Southeast Florida’s Regional Freight Plan
An Illustration of Successful Regional Planning

Presented to
AMPO’s 2015 Annual Meeting

Presented by
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And
Michael Williamson, Cambridge Systematics, Inc.

October 21, 2015
MANY PARTNERS, ONE UNIFIED VOICE

Metropolitan Planning Organizations
- Miami-Dade
- Broward
- Palm Beach

Department of Transportation
- Districts 4 and 6
- Turnpike

Regional Planning Councils
- South Florida
- Treasure Coast

Transit Agencies
- MDT
- BCT
- Palm Tran
- SFRTA

Agreed to Goals and Objectives
Identified regionally significant facilities
Developed a Transit Vision
Developed a Highway Network
Identified Pedestrian & Bicycle Emphasis Areas
Incorporates Freight Needs & Investments

2015 ADOPTION
FREIGHT & GOODS

Southeast Florida is home to a well-established and expanding freight transportation system. This system serves as the cornerstone of the region’s economy, providing goods and services to Florida’s largest consumption market as well as connecting the region to the global economy through major sea and air gateways. The region is home to a multi-cultural community with an economy dominated by tourism, international trade, agriculture and mining, and natural resources.

In recognition of the importance of freight and goods movement, the network, projects, and priorities from Cargo 2040 Regional Freight Plan were directly integrated into the region’s transportation plan. The following section highlights key information from Cargo 2040.
Our 2014 Southeast Regional Freight Plan Update is Positioning Us for Continued Growth

- Screens regional highway network for key freight bottlenecks
- Reviews capital needs for our airports, seaports and railroads
- Provides updated list of prioritized freight needs
- Estimates economic impacts generated by the freight industry
- Summarizes and incorporates key freight and logistics initiatives to help position the region as a global logistics hub
- Tells our freight story
Freight Program has been Built in Cooperation with Key Partners

- Regional Freight Advisory Committee
- Stakeholder interviews
- Truck company survey
- Outreach at regional conferences and committees
Southeast Florida Has Made Significant Investments

- SR 826/836 Interchange
- Eller Drive Overpass
- 595 Truck Stop
- Port Miami Tunnel
- Martin Luther King Blvd
- Port Miami Dredging
- Centurion’s new 800K sqft air cargo centre at MIA
- NW 25th St Viaduct Phase II
- ICTF at Port Everglades and Port Miami
- Port of Palm Beach Slip Redevelopments
- Post Panamax Cranes
- South Port Turning Notch
- FLL Runway Extension
Port Miami Improvements
Port Everglades Improvements
Port of Palm Beach Improvements
MPOs are Stepping Up Freight Investments

- 3 MPOs are looking at new ways to invest in freight projects
  - Broward MPO has a freight commitment of $338M in its 2040 LRTP Update for highway projects that benefit freight mobility (excluding major state investments)
  - Miami-Dade MPO has a freight set aside of $127M in its 2040 LRTP Update specifically for freight only projects (quick fix, low cost) and over $3B in highway capacity projects that benefit both freight and passenger mobility
  - Palm Beach MPO has a freight commitment of $1.3B in its 2040 LRTP Update for highway projects that benefit freight mobility (including major state investments)

<table>
<thead>
<tr>
<th>2040 Freight Set Aside (Millions)</th>
<th>2020</th>
<th>2021-2025</th>
<th>2026-2030</th>
<th>2031-2040</th>
<th>Total</th>
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<tbody>
<tr>
<td>TMA (5%)</td>
<td>$1.7</td>
<td>$8.4</td>
<td>$8.4</td>
<td>$16.8</td>
<td>$35.3</td>
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<td>Other Arterials (5%)</td>
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<td>$21.5</td>
<td>$20.3</td>
<td>$44.4</td>
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<td>TRIP (5%)</td>
<td>$–</td>
<td>$0.3</td>
<td>$0.3</td>
<td>$0.6</td>
<td>$1.2</td>
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<td>Total</td>
<td>$6.5</td>
<td>$30.2</td>
<td>$29.0</td>
<td>$61.8</td>
<td>$127.5</td>
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MAP-21 and National Freight Network Provides Southeast Florida with Opportunity and Challenge

• MAP-21 requires USDOT to establish a national freight network

• New freight policy brings new funding opportunities

• Key facilities in South Florida are missing
  – No seaport, airport, or rail yard connectors have been designated
  – Key Interstates and expressways are not contiguous
  – Key expressway connections are missing

• FHWA current reviewing comments

• FHWA also working with MPOs on urban freight network needs
Southeast Florida’s Freight Program is Consistent with Key Statewide Initiatives

- Florida’s Transportation Plan
- Florida’s Strategic Intermodal System Plan
- Florida Freight Mobility & Trade Plan
- Florida Trade and Logistics Study
Southeast Florida’s Freight System

- Expressways
- State highways
- Connectors to freight activity centers
- 3 International airports
- 3 Deep water seaports
- 3 Freight railroads
- Miami River
- New River
Truck Percent

- Trucks represent more than 5 percent of total traffic for much of the region’s state highway system.
- This percent increases as you move south into Miami-Dade County.
PortMiami Is Growing

- Economic recovery underway
- Major infrastructures investments complete or underway
- Forecasts suggest doubling or tripling of cargo over 20 years
Port Everglades is Growing

- Serves as gateway for petroleum products consumed in 14 South Florida counties
- Major infrastructures investments complete or underway to grow containers, petroleum, breakbulk and cruise passenger business
- Forecasts suggest doubling of containerized cargo over 20 years

**Petroleum**

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<th>Year</th>
<th>Historic</th>
<th>Forecasted</th>
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</tbody>
</table>

**Containers**

- Actual: 948,362
- Baseline @ 2.7%: 1,087,882
- Baseline Plus @ 3.0%: 1,230,102
- High @ 3.7%: 1,710,642

**Source:** Port Everglades (2000-2012), USACE, DOE, IHS Estimates

Note 2013 utilizes fiscal year 2013 data to April provided by Port Everglades
Port of Palm Beach is Growing

- Serves as a niche container port serving smaller ports in the Caribbean and Central America
- Infrastructures investments underway and planned to grow capacity
- Forecasts suggest steady growth for next 10 years
Southeast Florida Rail System

- Three rail operators serving the region
- Key connections planned and underway
- Possible new corridor under consideration

**FREIGHT RATIONALIZATION OPPORTUNITIES Between FEC and CSX**

- **NORTHWOOD CONNECTION**
  - In Design Phase Thru 2014
- **POMPANO CONNECTION**
  - Not Funded
- **IRIS CONNECTION**
  - In Design Phase Thru 2014
Miami International is Growing

- Major cargo investment plan largely complete
- Centurion’s new 800K sqft air cargo centre at MIA open for business
- NW 25th St Viaduct Phase I complete and Phase II under construction
- Forecasts call for significant growth over next 20 years
Miami River is Growing with Expanded Opportunities

- Designated as emerging SIS waterway in 2014
- Access to core industrial area under study with proposed improvements
- Continued growth of niche markets anticipated
Truck Parking Remains a Key Consideration

- 595 Truck Stop is South Florida’s only full service facility
- Miami-Dade MPO has completed two phases of a truck parking study to identify the need for truck parking
- FDOT has study under way to investigate feasibility of full service truck stop/parking on state owned land at one identified site at the northwest corner of Turnpike and NW 12th St
- Other private developers remain interested
Investments in Intermodal Logistics Centers is Expanding Our Supply Chain Capacity

- **FDOT ILC Grant Program**
  - $5 Million a year to support ILC development

- **Existing and Proposed ILCs**
  - FECI’s South Florida Logistics Center (underway)
  - Key Master Planned ILCs in Palm Beach, St. Lucie, Glades, and Hendry Counties
South Bay/Belle Glade Opportunities Include a Logistics Campus/ILC
Creation of the Florida Perishables Trade Coalition has Opened New Markets to Southeast Florida

- Many perishable goods are imported through Pennsylvania and trucked to Florida due to medfly concerns
- Cold treating products properly eliminates this risk
- FPTC formed to increase trade in perishable products through Florida’s airports and seaports
- Phase I of a pilot program successfully completed allowing grapes and blueberries from Peru and Uruguay
- Phase II will allow more products through more approved ports
- Phase III will allow for cold treatment to occur in Florida for any shipments which may fail
Needs Were Identified and Prioritized for Roadways, Seaports, Airports, and Rail

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<th>Rank</th>
<th>Facility</th>
<th>From</th>
<th>To</th>
<th>Project Type</th>
<th>Description</th>
<th>Total Score</th>
<th>Rank</th>
<th>Total</th>
<th>Rank</th>
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<td>1</td>
<td>SR-826/Palmetto Way</td>
<td>NW 87th Avenue on I-75</td>
<td>SR-826</td>
<td>Freeway Capacity Improvements</td>
<td>Add managed lanes</td>
<td>90</td>
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<td>2</td>
<td>Palm Beach International Cargo Facilities Access</td>
<td>FLL Runway 9R/27L Extension (8,000’ x 150’)</td>
<td>FLL</td>
<td>Arterial Capacity Improvements</td>
<td>Create separate barriered truck lane with manageable entry/exit</td>
<td>80</td>
<td>3</td>
<td>75</td>
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<td>3</td>
<td>Port Everglades ACOE Deepening and Widening-Design</td>
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<td>Total Score</td>
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<td>Rail Projects Total Score</td>
<td>CSX/FEC CSX TO FEC Pompano Connection</td>
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<td>20</td>
<td>Port Miami Acquisition Of FODEquipment</td>
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<td>21</td>
<td>Port Miami Taxiway S Rehabilitation</td>
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<td>26</td>
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<td>29</td>
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Freight Industry has Significant Impact on Southeast Florida’s Economy

Direct Impacts of Freight Industry in Southeast Florida, 2012

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<tr>
<th>Metric</th>
<th>For-Hire</th>
<th>In-House</th>
<th>Total Direct</th>
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<tr>
<td>Jobs</td>
<td>253,418</td>
<td>25,410</td>
<td>278,828</td>
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<tr>
<td>Labor Income (millions)</td>
<td>$18,264</td>
<td>$1,050</td>
<td>$19,314</td>
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<tr>
<td>Average Compensation</td>
<td>$72,070</td>
<td>$41,327</td>
<td>$69,268</td>
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<tr>
<td>GRP (millions)</td>
<td>$30,244</td>
<td>$1,404</td>
<td>$31,648</td>
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<tr>
<td>Economic Output (millions)</td>
<td>$51,746</td>
<td>$3,504</td>
<td>$55,250</td>
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Source: U.S. Census County Business Patterns, IMPLAN, Cambridge Systematics.
Key Strategies

- Promote economic contributions of freight and logistics industry
- Maximize use of available funding programs
- Evaluate the effectiveness of the freight system
- Support advancement of solutions for missing freight links
- Engage the freight community in the identification of freight bottlenecks
- Ensure trade and logistics remain targeted industries
- Support workforce development programs
- Leverage investments through public private partnerships
- Continue to develop, test and expand pilot programs
- Monitor ILC developments and partner as appropriate
- Promote regional freight mobility
Our Ability to Incorporate Freight Priorities into Our Regional Plan is Critical to Our Future

- South Florida is home to a well-established, globally competitive logistics industry
- Billions of dollars have been invested over the last several years to ensure we remain competitive
- We are well positioned to see significant growth as global trade patterns continue to shift
- Our economic prosperity and the sustainability of our communities will be strengthened and driven by our successful role as a global logistics hub
Questions?

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