

# APPENDIX I

## West Central Miami-Dade Freight Mobility Summit

**WEST CENTRAL MIAMI-DADE FREIGHT MOBILITY SUMMIT - SAVE THE DATE**



**SAVE** <sup>the</sup> **DATE**  
THURSDAY, JUNE 8, 2017  
8:30 a.m. - 1 p.m.

**PRO  
MOTION**  
MOVING FLORIDA FASTER

## West Central Miami-Dade Freight Mobility Summit

City of Doral Government Center  
8401 NW 53rd Terrace, Doral, FL 33166

Learn and share valuable information with our forum of freight and mobility experts, as they discuss the future of the community's competitiveness. Come and take advantage of the opportunity to:

**Create & identify NEW projects**  
**Generate ECONOMIC growth**  
**Improve FREIGHT mobility**

For more information or to RSVP please call Richard Denis at 305-573-0089 or email [richard@iscprgroup.com](mailto:richard@iscprgroup.com).

Sponsored by the Florida Department of Transportation (FDOT) and hosted by the City of Doral.



**WEST CENTRAL MIAMI-DADE FREIGHT MOBILITY SUMMIT PROGRAM - FRONT**

West Central  
**MIAMI-DADE**  
Freight Mobility Summit

**THURSDAY, JUNE 8, 2017**  
8:00 AM - 12:30 PM  
**CITY OF DORAL GOVERNMENT CENTER**  
8401 NW 53<sup>rd</sup> Terrace, Doral, FL 33166



**PROGRAM**

**8:00 AM REGISTRATION AND REFRESHMENTS**

**8:30 AM OPENING STATEMENTS, INTRODUCTIONS AND WELCOME**

*Carlos Castro, Florida Department of Transportation District 6 (FDOT D6) Freight Coordinator* – Review of the agenda and background information.

*Juan Carlos Bermudez, City of Doral Mayor and Host of this Event* – Importance of welcoming high value jobs to the City.

*Jose “Pepe” Diaz, Miami-Dade County Commissioner* – Importance of freight as part of the local and regional economy.

*James A. Wolfe, FDOT D6 Secretary* – Past and current infrastructure investments, funding, and continual need of coordination with partners to improve freight mobility.

**9:00 AM TRADE AND TECHNOLOGY TRENDS GUEST SPEAKERS**

*Carlos Castro* – Introduction of speakers and moderator.

*Jeff Sweeney, Martin Associates* – Global and national trade trends, discretionary trade open for competition, and strategies for growth.

*Rick Ferrin, TranSystems Inc.* – Trends in state and local seaport and railroad cargo and strategies for growth.

*Lenny Feldman, Managing Member, Sandler, Travis & Rosenberg, P.A. International Trade, Customs and Export Law* – Trade agreements, technology, and opportunities for South Florida.

**9:45 AM QUESTIONS AND ANSWERS**

**10:00 AM HIGHWAY OPERATIONS, OPPORTUNITIES AND CHALLENGES – Panel includes transportation infrastructure providers and users. Each panelist will provide commentary on their perspective, roles, and responsibilities regarding freight infrastructure and will discuss future challenges and opportunities.**

*Lenny Feldman* – Panel Moderator.

*James A. Wolfe, FDOT D6 Secretary* – USDOT and FDOT initiatives to support growth and partnerships.

*Paul Wai, Director of Transportation Operations, FDOT Florida’s Turnpike Enterprise (FTE)* – Infrastructure and technology projects and strategies.

*Claudio Diaferia, Assistant Director of Engineering, Miami-Dade Expressway (MDX)* – Current projects and opportunities for future extensions of network including multi-modal options and innovations.

*Barbara Pimentel, Florida Customs Brokers & Forwarders Association, Inc.* – Industry needs for connectivity, truck parking, security, and mobility; training opportunities for the next generation.

*Mark Sterling, VP of Terminals, Armellini Logistics/Armellini Express Lines, Inc.* – Operations and opportunities for future growth; vision of freight operations in the Airlades area.

*Alfredo Keri, CARGO42 Co-Founder* – Determined South Florida as the ideal place to launch innovative start-up company facilitating freight matching for local hauls; vision of the future of freight in South Florida.

**10:45 AM QUESTIONS AND ANSWERS**

**11:00 TO 11:20 AM BREAK**

## WEST CENTRAL MIAMI-DADE FREIGHT MOBILITY SUMMIT PROGRAM - BACK

WEST CENTRAL MIAMI-DADE FREIGHT MOBILITY SUMMIT | June 8, 2017



### 11:20 AM INTERMODAL OPERATIONS, OPPORTUNITIES AND CHALLENGES – Panel includes intermodal and multi-modal transportation providers and planners. Each panelist will provide commentary on their perspective, roles, and responsibilities and will discuss future challenges and opportunities.

Lenny Feldman – Panel Moderator.

*Emir Pineda, Manager of Aviation, Trade and Logistics, Chief of Staff and Senior Policy Advisor, Miami-Dade Aviation Department – Master Plan projections and new initiatives for future growth and high value jobs.*

*Kevin Lynskey, Deputy Port Director, PORTMiami – Impacts of canal widening, tunnel, and on-port rail and how to grow the Port in a constrained environment.*

*Robert LeDoux, Florida East Coast (FEC) Railroad Senior Vice President and General Counsel and Corporate Secretary – On-port rail and Flagler Station growth and future opportunities.*

*Mr. Stanley Rigaud, Director of Economic Development and International Trade and Logistics, Miami-Dade Beacon Council – Beacon Council mission and the importance of connectivity between air, rail, sea, highway modes and warehousing.*

*Carlos Roa, Assistant Director for Transportation and Land Use, Miami-Dade Transportation Planning Organization (TPO) – TPO goals, objectives, and processes for freight programs and how they relate to the SMART Plan.*

*Juan Flores, Miami-Dade TPO Freight Transportation Advisory Committee (FTAC) Vice-Chair – FTAC history as a first of its' kind advisory group and its function as a forum to continue collaboration on efforts discussed today.*

### 12:05 PM QUESTIONS AND ANSWERS

### 12:20 PM SUMMARY AND ACTION ITEMS

Carlos Castro – Conclusions

### SPEAKER BIOGRAPHIES

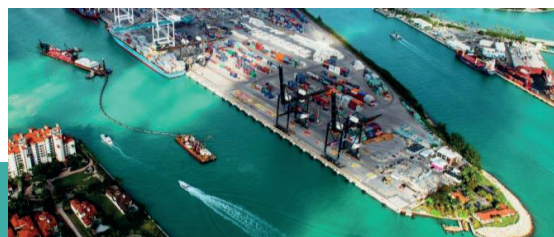
**Mr. Jeffrey Sweeney** is a specialist in strategic port planning and economic impact analysis of seaports and airports at Martin Associates. Mr. Sweeney has managed and participated in over 100 market planning, logistics and economic impact studies for numerous ports in all regions of

the United States, with a focus in the Southeast, Gulf and Great Lakes. Specifically, his client list in Florida includes PortMIAMI, Port Everglades, Port of Palm Beach, Port Canaveral, JAXPORT, Port Manatee, and Port Tampa Bay. He has been a speaker at numerous American Association of Port Authorities, Journal of Commerce, and regional freight and shipping conferences.

**Mr. Frederick R. Ferrin, PE** has 44 years of experience in a broad range of engineering endeavors including port development, facility planning, design, construction and project management, marine terminal operations, federal navigation project planning and development, and business development and financial management. He has spent a significant portion of his career in the maritime business as an engineering project manager with the Panama Canal Commission, as the Director of Engineering at the Port of Oakland, California and as a Port Executive Director at JAXPORT with responsibility over port operations and maintenance, security, planning, and development of cargo and cruise terminals.

**Mr. Lenny Feldman** is the Managing Member of the Miami Office and Member of the Operating Committee of Sandler, Travis & Rosenberg, P.A., a multinational customs and international trade law and consulting firm. Mr. Feldman resolves issues innovatively before numerous regulatory agencies including U.S. Customs and Border Protection (CBP), Immigration and Customs Enforcement, Food and Drug Administration, Environmental Protection Agency, Alcohol and Tobacco Tax and Trade Bureau, Department of Agriculture, Census Bureau, and Bureau of Industry and Security, to name a few. He is a leader in educating businesses as well as elected officials concerning trade and business reform.

Lenny is one of twenty (20) members appointed nationally by the Secretaries of the Department of Homeland Security and Treasury to serve on the 14<sup>th</sup> Advisory Committee on Commercial Operations to CBP (COAC). He serves as Co-Chair of the Trade Modernization Subcommittee advising CBP and other agency executives regarding international trade strategies and engagement.





**FREIGHT MOBILITY SUMMIT SIGN IN SHEETS JUNE 8 2017**



**Florida Department of Transportation District Six  
ELECTED OFFICIAL SIGN-IN SHEET**

PROJECT		MEETING LOCATION		MEETING DATE & TIME
West Central Miami-Dade Freight Mobility Summit		City of Doral Government Center 8401 NW 53rd Terrace, Doral, FL 33166		Thursday, June 8, 2017 8:00 a.m. - 1:00 p.m.
NAME	REPRESENTING (Name of business or group)	ADDRESS	TELEPHONE NUMBER	EMAIL ADDRESS
Carlos San Jose	Commissioner Bovo		305-820-8424	Carlos.sanjose@miamidade.gov

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Regina Serrano	TPO	111 NW 1st St	305 375 4907	regina.serrano@MDTPD.org
Carlos Castro	FDOT, DG	1000 NW 111th Ave	3-470-5238	Carlos.Castro@dot.state.fl.us
Nan Jimenez	FDOT DG/Gannett Fleming	1000 NW 111th Ave	3-470-5238	Nan.Jimenez@dot.state.fl.us
Jack SCHNETTLER	ATKINS	2001 NW 107th Ave.	305-514-3369	jack.schnettler@atkinsglobal.com
Rakhi Smith	City of Doral	8401 NW 53rd Ter	305 693 5740	Rakhi.Smith@cityofdoral.com
BOB LECOR	FSEC	7411 FULLERTON ST	904-279-3111	Robert.Lecor@fsec.com
Brandon Altroche	FDOT	1815 SW 98th Ct	786-449-1332	baltr93@gmail.com
JEFF WEDDERS	MARLIN	1200 NW 65 Ave	954-205-2471	jeff.wedders@marlin-engineering.com

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Eric Pineda	WDAD	AIRPORT	786 502 6072	epineda@miam-airport.com
Claudio Diaferia	MDX		786-879-9858	cdiaferia@mdxway.com
Eric Kerr	Merlin	9165 SW 72 Ave	(305) 609-2784	ekerr@merlincos.com
Khal Espino	Merlin	18352 NW 88 PL	786 290 8952	amartinez@merlinengineering.com
EUGENE COLLINGS-BENNETT	City of Doral	8401 NW 53 Terr	(305) 593-6740	eugene.collings@cityofdoral.com
Rita Carbonell	City of Doral	8401 NW 53 Terr	(305) 593-6740	rita.carbonell@cityofdoral.com
Jeff Sweeney	MARTIN ASSOC.	961 Woodlawn Ave Suite 203 Lancaster PA 17603	717-295-2428	jswee@martinassoc.net
Ivete Ruiz Paz	FDOT	1070 NW 111 Ave -	305-470-5225	Ivete.Ruiz-Paz@dot.state.fl.us

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Tish Burgher	FDOT	1000 NW 111 Ave Miami FL	305.470.2577	Tish.burgher@dot.state.fl.us
Kevin Smith	Ram-Tech Const.	15802 SW 200 ST. Miami, FL 33187	305-259-7853	LSonza@ramtechconstruction.com
James Wolfe	FDOT			
Ashutosh Kumar	CTG	3111 N University Dr Loral Springs FL 1700 NW 86 Ave #105	614 286 7433	akumar@ctgconsult.com
Jose SANTIAGO	MARLIN	PLANTATION, FL	3054777575	JSANTIAGO@marlineengineering.com
JOHN EASTERLINK	FDOT TPK	Po Box 9828 FT. LAUD, FL 33310	954 934 1620	john.easterlink@dot.state.fl.us
PAUL WAZE	"	"	954 934 1247	PAUL.WAZE@DOT.STATE.FL.US
Jorge Gomez	City of Doral		305-593-6740	Jorge.Gomez@CityofDoral.com

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Michael P. Ferrera	City of Doral	8401 NW 53rd Terrace	305-593-6630	Michael.Ferrera@cityofdoral.com
Keni Lynch	Port Miami	1015 N A Way	305-474-4800	KL@miadna.org
Carlos Roa	M-D TPO	111 NW 1 Street Suite 900 Miami, FL 33128	(305) 375-4507	croa@miamidade.tpo.org
Jose Chavez	J&DB		786-208-1326	Jose.Chavez@jdb.com

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Juan Flores				
Hernando Galindo	AIRGLADES AIRPORT	5201 Blue Lagoon Dr. Miami 33144	305-903-8900	Galindo@AIRGLADESAIRPORT.com

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## Florida Department of Transportation **District Six** PUBLIC SIGN-IN SHEET

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NAME	REPRESENTING (Name of business or group)	ADDRESS	TELEPHONE NUMBER	EMAIL ADDRESS
Alissa Penaker	PortMiami	1015 N America Way Miami, FL 33132	305 329 4035	escobase@miamidade.gov
Luis Perez-Godina	CAN/US	Bldg 701, Ste 208 2360 NW 66 Ave	3/869-4666	gpresse@luisconus.com
Karen Friedman	Port Everglades			kfriedman@broward.org
Abram Gutierrez	Xceligent		305-785-6596	abragu@xceligent.com
Kevin C Walford	TPO	119 NW 1st Street Miami FL 33128	305.375.2642	Kevin.Walford@mdtp.org
Roxana Santamaría	CAN/US		305 869-4667	rsantamar@luisconus.com
Jonathan Hernandez	Black Copy Honda	5730 SW 7th St Miami, FL	786 3510 721	jhernandez@shoplease.com

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Erin Kersh	Cambridge Systematics	2100 W Commercial Blvd Ft Lauderdale	954-331-0120	ekersh@camsys.com
MARTIN DE ANTONIO	CONSULATE OF ARGENTINA	110A BRICKELL AVE	305-373-1889	JD@MRELIC.GOV.AR
Christina Miskis	SFRPC	3440 Hollywood Blvd 140	954 985 4416	CMISKIS@SFRPC.COM

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NAME	REPRESENTING (Name of business or group)	ADDRESS	TELEPHONE NUMBER	EMAIL ADDRESS
Ken Okaniwa	Japan Consulate			
Fernando Villa	Hialeah Police Dept.	40, FL 33013 5555 E. 8 Ave	305-687-2525	Fvilla@HialeahFl.Gov.
RITA SANCHEZ	MORAN CARGO INC	10145 COSTA DEL SOL BLVD	305-4988884	RITA@MORAN4CARGO.COM
Roxana Matamoros	Marlin Engineering	1700 NW 66 AVE	954 870-5052	Rmatamoros@marlinengineering.com
JULIO PINERO	INNOVATE GROUP	7950 NW 20TH ST	7869422220	JULIO@INNOVATEGROUP.COM
Axel Zeissig	German Consulate	100 W Biscayne Blvd	305 358 0290 - 585	ax-10@dutem.diplo.de
Mayra Diaz	MDX			
Ana Maria Pinero	Colombian American Chamber	2305 NW 107th	305-446-7542	apinero@colombianchamber.com

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Laura Sakach	CMT	505 W. Hickpochee LaBelle FL	217-652-8280	lsakach@cmtengr.com
Jeremy Upchurch	FDOT - DU		954-777-4279	jeremy.upchurch@dot.state.fl.us
Rolando Jimenez Jr	DTPKI	111 NW 1ST #1510	305 375 5681	rjimenez@miamidadepki.com
Jeneta Dewert	Innovae Group	1001 Bridle Bay Dr	305 606 3686	rdewert@innovae.com
RICHARD SANCHEZ	MORAN INT'L INC	10145 COSTA DEL SOL BLVD	305 323 6104	RSANCHEZ@MORAN4INTERNATIONAL.COM
MURILO AMARAL	CARGO 42	1051 SW 37TH	858 366 5485	MAMARAL@CARGO42.COM
YONGQIANG WU	CTS ENGINEERING	3220 W. COMM FL	813 525 9575	YWU@ctseinc.com
JORGE E. CORZO	TOWN OF MEDLEY	2777 NW 12 AVE	(3) 934-6986	jcorzo@townofmedley.com

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Bob O'Malley	CSX	819 Glen Amber Way Altamonte Springs, FL 32701	407-803-3959	Bob_OMalley@CSX.com
Gus Fontje	AJF	2100 Ponce de Leon Hall C.G. FL 33134	305-443-6880	Gus@AJFproperties.com
Lillie Rodriguez	AIA	Clewiston, FL 33440	863-233-2837	LRodriguez@airstadesairport.com
Thomas Lanahan	TCRPC	421 SW CAMPBELL AVE STUART FL	772-221-4060	tlanahan@terpc.org
APRIL DABROWSKI	KIMLEY-HORN	606 N. PINE ISLAND ROAD PLANTATION, FL	954-535-5100	APRIL.DABROWSKI@KIMLEY-HORN.COM
Mike Amellini	Amellini	2811 NW 74th Ave Miami, FL	305-591-5575	mikeam@amellini.com
Guillermo Vega	Global Corps by	7975 NW 56 St Doral FL 33166	786-200-7299	Lgv55mens@notifico.com
Edison Vasquez	ComReal	2315 NW 107th Ave 1MGZ Doral, FL 33172 Box 126	786-433-2383	evasquez@comreal.com

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Mike Silver	CBRE	777 Brickell Ave	305-779-3124	Michael.Silver@cbre.com
IRMA HAJSE	Miami Dade College.			
Marilyn Devoe	AirGLADES		817-798-2585	Marilyn.devoe@gmail.com
Ken Armstrong	FLORIDA TRUCKING ASSOC	350 E. COLLEGE TALLAHASSEE 32301	850-222-9900	Ken@FLTrucking.org
Guillermo Chéz	TRUCKMAX.	6000 NW 77th	305-777-9000	GChéz@dol.com
SCOTT KAMLEN	ATEMS	FTE MP 203, Bldg 5315	407-264-3440	SCOTT.KAMLEN@dol.state.fl.us
John Dohm	Florida Transatlantic (FTAC)	6600 Cooper Rd #205 Miami Lakes, FL 33094	(954) 557-8646	John@jldohm.com
Nancy Ziegler	Maclin Engineering	Plantation FL	954-501-9695	nziegler@maclin-engineering.com

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FLORIDA TRADE TRENDS AND OPPORTUNITIES AND STRATEGIES FOR SOUTH FLORIDA - PRESENTATION



Rick Ferrin, TranSystems

## Trends at the State's Ports

- Seaport Cargo
- Cruise
- Seaport Capital Development
- Economic Impact & Jobs



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# Florida Seaport Cargo Tonnage

- Florida’s waterborne international and domestic cargo increased 4.2% to 107.4 million tons last fiscal year.
- Containerized cargo tonnage grew by 4%  
Dry bulk cargo tonnage grew by 1.8%  
Liquid bulk cargo tonnage grew by 5.8%
- Container throughput (FL Ports) 3.6 million in 2016
- Port Miami led the state in container tonnage with 39%
- Port Miami does not import or export dry or liquid bulks

Source: Florida’s Seaports: High Performance 2017|2021



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# Florida Cargo Growth

Year	Tonnage	Growth
2013-2014	98.7 Million	-
2014-2015	103 Million	4.35%
2015-2016	107.4 Million	4.2%

Source: Florida’s Seaports: High Performance 2017|2021



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## Cargo Growth at Florida Southeastern Ports

Year	Miami	Everglades	Palm Beach
FY 13-14 to FY 14-15	11.7%	.4%	-4.5%
FY 14-15 to FY 15-16	2.3%	3%	19%
FY 15-16 to FY 20-21*	11.8%	19%	20%

\* projected

Source: Florida's Seaports: High Performance 2017|2021



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## Florida Cargo Market Share

- 7% of US waterborne export trade
- 5% of US waterborne import trade
- 24% of US export trade with South & Central America and Caribbean
- 20% of US import trade from South & Central America and Caribbean

Source: Florida's Seaports: High Performance 2017|2021



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# Florida Waterborne Cargo Trends

- Continued long-term growth in global trade
- Accelerating & broadening demand for consumer goods by emerging consumer class, e.g. China
- Shifting production from NE to SW Asia
- Commodity pricing & weak demand for raw materials
- Shifting US population to Southeast and Florida
- Importance of economies of scale, rationalization, and immediacy of delivery

# Florida Waterborne Cargo Trends

- Greater global investment in transportation infrastructure
- Emergence of port-population hub freight corridors
- Rising waterborne imports & falling exports
- Large-scale shipping carrier consolidations into vessel-sharing & slot-sharing alliances
- Investment in larger vessels driving costs down through economies of scale
- Some Florida Ports prepare for Post-Panamax Vessels – others pursue niches for specific trade routes or commodities

Source: Florida's Seaports: High Performance 2017|2021



# Florida Cruise Operations

- 2015-2016: 15.5 Million passengers
- Port Miami led the state with 4.9 Million passengers
- Five Year Projection: 18 Million passengers
- Port Miami projected to lead the state and world with 6.6 Million passengers
- Trends:
  - 80 new cruise ships on order
  - Forecast for steady growth
  - Florida will continue to dominate the market and homeport the newest ships

Source: Florida's Seaports: High Performance 2017|2021



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# Capital Development and Investment in Florida's Ports

- \$2.8 billion in capital development over the next 5 years
- Projected Port Capital Development

Year	Amount
2016-2017	\$763 Million
2017-2018	\$522 Million
2018-2019	\$502 Million
2019-2020	\$665 Million
2020-2021	\$339 Million

Source: Florida's Seaports: High Performance 2017|2021



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## State Economic Impacts & Job Creation

- 15 Seaports support 900,000 direct and indirect jobs
- \$40.1 billion in personal income
- \$118 billion in economic activity
- Produce more than \$4.2 billion in tax revenue
- Handle 62% of all US cruise passengers – with 113 million visitors to Florida per year



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## State Economic Impacts & Job Creation

- Trends:
  - Rapid job growth in the direct and indirect job categories
  - Port investments have produced and ROI of nearly \$7 in state and local tax revenue for every \$1 of state investment.

Source: Florida's Seaports: High Performance 2017|2021



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# Port Activity Impacting South Florida

## Cargo

Port	Tonnage	% of State
Port Miami	8.8 Million	8%
Port Everglades	24.7 Million	23%
Port of Palm Beach	2.5 Million	2.3%
Total	36 Million	33.3%

## Cruise

Port	Passengers/YR	% of State
Port Miami	4.9 Million	32%
Port Everglades	3.8 Million	25%
Port of Palm Beach	0.5 Million	3%
Total	9.2 Million	60%



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# Port Activity Impacting Miami-Dade

## Capital Investment

Port	Capital Program (5 Years)	% of State
Port Miami	272 Million	10%
Port Everglades	766 Million	27%
Port of Palm Beach	54 Million	2%
Total	1.09 Billion	39%

Source: Florida's Seaports: High Performance 2017|2021



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MOTION**

# Southeast Florida Freight Mobility

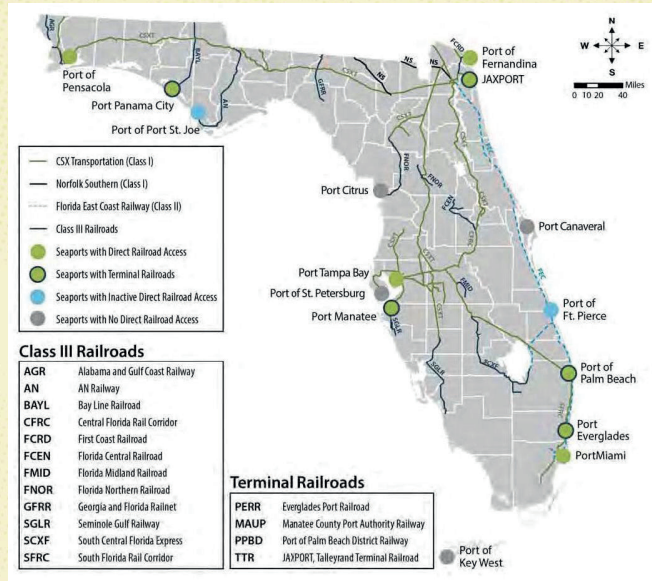
- Challenges
  - Steady population growth
    - More demand for consumer goods
    - More demands on surface transportation
  - Competitiveness for discretionary cargo
    - Rail interchange cost
    - Interstate highway limitations
  - Space for expanding port/freight operations

Source: Florida's Seaports: High Performance 2017|2021



PRO  
MOTION

# Florida Freight Rail Network Connections to Florida's Seaports



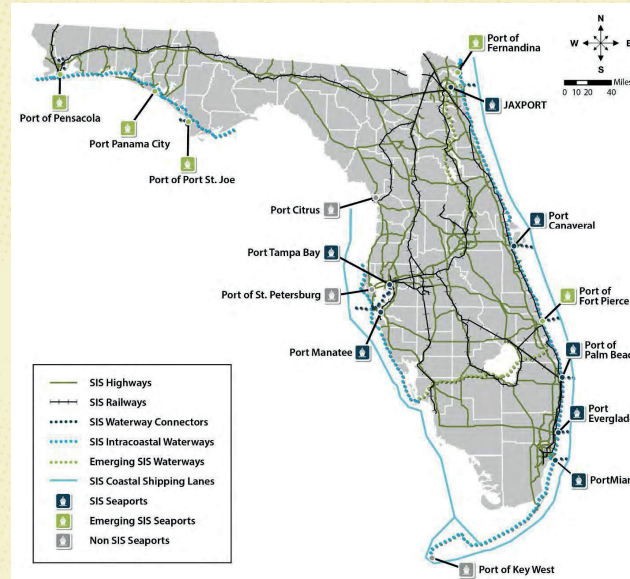
Source: Florida Seaport System Plan 2015



PRO  
MOTION



# Strategic Intermodal System (SIS)



Source: Florida Seaport System Plan 2015

# Southeast Florida Freight Mobility

- Opportunities to maximize freight mobility in Miami-Dade
  - Full development and use of freight rail capabilities
  - Inland port development
    - Near-port
    - Rail connected
    - Highway connected
  - Rationalization of port facilities
    - Cruise
    - Cargo

Source: Florida's Seaports: High Performance 2017|2021



## GLOBAL AND NATIONAL TRADE SHIFTS AND OPPORTUNITIES FOR FLORIDA - PRESENTATION



**PRO  
MOTION**  
MOVING FLORIDA FASTER

# Trade Overview and Florida Opportunities

Jeff Sweeney  
Martin Associates

DISTRICT 6  

## Agenda

- Discuss trends in containerized waterborne trade
  - U.S. waterborne flows
  - Shift in trade patterns
- Identify existing opportunities for Florida ports
- Discuss strategies to capitalize on these opportunities



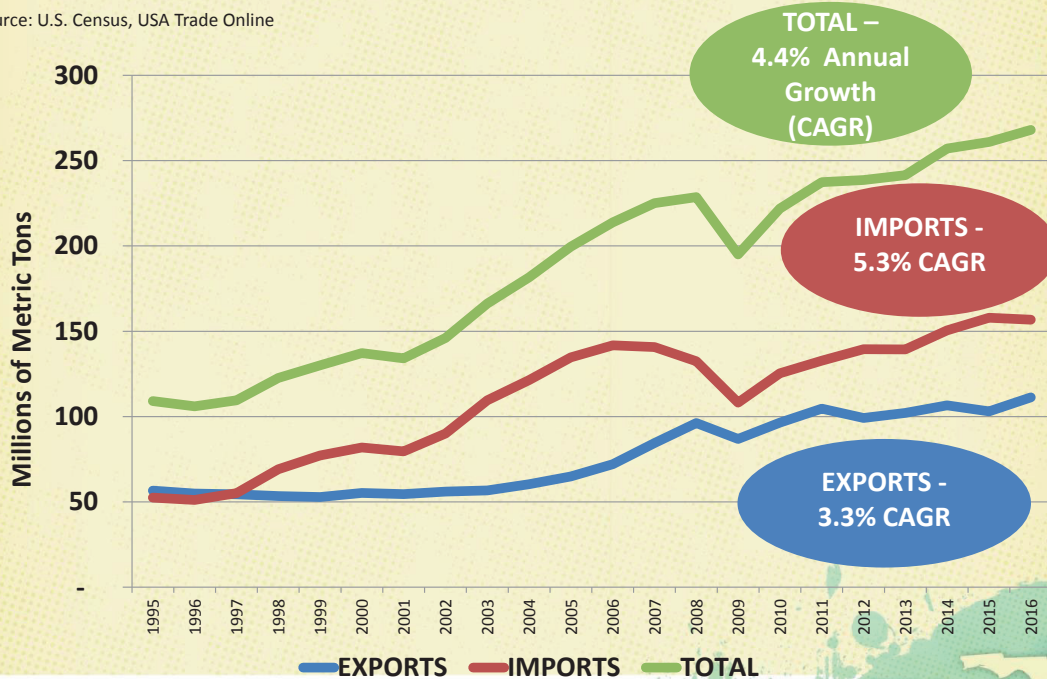
# Trade Overview and Florida Opportunities

## Overview of Waterborne Trade

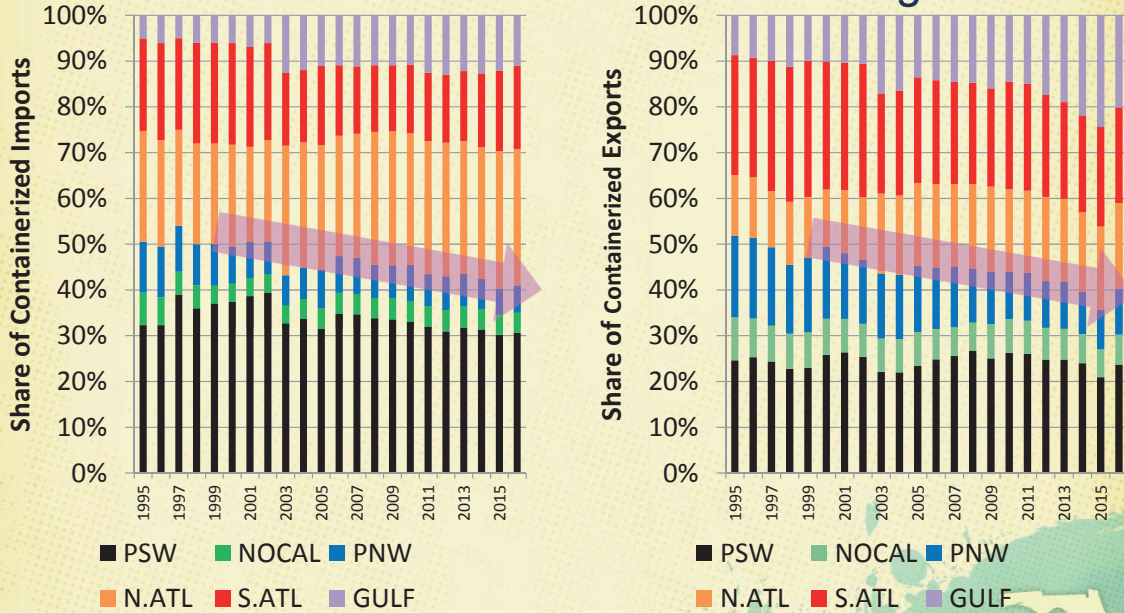


## U.S. Historical Import and Export Containerized Tonnage

Source: U.S. Census, USA Trade Online



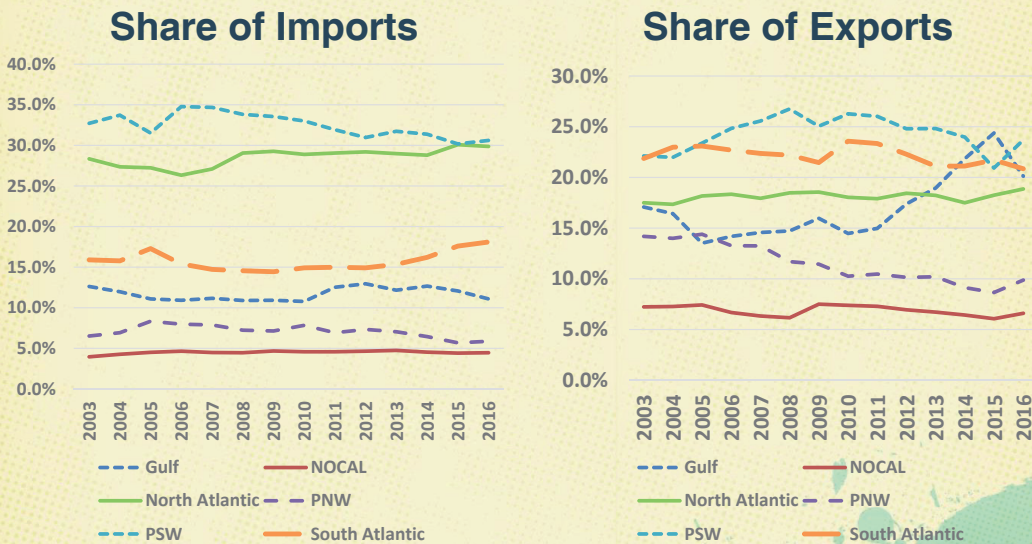
## West Coast Ports Handle About 40% of Containerized Imports and Exports; However Share Has Been Declining



Source: U.S. Census, USA Trade Online

PRO MOTION

## Market Share of Container Imports and Exports By Port Range



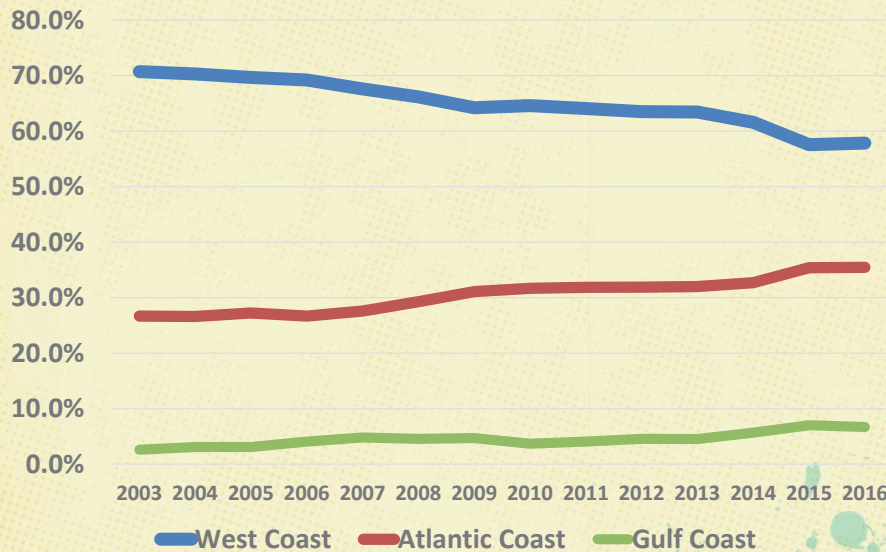
Source: U.S. Census, USA Trade Online

PRO MOTION



## West Coast Share of Asian Imports and Exports Has Fallen Constantly Since 2003

Share of Asian Imports and Exports By Port Range

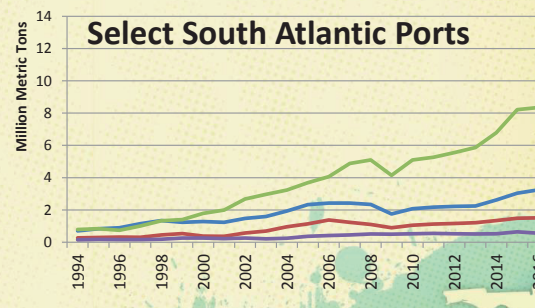
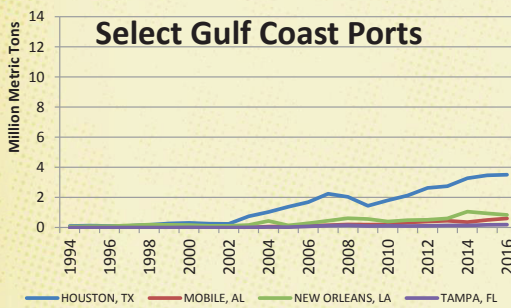
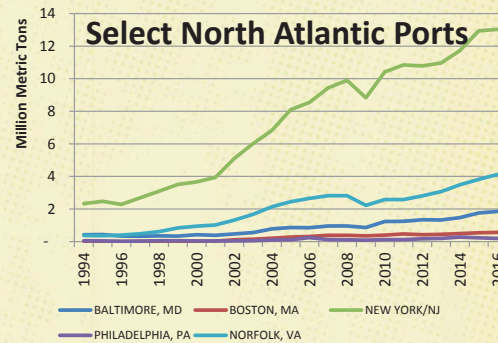


## Shocks have occurred in the existing logistics patterns of importers/BCOs since 2002

- Consolidation of imports via LA/LB - mid 1990's:
  - Distribution Center (DC) growth
  - Cross-dock operations
  - Rail investments in LA/LB to Midwest routings
- But then...
  - 9/11
  - West Coast Shutdown (2002)
  - Capacity issues – land and labor shortages
  - Rail and truck shortages
  - High intermodal rates
- And more recently...
  - Shifting production centers
  - Economic crisis
  - Continued West Coast/ILWU labor issues
- *Leads to search for alternatives and growth in all-water services...*



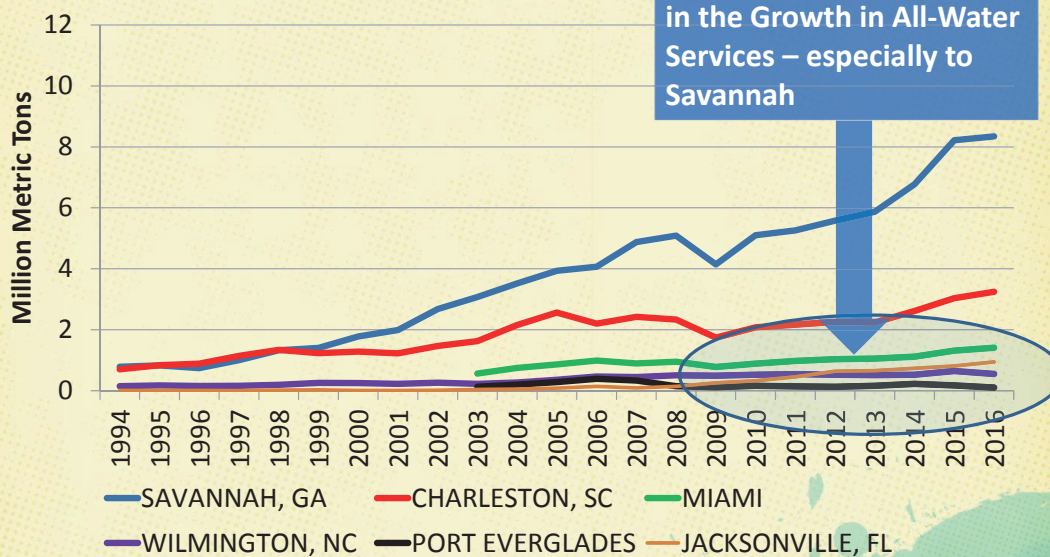
## Growth in All-Water Services Accelerated after 2002



Source: U.S. Census, USA Trade Online



## Florida Ports Have Not Participated in the Growth in All-Water Services from Asian Markets



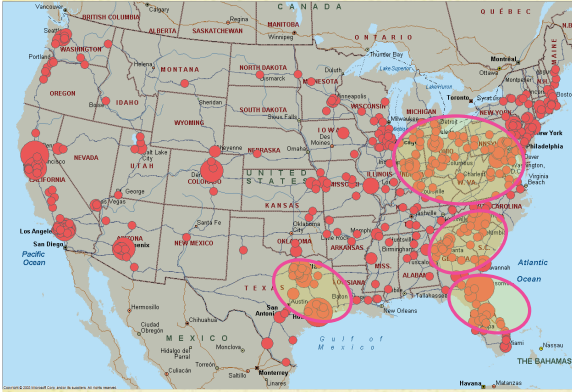
Source: U.S. Census, USA Trade Online





Significant growth in distribution centers in Gulf and Atlantic port ranges have further driven growth in all-water services

Top 25 Retailers



26-50 Retailers



Source: Chain Store Guide, National Retail Federation

PRO MOTION 11

# Trade Overview and Florida Opportunities

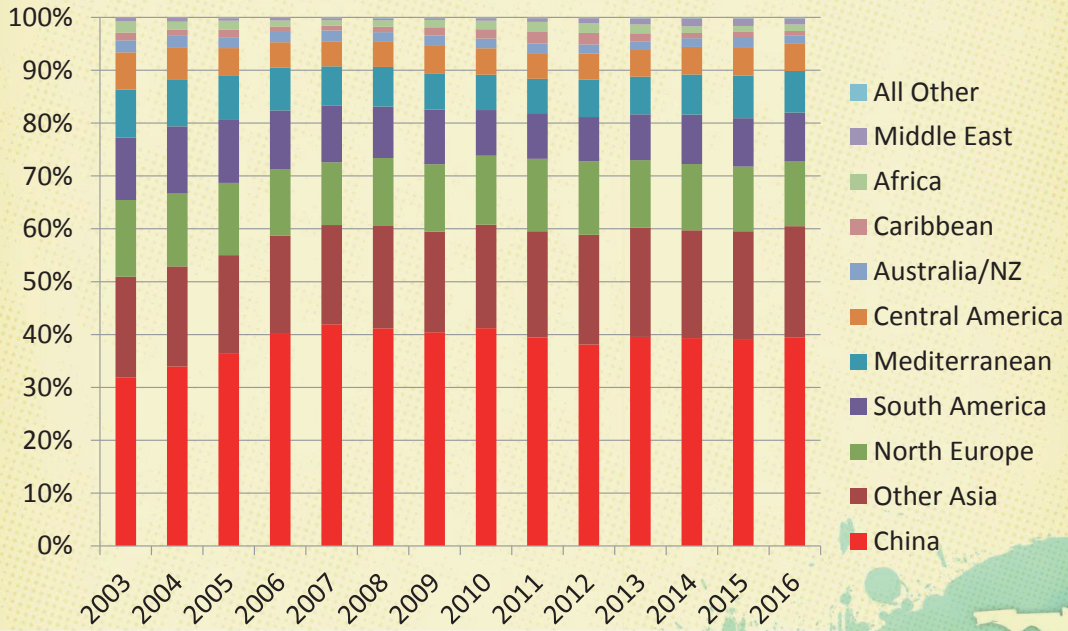
## Shifting Trade Patterns



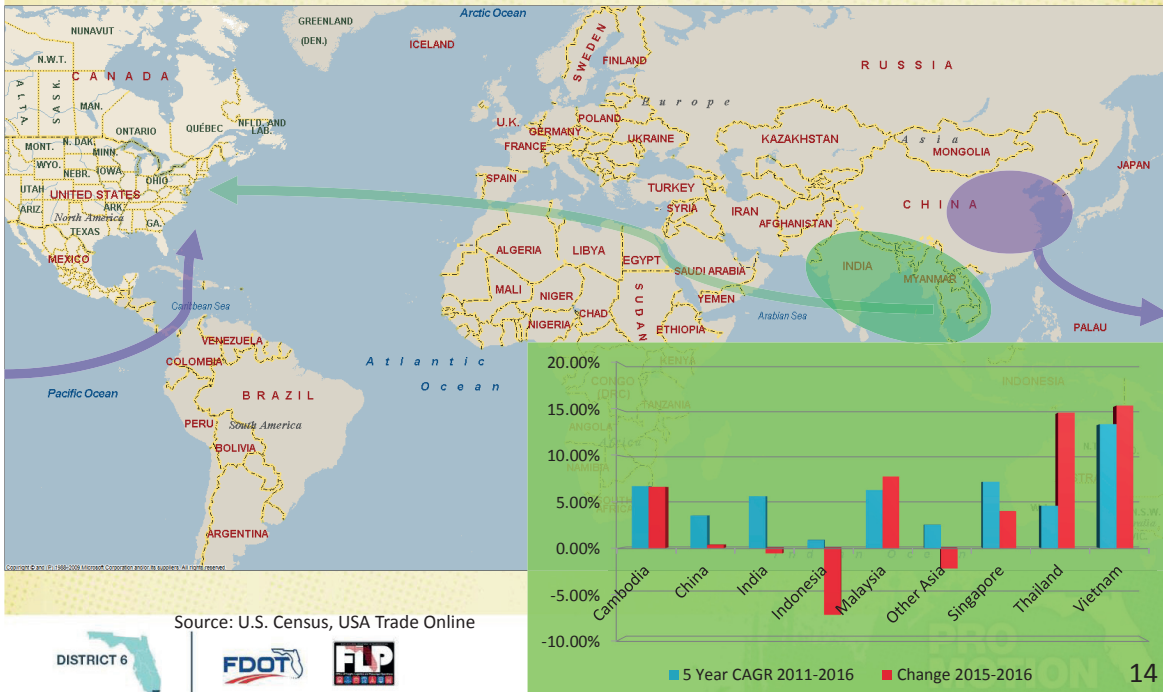
PRO MOTION 12



## Asia Has Been Responsible For About 60% of Imported Containerized Tonnage, Dominated by China

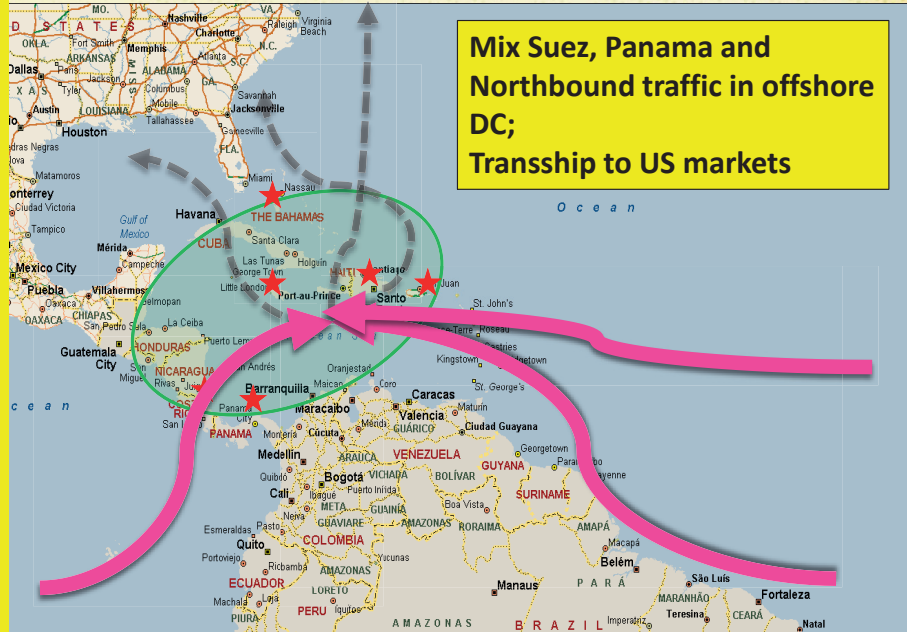


## However, Asian supply sources are shifting – favoring a Suez all-water routing to the East Coast



## Florida Infrastructure Needs: Keep Pace with Development of Caribbean Transshipment/Logistics Hubs

- Jamaica: Kingston
- DR: Caucedo
- Panama: Cristobal; Colon
- Bahamas: Freeport
- Costa Rica: Puerto Limon/Moin
- Cuba: Mariel
- USVI: St. Croix
- Puerto Rico: Ponce
- Trinidad



Source: Martin Associates

## Implications of Panama Canal expansion and growth in Suez traffic on Atlantic/Gulf Coast ports:

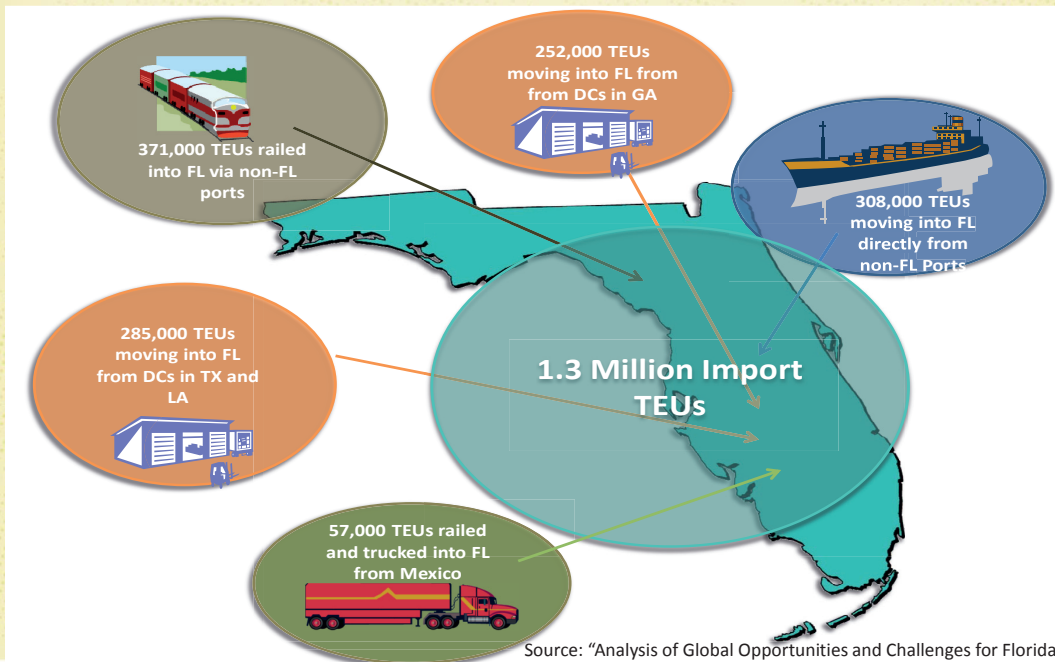
- Fleet Composition will change 6,500+ TEU vessels via Canal
  - 8,000 to 11,000 TEU
- Actual volume increases through the Panama Canal to the USEC and USGC may be less than anticipated
  - All-water services have been occurring
  - Suez Canal serves new trading partners
  - Growth in nearshoring and Caribbean transshipment centers
- Florida, USEC and USGC will compete to handle the larger vessels
- Infrastructure investment
  - Port infrastructure becomes critical
  - Intermodal rail infrastructure



# Trade Overview and Florida Opportunities

## Florida Opportunities

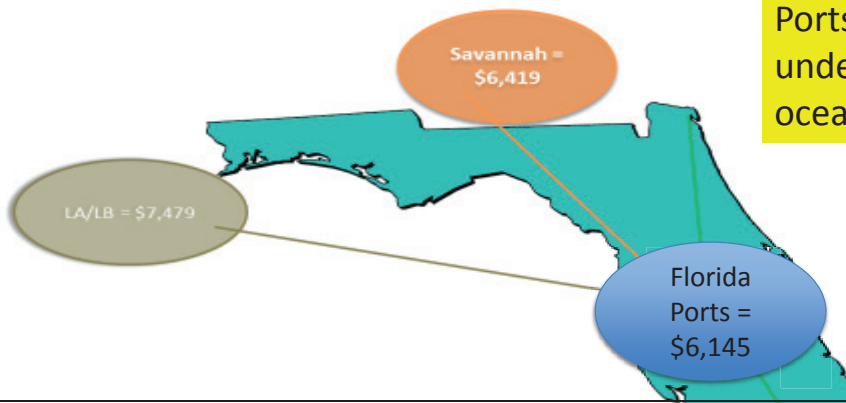
1.3 Million TEU Import Potential Has Been Identified –  
With Exports/Empties = 3.3-3.6 Million TEU Potential



Source: "Analysis of Global Opportunities and Challenges for Florida", conducted by Martin Associates, September 10, 2014

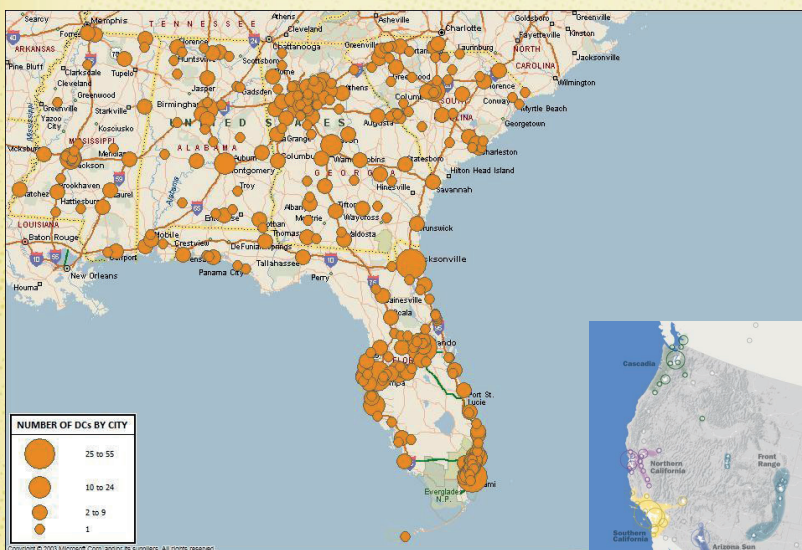
## Florida Ports can Provide a Cost Effective Routing to Serve the I-4 Corridor

However, Florida Ports are underserved by ocean carriers

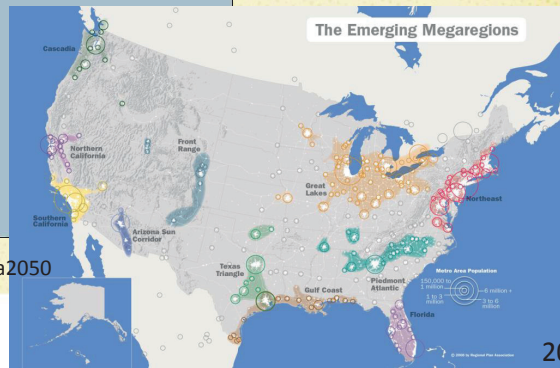


Hong Kong to: Orlando	Voyage	Terminal	Inland	Total	Days	Inventory Carrying Cost	Total Cost/Move
Los Angeles	\$1,990	\$406	\$3,660	\$6,057	28.5	\$1,423	\$7,479
<b>Florida Ports</b>	<b>\$3,966</b>	<b>\$222</b>	<b>\$442</b>	<b>\$4,631</b>	<b>30.3</b>	<b>\$1,515</b>	<b>\$6,145</b>
Savannah	\$4,005	\$216	\$660	\$4,881	30.8	\$1,539	\$6,419

## Beyond the I-4, Atlanta and the Southeast are growing markets for distribution and logistics-based activity

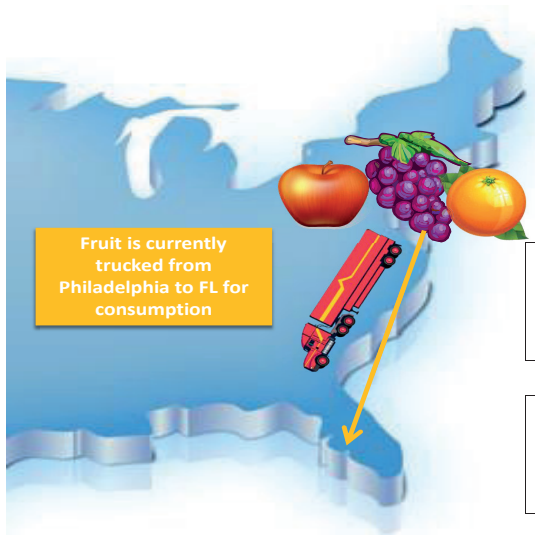


Source: Chain Store Guide, National Retail Federation, America2050





## Florida Ports Provide a Logistics Cost Advantage to Serve Southeastern U.S. for Containerized South American Perishables



Valparaiso to: Orlando	Total Cost/Move
South Florida	\$4,616
Philadelphia	\$6,921
Central Florida	\$4,322
Northeast Florida	\$4,602
Gulf Florida	\$4,293
<i>Truck From South Florida to Orlando</i>	

Valparaiso to: Atlanta	Total Cost/Move
South Florida Truck	\$5,619
South Florida Rail	\$4,916
Philadelphia	\$6,432
Central Florida	\$5,300
Northeast Florida	\$4,968
Gulf Florida	\$5,098

Under USDA's APHIS, the (pilot) program allows direct import of select fruits and vegetables from South America into southeastern US ports after undergoing a two-week cold treatment and obtaining the necessary unloading clearances

Increased containerization of fruits such as grapes, citrus, pears and apples

# Trade Overview and Florida Opportunities

Strategies for Florida Ports

## Strategies to Capitalize on Opportunities

- Direct marketing cost-effective routing via Florida ports to:
  - Beneficial Cargo Owners:
    - Top 10 importers in Florida control 40% of imports into Florida, but use Florida ports less than 60% of the time
  - Ocean Carriers:
    - Key international carriers underserve Florida Ports compared to Savannah and Charleston
  - Import distribution centers/export oriented manufacturers:
    - There is a high concentration of DCs along the I-4 Corridor, the majority being regional DCs
    - Leverage deepwater channels to attract export manufacturers
    - Explore incentives in place in other states
- Capitalize on imbalanced flow of northbound trucks:
  - 10,000 empty trucks move northbound from Florida weekly

## Strategies to Capitalize on Opportunities

- Continue to invest in port Post-Panamax infrastructure:
  - State-supported port infrastructure projects
  - Channel deepening and navigational projects
  - Integrate entire logistics system:
    - DCs
    - Ports
    - Rail/Highway
    - Airports
- Port, terminal and rail investment work in concert together
- Work with policymakers at all governmental levels to streamline regulatory processes



## Key Takeaways

- East Coast has gained market share over the past 15 years
  - Savannah demonstrating significant growth in Asian trade
  - Florida ports have lagged in Asian markets
- Florida ports can serve Florida market competitively
  - Orlando/I-4 Corridor is key
- Must compete against Savannah for Atlanta market
  - Port and rail synergy necessary
- Support at state level needed
  - Infrastructure
  - Policy
  - Incentives

# Trade Overview and Florida Opportunities

Thank You

*Jeff Sweeney*  
*Martin Associates*

## TRADE AGREEMENTS eCOMMERCE AND INNOVATION - PRESENTATION



# West Central Miami-Dade Freight Mobility Summit

Lenny Feldman, Esq.  
[lfeldman@strtrade.com](mailto:lfeldman@strtrade.com)  
6.8.17



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# Trade Agreements



## South Florida - Top Trading Partners 2016

Country	Total Trade (Billions)
1. Brazil	\$14.25
2. Colombia	\$7.62
3. China	\$6.42
4. Dominican Republic	\$5.43
5. Chile	\$4.95
6. Honduras	\$4.43
7. Peru	\$3.89
8. Argentina	\$3.24
9. Costa Rica	\$3.15
10. Venezuela	\$3.11
17. Mexico	\$2.20
37. Canada	\$0.66



## NAFTA RENEGOTIATION

- "We have all sorts of rules and regulations that are horrendous. Like we wanted to start negotiating with Mexico immediately and we have these provisions where you have to wait long periods of time...You have to notify Congress, and after you notify Congress you have to get certified, and then you can't speak to them for a 100 days. The whole thing is ridiculous."
- - *President Trump, 4/18/17*



## CHINA CURRENCY MANIPULATOR – NOT NOW

- April 18: Treasury Makes No Finding



**Donald J. Trump**   
@realDonaldTrump

Follow

Why would I call China a currency manipulator when they are working with us on the North Korean problem? We will see what happens!

RETWEETS	LIKES	
14,722	69,909	

8:18 AM - 16 Apr 2017

18K 15K 70K





# RIP UP FTAs, WITHDRAW FROM WTO?

- Not quite...but...



18110

Federal Register / Vol. 82, No. 72 / Monday, April 17, 2017 / Notices

## DEPARTMENT OF COMMERCE

### International Trade Administration

#### Public Comments and Hearing Regarding Administration Report on Significant Trade Deficits

**AGENCY:** Office of the United States Trade Representative, International Trade Administration, United States Department of Commerce.

**ACTION:** Notice of public hearing and request for comments.

**SUMMARY:** Pursuant to Executive Order 13786 of March 31 2017, the Secretary of Commerce and the United States Trade Representative (USTR), in consultation with the Secretaries of State, the Treasury, Defense, Agriculture, and Homeland Security and the heads of any other executive departments or agencies with relevant expertise, as determined by the Secretary of Commerce and the USTR, shall prepare and submit to the President an Omnibus Report on Significant Trade Deficits. The Executive Order can be found here: <https://www.whitehouse.gov/the-press-office/2017/03/31/presidential-executive-order-regarding-omnibus-report-significant-trade>.

The Department of Commerce (Commerce) and USTR will hold a public hearing and seek written comments to assist in the analysis for the assessment called for in Executive Order 13786. The trading partners with which the United States had a significant trade deficit in goods in 2016 (in alphabetical order) were Canada, China, the European Union, India, Indonesia, Japan, Korea, Malaysia, Mexico, Switzerland, Taiwan, Thailand, and Vietnam.

*Thursday, May 18, 2017:* A public hearing at the U.S. Department of Commerce, 1401 Constitution Avenue NW., Washington, DC, beginning at 9:30 a.m. EDT.

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served.

7



# WHAT ABOUT CONGRESS?



HOUSE



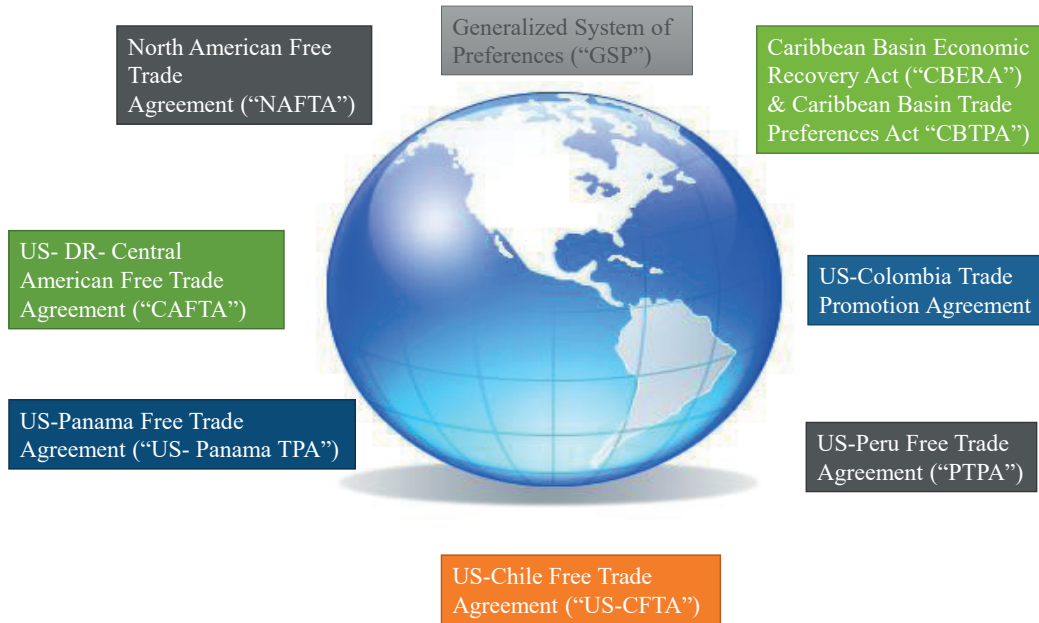
SENATE



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8

## Trade Programs



## Automation & Compliance





## Partner Govt Agencies (“PGAs”) Effecting Imports



## Bonded Movements & Facilities - Types

- Inbond / Transportation Entries
- Temporary Importation Bonds
- Bonded Warehouses
- Container Freight Stations
- Inbond Export Consolidator
- Foreign Trade Zones



## Executive Order 13659 Streamlining the Export/Import Process

- Increase efforts to complete the development of efficient and cost-effective trade processing such as ITDS to modernize and simplify how agencies interact with traders...while reducing unnecessary procedural requirements that add costs to both agencies and industry...and promote new opportunities for trade facilitation.



- Establish the Border Interagency Executive Council (BIEC) to develop policies and processes to enhance coordination across customs, transport security, health and safety...to measurably improve supply chain processes and improve identification of illicit shipments.



## Customs Brokers & PGAs?

- **19 U.S.C. §1484:**

Importer of Record to make entry with information enabling CBP and PGAs to determine whether merchandise may be released from CBP custody and file an entry summary with information necessary for CBP to determine whether any other applicable requirement of law is set.

- **Considerations:**

- How much data is necessary? Data Creep
- When is the data needed? Policy Creep





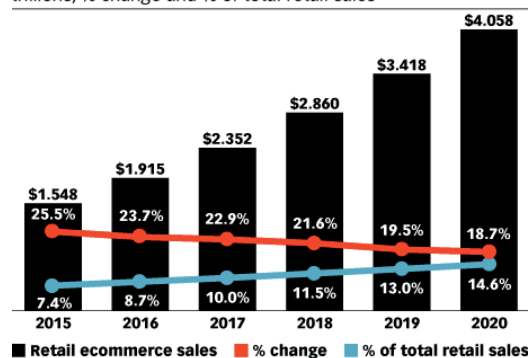
# E-Commerce



## Ecommerce by-the-numbers

- Worldwide e-commerce sales expected to reach over \$4 trillion by 2020
- E-commerce retail sales estimated to reach 14.6 % of total overall world retail in 2020
- Global cross-border sales\*
  - \$300b GMV in 2015
  - \$900b GMV in 2020

**Retail Ecommerce Sales Worldwide, 2015-2020**  
trillions, % change and % of total retail sales



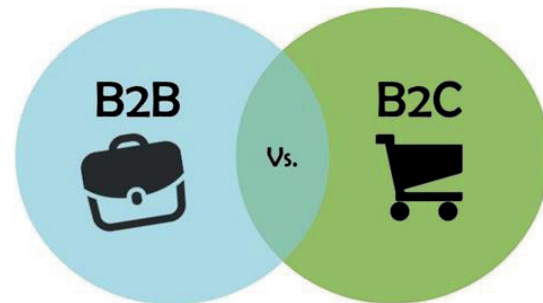
*Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets*  
Source: eMarketer, Aug 2016  
213201 | www.eMarketer.com



DHL "The 21<sup>st</sup> Century Spice Trade"  
[http://www.dhl.com/content/dam/Campaigns/Express\\_Campaigns/Local\\_Campaigns/apem/express\\_campaign\\_spice\\_trade\\_apem\\_en.pdf](http://www.dhl.com/content/dam/Campaigns/Express_Campaigns/Local_Campaigns/apem/express_campaign_spice_trade_apem_en.pdf)

## Definition of terms

- Ecommerce: internet-enabled sale of physical goods
- Models: B-B, B-C, C-C
- B-B similar to traditional trade model
- Challenges associated with B-C and C-C
- Ecommerce versus de minimis



## Trade Facilitation & Trade Enforcement Act

- Section 901, De Minimis Value:
- De Minimis value –
  - Change from \$200 to \$800 to admit articles free of duty, tax and entry formalities
- Congressional findings –
  - Modernizing international customs is critical for U.S. businesses of all sizes, consumers in the U.S., and economic growth of the U.S.
  - Higher thresholds for value of articles that may be entered informally and free of duty provide significant economic benefits to businesses and consumers in the U.S. and the economy of the U.S. through costs savings and reductions in trade transaction costs
- Sense of Congress –
  - USTR should encourage other countries to establish commercially meaningful *de minimis* values for express and postal shipments that are exempt from customs duties and taxes and from certain entry documentation requirements, as appropriate



## Parties in Ecommerce Transactions

- Foreign Manufacturer/Shipper
- E-Commerce Platform/Marketplace
- Carrier
- Express Courier
- Customs Broker
- Importer of Record
- Purchaser/Consignee



## CBP enforcement: Priorities for e-commerce

- Partner Government Agencies (PGAs)
  - Excluded from De Minimis Exemption: TTB
  - Likely Excluded from De Minimis Exemption: CPSC, ATF, FDA (med/pharma), NHTSA, DDTC
  - Policy Unclear: AMS, APHIS, FSIS, NMFS, EPA, FWS
- Intellectual Property Rights (IPR)
  - 19 USC 1526(d) personal use exemption for traveler importing one article of the type
  - Must accompany traveler; for personal use, not sale; not granted an exemption for last 30 days
- Revenue – Duties, AD/CVD, Fees
  - De Minimis for AD/CVD? Fees?
- Border Security
  - C-TPAT/Trusted Trader Applicability
- “Unmanifested” Cargo



U.S. Customs and  
Border Protection



## Questions?



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## JUNE 8 2017 FDOT FREIGHT MOBILITY SUMMIT PANEL SUMMARY

### West-Central Miami-Dade Freight Mobility Summit June 8, 2017 Summary of Audio Tape from Panels

1:12: 30 Highway Operations Opportunities and Challenges: DREAM BIG

Panel 1 - Lenny Feldman, Sandler, Travis, Rosenberg - Panel Moderator, Secretary Wolfe FDOT, Paul Wai Florida's Turnpike, Claudio Miami-Dade Expressway, Barbara Pimentel Florida Customs and Brokers Association, Mark Sterling Armellini Trucking, Alfredo Keri, CARGO42

Secretary Wolfe- FDOT: 38 years with DOT. Their mission is mobility for people and goods. There are five other studies similar to this one going on in Miami-Dade and is looking to starting one or two every year. There's lots of planning and development going on. As a general trend in transportation, the roads are becoming more congested than they are today. Governor Scott is big on job creation - travel time is important for freight and growth. Population growth of 2% and only .5% in highway capacity construction. Trying to get more people in transit.

Freight can be categorized in transportation projects, particularly highway as freight focus. The primary is where the focus of the project is to serve freight - the Port Tunnel and 25th Street are freight focused projects. Freight related; where freight is an important component of a project that also has other goals. Krome Ave, is mostly for widening Krome Ave and putting a median out there is safety. Too many accidents happening out there. Too many head-on collision with people trying to pass on a two-lane road. However we also know it's a major freight carrier and it's a good way to avoid the congestion that's there further east. This is an example of a Highway improvement that helps both freight and other modes. Southern end of Krome Ave will have a CBD truck bypass which will be mainly about trucks, these types of projects will remove the trucks from place where other people don't want them to be. It alleviates traffic. Freight Impacted; freight incidental benefit from another project. There's a large work program that's looking into truck parking for the area of Doral and it's been hard to find a site but it's a definite need and we need to make it happen. There will be a lot of upcoming work from Okeechobee Road which have very high truck volume with trying to alleviate the traffic to make the freight go through the middle of the state instead of the congested eastern seaboard. There's a lot of interstate work that the trucks will benefit from. The 395 downtown project; 395 will fly over I-95 at a very high level and connect directly with 836.

Paul Wai-Florida's Turnpike: Wants to be part of the transportation solution. Growth is a very positive thing to focus on and we need to deal with solutions for traffic. There's lot of construction going on including the Palmetto and Turnpike which is aiming to add capacity. About 15% of all traffic on the turnpike is truck traffic. Key projects on the HEFT from Kendall Drive all the way to 836. There's about \$500 million in active construction going on. In the next five years, going north on 836 all the way back to the

turnpike mainly to Broward County. The addition of the NW 41<sup>st</sup> Street NB ramp to the Turnpike is very important for this area. A suntrack testing facility is being built in central Florida. USDOT awarded Turnpike for Central FL to be an automated vehicle proving ground and it's called the Central Florida Automated Vehicle partnership. There's about 10 sites across the country for the automated program and the FL turnpike personnel's were selected out of 60 applicants to pilot certain AV technology and gather information. The future will get here fast. Primary project is a Central Florida partnership to gather information and also includes a truck platooning effort from Central Florida to the Jupiter in Palm Beach County. Looking for interested partners from Palm Beach to Dade. Also looking into truck focus parking and plaza to provide better rest for the drivers. Also focusing on Hurricane evacuations to prepare for hurricane seasons and always looking to improve incident management.

Claudio Diaferia - MDX; Miami-Dade Expressway: MDX is working on a very large project between 17th Ave to Palmetto/836 interchange which will provide major capacity improvements and relieve a lot of bottlenecks and it also includes accommodation of Bus Rapid Transit. Also there's the 87th Avenue interchange project which is under construction. Both of these projects will increase capacity and flow on the 836 which will definitely help the freight and transit. Looking to extend 847 over the Turnpike to Kendall warehouse area and extend 924 east and west, these projects are in PD&E phases and one of them is in the evaluation stage. Hoping I-395 project starts very soon. Looking into extending 836 all the way west near Kendall airport, schedule to come out in 2019. At the moment 30% of traffic exiting Kendall works in Doral. So this project will provide a direct link which will create a much quicker route. Also looking on adding a fly over on 112<sup>th</sup> which will avoid the iron triangle which is a nightmare for freight. Accident management is also another work in progress.

Future includes Dolphin Transit Station, inside lanes for Bus Rapid Transit, Autonomous/ Connected vehicles a communications center, preserving future corridors and future technology lanes.

Barbara Pimentel- Florida Customs and Brokers Association: represents the logistic community for moving freight. Represents 600 companies statewide, FDOY has been very involved and there is a lot of synergy between FDOT and the industry. Focus on infrastructure is key especially in South Florida. Florida is a dead haul state where we are paying for the movements in both direction as trucks are empty in one direction. Freight doesn't move without the logistics community. They choose the path for the freight and we make sure the cargo gets on the planes and ships. The more trucks you see on the highway, the stronger the economy is.

The agency wants to make sure that all the projects that are going on around the state are connected; because if they don't connect, they don't work. Flow of freights needs to be effective and efficient. South FL has more licensed brokers than anywhere in nationwide. There's 12,800 in the nation and we have about 1,400 of those in S FL alone. Looking to branch out to up north; Atlanta, Houston etc.



Safe and secure truck parking is a major concern, it is a life line need now. Each truck represents jobs, not just the driver but the loading and packing.

Mark Sterling- Armellini Trucking: Around since 1945 specialty is an LTL (Less Than Truckload) carrier, we specialize in truckloads of flowers to about 44 states, 4 facilities including 2 in Miami, 1 in Atlanta and 1 in California. Our biggest challenge at the moment is lack of drivers. 100% turnover of drivers, we have a significant recruiting department trying to maintain and build up the driving force. We have 140 importers that deliver to the Miami facilities. The 25<sup>th</sup> Street overpass has been a significant boom for their facilities it has helped relieve traffic has helped with the movement of traffic.

Constantly looking to be out of Miami by 3:00, 3 days a week products are moved from Miami to Palm City. Other trucks need to be out by 8:00 PM in order to leave the state.

Significant change has occurred with FDOT and MDX. They have made all the effort to help them move freight quickly up the road.

Very interested in technology in pooling drivers and autonomous vehicles. They would like to link it to recruiting. They could use Team drivers to make the 3.5 day trip to California. Their industry is looking into automated trucks.

Alfredo Keri- CARGO42: Dreaming Big!!! Experience in logistics, technology and business innovations in market places to make trucking more efficient for empty miles and idle time. We are a platform in the marketplace for matching companies - trucks on the road with empty space with other shippers who have pallets to move. They are a startup beginning to get the attention of shippers and carriers. Only works in FL at this moment. Support small carriers, only 1 year old. Have 500 trucks in network and growing.

Looking for continued conversations with import companies and integration to expand features.

Came to South Florida as they saw huge opportunity and the perfect landscape. Plenty of opportunity as South Florida is the door to Latin America. Looked for and did not expect so much support from agencies - FDIT, FIU, Beacon Council, FCBF in partnership to support local economy.

Q and A

Eddie Vasquez- ComReal - work in flower industry. Have you seen any advance in other cities trying to take over the flower business? If it exists what steps can Miami take to stay ahead in the game?

Mark Sterling- Miami has taken the dominance from California and California is now shifting to another crop. Miami International Airport supplies majority of the flowers. 1 billion per day - Houston tried to as well as a location in Missouri but they have

struggled because they don't have the USDA presence that we have. We have the government structures in place. We haven't seen Miami losing its grasp. I think we're going to be moving flowers for a while from Miami.

Lenny Feldman - From your travels to other states and countries are moving perishables is there anything that you've seen that sticks out as something that's cutting edge? Are we falling behind?

Barbara Pimentel - We thought we were behind but after visiting those countries we are in the forefront. The way we care and the experience we have put us above the rest. Miami handles a greater volume than the other countries. 49 agencies that regulates our industries. I don't think our flowers are going anywhere any time soon.

Emir Pineda - we have the experience with all the federal agencies. 90 percent of the flowers go through Miami International Airport by air carriers at least 85% for last 10 years. The market is geared towards Miami instead of the other airports. Perishables will continue to come through Miami. More cooling space - 445 Ksqft - than the whole country combined. We have a dominance of Latin American flights so the planes have passengers in both directions.

Roxana Santeria- CAN/US Logistics: Artificial intelligence and technology are harming the job market on a mass scale, so what does the panel think about that progress? And how is it going to impact your areas of focus and how can we slow these changes or help so these technology will drastically eliminating jobs?

Alfredo Keri - I think technology is going to bring in efficiency and jobs will be shifted so I see it as a positive thing not negative.

? - New technology does displace jobs and automated vehicles will be here sooner than you think. Autonomous vehicles will help with efficiency but congestion will probably be worse.

Claudio Diaferia - See it as a positive, reducing the spacing between trucks and vehicles will add capacity. We cannot keep up with growth by capacity alone we need technology.

James Wolfe - A lot of people think technology will come sooner that you think but it will also take longer than you [as older vehicles will be in the mix for a long time]. Log time before 100% autonomous.

Lenny Feldman - Delicate balance between trucks and pedestrians. How do you make it work? All politics are local and need to deal with how to make it work - Complete Streets.



James Wolfe - Some streets have been designed to handle truck turning radius more than necessary. It has to do with the character of the area. It's about doing the right thing in the right place, not one size fits all, need to accommodate all modes.

Hernan Galindo - Airglades - Why it is so difficult to move perishable away from Miami and South Florida. Once you get beyond Miami you need to drop cargo and refuel - overall cost increases - cost/kilogram increase exponentially. Combination of low air cargo rates and excellent trucking - it is hard to beat Miami.

Lenny Feldman - What is the one thing that industry can do to assist the providers and vice versa:

James Wolfe - Tell us what you need e.g. Truck Parking

Paul Wai - Turnpike is listening now allowing tandem trucks to come off the turnpike

Claudio Diaferia - Not just about new capacity - changing traffic patterns and behavior - we don't know unless you tell us in a forum like this or in PD&E studies

Barbara Pimentel - Keep listening, understand the freight story, let us come to the table

Mark Sterling - You all are listening. SR 826/25<sup>th</sup> Street MOT showed excellent communications from the agencies. We're in this together - keep the doors open.

Alfredo Keri - Give us exposure - thanks for this event. Looking for partnerships. Consider themselves a South Florid Startup - success in Miami mirrors what happens in the state.

Barbara Pimentel - Teamwork make the Dream work.

Ken Armstrong, Florida Trucking Association - Speed of technology and the slowness of infrastructure development and construction will slow growth.

End 2:18:10

Panel 2:18:50 - Emir Pineda, Miami International Airport, Kevin Lynskey, PORT Miami, Robert "Bob" LeDoux FEC RR, Stanely Rigaud Beacon Council, Carlos Roa Miami-Dade TPO, Juan Flores TPO FTAC

Emir Pineda - Miami International Airport: The port programs are basically plans to facilitate the growth in Miami Dade and encompasses what panel 1 discussed earlier roadways, how do we tie in with FDOT? How do we plan together this growth because along with this additional 2 million tons of cargo that means more trucks and more people working at the airport that means parking, that means where do we put the trucks and build the roadways that go with growth. Part of that is we are continuing

support the extension for the viaduct to the turnpike. It is something that's in the works and we are supportive of any infrastructure that is going around in the airport from MDX and FDOT. One of our job growth is in trade. Trade is a result of what happens in the airport and the port. We need to work with state and local entities to facilitate this growth as we move forward.

Kevin - PORTMiami Deputy Director: Working at Port for 10 years providing projection of waterborne containerized traffic through the port, and expand projection to the southeast. Largest cruise port in the world. Developed a 25 year master plan that was produced 5-6 years ago, to project the numbers of passengers in 2035. 4 million to 6.3 million but by the end of this year, we will take to our County Commission projects that will take us beyond our 2035 projections by the year 2020. Cruise is exploding.

Now for Cargo, the growth rate for the north south trade lanes has been zero for the last 10 years. We are surrounded by 1,000 miles of water and are 1/16<sup>th</sup> of nation's population and only bring in 1/16<sup>th</sup> of the trade. Doesn't add up. 100% of the growth in SE has been related to Asia trade. PORTMiami Asia trade is up 11% to 15% over last 2 years.

Panama Canal; is outperforming what we thought. Ships with 7,500 to 8,000 TEUs coming through now and most want to go to NY/NJ but there is a bridge problem. That problem will be mitigated soon and we will see 10,000 to 13,000 TEU ships. In less than one year more than 50% of the ships are ships that previously could not fit.

Alliances: 20 shippers control 80% of the world traffic. They invested in large ships - squared off into 3 groups dominating trade into the US on large vessels with 70% - Maersk/MSC, CMA/2 merged Chinese companies and a Japanese/German group. They move 50% of the Florida waterborne trade.

Major issue at the moment for all ports is trying to move the containers in small spaces. PORTMiami has 250/300 acres dedicated to cargo. 10 years ago maybe moved 500 to 750 containers off the ship now we get 2,000 container exchange. Quickly adjusting how we use this small area and are looking for an Inland Terminal. We can move 1.0 million containers per year now and have capacity for 1.8 million, not urgent but need to start planning now

Bob LeDoux- FEC: The FEC/Norfolk Southern and CSX have a very efficient transfer in north Florida. 10 years ago we FEC/CSX got together and were able to shift raw cotton from Charlotte for the garment industry. Used to be known as the rock train now we are the underwear train.

A very large percentage of packages from UPS go through the FEC. Rail volumes went down about 5% last year but we are starting to see some remarkable growth of about 20%+ specially in Medley, 60 car trains are now 100 car trains coming out of Medley thanks to FDOT. Growth with Boise Cascade Paper Company who will begin to ship paper by rail here next week. There's a lot of growth this year. Flagler Station under FEI has

built a bunch of warehouses. All the warehouses to the north of 36 St are full and there's a contract to get all the warehouses to the south completed. 1.5 million square feet, Amazon took an entire building. Amazon also has a major 2 million square foot warehouse in Jacksonville and one of our goals is to have the cargo that's moving between the two facilities go on the rail instead of trucks in the highway. What is the vision for the future? We are actually seeing it real time at FEC. A real life example is the IKEA just down the street from here in Doral. That cargo got there on the FEC. As new businesses are coming in, we help the logistic channel to bring the cargo in. The IKEA down the street is the fastest growing largest IKEA in the US and 70% is exported to Latin America. Last week for the first time we took 2 containers of liquid natural gas to the port. We are running 24 locomotives a day on natural gas.

Stanley Rigaud- Beacon Council: The Miami Dade Beacon Council is the official economic development organization for Miami Dade County. As a service to the community we are charged with bringing new job generating investment to the Miami Dade County. The role of the director of economic development for trade logistics is to focus on how I can assist companies here in the industry to grow and promote the industry so that when we do get these jobs to come to Miami. There's a lot of international attention that's being looked at in Miami. I was just pulled out of this forum as a Governor of a City in Poland was here talking to the Mayor and observed our event. He wanted to know why he should trade through Miami. Doral and Medley are probably the two highest concentration of logistics companies. It's important that we recognize the asset that we have here. If there's one thing that's constant, it's change. People are looking at Miami as a leader in this industry. Without the three entities, MIA, CPORT, and FEC because they are the entry points and without these entry points, truckers will lose their values. They are considered the economic engine of this county.

Really important to have added value services, understand regulatory compliance, at FEDEX I learned that change is constant, we need to be on the cutting edge of technology. The SMART Plan is critical to growth. Also very important that industry responds to the Council's surveys. The data is very important.

Carlos Roa- Assistant Director for Transportation and Land Use at MD TPO: The TPO connects the dots in partnership with the agencies. I would like to start by saying that 15 years ago freight planning did not exist. The efforts that have been conducted at the national level have moved freight to a position that is much more relevant now as part of the planning at the TPO. Besides planning the need for roadways, finding the needs, allocating the funds, and prioritizing the investment. Now freight has its own platform and set aside funding. Miami is a global hub not to be ignored.

The TPO is also leading the Strategic Miami Area Rapid Transit (SMART) plan and that plan is promoting transit as a high priority in the county. How does that relate to freight? It is strategically being implemented to getting people off the road and its about connecting all the modes.



Miami-Dade TPO was first in the state in implementing a Freight Transportation Advisory Committee (FTAC) which brought our industry partners to the table. We also coordinate the FTAC effort in a way that now we prioritize freight projects together. There's a creative class in this area and in Miami Dade that is obviously pushing the envelope and is moving freight to other dimensions. Freight continues to be one of our highest priorities. The TPO just started a new freight plan update and we will be in touch with you all through that process. . FTAC- freight transportation advisory committee.

Juan Flores- FTAC Vice-Chair, JACOBS, Most people do not know what a TPO/MPO is. The state of Florida has 27 TPO/MPOs, California has less than that. Florida has a lot of MPOs and there a lot of planning going on. To see the reason why that is important we have to take a deep dive. There are issues in the panhandle, the issues in the west coast and issues in southeast Florida are different like night and day. And then take another deep dive as it relates to the FTAC here in South Florida. I am the Vice-Chair of the FTAC and it is really focused on a lot of supplemental resolutions - the viaduct, truck parking they believed in the Port Tunnel. It supports the planning within the TPO. As we know TPO's are made up of local elected officials.

People may wonder what cruises have to do with freight and goods movement, it's called provisioning. There are dedicated port planners who are looking at this. Everyone has their issues - bike lanes, landscaping - well we want to elevate the discussion on freight.

Ken Armstrong mentioned the issue with planning [that it takes too long] it is complicated. Need to deal with all 3 counties in the SE, Miami-Dade County and the State to get things done. We also have 40+ federal agencies knocking at your door. Everyone has a role to play. The country changed after the 911 terrorist attack, security have become more scrutinize.

Many change makers have served on the FTAC. Miami is the place to play and if you notice, everything is going up, there's no more room. Doral is booming like crazy.

FTAC is critical to bring the players together to for jobs, economic development, airport, seaport - to provide balanced planning.

2:49:12 Q and A

John Dohm - Infinity Real Estate: Kevin what do you envision being done at the port? What things that are essential who really can't afford to pay on a private property as you know the land is getting pretty expensive everywhere.

We us the term Inland terminal. Primarily the land is rent out. We need cold storage, warehouses, something for the truckers. In no way do we want to gain competition which private industry provides. Looking for a nice piece of land dead center here in Medley that can provide truck parking and container storage with rail access.

Jeff Weidner- MARLIN Engineering: How can we help to make the connection between investment and high value jobs?

Emir Pineda - There is enormous growth in pharmaceuticals. It is an important industry and we have recently worked with IATA to get certified - move more pharma freight with trained personnel - high yield cargo.

There is a long term goal to create jobs for the community. They're looking to build a smart warehouse which will create jobs for both regular paying and engineering paying jobs. Looking to see what the economy needs are to see if Miami have the talent required to get the job done.

Lenny: Bob is rail being underutilized? Are we missing something or is it being utilized at capacity.

We run 14 trains today but there are driver shortages. We're expanding in markets where rail is not expected.

Are there conversations going on to see if we are going to produce more? How do we makes FL work up in a way it hasn't yet

What the industry needs is a backfill for when the baby boomers retire. People who are in these jobs today make it marketable for the younger generations to want to get involved. China is expansive now. Now tags are reading Malaysia. We have to make sure we have the right talent.

Jeff Weidner concludes: The state is actively looking for new projects from planning into the project development phase. A number of action items have been raised today that stakeholders can work on. Truck parking is a safety issue now. As a team, we need to educate the public in order to avoid the NIMBY issues like this. We thought truck parking was difficult the Inland Terminal will be harder. The FTAC and the TPO long range plans are a good mechanism for us to work through these issues. If the tunnel project was never shown in the Long Range Plan it would never have been built.

**SUMMARY PAMPHLET - OUTSIDE**

# POTENTIAL ACTION ITEMS FOR THE STAKEHOLDERS

Some of these efforts are outside the responsibilities of FDOT and will need to be led by the private sector or other agencies.

Participate in Turnpike Federal AV Grant to **GATHER INFORMATION ON NEW TECHNOLOGIES** and **EXTEND THE TRUCK PLATOONING EFFORT** from Palm Beach County to Miami-Dade County

**COORDINATE** on transportation projects at the local level through the FDOT sponsored subarea studies

**SUPPORT THE DEVELOPMENT OF TRUCK PARKING** in Miami-Dade County

Work together to **LEVERAGE FUNDING OPPORTUNITIES** from the National Freight Network

**INCREASE EXPORTS** to balance logistics efficiency

**LEVERAGE** empty miles and idle hours

**SUPPORT TRANSIT INVESTMENTS** to increase mobility and allow for more growth

**PROVIDE EXPOSURE** for South Florida startup companies

**PARTICIPATE & SUPPORT** the development of the Miami-Dade TPO Freight Plan Update and the Long Range Plan

**CONTINUED IMPROVEMENT** of incident management strategies and protocols

**ENGAGE MILLENNIALS** for careers in freight and logistics and for us to better understand the future workplace in order to be successful

**SUPPORT THE DEVELOPMENT** of a Miami-Dade Inland Terminal

**INCREASE TRADING** with Southeast Asia

**SUPPORT TRUCK DRIVER RECRUITING** and how to leverage technology to recruit

# 2017



# WEST MIAMI-DADE FREIGHT MOBILITY SUMMIT SUMMARY

On June 8<sup>th</sup>, 2017 the Florida Department of Transportation sponsored a summit focused on freight mobility in relationship to maintaining and expanding economic development in the West Miami-Dade area and the South Florida Region as a whole. The event was hosted by the City of Doral and we had an audience of local, regional and international stakeholders from the private and public sector. Discussions were interactive and a number of opportunities and challenges were discussed that could/should be further explored and championed by the South Florida Freight Community.

Two themes evolved throughout the event – continued coordination and collaboration with partners at the local level is critical to success and the idea of “Dreaming Big” given that freight knows no borders.

This pamphlet provides a listing of highlights from the event. To access the presentation slides, summary of the event and a taping of the entire event please visit [www.freightmovesflorida.com](http://www.freightmovesflorida.com)





SUMMARY PAMPHLET - INSIDE



# NOTABLE NOTES

<p>HISTORIC US CONTAINER CARGO GROWTH</p> <p>Imports at <b>5.3%</b> &amp; Exports at <b>3.3%</b></p>	<p>US West Coast share of trade has gone down - <b>BIG WINNERS</b> on the East Coast are <b>Houston, Savannah &amp; NY/NJ</b></p>
<p><b>3.6 M TEUs</b> come into Florida through Non-Florida Ports</p>	<p>Planning needs to be focused on <b>HIGHWAY ACCESS</b> to Orlando and <b>RAIL ACCESS</b> to Atlanta &amp; Southeast US to be competitive</p>
<p><b>PORTMiami &amp; Miami International Airport</b> are statewide <b>ECONOMIC ENGINES</b></p>	<p>Florida will invest <b>\$2.8 B</b> in freight infrastructure for the next 5 years</p>
<p><b>OPPORTUNITIES</b> for continued and expanded growth lie in full development of rail capacity and by rationalizing and accommodating both <b>Cruise and Cargo</b> expansion through an Inland Terminal in Miami-Dade County</p>	
<p>South Florida wins big with an <b>expanded focus on trade agreements</b> with <b>LATIN AMERICA, THE CARIBBEAN &amp; SOUTH AMERICA</b></p>	<p><b>50% OF TRADE</b> in South Florida is <b>HANDLED BY 3 SHIPPING ALLIANCES</b></p>
<p><b>GROWTH IN NORTH/SOUTH</b> trade lanes has been <b>ZERO FOR LAST 10 YEARS</b></p>	<p><b>INNOVATION</b> in automated and connected mobility <b>IS MOVING FAST</b> and we <b>NEED TO KEEP PACE &amp; MODERNIZE OUR INFRASTRUCTURE</b></p>
<p><b>100%</b> of the growth in the Southeast US is in Asian Trade</p>	

eCommerce is growing rapidly and the Trade Facilitation & Trade Enforcement Act of 2015 change from

**\$200 - \$800**

to admit articles free of duty, tax and entry formalities increases the flow of goods

PORTMiami **ASIAN TRADE** is **UP 11% - 15% IN LAST 2 YEARS**

“Success [in Miami-Dade] mirrors what happens in the State.”

“South Florida is the door to Latin America.”

“Freight has no borders.”

Dream Big > Game Changer Projects > Cutting Edge Technology > Where are we going?

“Safe and Secure Trucking is a major concern.”

“Growth is good but it needs to be planned.”

“All projects around the state need to be connected.”

“We are a South Florida startup ... we came here because we saw huge opportunity and the perfect landscape.”

“Freight doesn't move without trucks.”

“Not just about new capacity it's about changing traffic patterns.”

“Constantly working to be out of Miami-Dade County by 3:00 PM” [to beat the traffic]

“Speed of technology and slowness of infrastructure [development] will slow growth.”

## QUOTABLE QUOTES