

# Freight logistics market study: Summary of findings

**Competition in the freight logistics market could be more effective. If there was more competition, freight logistics operators would face stronger pressure to deliver the right prices, quality and range to satisfy a diverse range of preferences.**

## Competition issues

- Lack of space in the port limits new entrants, constrains growth and introduces potential inefficiencies in operations.
- Warehousing capacity at the port is a specific constraint, in particular in the context of temperature-controlled business.
- Competition in freight logistics is also affected by wider policy matters, for example road accessibility and vehicle restrictions, which reduce the scope for handling freight outside the port. Further, the Condor Operating Agreement makes it difficult to set up new Roll-on, roll-off (RoRo) freight services.



## Market observations

- There is scope to improve efficiency within the current port constraints, through a better understanding of how freight logistics is operating in Jersey.
- A greater focus on the environment and carbon emissions offers both challenges and opportunities for freight logistics, for example the use of green fuels for both shipping and landside operations.

## Market resilience

- Jersey is heavily dependent on one RoRo operator / one large freight logistics provider / trade with UK. This could be a potential market resilience risk.
- Lift-on, lift-off (LoLo) traffic in Jersey remains high relative to other locations and, for some goods, offers an alternative to RoRo.
- Proximity to France creates an opportunity to diversify and increase supply resilience.

