

Logistics and land issues in regional plans

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The aim of this Master's thesis was to examine and compare the place of logistics in regional planning efforts, particularly in the 13 French regional master plans (called SRADDET in French, to which were added the Corsican PADDUC and the master plan for the Paris region- SDRIF-E) since the adoption of legislation on zero net land take (ZAN in French). The study combines quantitative and qualitative analysis followed by a series of interviews and discussions with public officials and experts.

Given the objectives of ZAN, changes in the logistics sector, and climate constraints, how is logistics addressed in regional planning documents?

Methodology

The work is based on a mixed approach, combining quantitative and qualitative analysis. Initially, a basic quantitative analysis was carried out to measure the importance given to land and logistics issues in the plans. Subsequently, a qualitative analysis was conducted in two stages: an in-depth reading of the documents, followed by interviews with managers from six regions. The plans were reviewed based on seven analysis criteria covering both land and logistics issues. A score was assigned for each criterion:

- General attitude towards logistics real estate (from 0 to 3)
- Vision of logistics more or less subordinate to reindustrialization issues (from 0 to 1)
- Dynamism of the consultation process with logistics stakeholders (from 0 to 3)
- Treatment of logistics as an explicit ZAN issue (from 0 to 2).

We also produced a detailed analysis for each plan, which was submitted to each region and whose feedback, when any, was taken into account. Finally, interviews were conducted to supplement and support the observations.

Main results

The analysis reveals significant regional disparities in the consideration of logistics in regional plans. Port regions make greater use of logistics vocabulary. It should also be noted that the plans modified after the French Climate Law (2021) deal more extensively with logistics (+146%) and artificialization (+366%). Table 1 shows the "physical" place of logistics calculated by the number of lexical occurrences. The plans with the densest logistics vocabulary are those of Hauts-de-France, Île-de-France (the Paris region), Auvergne Rhône-Alpes, Occitanie, Normandy, and PACA (Table 1).

The master plans were also analyzed qualitatively, based on their approach to logistics real estate (Figure 1). All the plans affirm the importance of logistics for the economy and the need to transform the sector in the face of environmental challenges, but the articulation of these two dimensions varies greatly. Some regions see the ecological transition as an opportunity, while others, such as Île-de-France, highlight the tensions associated with the social acceptability of logistics. Most link the importance of logistics to their geographical location and interregional cooperation, revealing a tension between local issues and international openness, sometimes within the same document.

Table 1. Occurrences of words related to logistics in regional master plans

Region	"Logistics"	"Freight"	"Rail freight"	"Warehouse"	Total	Occurrences per 100p
Auvergne-Rhône-Alpes*	84	33	0	3	120	40
Burgundy-Franche-Comté	91	13	1	6	111	22
Brittany	32	8	0	0	40	20
Center - Loire Valley*	23	27	4	0	54	21
Corsica*	6	9	0	0	15	9
Grand Est	74	9	0	0	83	27
Hauts-de-France	171	32	6	5	214	43
Île-de-France	112	17	1	28	158	42
Normandy	178	8	2	6	194	36
New Aquitaine	104	16	4	3	127	33
Occitanie	88	48	18	1	155	38
Pays de la Loire*	30	16	7	0	53	15
PACA	195	43	15	8	261	36
Average	91.4	21.5	4.5	4.6	121.9	29.4

*Unmodified plans after 2024

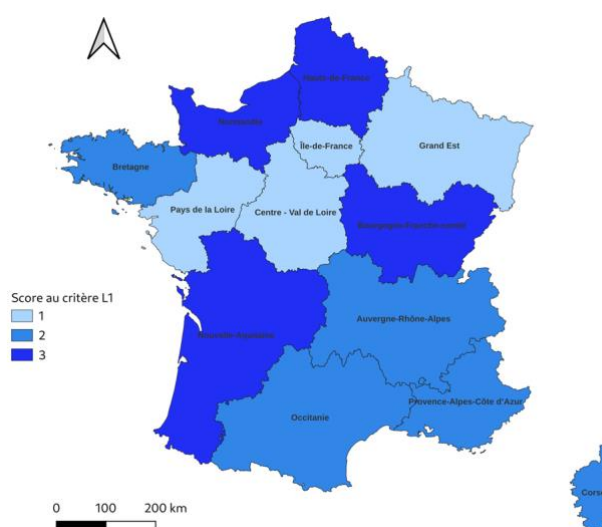
Source: T. Leloup, 2025, Logistics City Chair

The maturity of strategies varies but is progressing: post-2024 plans incorporate more objectives and rules, confirming the growing importance of logistics in compliance with ZAN. This development is accompanied by systematic treatment of land issues: incentives for sobriety (densification, redevelopment of brownfield sites) but also recognition of the need for logistics land in certain regions (Hauts-de-France, Île-de-France, Normandy, Nouvelle-Aquitaine).

Finally, modal shift is a central, and sometimes dominant, focus of the freight sector's transformation.

Bourgogne-Franche-Comté stands out by explicitly linking the location of warehouses to the optimization of goods flows.

Figure 1. Logistics real estate in regional master plans, qualitative analysis



Source: T. Leloup, 2025, Logistics

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The regions in dark blue identify logistics as a vital sector for the regional economy and are (relatively) favorable to logistics real estate development. The regions in light blue do not elevate logistics to the status of a key sector of the economy. They approach it mainly from the perspective of modal shift. In the case of Grand Est, the region considers itself to already have sufficient logistics infrastructure. The idea is to modernize, maintain, and make existing infrastructure bi- or even tri-modal. In Île-de-France, the region supports the development of logistics activities that contribute to modal shift and the decarbonization of truck fleets. Conversely, "the creation of new logistics facilities exclusively for road transport should be avoided." Intermediate regions consider logistics to be important in their plans but do not organize any specific integration of logistics real estate.

Conclusion

Developing a regional master plan is a long, complex, and costly exercise, which requires the involvement of numerous stakeholders and the reconciliation of sometimes divergent interests. Regarding logistics, the analysis highlights a certain degree of heterogeneity between regions, but also reveals, overall, a dynamic of progress in the integration of logistics issues. It is regrettable that in some plans this treatment is limited to the single issue of modal shift (from road freight to rail or waterway freight). It should also be noted that plans remain imperfect in terms of operationality, particularly due to the need for further consultation with local authorities. While they offer a relevant overview of logistics, plans lack tools that can be directly mobilized for the practical implementation of logistics projects.

In the future, it would be appropriate to go beyond the strictly regional scale for logistics planning and to consider multi-regional planning at the national level, in coordination with cross-border regions. In addition, significant work is also needed to support the development of sub-regional planning documents (territorial coherence plans and local zoning plans), with a focus on the creation and mobilization of databases. This will make it possible to better link development projects included in the plans and their logistics dimension.

At a more micro level, even if they have not been addressed in this work, issues of accessibility (for both workers and transport operators) to logistics parks and buildings also appear to be crucial.

Research, for its part, must advance in modeling the strong links between warehouse location and the generation of goods flows, henceforth integrating the institutional level of planning and increasing land constraints into these works.