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The explosion of last-mile food deliveries: A growing challenge

In the world's top 100 cities, the **World Economic Forum** anticipates a **36% increase** in the number of delivery vehicles on the roads by **2030**, compared with **2019 levels**[1] . Within this sector, **food home-delivery services** (B2C) represent a rapidly expanding segment. The restrictions introduced during the pandemic further accelerated the growth of turnover among companies providing home-delivery services. Growth figures for the value of the online food-delivery market show similar trends across different regions:

- **Europe: USD 56 billion in 2024 - USD 91.2 billion by 2030 (CAGR[2] of +8%)**
  EURO ≅48.1 billion in **2024**- EURO ≅78.4 billion in **2030**
- **US: USD 52.6 billion in 2024 - USD 93.3 billion by 2030 (CAGR of 9.6%)[3]**
  EURO ≅45.2 billion in **2024**- EURO ≅80.2 billion in **2030**
- **Canada: USD 20.2 billion in 2024 - USD 32.3 billion by 2030 (CAGR of 7.6%)**
  EURO ≅17.3 billion in **2024**- EURO ≅27.7 billion in **2030**

The rise in home-delivery services has caused a steady increase in workers in this sector and, as a result, more cars and vans on city streets, especially delivery riders on motorcycles, bicycles, e-bikes, e-scooters, and mopeds. These are often electric micromobility vehicles, making this segment generally more environmentally friendly than the overall logistics sector. Conversely, since these workers spend most of their time on the road, safety and well-being have become key issues in the public debate.

They are often non-specialised workers with limited protections and precarious contracts. These working conditions frequently lead to non-compliance with traffic regulations and a higher risk of accidents: the pressure and stress associated with their work can affect workers' decision-making; low remuneration frequently leads delivery workers to rely on non-certified or non-compliant vehicles, increasing safety risks. While contractual issues fall under labour legislation at higher administrative levels, many cities have taken steps to improve riders' working and travel conditions by implementing safety protocols for companies, developing dedicated infrastructure and support services, and promoting educational programs.

The EU's response: integrating mobility, labour, and food systems

The European Green Deal provides an overarching framework to make Europe's economy resource-efficient, low-carbon, and socially inclusive. Within this agenda, urban mobility and sustainable food systems are strongly interlinked. The Sustainable and **Smart Mobility Strategy (2020)** and the **Urban Mobility Framework (2021)** advocate for cleaner, more efficient, and inclusive transport systems, while the **Farm to Fork Strategy** calls for resilient local food value chains and shorter distribution circuits.

Last-mile delivery systems, particularly in food distribution, serve as a vital link between these two policy areas. They affect not only urban traffic patterns but also the competitiveness of local products, the carbon footprint of consumption, and the overall liveability of cities. Supporting local logistics hubs, zero-emission delivery zones, and coordinated urban planning can help cities align mobility needs with environmental and economic goals.

Generally, the **Urban Mobility Framework (2021)** and the EU Road Safety Policy Framework 2021–2030 emphasize protecting vulnerable road users, including pedestrians, cyclists, and micromobility users, a group that includes many riders. These frameworks guide local policies on infrastructure, education, and enforcement.

Additionally, the European Agency for Safety and Health at Work (EU-OSHA), promotes the initiative **"Safe and healthy work in the digital age" (2023–2025)** , which includes dedicated sections on the risks associated with platform work (such as stress, delivery times, use of bicycles and e-bikes, and battery management), as well as case studies on couriers and related prevention recommendations. In particular, the recommendations issued by the French Agency for Food, Environmental and Occupational Health & Safety (ANSES) are cited as a good practice example. These include making employment protections mandatory for this category of workers, ensuring the effective implementation of Directive

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(EU) 2024/2831 on platform work, and continuously collecting detailed information on their health conditions and exposure to occupational risks[4] .

In terms of labour regulation, the European Parliament and the Council adopted in 2024 the **Platform Work Directive**, which aims to address the false self-employment status of delivery workers, introduces transparency and human oversight in algorithmic management, and strengthens access to rights and protections, including information, representation, and social security.

In the **United States**, initiatives such as the **Department of Transportation's Smart City Challenge** and the **Urban Freight Lab at the University of Washington** explore new ways to integrate last-mile logistics within broader sustainable mobility strategies, focusing on congestion management, zero-emission zones, and equitable access for delivery workers. Several U.S. cities, including San Francisco[5] and New York, as outlined in the following section, have launched pilot programmes to regulate delivery platforms and to improve riders' rights and infrastructure.

In **Canada,** the federal government is advancing decarbonisation strategies aligned with the 2030 Emissions Reduction Plan, which includes national funding streams that support cities in decarbonising transport at the urban level. This objective can be pursued, for instance, through the development of zero-emission delivery fleets and urban-logistics innovation hubs at the municipal scale. These programmes show a strong alignment with European goals under the Green Deal, indicating a growing transatlantic convergence on sustainable urban logistics and the regulation of digital platforms.

Learning from Cities

Florence, Italy - "Casa Riders" project

Since February 2025, the Municipality of Florence has made available municipal premises to create a multifunctional centre dedicated to last-mile delivery workers. In this space, delivery riders can rest indoors, access toilets and drinking water, recharge their phones or e-bike batteries, and use a small workshop for basic bicycle repairs, so that they can travel in the safest possible conditions. The centre also offers information desks and training activities – for example, on road safety, occupational health and safety, and workers' rights.

The project, co-designed with the riders themselves and funded through public crowdfunding, as well as municipal support, provides a space for socializing and assistance, affirming in Florence the "right to rest" and to adequate working conditions for delivery cyclists – elements that ultimately translate into greater road safety.

The entire policy was developed in close collaboration with trade unions such as the Italian General Confederation of Labour and NGOs. This approach highlights the importance of collaborating with professional associations, unions, and local community organizations to address complex issues that intersect social and economic dimensions, particularly those related to the working conditions of specific worker categories and their broader impact on road safety. The risks associated with intense work rhythms, stress, and the use of unsuitable vehicles primarily affect the workers themselves. Still, in the case of road safety, since any potential accidents involving them may also affect other road users, they also pose a danger to the broader community.

New York, USA - Street Deliveristas Hubs

Since 2022, New York City has launched the pilot programme "Street Deliveristas Hubs", the first of its kind in the United States. In collaboration with the riders' union and supported by federal funding, the city is converting former unused kiosks (such as old newsstands) into well-equipped rest areas.

These hubs provide riders with a place to shelter from severe weather, take a break, and recharge both e-bike batteries and phones, as well as access bicycle repair stations. The idea is to offer "couriers", who ride through New York in all weather conditions every day, a kind of public "break room" similar to what regular employees have in their current workplaces. It is estimated that more than 65,000 app-based riders work in New York City, compared to a total of about four million private-sector jobs[6] — that is, roughly 1.6 percent of the city's entire workforce.

The *"Deliveristas Hubs",* co-designed with the riders themselves, also include information points on workers' rights and safety (e.g. traffic safety, safe battery charging). This innovative model of urban infrastructure, designed with solar panels and featuring green roofs, reflects NYC's commitment to improving the safety and comfort of delivery workers while reducing the environmental impact in the city.

After initial delays and the need for approval by the Landmarks Preservation Commission, construction of the first hub began in 2024 near City Hall Park.[7]

Since 2023, New York City has also promoted a pilot initiative called **E-Bike Trade-In** , allowing riders to exchange uncertified e-bikes or batteries[8] (often modified or untraceable) for new, safe, and certified ones, provided free of charge by the municipality, alongside the installation of the first city-operated public e-bike charging stations, aimed

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at reducing the risk of fires caused by unsafe batteries . The programme has enabled the replacement of more than 400 unsafe vehicles[9].

Delivery rider in New York City, USA. Photo by Robinson Greig

Toronto, Canada – A Micromobility Strategy

In 2024, Toronto adopted a Micromobility Strategy aimed at safely integrating low-emission two-wheeled vehicles (bicycles, e-bikes, cargo bikes, and e-scooters) into the city's urban mobility network. Last-mile delivery plays a crucial role within this strategy, which aims to make deliveries safer and more efficient by creating logistics "micro-hubs" in high-volume areas. These sites enable couriers to operate micromobility vehicles, particularly cargo bikes, for the final leg of delivery routes.[10]

In practical terms, after amending municipal regulations to authorise the use of large cargo-bikes on city streets (electric scooters remain prohibited on public roads and cycle lanes)[11], the municipality designated several on-street parking spaces and installed temporary logistics containers on public land. These micro-hubs may also include vehicle maintenance and repair services, as well as rest areas for riders.

Furthermore, the strategy places strong emphasis on safety and compliance with traffic regulations by all road users, including last-mile delivery riders. In the summer of 2025, the city launched an educational campaign targeting urban cyclists and delivery riders to reinforce key traffic rules. In particular, the **Toronto Police Service** conducted a three-week "Safety Blitz" focused on riders and micromobility users: additional patrols were deployed at intersections and in high-delivery areas, combining enforcement of illegal behaviours with the distribution of informative leaflets.[12] The city is also considering making road-safety training courses mandatory for all bicycle delivery workers as an additional accident prevention measure.

Rethinking the urban delivery cycle in this way contributes to both improving road safety for riders and enhancing overall urban liveability.

1. https://www.weforum.org/press/2020/01/urban-deliveries-expected-to-add-11-minutes-to-daily-commute-and-increase-carbon-emissions-by-30-until-2030-without-effective-intervention-e3141b32fa/
2. CAGR = compound annual growth rate
3. https://www.grandviewresearch.com/industry-analysis/online-food-delivery-market-report
4. https://www.anses.fr/en/content/working-conditions-food-delivery-couriers-digital-platforms-are-damaging-their-health
5. https://www.sfenvironment.org/ebike-delivery-pilot
6. https://dol.ny.gov/labor-statistics-new-york-city-region
7. After initial delays and the need for approval by the Landmarks Preservation Commission, construction of the first hub began in 2024 near City Hall Park, alongside the installation of the first city-operated public e-bike charging stations, aimed at reducing the risk of fires caused by unsafe batteries.
8. https://www.nyc.gov/html/dot/html/bicyclists/ebikeprograms.shtml
9. https://www.nyc.gov/html/dot/html/pr2025/nyc-dot-e-bike-trade-in-program.shtml
10. https://nacto.org/latest/urban-delivery-by-bike-microhubs-replaced-delivery-trucks-in-toronto/#:~:text=In%202022%2C%20the%20City%20of,street%20microhub%20pilot%20program
11. https://www.toronto.ca/legdocs/mmis/2021/ie/bgrd/backgroundfile-167154.pdf
12. https://www.tps.ca/media-centre/news-releases/64108/

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