Northeast Florida
Freight Movement Study
Stakeholder Forum
January 2017
Presentation Overview

I. Context and Study Overview
II. Stakeholder Engagement
III. Technical Approach
IV. Question & Answer
**Why Freight Matters**

- The broader wholesale trade, transportation and logistics industry is home to more than **70,000 companies**, employing **630,000 Floridians**.
- In 2014, Florida passed New York to become the **3rd most populous state**. Florida’s multimodal infrastructure now supports more than **20 million residents** and **over 100 million tourists annually**.
- Goods valued at nearly **$160 billion** flow through Florida’s airports and seaports each year.
- Over **762 million tons of freight** moving throughout Florida annually.
- From agriculture, to space shuttles, to your morning coffee, freight impacts almost every facet of daily life.
National, State & Regional Context

National
- MAP-21 (2012)
  - Set National Freight Policy and Strategy
  - Established a National Freight Network
  - Called for State Freight Plans
  - Greater Federal Funding Share
- FAST Act (2016)
  - Improved Freight Project Funding (Formula and Discretionary)
  - Established Performance Measures and Data Driven Analysis

State & Regional
- Florida Freight and Mobility Plan (2012)
  - Policy Element (2013)
  - Investment Element (2014)
- NFTPO Freight, Logistics & Intermodal Framework Plan (2012)
  - Multi-phased, comprehensive, integrated and intermodal approach
  - Understanding needs and driving forces
  - Evaluated processes and strategies of North Florida’s port competitors
  - Identified opportunities & challenges
  - Established Common Regional Vision
Study Objectives

• Develop a regional branding for freight and related services;
• Leverage public-private-partnership opportunities;
• Create a living document that is a useful tool for public and private sector stakeholders;
• Design the document to be upward looking to align with Federal and State policies while being tailored to meet local and regional freight needs;
• Create a defensible list of priority projects; and
• Position District Two for future funding opportunities.
Study Area

- Interstate
- Major Highway
- Rail
- Seaport
- Airport
- Space Port

1. Spaceport
2. Deepwater Seaports
3. Commercial Service Airports
7. Freight Railroads
18. Counties
1,212. Bridges
2,556. Miles of State Highway
12,000. Sq. Mile Study Area
METHODOLOGY

- Partner and Stakeholder Engagement
- Analyze Commodity Flows
- Review of Existing Plans and Policies
- Identify Freight System Needs
- Identify Existing Freight System Conditions
- Propose Actionable Solutions
- Develop Inventory of Freight System Assets
- Prioritize Freight Improvements
Stakeholder Engagement
Stakeholder Engagement

- One-on-one meetings
- Website: www.fdotd2crossdock.com
- Interactive Comment Map
- Online Survey
- Industry Events
- Forums
<table>
<thead>
<tr>
<th>NE FLORIDA FOCUSED FEEDBACK</th>
<th>NATIONAL ATRI INDUSTRY SURVEY</th>
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<tr>
<td>CONGESTION</td>
<td>ELECTRONIC LOGGING DEVICE MANDATE</td>
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<td>FIRST &amp; LAST MILE ISSUES</td>
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<td>TRUCK CONSIDERATIONS IN ROADWAY DESIGN</td>
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<td>SAFETY CONCERNS</td>
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<td>DELAYS CAUSED BY CONSTRUCTION</td>
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<td>LOCAL ROADWAY MAINTENANCE</td>
<td>COMPLIANCE, SAFETY, ACCOUNTABILITY (CSA)</td>
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<td>PUBLIC-PRIVATE PARTNERSHIP OPPORTUNITIES</td>
<td>DRIVER SHORTAGE</td>
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<td>DESIRE FOR TRUCK ONLY LANES</td>
<td>DRIVER RETENTION</td>
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<td>IMPROVE AWARENESS OF FDOT COMMUNICATION TOOLS</td>
<td>INFRASTRUCTURE ISSUES &amp; CONGESTION</td>
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<td>OTHER / MISCELLANEOUS</td>
<td>DRIVER DISTRACTION</td>
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INTERACTIVE MAP FINDINGS
Technical Approach
Multimodal Data Collection

- Safety
- Traffic
- Facility
- Stakeholder
- Commodity
Heavily Utilized Roads (2015)
Major Freight Hubs (2015)
How much freight?

**INBOUND**
- 44.2 million tons
- worth $71.7 B

**OUTBOUND**
- 33.8 million tons
- worth $58.5 B

**WITHIN REGION**
- 18.5 million tons
- worth $34.8 B

**THROUGH**
- 64.1 million tons
- worth $115.3 B
What is moving?

- **Transportation Products**: Valued at $36.7 B (29%)
- **Construction Materials**: Valued at $3.1 B (11%)
- **Warehouse & Distribution**: Valued at $77.5 B (17%)
- **Industrial Products**: Valued at $23.2 B (11%)
- **Fuels & Energy**: Valued at $8.2 B (8%)
- **Consumer Goods**: Valued at $16.3 B (9%)
How is freight moving?

- Truck: 66%
- Rail: 28%
- Water: 6%
- Air: <1%
Who are our trading partners?

Trading Partners 2015 (Tons)

- **Study Area**
- **< 10,000**
- **10,001 – 25,000**
- **25,001 – 100,000**
- **101,000 – 500,000**
- **> 500,000**
Next Steps

Identify Freight System Needs

Propose Actionable Solutions

Prioritize Freight Supportive Improvements
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