March 5, 2024

CRTPA COMMITTEE AGENDA ITEM 5A

REGIONAL FREIGHT STUDY

STATEMENT OF ISSUE

The Project Team for the regional Freight Study developed the Existing Conditions Report, Future Conditions Report, and a Needs and Recommendations Report. These three items constitute the efforts over the last year on the project. The presentation for the Regional Freight Study will focus on the Needs and Recommendations Report, however, the background information (Existing Conditions and Future Conditions) is outlined on the following pages.

RECOMMENDED ACTION

Option 1: Recommend the approval of the CRTPA Regional Freight Study.

BACKGROUND

The CRTPA Regional Freight Study was kicked-off at the January 2023 Board Retreat. Since that time the project team has been collecting data for the Existing Conditions Report, holding stakeholder meetings (individual and Freight Committee), and developing actions that will enhance the future of the regional freight system.

Existing Conditions Report

The following pages briefly describe the components of the Existing Conditions Report.

Relevant Study Overview

The freight study development started with building a foundation for assessing CRTPA freight mobility framework using stakeholder outreach and peer literature reviews. This collaborative approach provides the CRTPA Board members with a bottom-up assessment of demand/impact profile from an all-user perspective; and it empowers collective visioning for strategy development and needs resourcing. Through the outreach and review, general guidance and best practices were captured for CRTPA freight mobility assessment.

The documents that were reviewed for this effort included:

- Statewide Freight Mobility and Trade Plan (2020)
- Statewide Truck Parking Study (2020)

- Florida Rail System Plan (2022)
- Connections 2045 Regional Mobility Plan (2020)
- Tallahassee International Airport Master Plan Update (2019)

Existing Conditions

The transportation system is essential for efficient movement of people and goods in, out, and within CRTPA (the region); and it accounts for all modes in terms of infrastructure and related users, programs, and stakeholders. Identifying the transportation system's framework and characteristics is imperative for understanding the benefits, needs, and issues experienced by the region. This section identifies the exiting conditions for the region's transportation freight systems elements; it describes the characteristics and locations of each element while evaluating the benefits, needs, or issues experienced by the region.

Major topics covered in this section include:

- National Freight and Freight Related System Designations (PDF pages 14 – 25)
- Statewide Freight and Freight Related System Designations (PDF pages 26 – 32)
- Transportation Assets (PDF pages 33 – 77)

Stakeholder Coordination

The project team held a series of meetings with stakeholders to discuss freight infrastructure and freight movements in the Tallahassee area. The stakeholder involvement consisted of a series of targeted individual meetings and the formation of a Freight Stakeholder Committee.

Stakeholder involved in this process included:

- Freight Stakeholder Committee (PDF page 78)
- Individual Stakeholders (PDF pages 79 – 80)

Future Conditions Report

Building upon the existing conditions, the Future Conditions Report (and Data Appendix) for the freight system includes the following components.

Socioeconomic Trends

Socioeconomic factors are key indicators for characterizing growth impacts within an area. These factors account for shared cultures and norms that shape the area's social decision, activities, and policies. This section includes an analysis of:

Future Regional Populations (PDF pages 6 – 9)
Freight Labor Supply (PDF page 10)
Freight Employment (PDF pages 10 – 13)
Freight Employment Earnings (PDF pages 13 – 15)

Business Environment

Business environments directly influence freight mobility by both generating demand for goods for customers and product development, and by employing workers who generate demand for goods. Increasing in the number of establishments means an increase in demand for goods by both the industry and the general consumer. This section analyzes the changes (increases) in CRTPA's business establishments and the impacts and compares the changes with the State as a point of reference. The following areas are presented in this section.

Business Establishments (PDF pages 15 – 18)
Business Establishments by Freight Industry (PDF pages 19 – 21)

Tourism

Tourism directly influences freight mobility by both generating more vehicle traffic from attracting traveling visitors; and by generating more freight traffic from the traveling visitors demanding more goods. Therefore, increases in the number of visitors represent an increased impact on freight mobility. This section analyzes CRTPA's tourism and the expected impacts on freight mobility.

Tourism (PDF pages 22 – 23)

Network Performance

Network performance indicators help to define the network's ability to support efficient freight mobility within an area. The following assessment takes a strategic approach for defining network performance by measuring connectivity and reliability of the multimodal network. Along with safety, connectivity, and reliability are freight mobility indicators important to industry operators. This assessment defines CRTPA's highway and rail multimodal network performance through analyzing connectivity and reliability. The topics presented in this section include:

Highway Mobility (PDF pages 23 - 31)
Rail Mobility (PDF pages 32 – 48)

Freight Intensive Areas

Each of the four member counties maintain a comprehensive plan that outlines the projected growth patterns and desires of the community. As part of the comprehensive plan development, the future land use element is created to outline where growth is anticipated and desired within the community. Future Land Use Maps (FLUMs) are generated with descriptions highlighting the appropriate development within the areas and what should be considered. These FLUMs are used to identify the freight related land uses and can be found, in detail on PDF pages 41 – 43.

Additionally, there are identified freight intensive areas identified by the Florida Department of Transportation (FDOT) and are described in detail on PDF pages 43 – 48.

Lastly, this section includes details regarding the Connections 2045 Regional Mobility Plan (RMP) and associated projects that are anticipated to impact future freight movement within the CRTPA region. This information can be found of PDF pages 49 – 51.

Regional Trucks Trade and Commodity Flows

The road network within the region supports freight movements for a variety of commodities and enables connections to other regions across the national freight network. The FHWA Freight Analysis Framework (FAF5) was used to analyze the existing and projected movement of goods on roadway corridors throughout the region. Overall, data from FAF5 indicates that the region will see a substantial increase in freight movement between 2022 and 2050. Areas presented in this section include:

Florida Shipping Trends (PDF pages 52 – 53)
Florida Trading Partners (PDF Page 53 - 54)
Key Corridors – All Commodities (PDF pages 54 – 59)
Key Corridors – By Commodity (PDF Pages 60 – 61)

Regional Air Trade

Tallahassee Regional Airport (TLH) has anticipated future growth with a goal of heightening the airport as a transportation hub that will increase economic growth with increasing demand for air cargo service. Further discussion regarding TLH can be found on PDF pages 61 – 63).

Port Trade

The road network within the region supports freight movements for a variety of commodities and enables connections to other regions across the national freight network. The FHWA Freight Analysis Framework (FAF5) was used to analyze the existing and projected movement of goods on roadway corridors throughout the region. Since data is provided at the network link scale and not aggregated by corridor, the maximum values for each corridor were utilized in this analysis. Overall, data from FAF5 indicates that the region will see a substantial increase in freight movement between 2022 and 2050.

Conclusion

The future and existing conditions assessments define the freight mobility framework for the region. Over the planning horizon, it is anticipated that business development will continue to increase in the region; however, the number of freight related businesses within the area has been declining. Regional comprehensive planning efforts highlight a limited emphasis on the development of industrial and freight related businesses which may limit this growth. These limitations provide communities with the tools to guide this development into desired areas while maintaining the character of the overall region. It is anticipated that future freight related growth will largely be clustered adjacent to major corridors (especially Interstate 10).

The movement of cargo through the region is expected to increase along the major freight corridors and major freight modes in the area. The presence of Interstate 10, other major roadways, rail lines, and TLH will continue to move cargo through the region and beyond. The TLH infrastructure and policy improvements are anticipated to improve cargo modal options while having a significant and positive economic impact on the region. Likewise, the rail providers in the region have identified improvements to the corridors and are pursuing business partnerships across the state.

Needs and Recommendations Report

There are two documents associated with the final component of the CRTPA Regional Freight Study, including the Draft Needs and Recommendations Report and the associated Draft Needs and Recommendations Appendix. The results from this study are divided into several chapters relating to:

- Findings
- Performance Management
- Needs
- Recommendations

These chapters are arranged as a top down approach to illustrate the process used in the freight study from the development of the existing and future conditions reports to the final recommendations.

Findings (PDF pages 4 - 10)

This chapter summarizes the existing and future conditions of the freight network, the infrastructure in place and the potential issues related to growth of the region and the freight system. Both the Existing Conditions and Future Conditions assessments include references back to their respective report. Overall, the existing system is performing well, however, as the CRTPA develops plans such as the Long Range Transportation Plan (LRTP) freight consideration must be incorporated in the efforts to ensure future conditions aren't impeded.

Performance Management (PDF pages 11 - 13)

To assist in future assessment and conditions for evaluation of freight needs, the Performance Management chapter provides measurements to utilize for consideration. These measures could be incorporated to determine if infrastructure improvement(s) have a positive or negative affect on the freight system. Again, some of these measurements could be used in the LRTP process or individual roadway studies.

Needs (PDF pages 14 and 15)

The "Needs" for the freight system are divided into three categories, including, Land Use and Policy, System Capacity and Efficiency, and System Safety. This assessment produced quite a few project needs. This information can be found in the Draft Needs and Recommendations Appendix, under the "Needs Category" heading with the vast majority of the projects fall under the System Capacity and Efficiency area. Page 10 of the appendix includes a map with the location of the projects, for reference.

Recommendations

Finally, the report provides recommendations (short-term, mid-term, and long term) for:

- Infrastructure (Roadway, Rail, Air)
- Policy (Roadway, Air, Sea and Multi-modal)

- Technology (Roadway, Rail, Air)

All efforts outlined above require continued coordination between local, regional, and state efforts whether it is the expansion of the Tallahassee International Airport, technological upgrades through Intelligent Transportation Systems (ITS), or physical infrastructure improvements to the transportation system. All impacts to the freight system require consideration to move the Capital region forward.