



# *2010 SIS Strategic Plan Update*

## *Trade & Logistics Breakout Group - 1<sup>st</sup> Meeting*

Florida Department of Transportation



April 20, 2009



# Agenda

- Breakout Groups Charge
- Brief Overview of Domestic and International Trade Trends in Florida
- Identify and Discuss Key Trade & Logistics Issues
- Discussion Questions – Open Forum
- Next Meeting Information

# *Breakout Groups Charge*

- **Purpose**
  - Clarify issues and draft potential recommendations for Leadership Committee before May meeting
  
- **Process**
  - 2 teleconferences through May meeting; potential follow-up call between May and June
  
- **Roles**
  - Group members (or designees) participate in discussion and develop consensus recommendations
  - Opportunity for public comment at each meeting
  - Facilitators guide discussion
  - Support team (FDOT staff and consultants) provide technical input

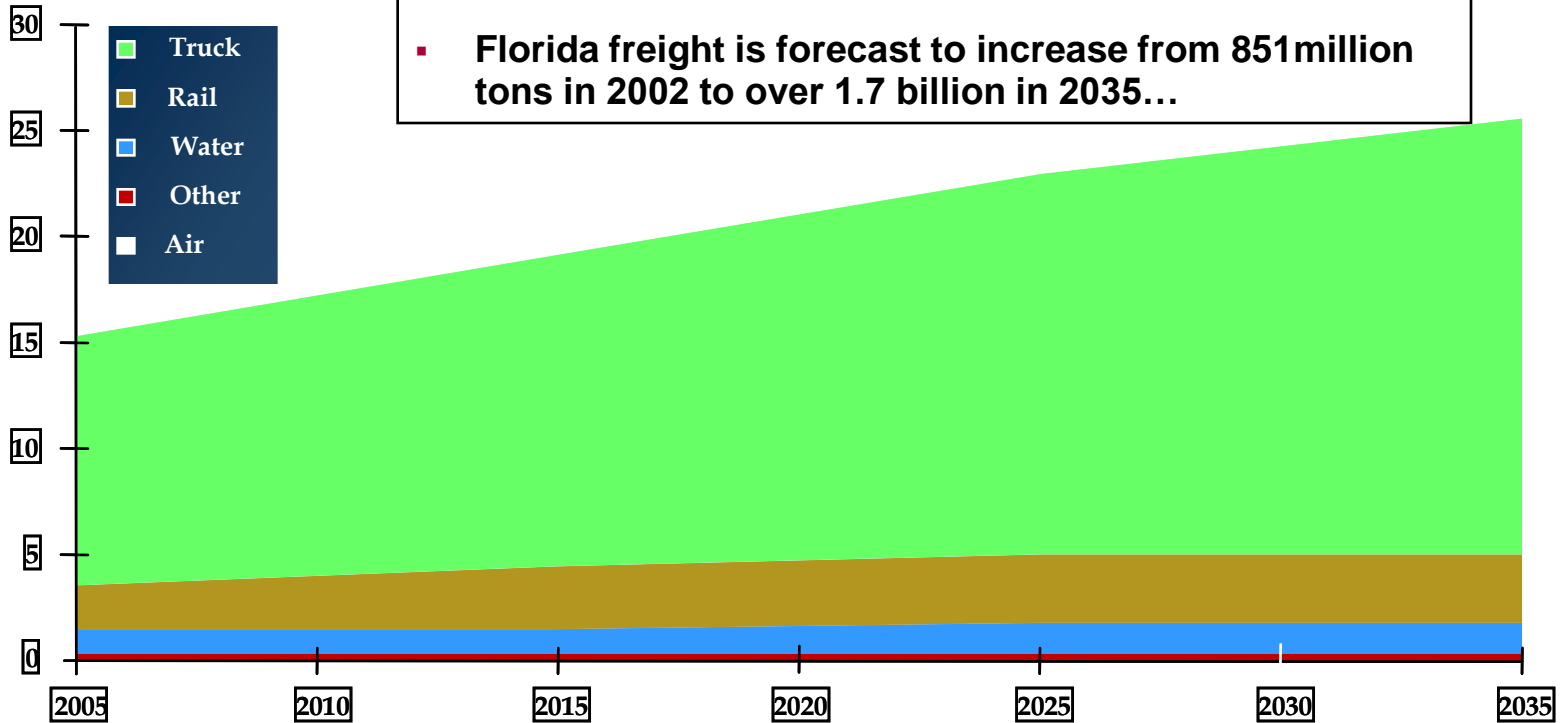
# *Leadership Commitee: Key Trade & Logistics Issues*

1. Growth in global trade in the future
2. Development of inland ports and distribution networks



# State and National Freight Trends Call for Significant Growth in Domestic Cargo...

Net Freight Tons (in Billions)



- US freight is forecast to increase from 15 billion tons in 2005 to over 26 billion tons in 2035...
- Florida freight is forecast to increase from 851 million tons in 2002 to over 1.7 billion in 2035...

Sources: Global Insight, Inc., TRANSEARCH, 2004

[http://ops.fhwa.dot.gov/freight/freight\\_analysis/state\\_info/florida/profile\\_fl.htm](http://ops.fhwa.dot.gov/freight/freight_analysis/state_info/florida/profile_fl.htm)



# Rising Demand for Freight Movement

## Freight Volume in Millions of Tons

<b>Mode</b>	<b>2002 (Estimate)</b>	<b>2035 (Forecast)</b>	<b>Change</b>
Total	851	1,680	97%
Truck	623	1,295	108%
Rail	114	183	60%
Water	88	142	61%
Air (air and truck)	0.7	1.8	157%
Employment* (millions)	7.2	12.3	52%

\* 2035 employment is extrapolation only.

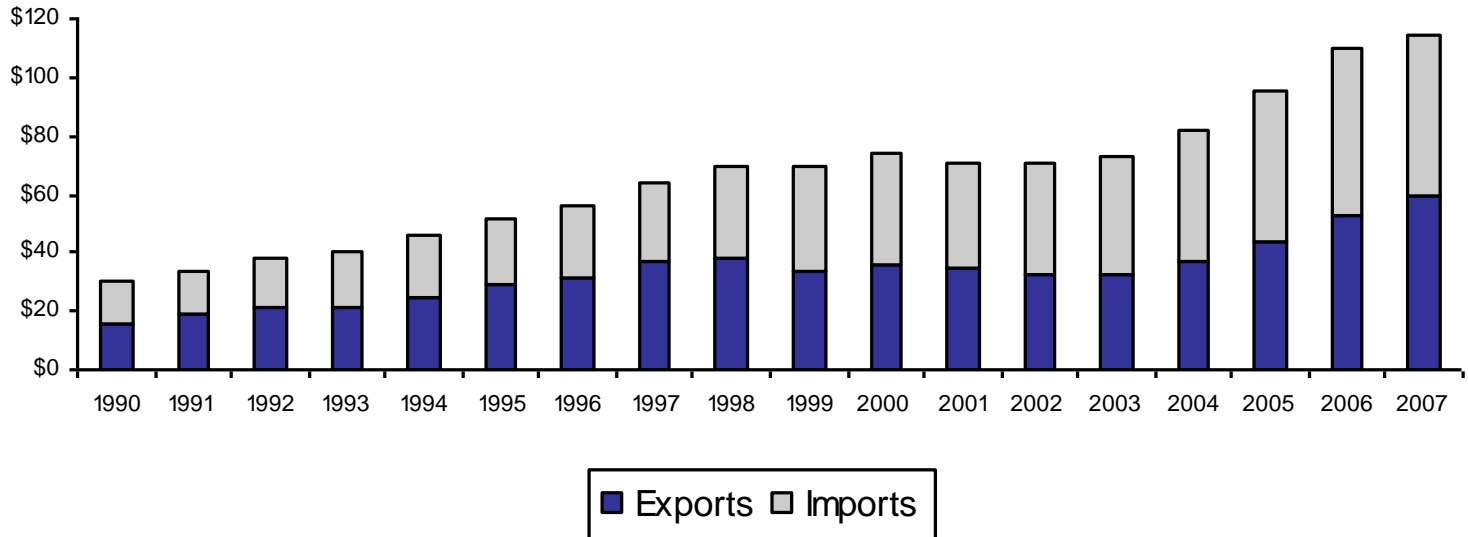
Source: Modes - FHWA Freight Analysis Framework, 2002, [http://www.ops.fhwa.dot.gov/freight/freight\\_analysis/faf/state\\_info/faf2/fl.htm](http://www.ops.fhwa.dot.gov/freight/freight_analysis/faf/state_info/faf2/fl.htm)  
 Employment – Bureau of Labor Statistics



# Trade and Distribution

## Value of Florida International Trade

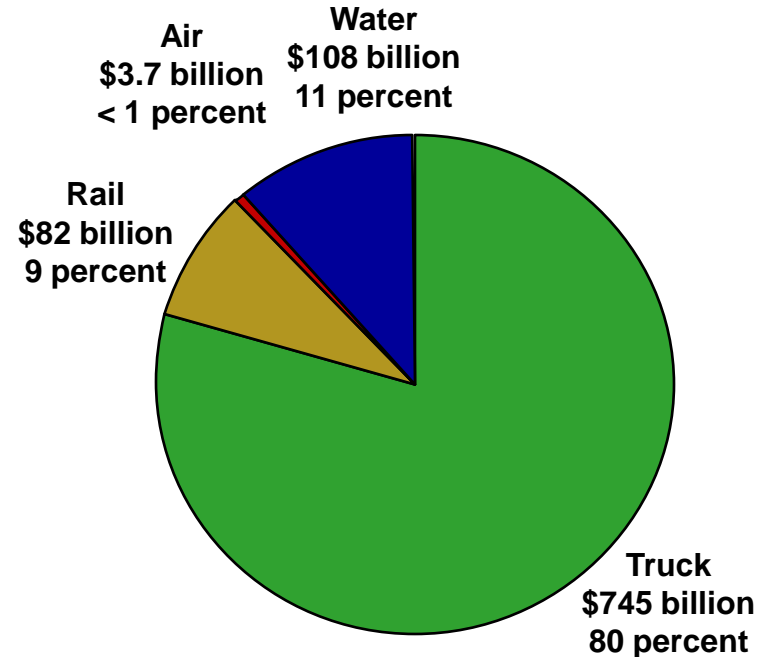
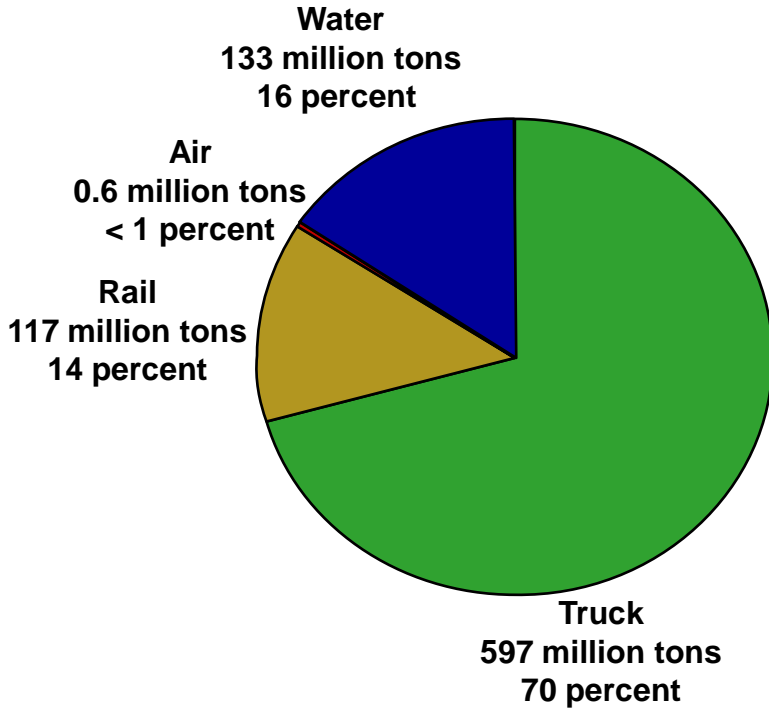
Value of Trade (in Billion \$)



Source: U.S. Census Bureau



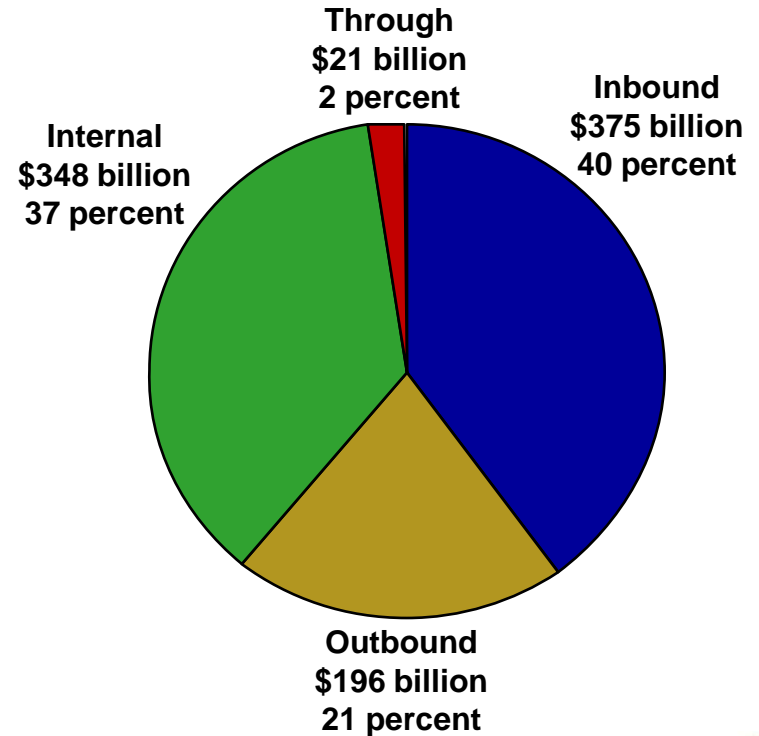
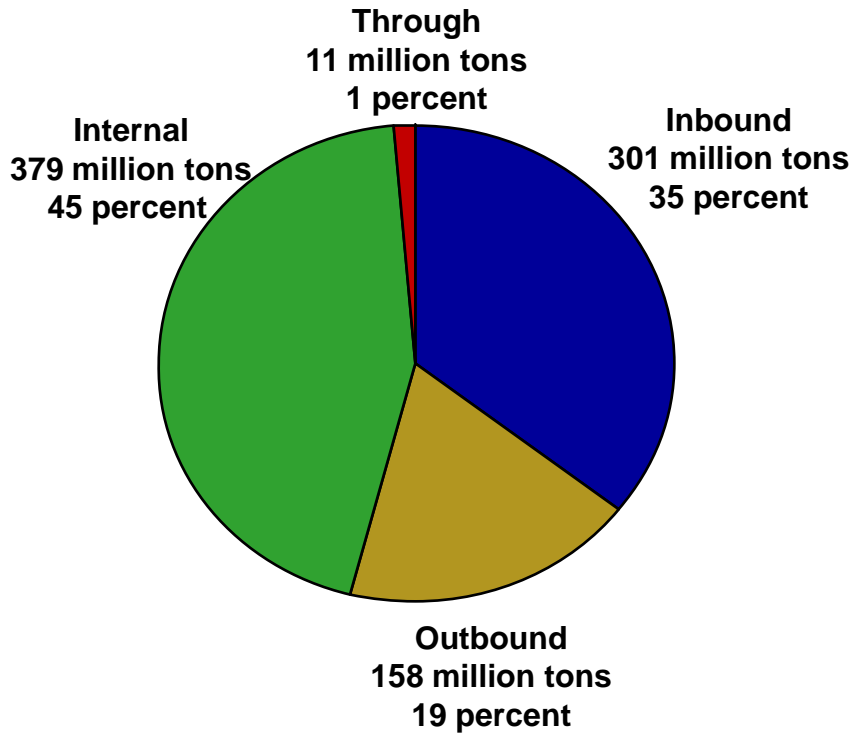
# Florida Cargo Relies on All Modes



Source: Global Insight, Inc.



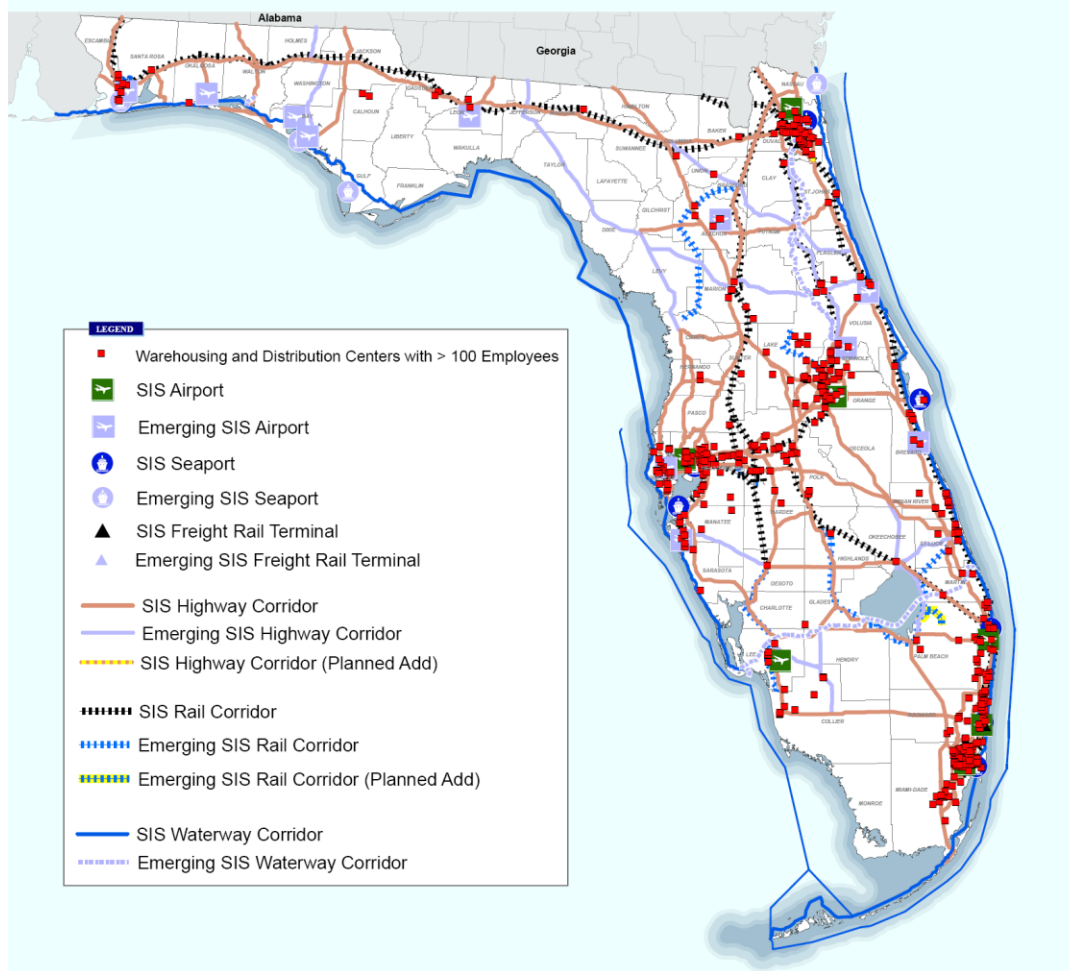
# Florida Consumes More than it Produces



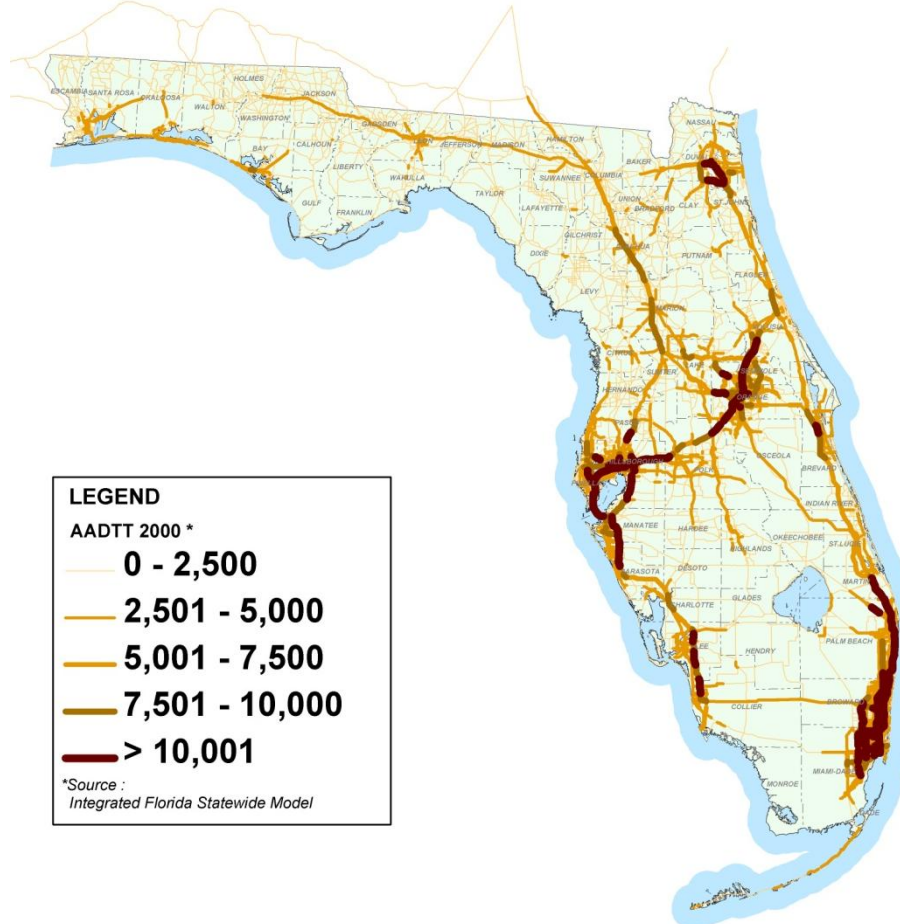
Source: Global Insight, Inc.



# Florida's Distribution System Is Concentrated in Major Urban Areas

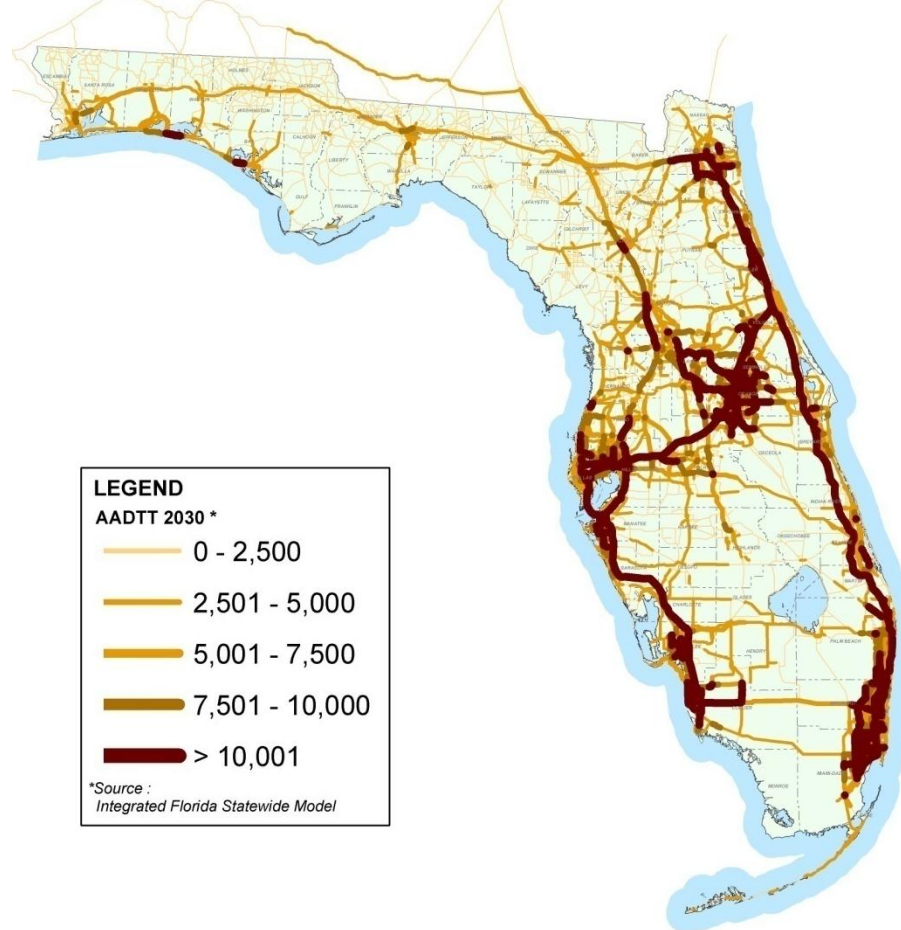


# Truck Annual Average Daily Traffic on Florida's State Highway System, 2000



Source: Integrated Florida Statewide Model, 2000

# Truck Annual Average Daily Traffic on Florida's State Highway System, 2030



Source: Integrated Florida Statewide Model, 2000

# Key Questions for Breakout Group

1. Growth in global trade in the future
  - How can the SIS prepare for anticipated **growth in global trade** over the next few decades?
2. Development of inland ports and distribution networks
  - Should there be proactive efforts to develop **inland ports** and **distribution networks**?
  - How should this opportunity be addressed in the SIS Strategic Plan update?

# *Key Questions for Breakout Group (cont.)*

3. What **policy changes** should be considered as part of the 2010 SIS Strategic Plan update?
  - Changes to goals and objectives
  - Changes to designation criteria
  - Changes to planning and prioritization processes
  - Other
  
4. How can **partner coordination** be enhanced to address the Urban issues?

# Summary of Presentation

- Breakout Groups Charge
- Overview of Domestic and International Trade Trends in Florida
- Identify and Discuss Key Trade & Logistics Issues
- Discussion Questions – Open Forum
- Next Meeting

# Next Meeting

- Date: May 8, 2009 ~tentative~
- Time: 10:00am – 12:00pm
- Agenda
  - Additional briefings as needed
  - Additional Discussion
  - Development of Preliminary Policy Statements



*Questions or Comments?*

*Buckle up, every trip, every time!*