



EUROPEAN CITIES AND REGIONS NETWORKING
FOR INNOVATIVE TRANSPORT SOLUTIONS



EUROPEAN PANORAMA OF URBAN LOGISTICS

A SYNTHESIS OF THE E-MOBILITY & “LAST MILES” LOGISTICS GROWTH IN EUROPE



Clean Vehicles for Urban Freight

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MUSES EUROPEAN STUDY AIMS

A EUROPEAN STUDY WITH AN OPERATIONAL PURPOSE

- **UNDERSTANDING & ORIENTING** our research:
A European urban geography study
- **IDENTIFYING:**
The regulations implemented in favor of a greener urban logistics
- **BOOSTING & FOLLOW UP:**
The rise and expansion of urban logistics – ambitions & projects
- **SIZING THE MARKET POTENTIAL:**
The transporters acting for the « last miles » logistics in Europe
- **BUILDING PARTNERSHIPS:**
The European peripheral services actors



MUSES TARGETS EUROPE!

LEADER IN INTEGRATING GREEN “LAST MILES” DELIVERY
VEHICLES IN LOGISTICS CHAIN

- **MUSES is present today on the French market**

Examples of business partners:



Approved as
N1(-3,5t)
vehicles

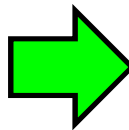


- **MUSES offers a sustainable logistics solution for our cities**

Already present in Paris, Toulouse, Orléans...

- **The positive evolution of regulations encourage us to grow beyond French borders**

- **The transformation of the cities generates a true mutation of the urban deliveries modes**



MUSES EUROPEAN STUDY ISSUES

EUROPEAN PROJECT PHASES

Launch of the European market study and its development

March 2014 - November 2014



End of the European research – Selection of 3 target countries

December 2014



Creation of the marketing strategy & commercial action plan

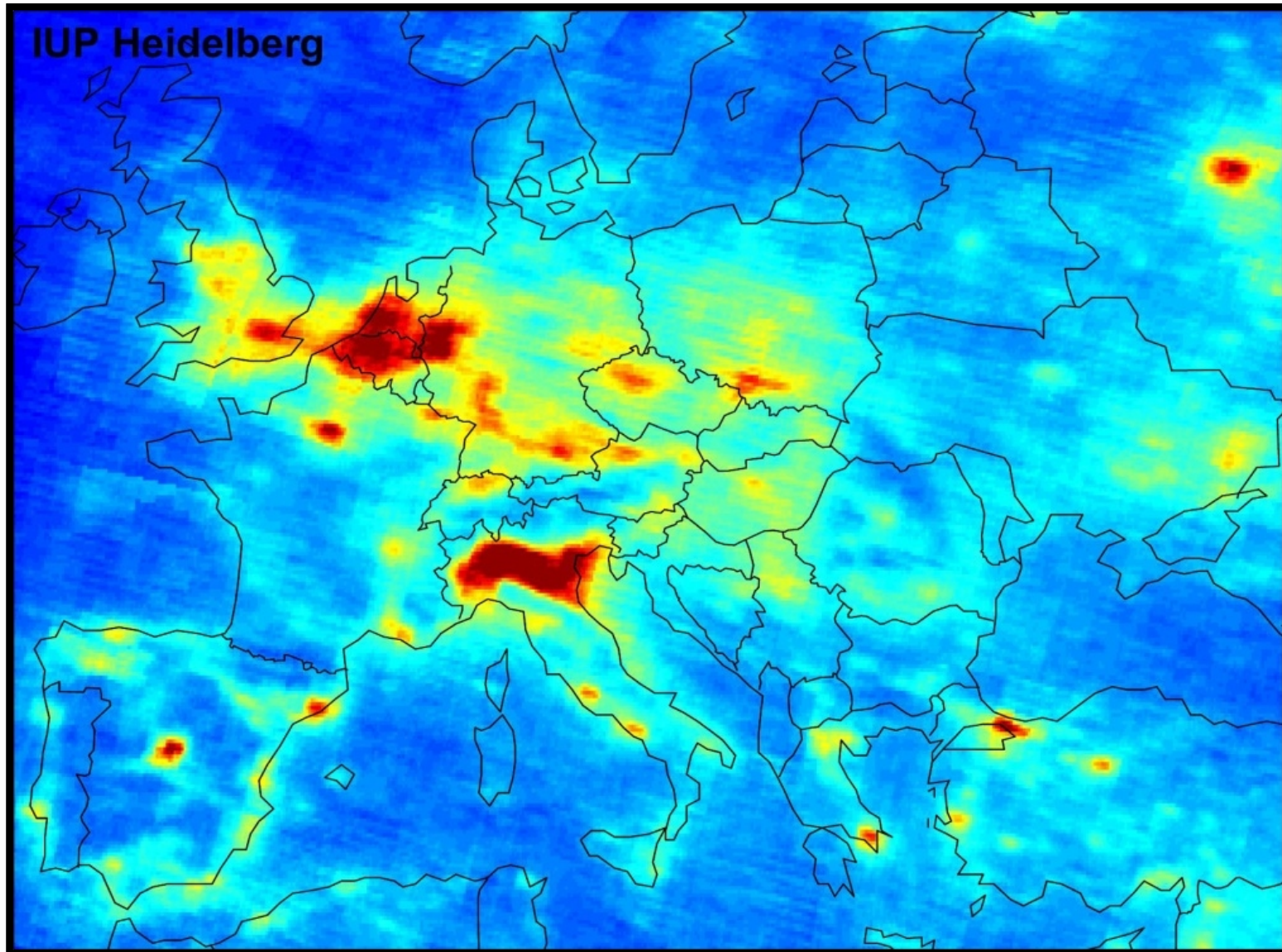
January 2015 - March 2015



Muses ready for its European adventure! Execution of the plan

April 2015

AIR-POLLUTION IS NOT A LOCAL PROBLEM!



WHERE?



10 countries visited

Meeting with more
than 100 major
logistics actors

In contact with more
than 250 logistics
actors

Participation to 10
Conferences on
logistics & electro
mobility

A LOCAL DEVELOPMENT WITH GLOBAL ISSUES

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WHAT? THE GREEN "LAST MILES" MOBILITY FUNDAMENTALS



Infrastructures

+



Regulations

+



+



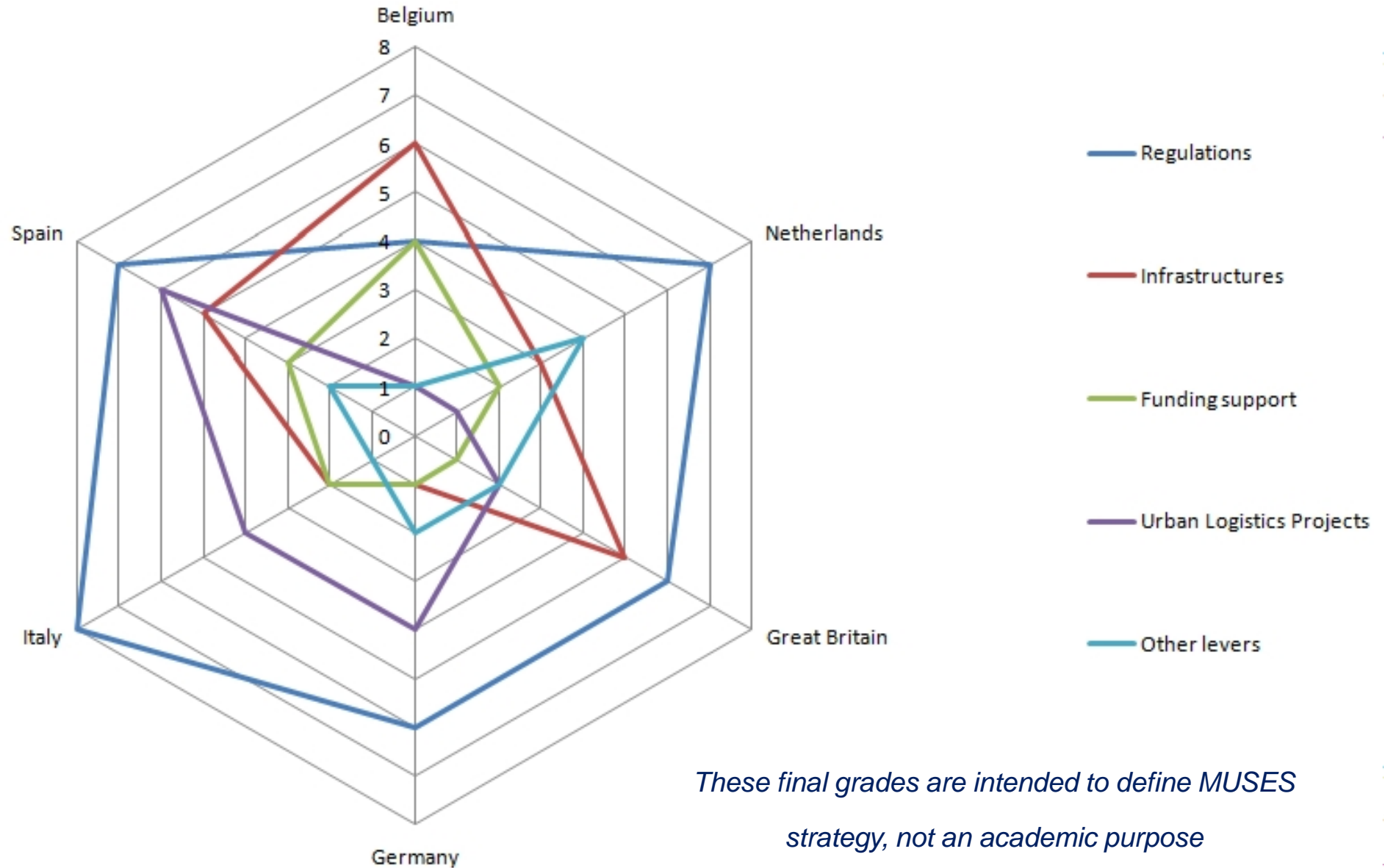
Projects & ambitions

+



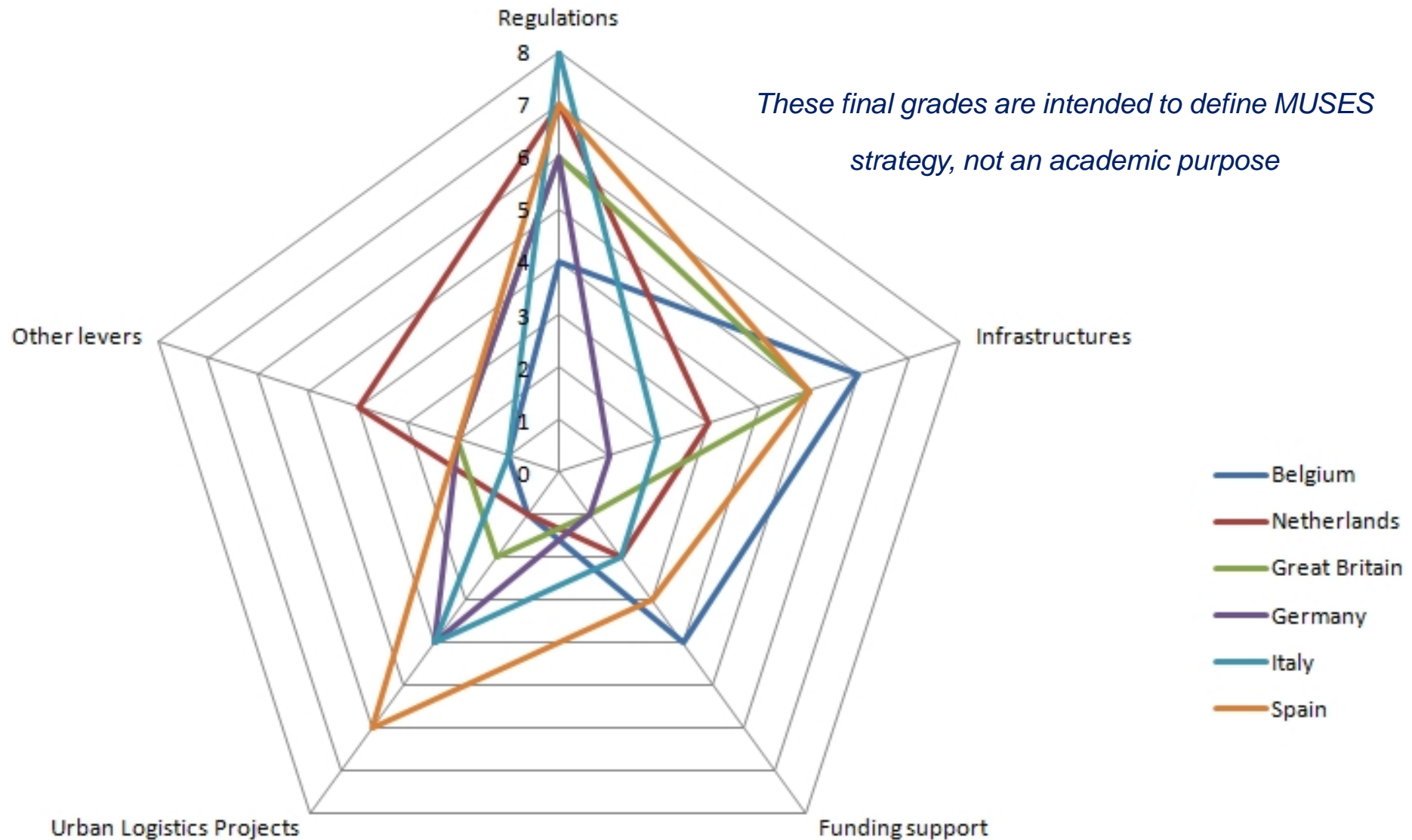
Funding supports

URBAN LOGISTICS KEY SUCCESS FACTORS IN EUROPE



URBAN LOGISTICS KEY SUCCESS FACTORS IN EUROPE

OUR INTERLOCUTORS STRATEGY DEVELOPMENT PERCEPTION



THE CONTEXTUAL DETERMINANTS

THE SELECTION OF OUR TARGET COUNTRIES

POPULATION CRITERIA



Urban density of population

Population urban mobility trends

Ageing of the population



CITY CRITERIA



Size of the cities

Urban structures of cities

City development & transformation



CITY LOGISTICS CRITERIA



Inflows & outflows of goods

The boom of e-commerce



WHAT MAKES EUROPE GO FOR GREEN MOBILITY?

The countries' ambitions



➤ ECONOMY



➤ ECOLOGY



➤ ADAPTABILITY



➤ IMAGE



➤ IMAGE



➤ ECOLOGY



➤ ECOLOGY



➤ ECOLOGY



➤ ECONOMY

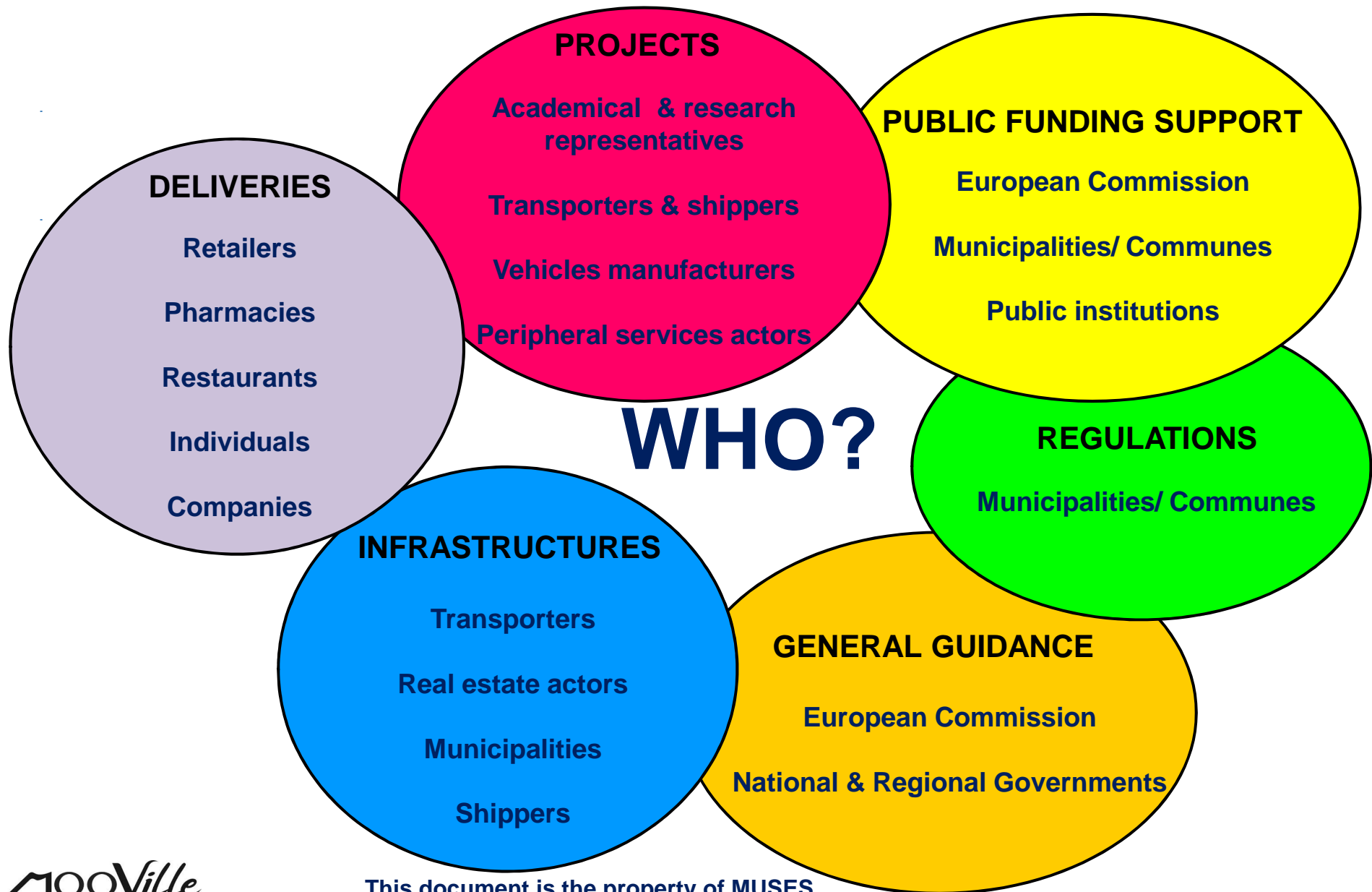


➤ ADAPTABILITY



A “LAST MILES” NETWORK TO BUILD

BRINGING ALL LOGISTICS ACTORS WORKING TOGETHER



THE URBAN LOGISTICS ACTORS IN EUROPE

- Pharmaceutical distributors
- Postal and parcels deliveries
- Fresh products deliveries
- Waste & recycling sector



URBAN LOGISTICS WILL BE GREEN

A EUROPEAN CONSENSUS

An environmental issue - public and private commitments

The attractiveness & quality of life of city centers



Strong restrictive regulations for polluting vehicles

Emergence of adapted & operational green delivery vehicles

Diversification & complementarity of renewable energies



Urban logistics projects all around Europe – a public/ private cooperation

The rise of clean & sustainable delivery fleets

OPPORTUNITIES FOR CHANGE OFFERED BY GREEN DELIVERY VEHICLES

STRUCTURAL & ECONOMIC BENEFITS FOR URBAN LOGISTICS

Building innovative « last miles » business models

Rehabilitation of abandoned urban spaces



Pooling urban inflows and outflows of goods

Pooling goods storage

Better management of the loading of vehicles

THUS



Streamlining investment costs

Maximising returns on investment for transporters

Using clean & sustainable delivery vehicles



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THANK YOU FOR YOUR ATTENTION

MOOVille by Muses



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