

Florida Freight Advisory Committee Meeting

December 15, 2020



Call to Order

Roll Call

Organization	First Name	Last Name
Broward County's Port Everglades Department	David	Anderton
Genesee Wyoming Railroad	Joe	Arbona
Space Florida	Mark	Bontrager
Florida Fruit and Vegetable Association	Tori	Bradley
Lakeland Linder International Airport	Gene	Conrad
Florida TransAtlantic Holdings	John	Dohm
JAXUSA	John	Freeman
Interport Logistics, LLC	Gary	Goldfarb
Enterprise Florida	Mason	Henson
Atlantic Logistics Inc.	Robert	Hooper
Franklin Street	Larry	Kahn
FEC	Bob	Ledoux
FAU - Freight Mobility	Dan	Liu
Winter Haven Economic Development Council	Bruce	Lyon
Walmart	Robert	Midgett
City of Pensacola/Port of Pensacola	Amy	Miller
Florida Trucking Association	Alix	Miller
University of South Florida	Seckin	Ozkul
Crowley Logistics	Stan	Parkes
Brevard County	Troy	Post
Florida Ports Council	Mike	Rubin
Broward Metropolitan Planning Organization	Gregory	Stuart
UNF	David	Swanson
US Sugar	Malcolm	Wade

Approval of Meeting Minutes

Agenda

- Committee Turnover Process Reminder
- FMTP Implementation Update
- FMO's Recent Workshops
- Freight Commodity Flow Data

Committee Turnover

Summary of Turnover Process

- We will be doing another cycle of staggered renewal soon. We are currently accepting applications and will be through January (FDOT.gov/FLFAC)
- Those FLFAC members who joined the committee for the first time last 1.5 years ago should re-apply to remain on for another half-cycle (1.5 years).
- Those FLFAC members who have served 3 years will step down, and a group of new FLFAC members who are selected through application will join the committee for a 3 year cycle.
 - If you have already been on the committee for a full cycle, you may still reapply, and in the event that there is space available on the committee, you may be selected again.
- A new chair/co-chair will be voted on at the first meeting of 2021

FMTP Implementation Update

Recommendations

Each of the 10 objectives identified in the FMTP have 5 associated recommendations based on a combination of:

- Technical Analysis Results
- Stakeholder Input
- Considering Emerging Market Trends and Opportunities



10
OBJECTIVES

OBJECTIVE RECOMMENDATIONS:

OBJECTIVE	RECOMMENDATIONS:			
1	• Identify commercial vehicle high crash segments and intersections, analyze causal factors, and develop counter measure	●		●
	• Provide more safe and secure truck parking facilities		●	●
	• Identify and implement freight related automated and connected vehicle projects to improve safety and mobility	●		
	• Prioritize rail-highway grade separation needs and implement select projects depending on funding availability	●		
	• Partner with freight related industries to support development of electronic freight management systems that enhance freight flow visibility throughout the entire supply chain, expedite communication among supply chain partners and government agencies, and enhance system security			●

Action Items

Each of the 50 recommendations is broken down further into action steps for implementation, including partner offices/agencies and a timeframe for scheduling.



Recommendation	Action	Partner Offices	Partner Agencies/ Private Stakeholders	Schedule
1.1 Identify commercial vehicle high crash segments and intersections, analyze causal factors, and develop counter measures	1.1.1 Conduct data analysis to identify commercial vehicle high crash segments and intersections	Office of Safety, Transportation Data Analytics	DHSMV	Short-term
	1.1.2 Analyze causal factors, develop countermeasures, prioritize and implement projects	FDOT Districts		Continuous
	1.1.3 Establish/ leverage Florida intra and inter agency task force	Office of Safety, Office of Maintenance, Office of Motor Carrier Size and Weight	FDLE, DHSMV	Continuous

Implementation



The resulting 154 action items make up the action plan for implementation. The primary focus of the initial implementation phase will be:

- Freight Resiliency
- Truck Parking
- Freight Safety
- Freight Connected Vehicles
- Freight Alternative Fuels
- First/Last Mile Gap Improvements
- Freight Training
- Truck Only Lanes
- National Highway Freight Network

For information on implementation progress, visit [FDOT.gov/FMTP](https://www.flhwy.com/FDOT.gov/FMTP)



Implementing Resilience

From FMTP to Action

Definition & Purpose

Our resilience definition is:

“The ability of a supply chain to both resist disruptions and recover operational capability after disruptions occur.”

-Steven A. Melnyk, David J. Closs, Stanley E. Griffis, Christopher W. Zobel, and John R. Macdonald(2015).

Understanding Supply Chain Resilience - Supply Chain 24/7

Our purpose is to:

- Complement the Freight and Multimodal Operations (FMO) Office vision of creating a well-connected, reliable, and safe multimodal network.
- Create a more resilient multimodal freight system per the Freight Mobility & Trade Plan (FMTP).



Step 1: Listen

- Listen to industry partners about the top resiliency challenges/issues from a freight mobility angle
 - What/where are the recurring disruptions in the supply chain?
 - What have been the lessons learned from specific disruptions?
 - What infrastructure is lacking (break down by mode)?
 - What can FDOT do to assist?



Step 2: Identify

- Identify resilience work that has been done in the public and private sector for the areas/situations identified
 - What does the data tell us that matches up with what we've heard?
 - Leverage analysis done by DoD/EOS/OEM/Traffic Ops/SIS
- Identify potential funding sources for resilience projects



Step 3: Create

- Create a matrix that displays top industry concerns with lessons learned and analysis
 - Include a toolbox of solutions that identifies steps for guidance to the Department and stakeholders for readiness/recovery, and combines potential funding sources identified



Step 4: Partner/Collaborate

- Prioritize issues to address, and coordinate with partners
- Use matrix/solutions toolbox as an opportunity to define where FDOT's role starts and ends compared to other agencies
- Begin to formalize relationships and strategies for disruptions, and create mutual agreements to ensure follow-up
- Collaborate with stakeholders and partners to develop and implement resiliency initiatives and projects





Discussion

Industry View

1. From private enterprise/business perspective, what types of disruptions have you experienced on more than one occasion?
2. What types of freight mobility infrastructure/facilities have been impacted during these disruptions and how?
3. Has your industry/company completed any assessments of vulnerable & critical supply chain nodes/links?
4. What are some of the solutions you've implemented/considered from those assessments?
5. What could the state do to help improve your operations?



FMO



FREIGHT & MULTIMODAL OPERATIONS

5-Minute Break

A world map composed of small grey dots is visible in the background. Overlaid on the map are three large, curved arrows pointing from the left towards the right. The top and bottom arrows are dark blue, while the middle arrow is red. The red arrow is the largest and most prominent, pointing towards the right side of the frame.

Implementing Alternative Fuels

From FMTP to Action

Step 1: Research

- Understand the current state of alternative fuels in the freight market in Florida
 - What is out there today?
 - What is being researched?
 - What is already being used in the market?
 - Identify current infrastructure and gaps in the state



Step 2: Industry Input

- Conduct industry outreach
 - Use a bottom-up approach to identify what the industry needs
 - Discuss with the FLFAC
 - Survey of modal partners/MPOs/universities
 - Understand what FDOT partners trying to do in different freight modes
 - Understand how can FDOT help enable partners to get to that goal



Step 3: FDOT's Role

- Determine the role of the Department
 - How can the Department support alternative fuels through:
 - Rest areas?
 - Design standards?
 - Developing frameworks?



Step 4: Strategies Matrix

- Develop a set of strategies for alternative fuels for Florida's freight system
 - Identify:
 - Opportunities
 - Recommendations to overcome barriers
 - Potential funding sources
 - A partnership framework for FDOT



Outcomes

- A strategies matrix for alternative fuels in Florida's freight system, including opportunities, recommendations, funding sources, and a partnership framework
- Target date of March/April 2021





Discussion

Industry View

1. Is your industry using/looking into alternative fuels? If so, what types and in what capacity?
2. What are the biggest opportunities and challenges that you see in regard to alt fuels?
3. What could the state do to help improve your operations?



Recent Workshops

National Highway Freight Program

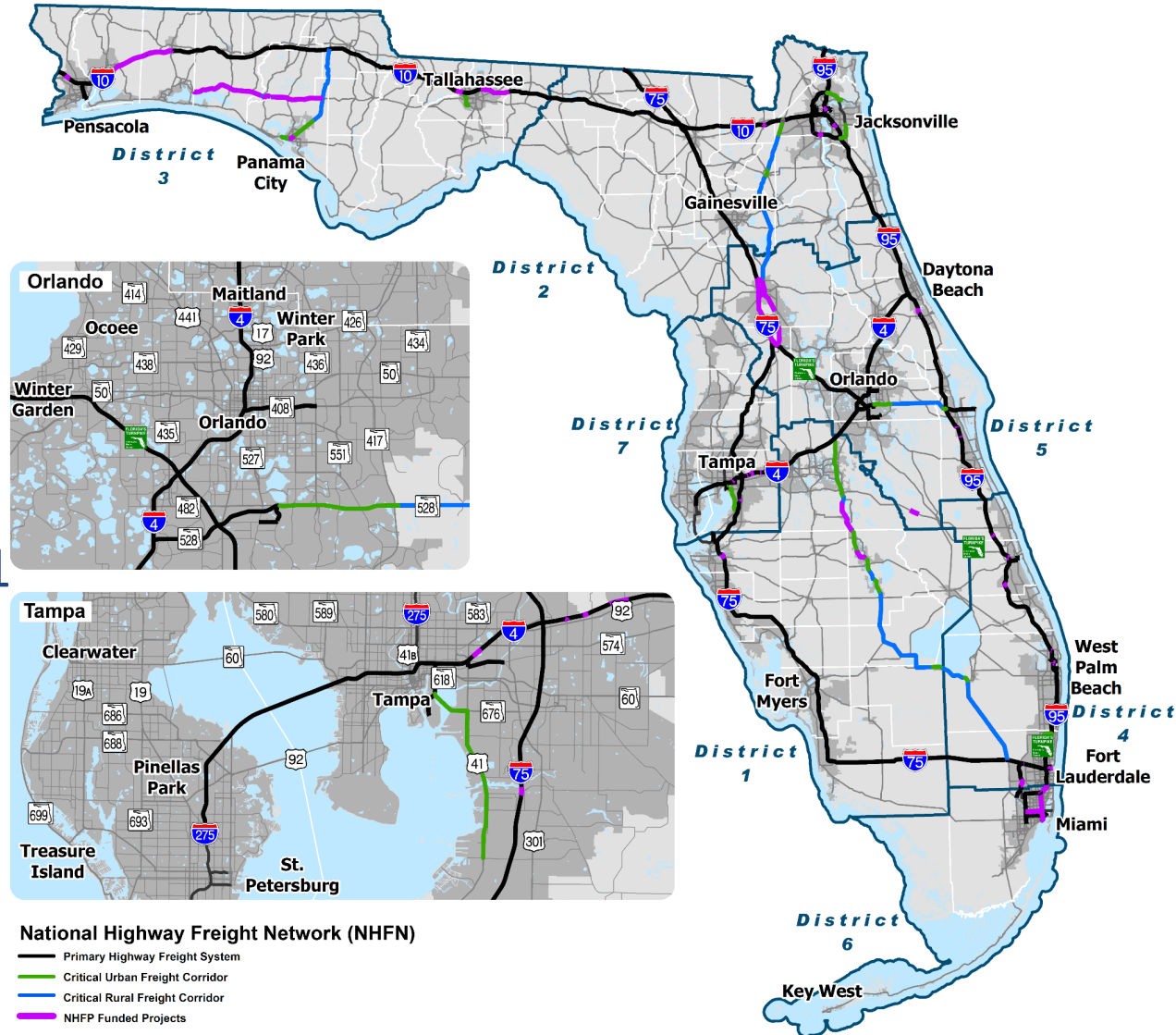
- FMO held an internal workshop on November 30 to inform all stakeholders of the updated NHFP process which has been created to align with the recent FMTP Update. The objectives were:
 - Clearly define the program by policy
 - List all requirements and limiting factors
 - List all expectations from Central Office and Districts
 - Develop a final policy based on consensus
 - List FMO Handbook and Work Program Instructions updates



NHFP Funding Update 2020

Fiscal Year	Estimated NHFP Funding*	Estimated NHFP Spending
2021	\$60,000,000	\$53,271,987
2022	\$60,000,000	\$71,115,865**
2023	\$60,000,000	\$64,455,307
2024	\$60,000,000	\$53,484,224
2025	\$60,000,000	\$56,680,575
2026	\$60,000,000	\$62,616,533
Total	\$360,000,000	\$ 361,624,491

- NHFP funds between 2021 and 2026 total \$361 across 64 projects
- Funds are supported by \$221,401,039 of state/local matching funds making up 38% of total NHFP project cost estimates
- 4 projects are on the CUFC totaling \$24,959,323.
- 5 projects are on the CRFC totaling \$4,137,828



Source: FDOT 2016, FDOT 2020

Truck Parking

- Held a workshop on December 10 to bring together the truck parking industry, including both public and private partners to:
 - Describe truck parking needs and initiatives
 - Solicit industry input
 - Discuss upcoming partnership opportunities

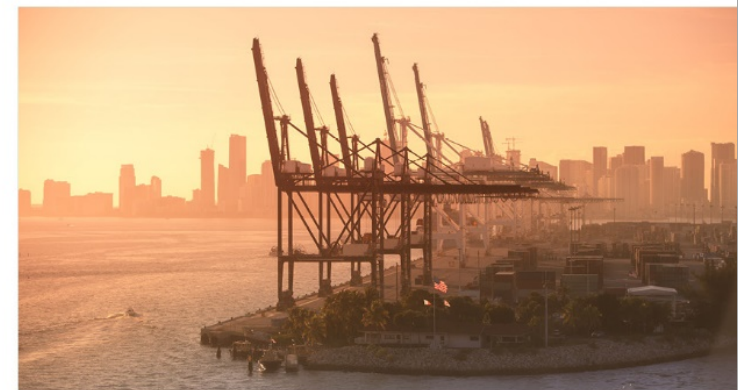




STATEWIDE FREIGHT AND COMMODITY ANALYSIS

Florida Freight Advisory Committee Meeting

Wednesday, December 16,
2020



Project Team

Makarand Gawade
Consultant Support, HDR
FDOT



Jerry Scott
Multimodal Data System Coordinator
FDOT



Purpose

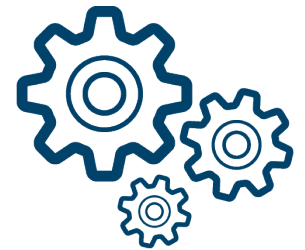
- The freight industry has changed considerably in the last five years (e-commerce, distribution centers and other trends).
- Information Handling Services (IHS) Global Commodity Flow Data* will be used to develop a statewide commodity flow profile.
- IHS uses a data-intensive model to create a highly detailed picture of freight traffic activity throughout the country.



Data



Knowledge



Action

*No data was purchased for this project

Process

- Freight data analysis activities.
- Commodity flow movement.
- Import/Export activities.



Deliverables

- Develop a report summarizing the movement of freight and commodities across Florida's transportation system.
- Develop a series of brochures for public administrators, private corporations, and the general public on Florida's freight infrastructure and commodity.
- County and District freight Brochures.
- This project will conclude on 1/22/2021 and the reports will be posted on our Multimodal web page: <https://www.fdot.gov/statistics/multimodaldata/>.





Statewide Data Analysis

Overview of TRANSEARCH Data

County-level freight-movement data:

- Produced by IHS Markit for base year 2018.
- Developed by combining information from public sources and data on primary shipments obtained from major freight carriers.
- Classified by:
 - Inbound, outbound, intrastate and through traffic.
 - Modes including truck, rail, water and air.
 - Tonnage, value and units (trucks and rail).
 - Commodity type – 35+ broad categories (400+ sub groups).
- Forecasted based on expected growth in output, employment and consumption factors within each county (2030 and 2045).

Analysis Overview

- 73.7 M tons (\$137 B) were exported out of Florida counties in 2018.
- 154.1 M tons (\$306.1 B) were imported by Florida counties.
- Similarly, 249.6 M tons (\$171.3 B) are intra-state movements.
- 109.4 M tons (\$105.9 B) are intra-county movements.

These numbers emphasize that Florida is predominantly a consumer state.

Interstate Export and Import Commodities (2018)

FL Rank	Commodity Type (STCC 2)	Percent of Total Tonnage
1	Clay, concrete, glass, stone	18.12%
2	Waste or Scrap Materials	17.20%
3	Chemicals or Allied Products	10.57%
4	Petroleum or Coal Products	9.63%
5	Food or Kindred Products	8.95%

FL Rank	Commodity Type (STCC 2)	Percent of Total Value
1	Transportation Equipment	18.73%
2	Misc. Manufacturing Products	11.08%
3	Electrical Equipment	10.01%
4	Chemicals or Allied Products	6.74%
5	Instruments, Photo and Optical Equipment	6.01%

Top 5 Interstate Export Commodities (2018)

FL Rank	Commodity Type (STCC 2)	Percent of Total Tonnage
1	Petroleum or Coal Products	26.85%
2	Nonmetallic Minerals	13.42%
3	Food or Kindred Products	10.98%
4	Coal	6.58%
5	Chemicals or Allied Products	6.36%

FL Rank	Commodity Type (STCC 2)	Percent of Total Value
1	Transportation Equipment	18.31%
2	Food or Kindred Products	9.21%
3	Petroleum or Coal Products	8.93%
4	Electrical Equipment	8.86%
5	Chemicals or Allied Products	7.07%

Top 5 Interstate Import Commodities (2018)

Intrastate and Intra County Movements (2018)

FL Rank	Commodity Type (STCC 2)	Percent of Total Tonnage
1	Nonmetallic Minerals	39.89%
2	Clay, concrete, glass, stone	14.37%
3	Warehouse, Distribution Center and Drayage movements	13.13%
4	Petroleum or Coal Products	11.62%
5	Waste or Scrap Materials	5.58%

FL Rank	Commodity Type (STCC 2)	Percent of Total Value
1	Warehouse, Distribution Center and Drayage movements	38.09%
2	Transportation Equipment	10.18%
3	Petroleum or Coal Products	8.59%
4	Misc. Mixed Shipments	8.43%
5	Food or Kindred Products	5.66%

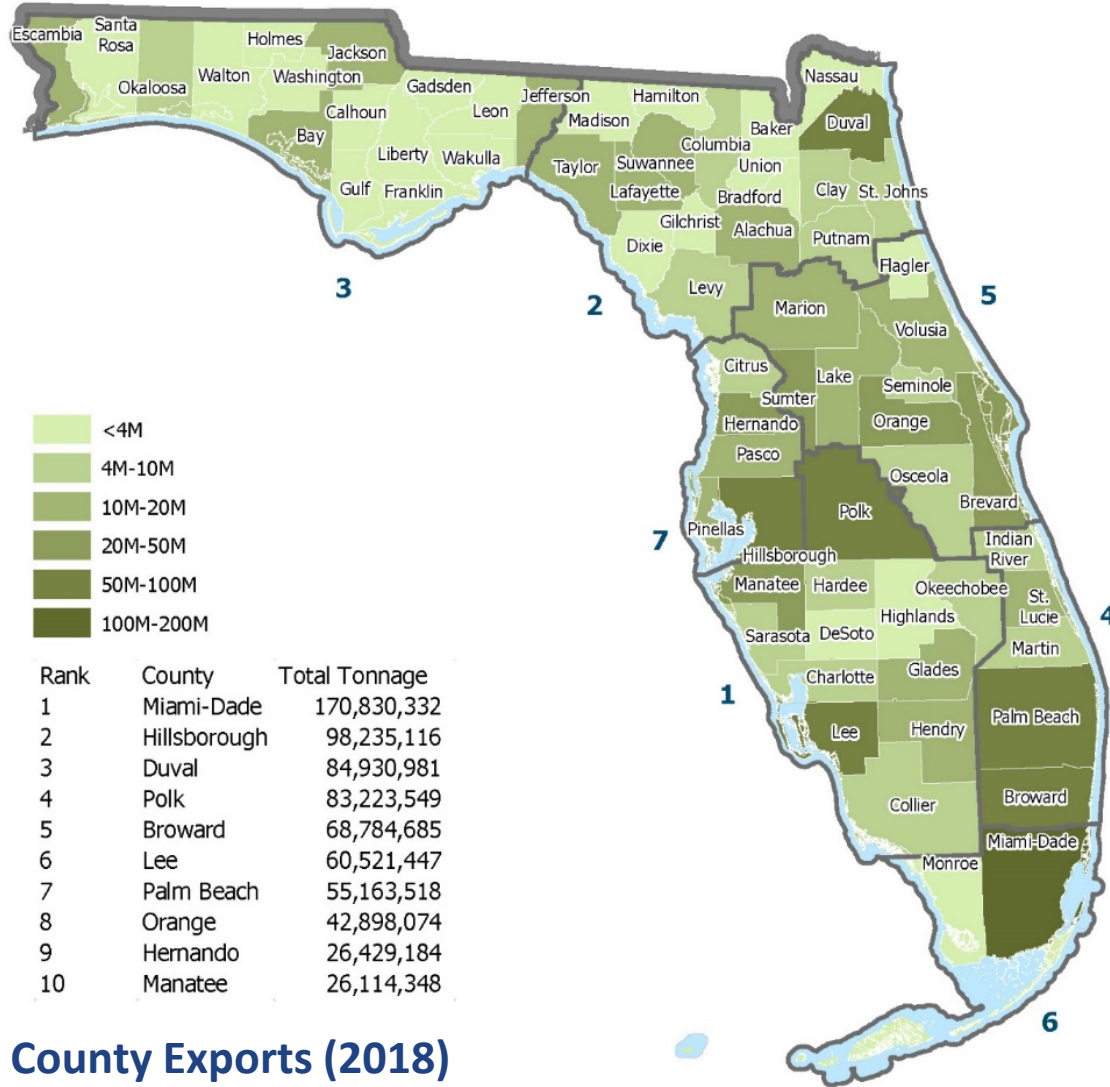
Top 5 Intrastate Commodities (2018)

FL Rank	Commodity Type (STCC 2)	Percent of Total Tonnage
1	Nonmetallic Minerals	31.65%
2	Clay, concrete, glass, stone	17.32%
3	Petroleum or Coal Products	14.06%
4	Farm Products	11.88%
5	Warehouse, Distribution Center and Drayage movements	11.60%

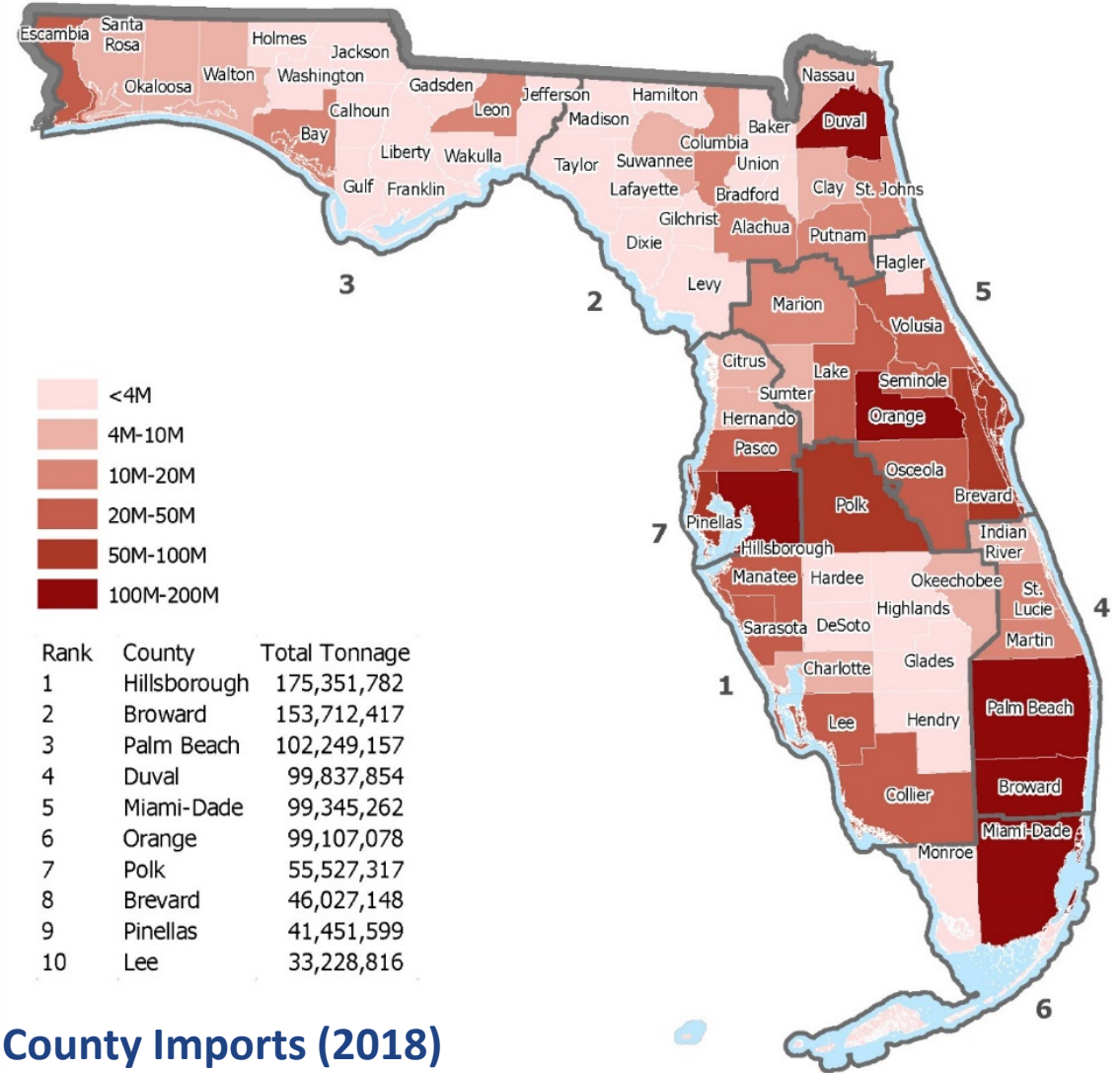
FL Rank	Commodity Type (STCC 2)	Percent of Total Value
1	Warehouse, Distribution Center and Drayage movements	50.48%
2	Petroleum or Coal Products	8.32%
3	Transportation Equipment	7.22%
4	Misc. Mixed Shipments	5.85%
5	Food or Kindred Products	3.90%

Top 5 Intra County Commodities (2018)

County Imports/Exports

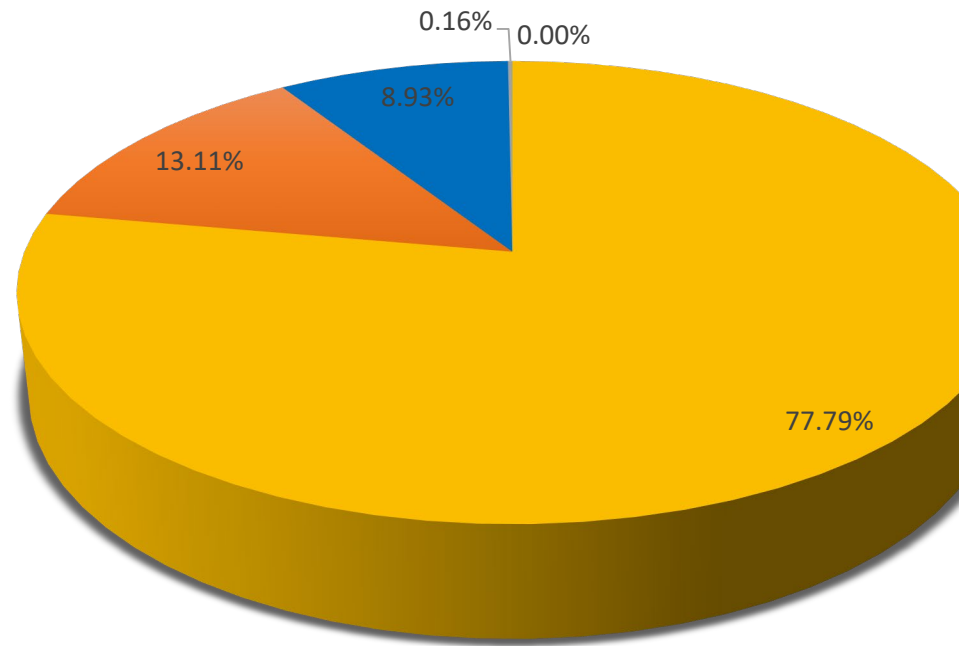


County Exports (2018)

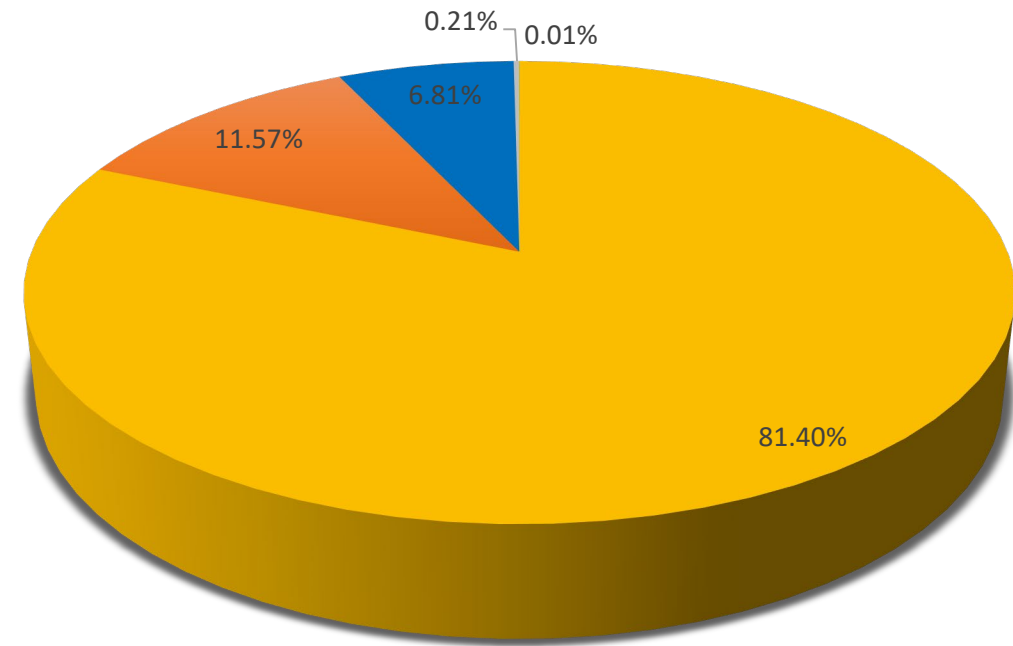


County Imports (2018)

Modal Splits – Tonnage for 2018 and 2045



2018 Tonnage** (589 Million)



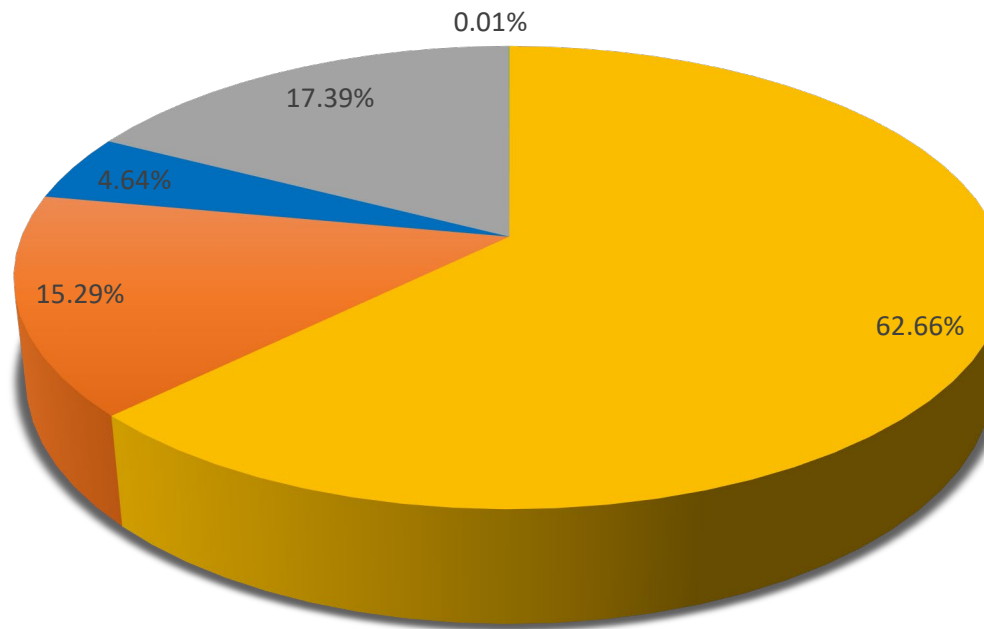
2045 Tonnage** (785 Million)

- Truck
- Rail
- Water
- Air
- Other *

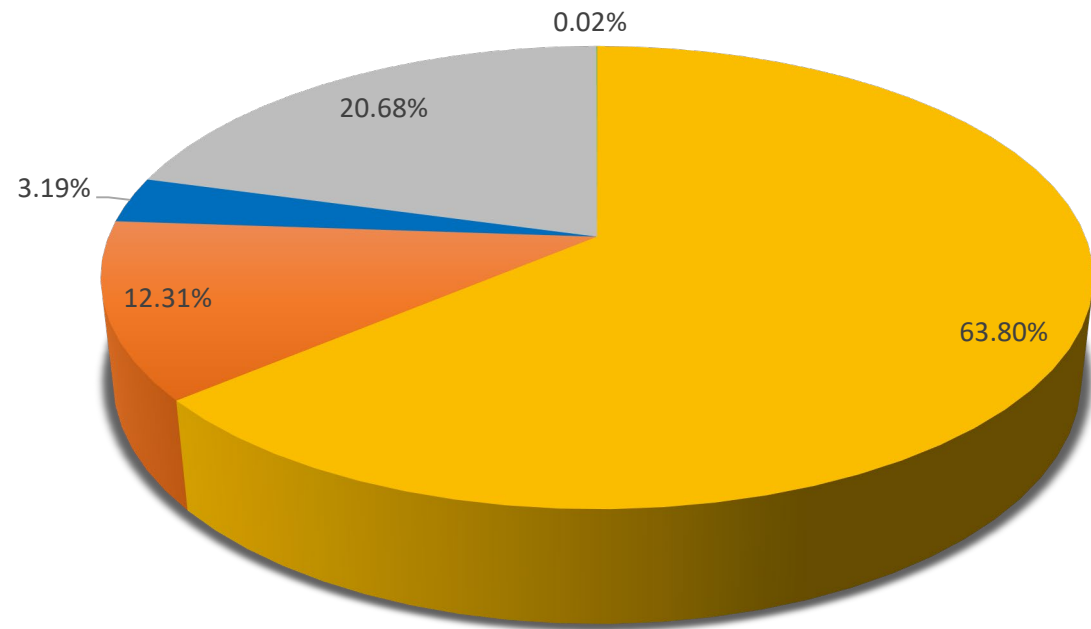
*Other includes Foreign Trade Zones and other modes.

** Tonnage indexed to the same year as the data.

Modal Splits – Value for 2018 and 2045



2018 Value** (\$ 720 Billion)



2045 Value** (\$ 1098 Billion)

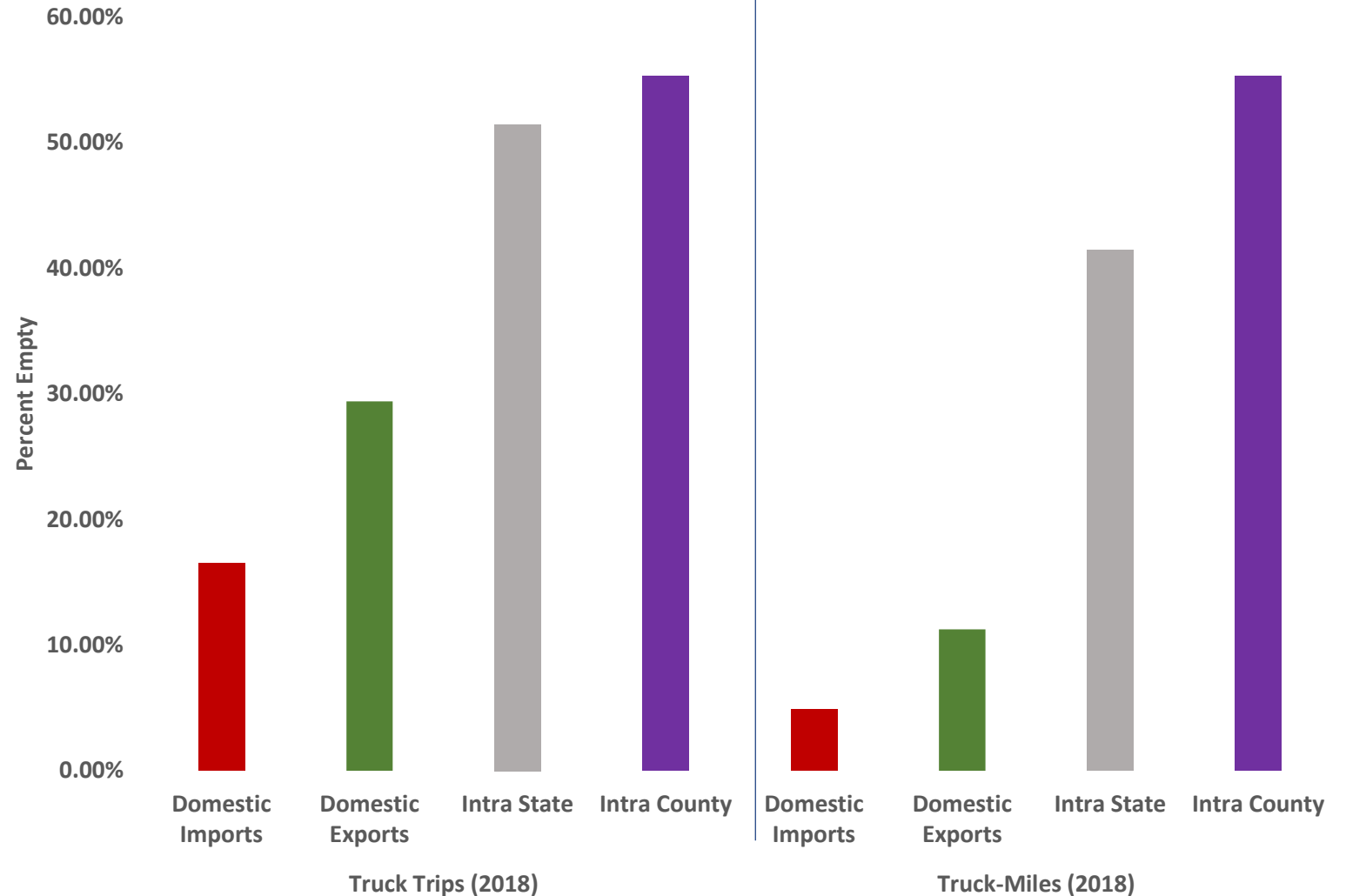
- Truck
- Rail
- Water
- Air
- Other *

*Other includes Foreign Trade Zones and other modes.

** Value indexed to the same year as the data.

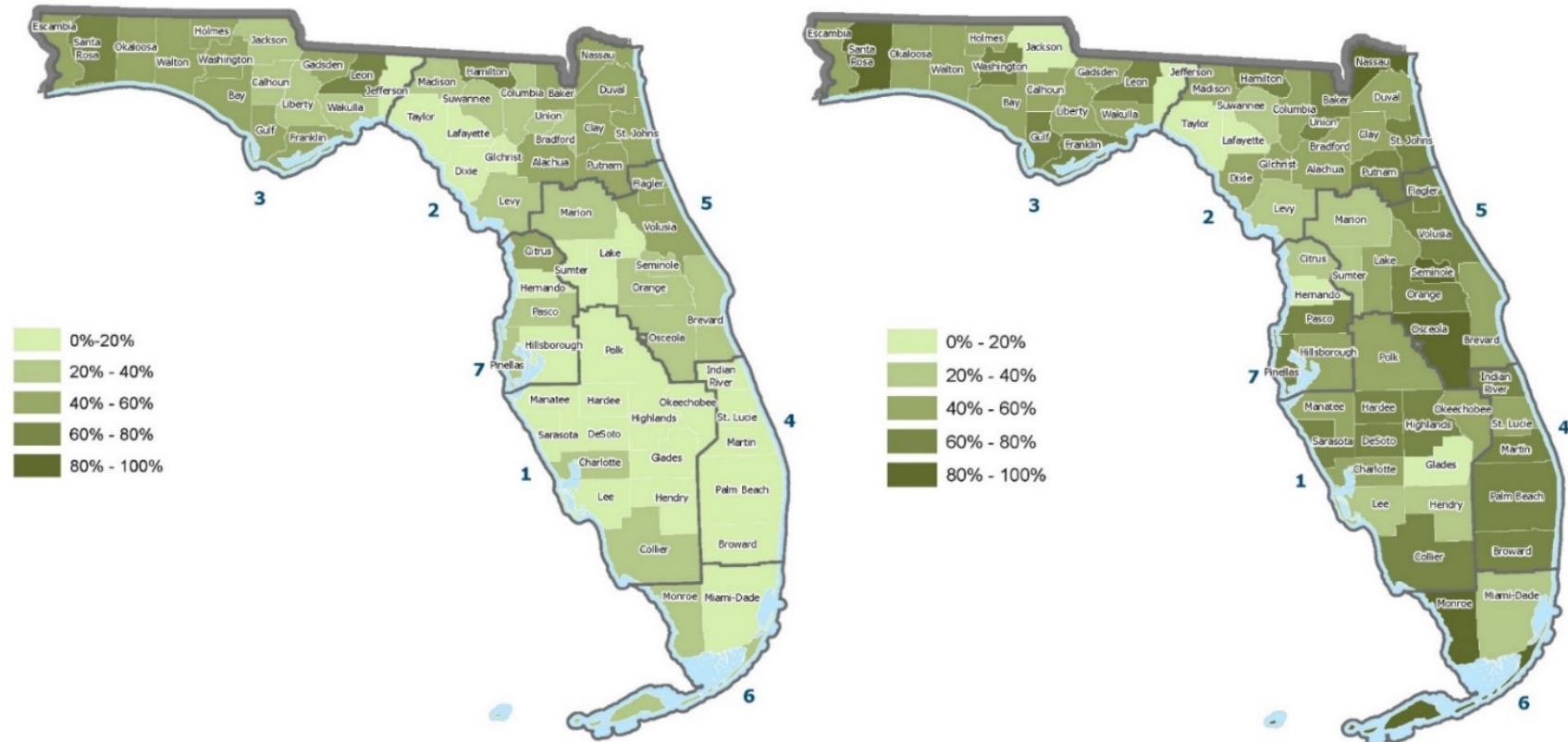
Statewide Empty: Truck Trips and Truck-Miles

- **29.4%** of truck trips moving out of state are empty.
- **16.49%** of truck trips moving in state are empty.
- **11.26%** of truck miles traveling out of state are empty.
- **4.88%** of truck miles traveling in state are empty.



Statewide Empty: Truck Trips and Truck-Miles

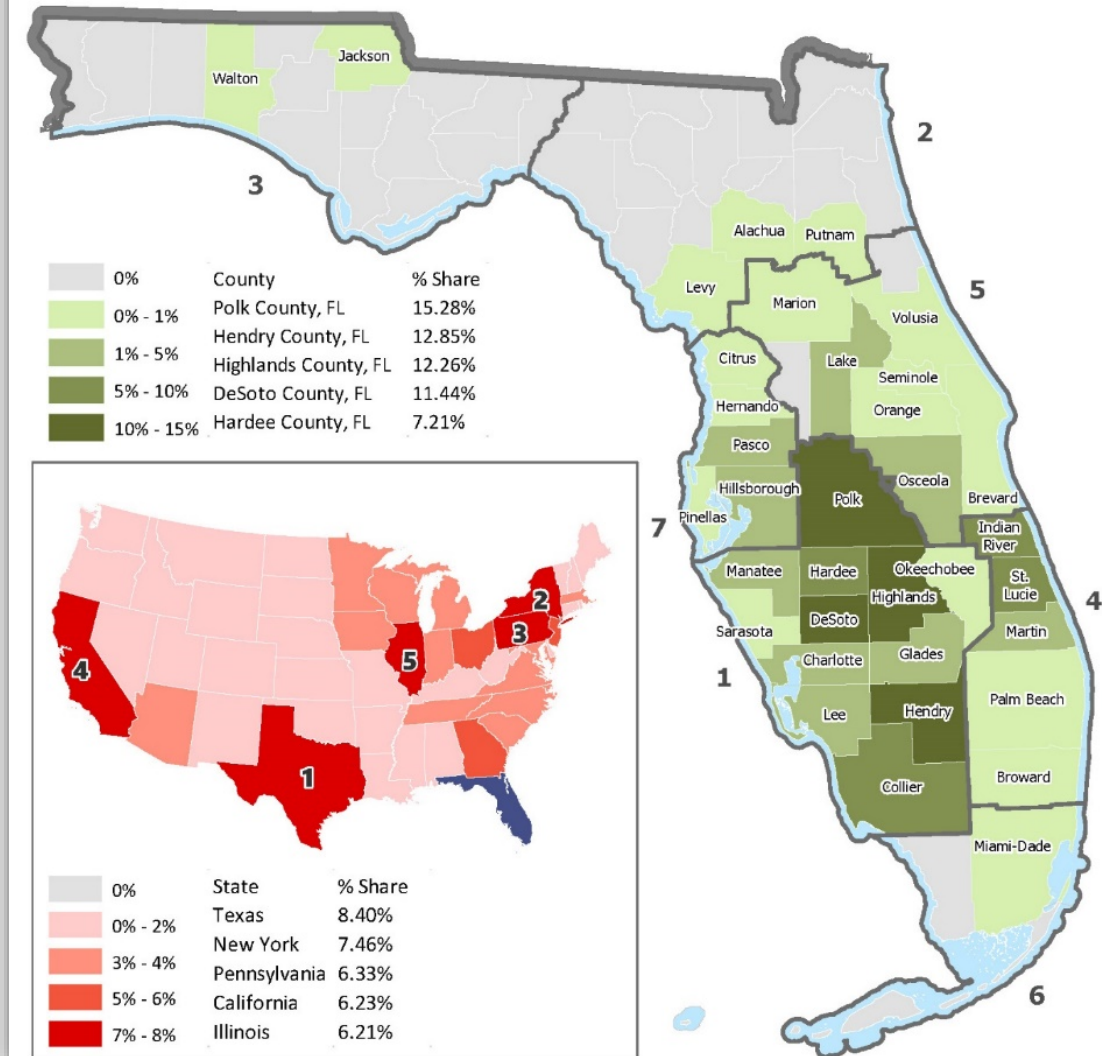
- As expected approximately 1/2 of the intrastate trips and 40% of the intrastate truck-miles are empty.
- The intra county empty movements are a higher share (55.26%) as they include short-haul and day trips.



Percent of Empty Trips - Interstate (Left) and Intrastate (Right) Exports

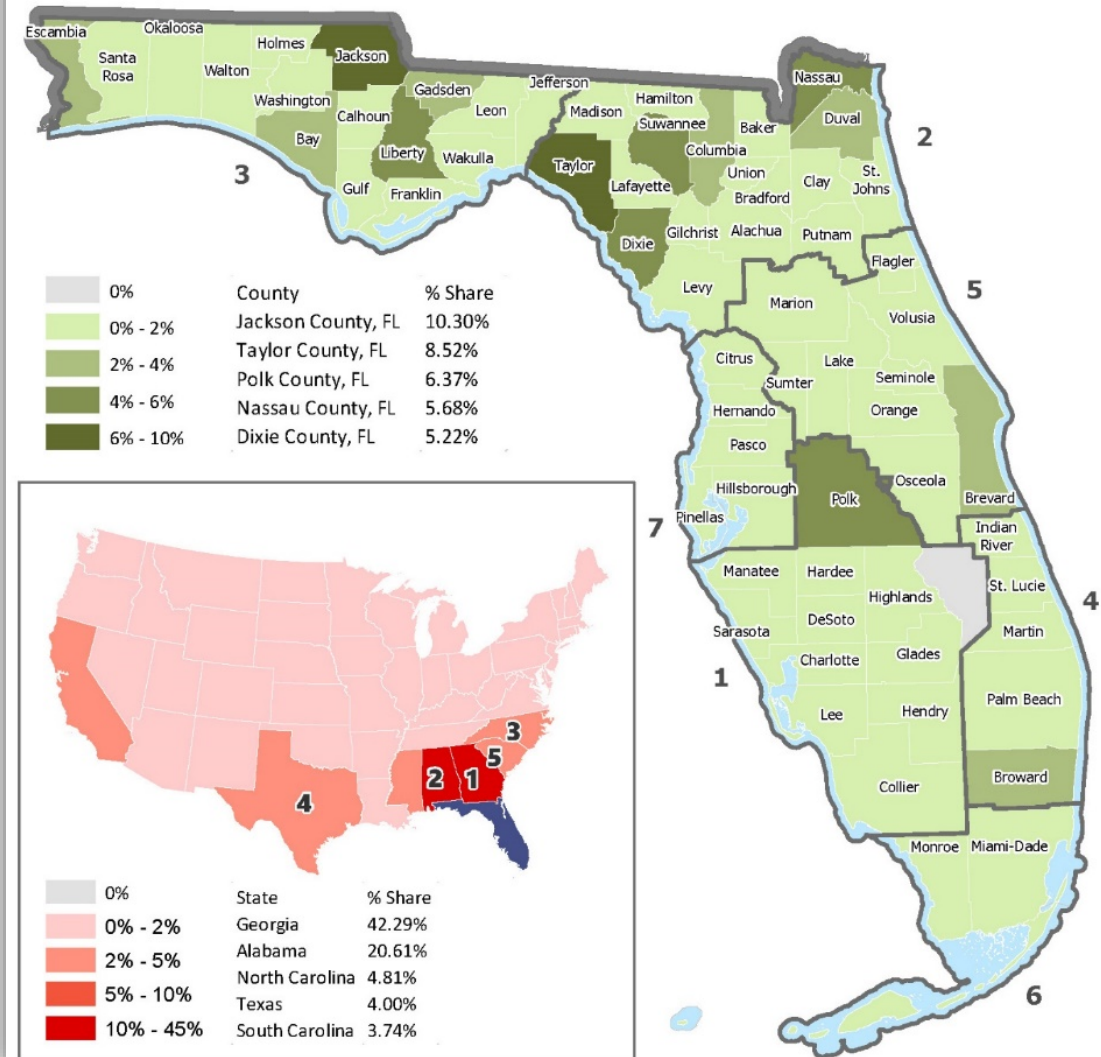
Citrus Fruits Exports (Interesting Statistics)

- Largest citrus producing state (70% of U.S. citrus supply).
- Florida is also second only to Brazil in global orange juice production.
- \$ 9 B citrus industry.
- Employs nearly 76,000 Floridians.
- 569 K acres of citrus groves.
- Florida counties exported 2.14 M tons of citrus fruits (\$ 0.86 B).
- Florida exports are forecasted to grow from 2.14 M tons (2018) to 3.71 M tons (2045).



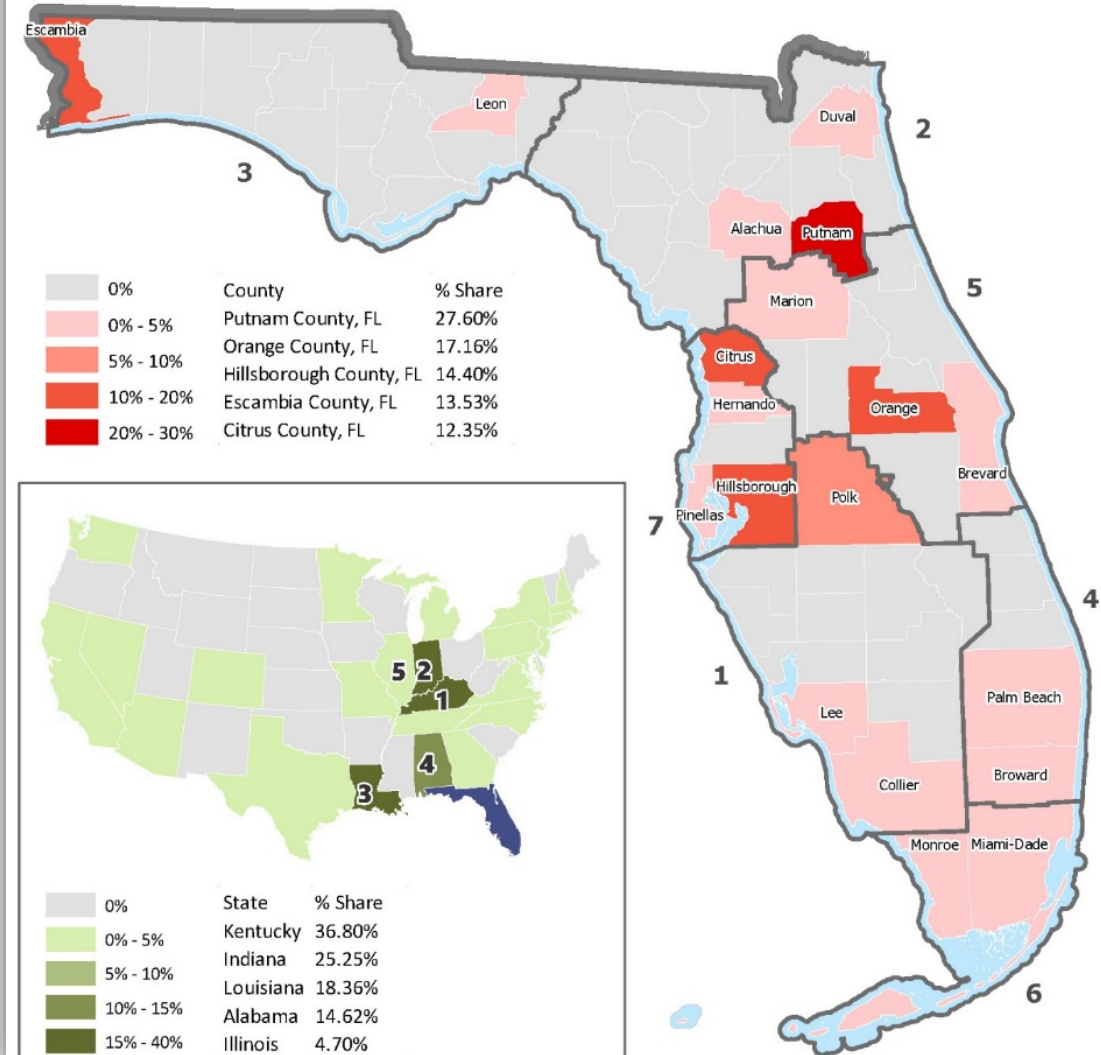
Lumber or Wood Products Exports (Interesting Statistics)

- 17.16 million acres (26,807 square miles) of forestland (50 percent of the state's total land area).
- Florida counties exported 9.3 million tons of lumber/wood products (\$ 5 B).
- 92.92% of lumber/wood products are hauled by trucks. Rail (6.38%) and water (0.7%) are the other major modes.
- Florida exports are forecasted to grow from 9.3 M tons (2018) to 10.61 M tons (2045).



Coal Imports (Interesting Statistics)

- Florida does not have any coal reserves or production and relies on several other states to meet its limited coal demand.
- Almost all coal consumed in Florida is used for electricity generation.
- Florida counties imported 10.1 M tons of coal (\$ 0.3 B).
- 67.5% of coal is carried by rail and 32.46% is carried over water.
- Florida exports are forecasted to decrease from 10.1 M tons (2018) to 3.2 M tons (2045).



Questions?





Contact Information

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<https://www.fdot.gov/statistics/multimodaldata/>



Seckin's Survey



0% Survey Completion 100%

The Supply Chain Innovation Lab at the Monica Wooden Center for Supply Chain Management & Sustainability at the University of South Florida is conducting research for the Florida Department of Transportation (FDOT) to enhance successful logistics activity center (LAC) development in Florida. A logistics activity center is a defined area comprised of facilities and operations related to transportation, storage, and distribution of goods for domestic and international transit. The research objective is to identify the optimal areas that are most suitable for future LACs located within Florida. The survey will take 5-10 minutes to complete, and

The survey is available at this link →

[Land Use and Logistics Activity Center Development Survey](#)



Public Comments

Member Comments

Adjourn



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