

# Parking in a changed urban landscape

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# FleetHubs

Hyperlocal / OOH

A bit of History and What we do . . . ?

# What's changing?

- WFH
- TWaT's Week
- Staying Local
- High Street
- Vehicle Ownership
- Transition to Low Carbon
- EU Inbound – market consolidation

Macro Trends . . .



# The race to Net Zero and the rise of E-commerce



Global e-commerce market sales of \$4.9tn in 2021 up 46% on pre-pandemic<sup>2</sup>



Last mile delivery in North America expected to grow 16% annually<sup>3</sup>



Transport produced 7.3bn metric tons of CO2 emissions globally in 2020<sup>1</sup>



Global pledge to reach 100% zero emissions in transport by 2040<sup>4</sup>



<sup>1</sup> <https://www.statista.com/statistics/1185535/transport-carbon-dioxide-emissions-breakdown/>

<sup>2</sup> Emarketer and Statista. In 2019 global retail e-commerce sales amounted to an estimated \$3.4 trillion

<sup>3</sup> According to a recent study by Technavio, annually between 2021 and 2025

<sup>4</sup> Declaration at the 26th United Nations Climate Change conference (COP26) - <https://cop26transportdeclaration.org/en/>

# The green revolution: US vs Europe

## In Europe:

- EV sales overtook diesel for first time in Dec 2021 with 176,000
- EVs made up 14% of total 2021 vehicle sales
- Europe has 374,000 public charging stations (two thirds in five countries)<sup>1</sup>
- 260 Low Emission Zones across Europe operate
- Cargo bike sales in Europe increased by 65.9% in 2021<sup>2</sup>


## In the US:

- EVs made up 4% of 2021 vehicle sales
- 113,600 charging stations<sup>3</sup>
- City of Santa Monica launched US's first voluntary zero-emissions delivery zone
- 14 states have adopted California's zero-emission vehicles program, including Colorado, Connecticut, Maine, Maryland, Massachusetts, New Jersey, New York, Oregon, Rhode Island, Vermont, and Washington

<sup>1</sup> According to "Power sector accelerating e-mobility," a report by EY and Eurelectric

<sup>2</sup> According to the European Cyclists Federation (ECF)

<sup>3</sup> According to research by Publicis Sapient

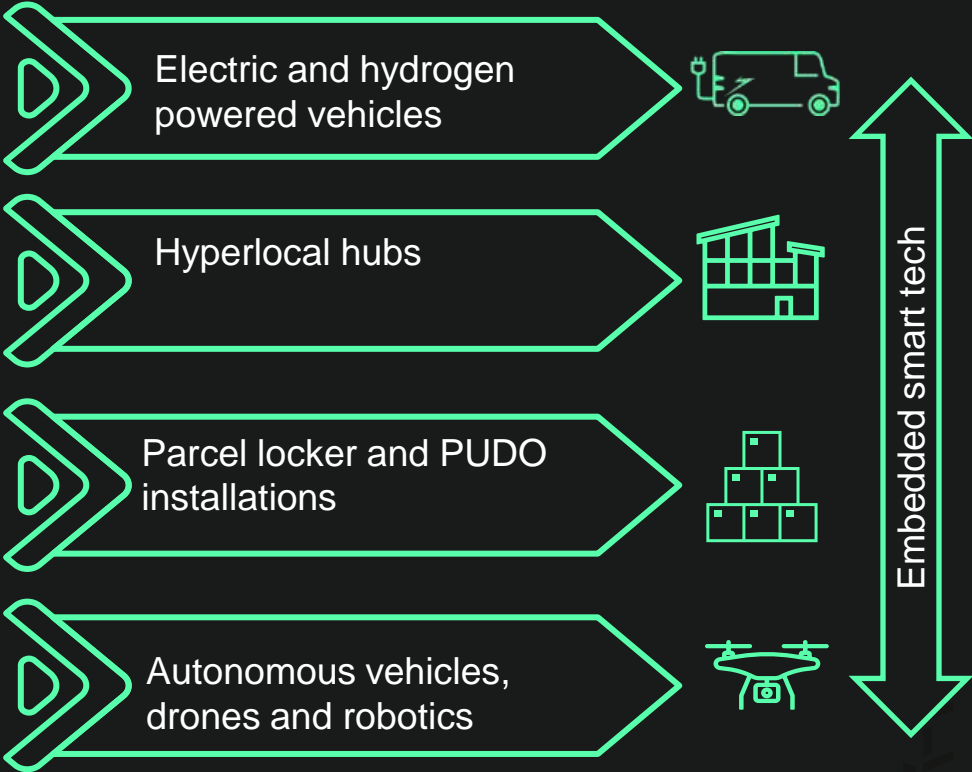
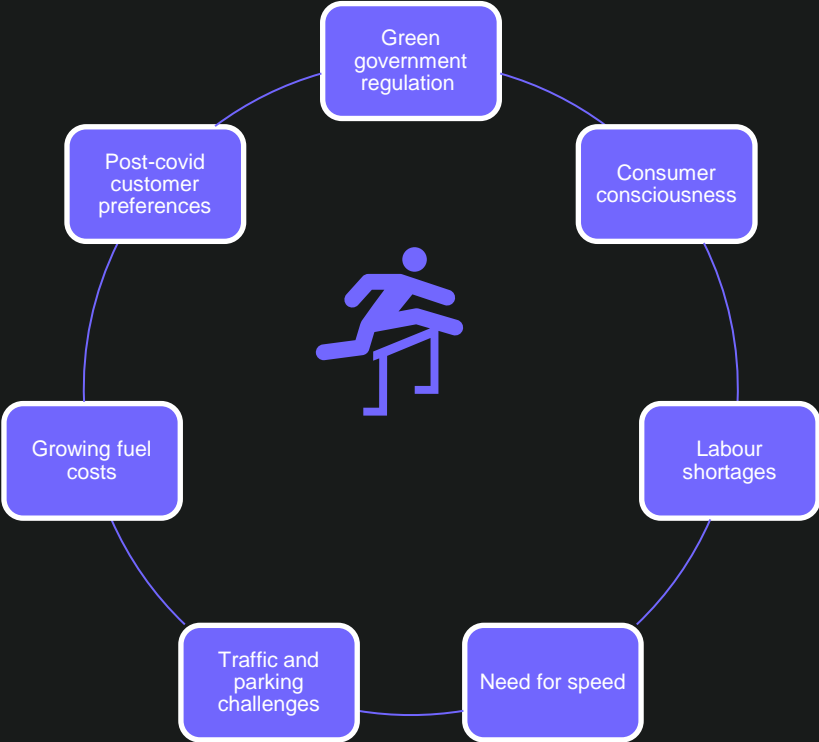


# Electric Vehicle<sup>1</sup> Transition

## How many spaces need EV?

- Industrial Use case 100%
- Public Use Case?
- On street?
- Pre Book?
- Unified Transactions
- EV Fuel Card - Fleet

# The changing landscape: climate change as a source of disruption, innovation and differentiation



# Industrial parking locations . . .

## Changing Customers . . . Alternative Locations . . .

Acquisition of 4.2-acre site in Swindon to develop a “fleet hub” for 300+ final mile delivery vehicles, with a phased EV transition program includes securing planning, power and charging infrastructure and embedded technology to future proof and support the decarbonisation





# Transforming and Repurposing Space Within Multiple Sectors



## CAR PARKS

Operators  
Managed  
Private



## HOSPITALITY

Hotels  
Pubs  
Restaurants



## RETAIL

Supermarkets  
Shopping Centres  
Convenience Stores



## PROPERTY

Residential  
Commercial  
Managed



## TRANSPORT

Trains  
Buses  
Airports



## HEALTHCARE

Hospitals  
Health Centres



## EDUCATION

Schools  
Colleges  
Universities



## SPORTS & LEISURE

Leisure Centres  
Football, rugby and  
cricket grounds



## COMMUNITY/SOCIAL

Social Clubs  
Communal Areas



## PUBLIC SECTOR

Local Authorities

# Highest best use...

## Hyperlocal hubs and turnkey solutions

The infrastructure to operate and grow within the first and final mile logistics sector.

Turnkey solutions have been designed for Cargo Bike park and charging and Dark Stores for e-grocery and ecommerce fulfilment.

Shared or dedicated space in prime locations.



# 'Hyperlocal Hub Pilot'

## E-cargo bikes: transforming the final mile from an underground car park



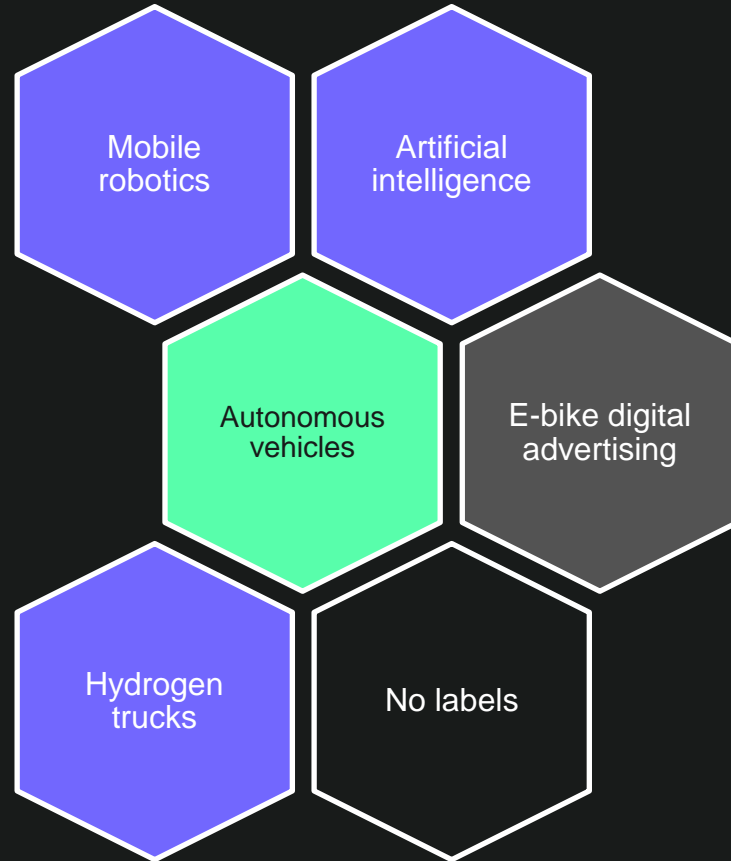
- 30 e-cargo bikes covered a 1.5km radius and completed around 4,000 shipments per day
- CO2 reduction estimated at 240 tonnes pa (UK average carbon footprint per person is 6 to 10 tonnes CO2 pa)



Parking inherently inefficient property use . . .  
Rent per sp ft Parking (\$3500 Season ticket)  
in car park at 50% capacity is \$7  
Hyperlocal Rent is \$70 (10x)



# The future...



**20% of Car Park Space Given over to other uses . . . . .?**



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