

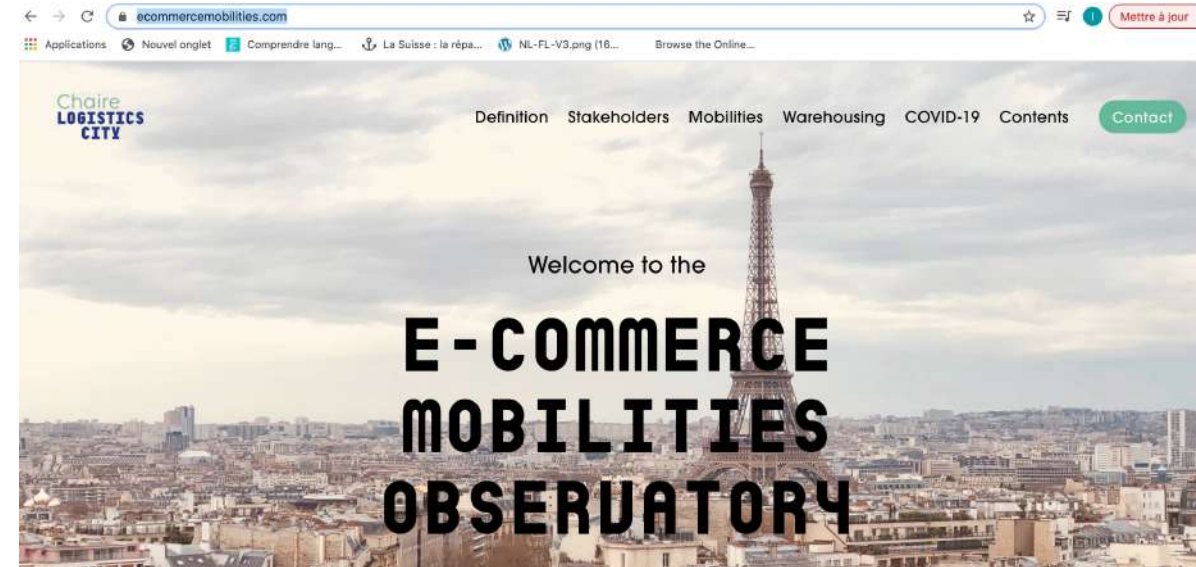
# E-commerce logistics in Paris

Dr. Laetitia Dablanc

- Research oriented Chair
- **Warehouses, innovations, new trends in consumption** and city logistics

Results available online:

- **Observatory of ecommerce mobilities** (<https://www.ecommercemobilities.com/>)
- Surveys on **gig workers for instant delivery** platforms in Paris 2016, 2018, 2020, 2021
- E-commerce logistics **real estate** and relationships with urban form in 74 large cities around the world



# E-commerce growth since the pandemic in France

- +32% B2C products sold in 2020 (growth rate **twice as high** as usual)
- Traditional retail has accelerated **omni-channel** services
- Huge increase in grocery and DIY **click-and-collect**
- Huge increase in **instant deliveries** (UberEats, Deliveroo, Glovo)
- Higher **diversity** of e-consumers: poor and rich, rural and urban, old and young, women and men

**Le Monde**

ÉCONOMIE

Favoris 

## Covid-19 : la logistique, un secteur devenu incontournable

La pandémie a mis en exergue le rôle des chauffeurs et livreurs dans la bonne marche de l'économie.

Par Eric Béziat et Julien Bouissou

# Connecting urban delivery stakeholders

- A City of Paris website identified and mapped local retailers proposing home delivery

<https://www.paris.fr/pages/livraison-alimentaire-a-domicile-les-commerçants-parisiens-mobilises-7685>



Services

Municipalité

Participez !

Que faire à Paris ?

Mon Paris

Attention certaines informations de cette carte peuvent être amenées à évoluer. La carte est mise à jour chaque lundi.

☐ Livraisons à domicile

☐ Retrait de commandes en magasin

Label Fabriqué à Paris

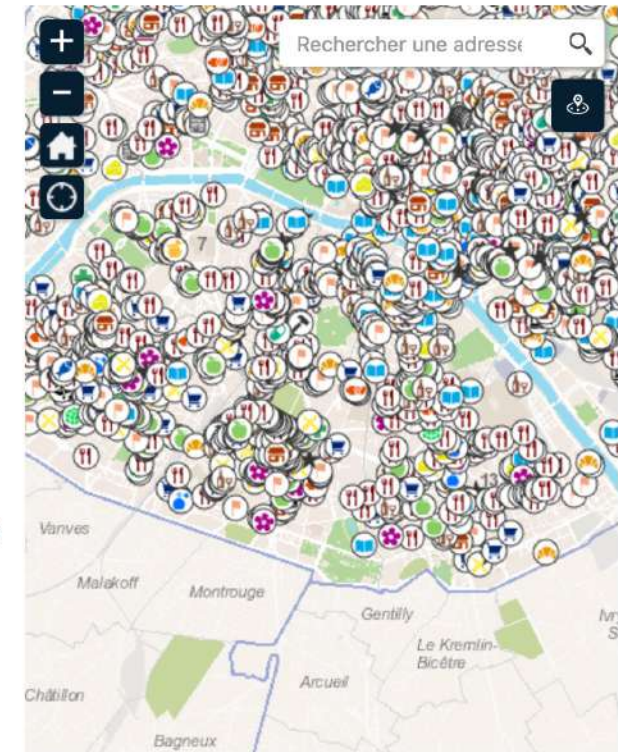
☐ Commerces labellisés

Type de commerce

☐ Alimentation générale et produits de première nécessité

☐ Aliments et fournitures pour les animaux de compagnie

☐ Articles médicaux et orthopédiques





# New formats for super fast grocery delivery

- Cajoo promises to deliver in 15 minutes
  - Gorillas promises to deliver in 10 minutes
  - Getir promises to deliver in a few minutes
- Use of 'dark stores', urban facilities serving as fulfillment warehouses for products to be delivered (1000 to 10,000 SKUs)

A black rectangular graphic representing the Gorillas app interface. At the top, there is a dark grey rounded rectangle containing a white hamburger menu icon on the left and the word "GORILLAS" in white capital letters on the right. Below this, the text "Plus rapide que vous" is written in white. The main part of the graphic features the text "Vos courses livrées en 10 minutes" in large, white, sans-serif font, with "10 minutes" being significantly larger and bolder than the rest of the text.

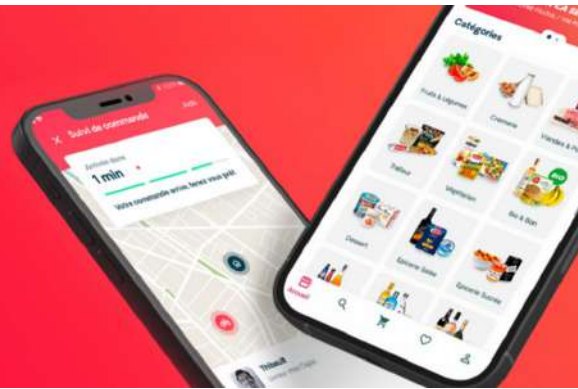
☰ GORILLAS

Plus rapide que vous

Vos courses  
livrées en 10  
minutes

**cajoo**

VOS COURSES EN 3 CLICS  
LIVRÉES EN 15 MINUTES

A purple rectangular graphic representing the Getir app interface. In the upper left corner, there is a yellow circle containing the word "getir" in lowercase white letters. The background of the purple area is filled with faint, white line-art icons of various grocery items like bottles, bags, and food containers. At the bottom, the text "Vos courses livrées en quelques minutes" is written in white.

getir

Vos courses livrées en quelques minutes

# Diversified modes for urban deliveries



## Micro-freight companies in the Paris region

- In 2019: 24,000 new micro-companies in freight transportation
- In 2020: 32,000 new micro-companies in freight transportation

(Insee)

## B2C parcel delivered in the Paris region

- In 2019: 600,000/day
- In 2020: 900,000/day

(approximation from La Poste group data)



# A huge increase in cycle-logistics in Paris



One of the main advantages:  
access to bike lanes (and  
'corona-lanes')

**International Cargo Bike Festival Groningen**

**June 14-16th 2019**



# Accelerated implementation of urban warehouses

- Recycling local shops, car parks or other underused areas into logistics facilities
- Micro-hubs for last mile distribution of parcels and grocery
- 'Dark kitchens': for meals
- 'Dark stores': for groceries

- Former gas-station in Paris (project)



- Empty space under the Paris ring-road (finalized in December 2020)

# Four networks of pick-up-point networks, representing one fourth of e-commerce deliveries

	Paris region	Grand Paris	City of Paris
Relais Colis	1406	790	291
Pickup (hors consignes)	2685	1709	655
UPS	1620	936	421
Mondial Relay	2317	1272	465
Total	8028	4707	1823

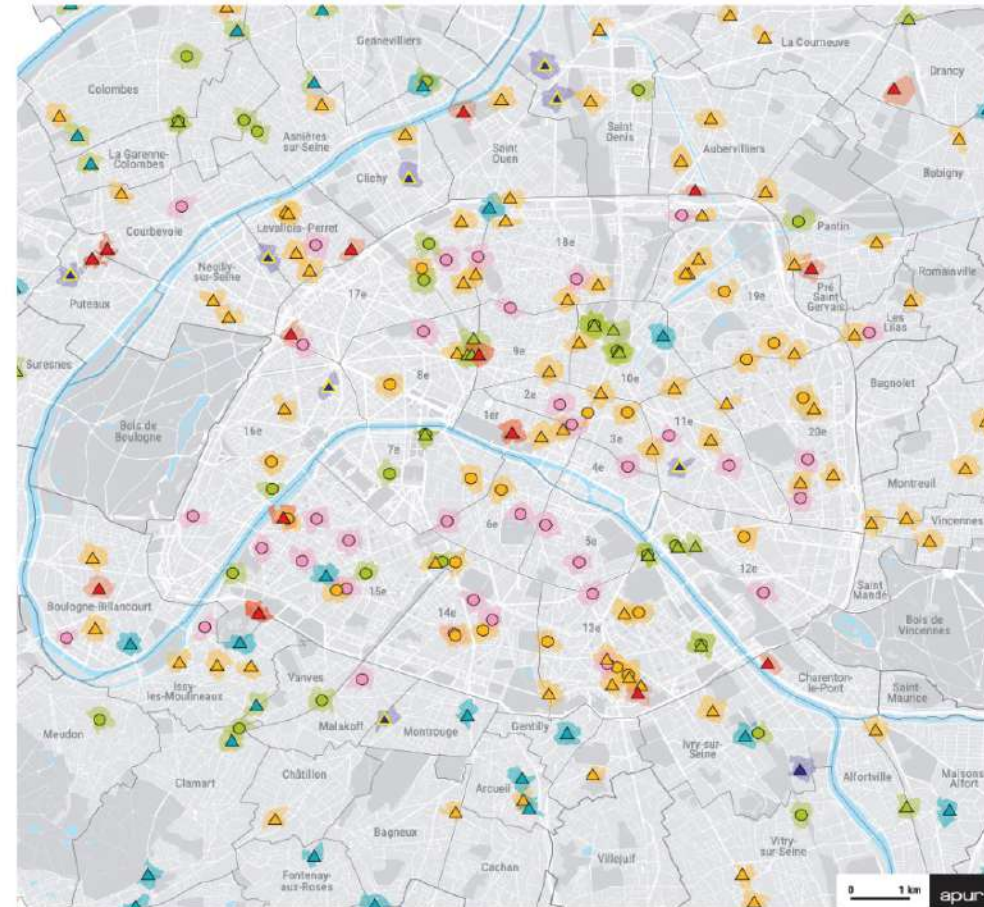
Apur, 2020



# Comparing Manhattan and the city of Paris (6T, 2018)

	Manhattan	Paris
Home and in hands	29	27
To doorman	28	12
In mailbox	18	15
In a store (click and collect)	4	2
In an automated locker	1.5	0.5
In post office	1	5
In a pick up point	1	21
At work	1	4
Other		

# Automated lockers catching up



Apur, 2020

## LES CONSIGNES AUTOMATIQUES

### Type de structure

- Bureau de poste
- Centre commercial
- Commerce, supermarché
- Entreprise, lieu privé
- Gare SNCF
- Station-service

### Type de consigne

- △ Amazon Locker
- Pick Up Station Chronopost

### Type d'accès

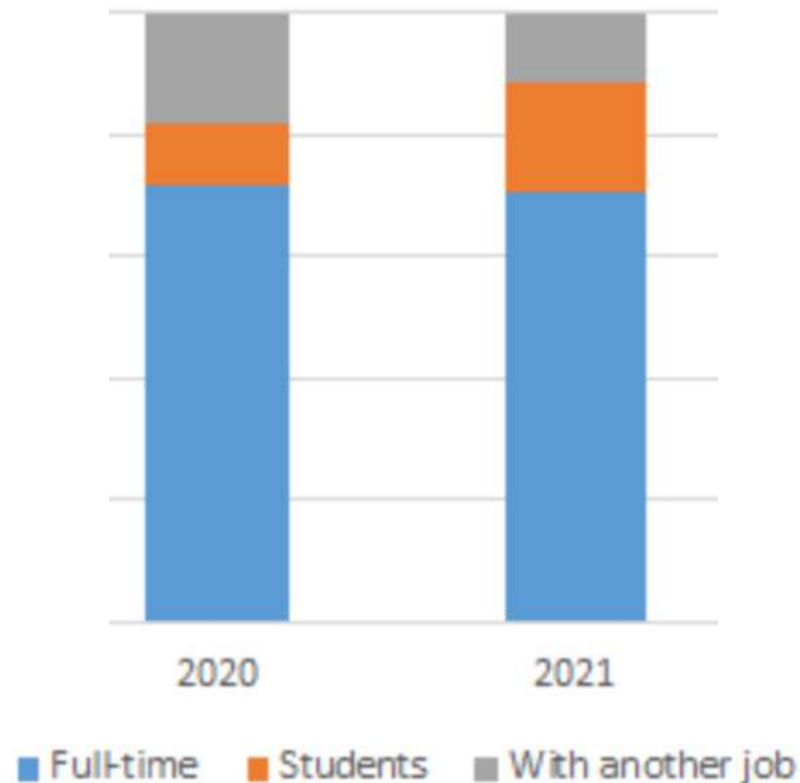
- △ Normal
- △ Restreint

- Zone d'accessibilité de 300 m à pied
- Agglomération urbaine (présence de population en continu)
- Autoroute, voie principale
- Voie ferrée

Source : IDFM, Amazon, Bostal, traitement Apur - 2020



# Gig workers in instant deliveries in Paris: impact of the pandemic



- More students on the job, reversing a strong trend since 2016
- 34% turned to this activity because of the pandemic (61% among students)
- The pandemic has led to a decrease in income for more than half of delivery workers
- 57% of delivery workers say that the pandemic has worsened their working conditions

# Diversification of vehicles for instant deliveries: mopeds, cars and electric shared-bikes

**2021**

47% bicycle

36% mopeds

7% cars

⇒ Increased use of motor vehicles:  
(strictly regulated in French legislation)  
=> Increased use of bike and scooter  
sharing (not allowed for deliveries)



# Open-access data on bike-sharing

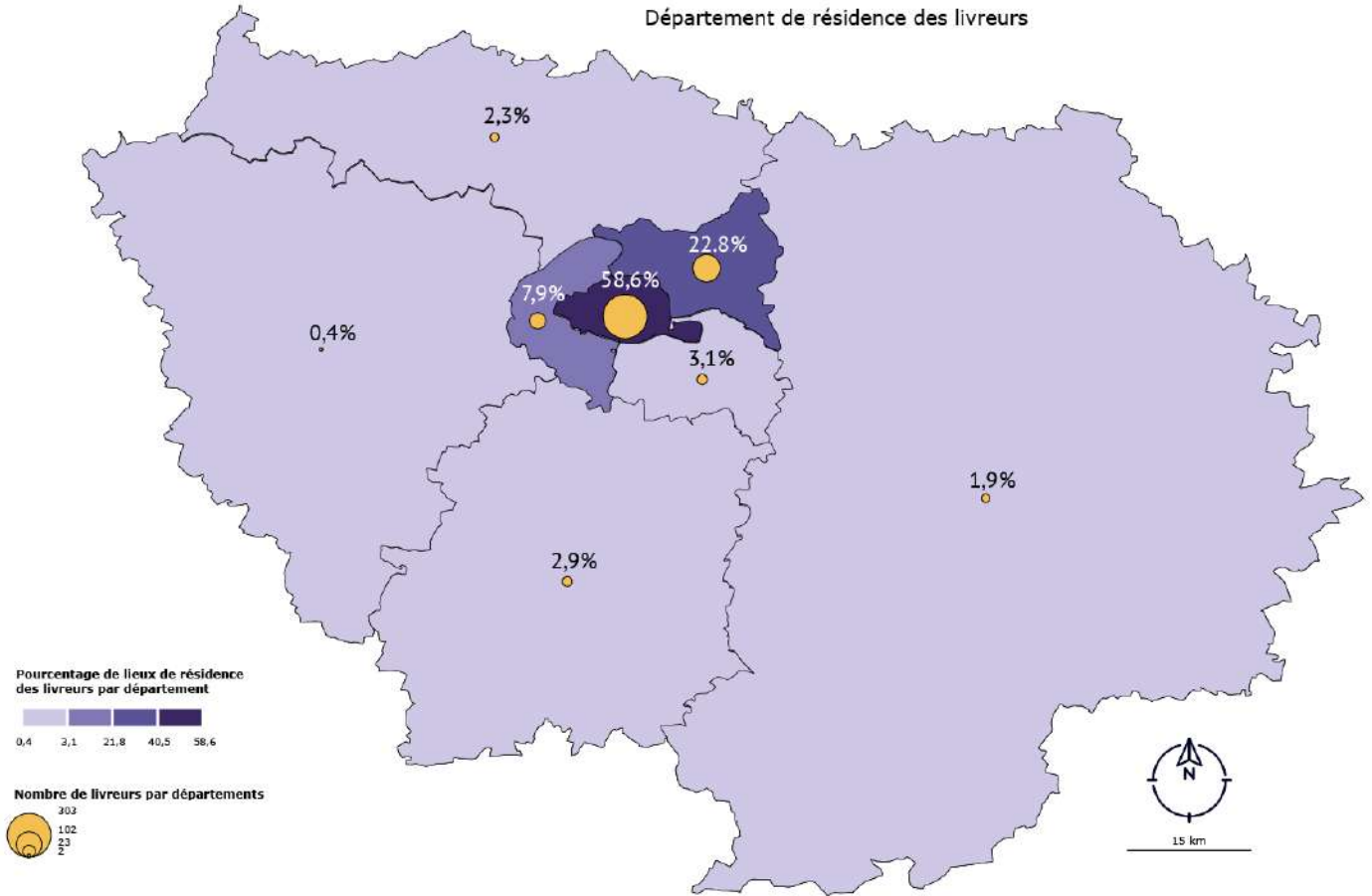
- Use of AI to identify use of bike-sharing for deliveries
- Number of deliveries, routes, pick-up and delivery points





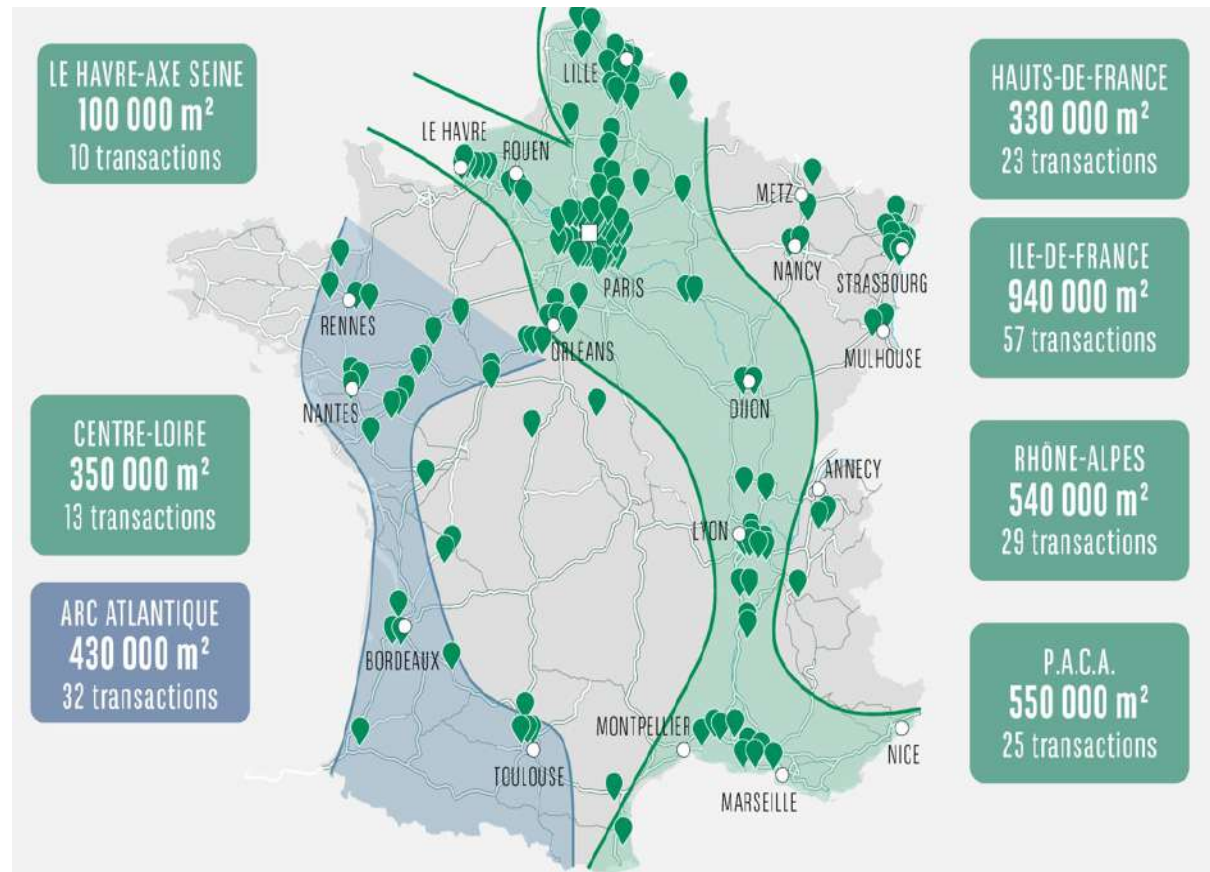
# Commuting to the work place (2021)

- 62% with vehicle used for deliveries (bike or moped or car)
- 16% in public transit, with bike
- 13% in public transit
- 9% other





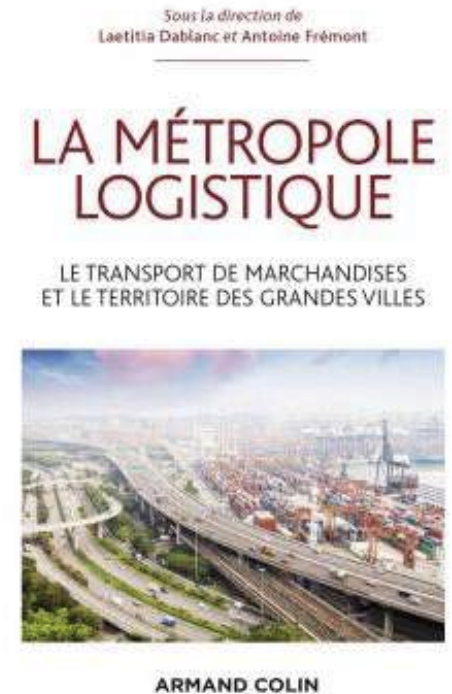
# Less concentration of logistics development in the largest four metro areas (Lille, Paris, Lyon, Marseille) in 2020



(ImmoStat/BNP Paribas Real Estate)

# Ressources

- LOGISTICS CITY CHAIR: [www.lvmt.fr/en/chaieres/logistics-city-sogaris/](http://www.lvmt.fr/en/chaieres/logistics-city-sogaris/)
- World Conference on Transport Research <https://www.wctrs-society.com/>
- METROFREIGHT [www.metrotrans.org/metrofreightw.metrotrans.org/metrofreight](http://www.metrotrans.org/metrofreightw.metrotrans.org/metrofreight)
- Browne, M., Behrends, S., Woxenius, J., Giuliano, G., Holguin-Veras, J. *Urban logistics. Management, policy and innovation in a rapidly changing environment*. Kogan Page, London
- Urban Freight Lab: <https://depts.washington.edu/sctlctr/urban-freight-lab-0>
- CITYLAB (2018) Observatory of Strategic Developments impact urban logistics [http://www.citylab-project.eu/deliverables/D2\\_1.pdf](http://www.citylab-project.eu/deliverables/D2_1.pdf)
- Urban freight platform:  
<https://www.chalmers.se/en/centres/lead/urbanfreightplatform/Pages/default.aspx>



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