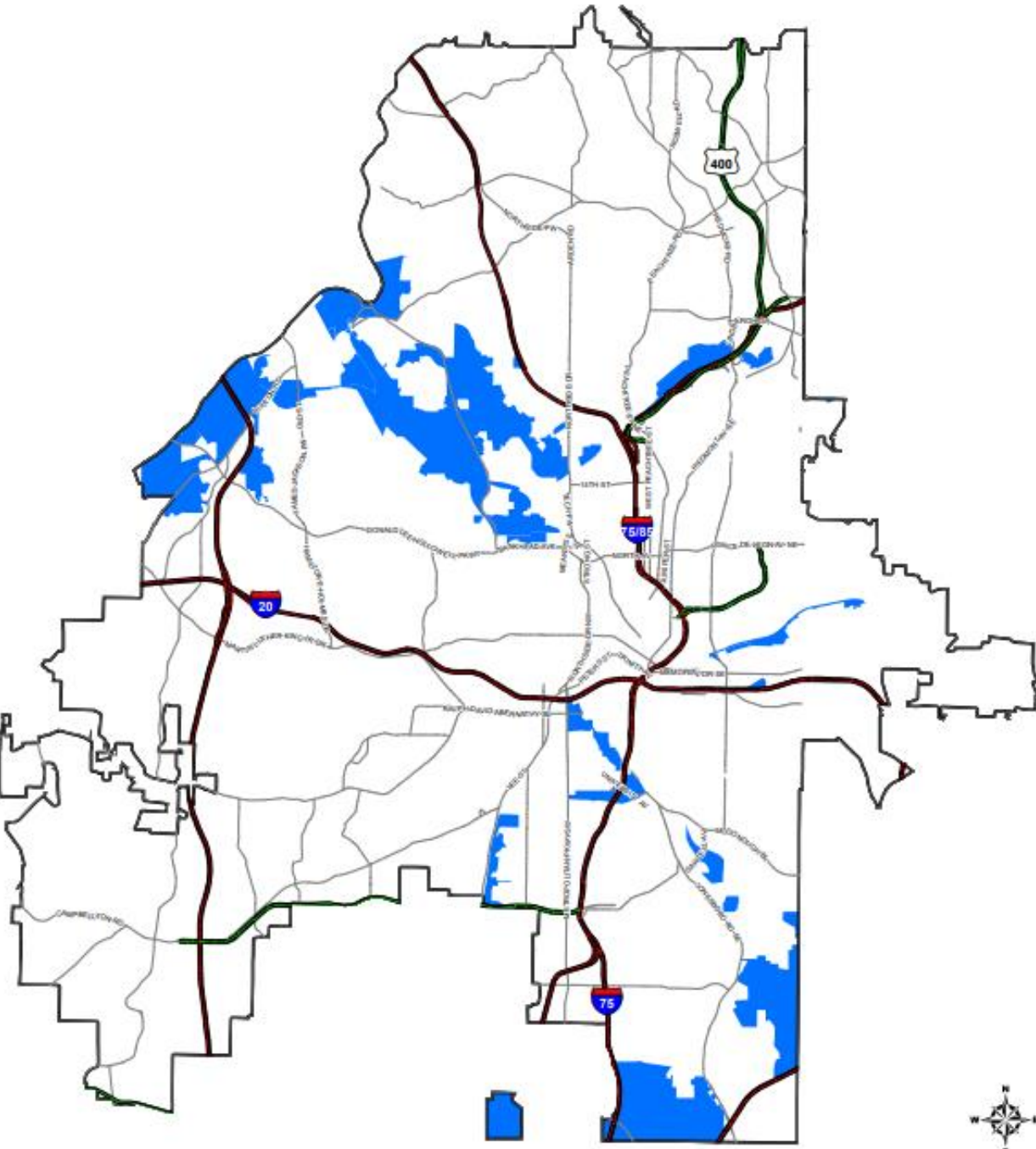
Reviewing plans

# 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



Character Areas  
Industrial

0 1 2 Miles  
**2016 CDP**

Map 10-14: Industrial Areas

**2016 CDP**



# Reviewing plans BeltLine Subarea Plans

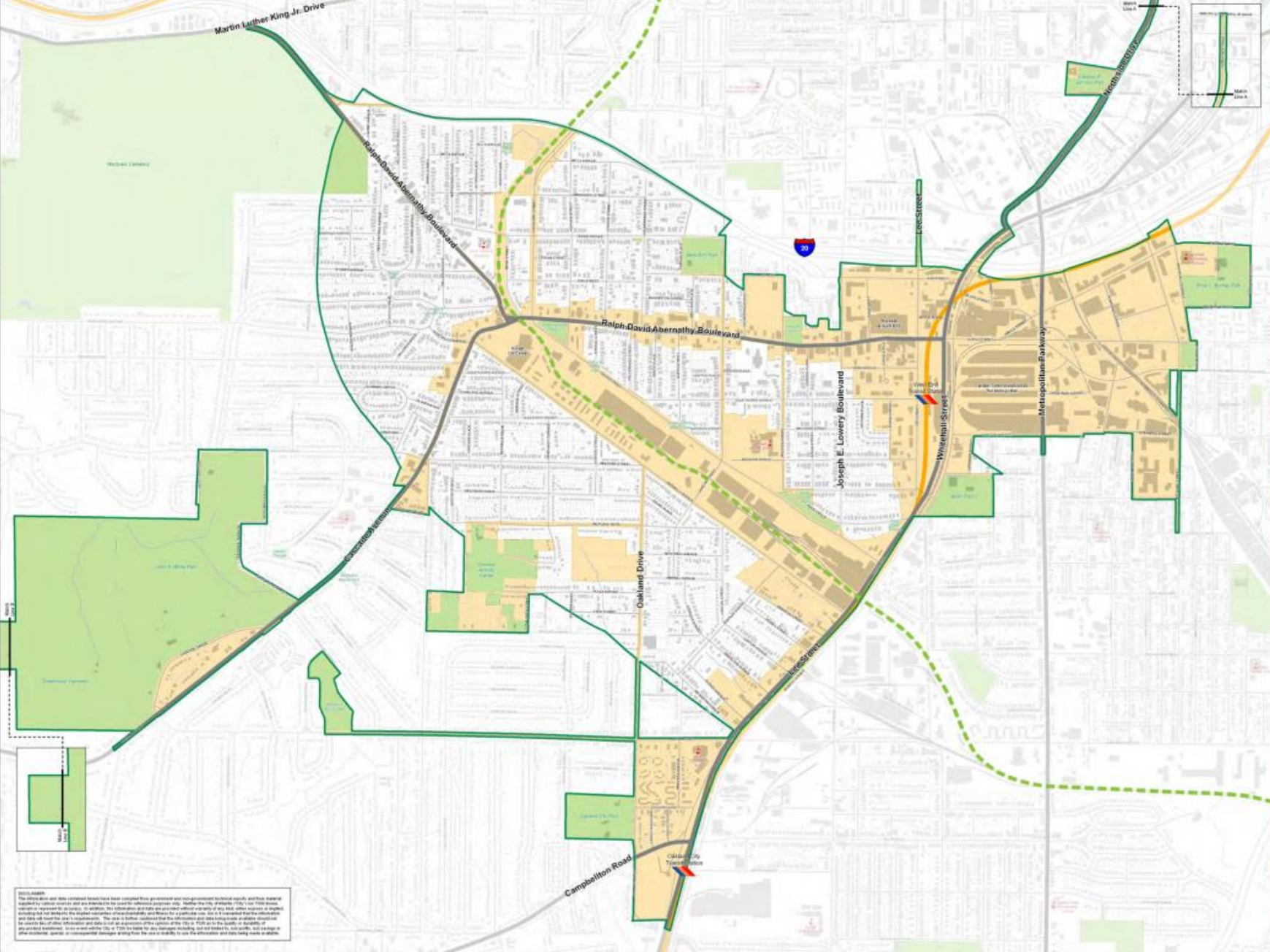
- 2010 - eight years old
- Significant Land Use changes proposed
- Industrial “compatible with live/work”
- Overlay, arguably forcing out light industrial and distribution due to competitive land uses with higher returns







- LEGEND**
- School
  - BeltLine
  - Stream
  - Railroad
  - MARTA Rail
  - Subarea Boundary
  - Existing Park
  - BeltLine TAD



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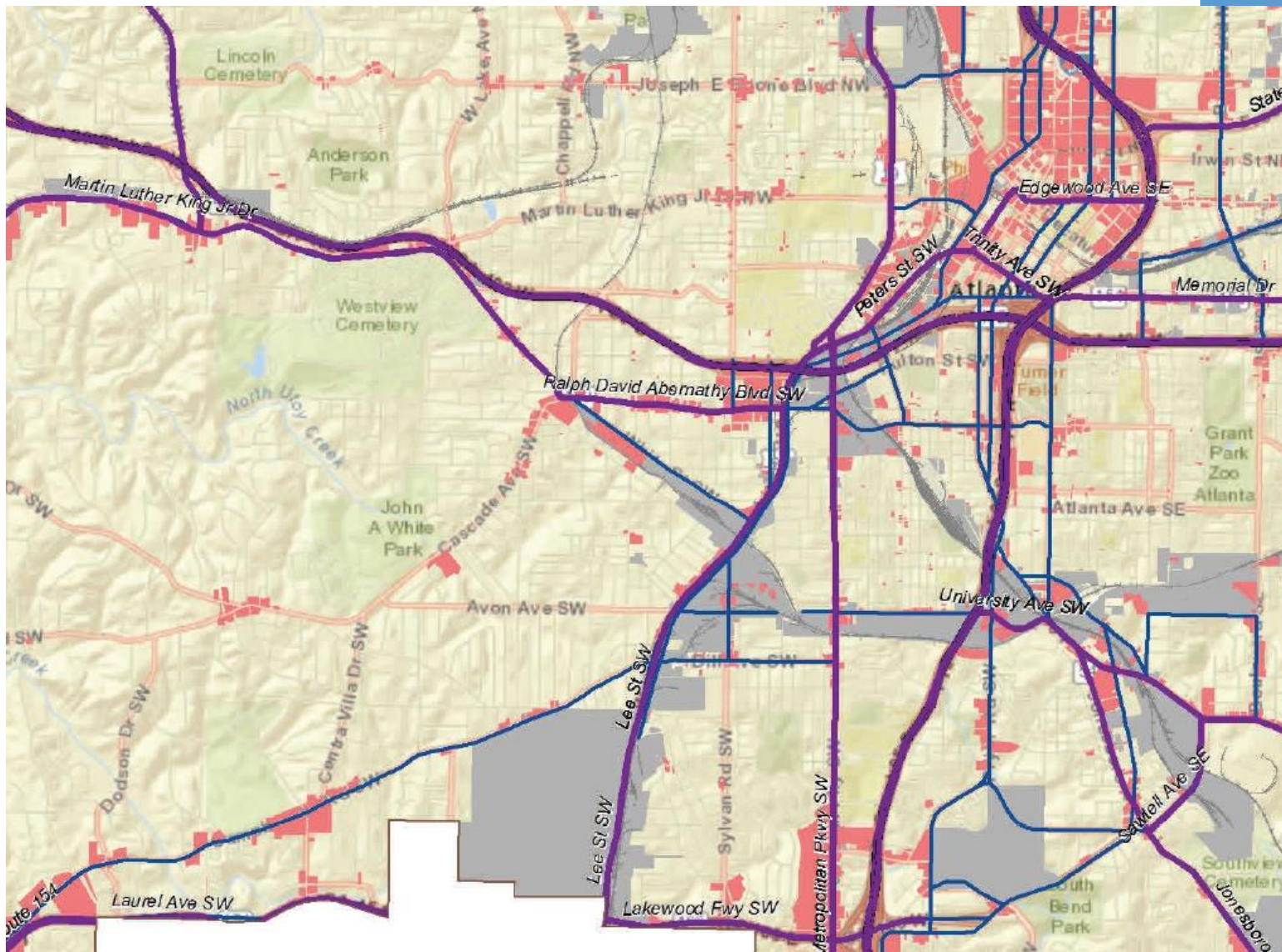
BeltLine Sub Area 1: Includes Neighborhood Planning Units V, T, and S  
[Beltline source](#)

# 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





## City of Atlanta Freight Route Map

### *Cargo Atlanta: A Citywide Freight Study*

Close up of NPU V, T, S area



#### Legend

- City of Atlanta Freight Routes
- State and Regional Freight Routes
- Railroad
- Office and Commercial Uses
- Industrial Uses and Zones

# 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

