

2018

MIAMI-DADE COUNTY FREIGHT LOGISTICS ZONE DESIGNATION STRATEGIC PLAN



PREPARED FOR
Miami-Dade Transportation
Planning Organization



PREPARED BY
MARLIN Engineering, Inc.
15600 SW 288th Street, Suite 208
Miami, FL 33033
P: 305.477.7575
www.marlinengineering.com



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Miami-Dade County Freight Logistics Zone Designation Strategic Plan

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Prepared for:

Miami-Dade Transportation Planning Organization (TPO)
111 NW 1st Street Suite 920
Miami, FL 33128

Prepared by:

MARLIN Engineering, Inc.
1700 NW 66TH Avenue, Suite 106
Plantation, FL 33313

In Association with:

Cambridge Systematics Inc.
2101 W Commercial Boulevard
Ft. Lauderdale, FL 33309

CONTENTS

1.0	Miami-Dade Freight Logistics Zone (FLZ) Designation	2
1.1	What is an FLZ?	2
1.2	Designating the FLZ in Miami-Dade County	3
1.3	Freight Facilities or Logistics Clusters	3
1.4	Transportation Infrastructure	6
1.5	Workforce Availability	10
1.6	Workforce Training Capabilities	10
1.7	Freight Plans	13
1.8	Development Incentives	14
1.9	Consistency with Existing Plans	15

LIST OF FIGURES

Figure 1.1 - Miami-Dade County Designated Freight Logistics Zone	4
Figure 1.2 – Miami-Dade County Land Use Map	5
Figure 1.3 - Examples of Warehouse Investments	7
Figure 1.4 - Miami-Dade County Freight Network	8

LIST OF TABLES

Table 1.1 - Miami-Dade Workforce	11
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STRATEGIC PLAN

1.0 Miami-Dade Freight Logistics Zone (FLZ) Designation

A proposed Freight Logistics Zone designation has been prepared as part of the Miami-Dade Transportation Planning Organization (TPO) 2018 Update to the Miami-Dade County Freight Plan. The findings and recommendations for this designation are supported by the Freight Plan, the designation has been vetted through the Freight Transportation Advisory Committee (FTAC) and the Miami-Dade TPO reached out to all municipalities informing them of the proposed designation.

1.1 What is an FLZ?

In 2015, the Florida Legislature created a new section in Florida Statutes Chapter 311, "Designation of state freight logistics zones (FLZs)". FLZs provide a framework for directing potential funding to freight projects within the defined boundaries. These designations have the potential to qualify projects for funding or incentive programs, and ultimately compete for available funding.

FLZs by definition increase the efficiency of freight moving to, from, and through the designated area. To establish an FLZ, a designated area(s) in a county, or two or more contiguous counties must be identified. This area must be

defined as "a grouping of activities and infrastructure associated with freight transportation and related services within a defined area around an intermodal logistics center." Additionally, a strategic plan must be adopted by the county or counties. The strategic plan must contain a minimum of eight elements as defined by F.S. 311.103 (see inset to right).

Strategic Plan Requirements

1. Map identifying the area to be included
2. Identification of existing or planned freight facilities or logistics clusters
3. Identification of existing transportation infrastructure within or in close proximity to the proposed FLZ
4. Identification of existing workforce availability
5. Identification of existing or planned local, state, or federal workforce training capabilities available
6. Identification of existing or planned local, state, or federal plans concerning the movement of freight
7. Identification of financial or other local government incentives to encourage new development, expansion of existing development, or redevelopment within the proposed zone
8. Documentation that the plan is consistent with applicable local government comprehensive plans and adopted long-range transportation plans of a metropolitan planning organization, where applicable

1.2 Designating the FLZ in Miami-Dade County

For the Miami-Dade FLZ, it is important to provide a geographic definition that encompasses existing and future freight and logistics related activities, and also captures key secondary components, such as workforce development. The proposed Miami-Dade FLZ will include the entire county. This approach includes key subareas that provide for freight and logistics operations, and also captures other key operations including workforce training (e.g., colleges, universities, industry training programs) that typically are located outside of the industrial areas. The intent of this approach to FLZ designation is to provide the county and its municipalities with the ability to market the entire county for a full range of freight and logistics related activities. The expectation is that new opportunities will focus in established industrial areas and along key industrial corridors, as well as take advantage of existing workforce training programs. The boundaries of the proposed Miami-Dade FLZ includes all of Miami-Dade County, as shown in Figure 1.1.

1.3 Freight Facilities or Logistics Clusters

Available land use data helps to illustrate the location of freight and industrial operations in Miami-Dade County. Four categories of land use data illustrate freight intensive areas, as follows:

- **Transportation land uses (e.g., airports, seaports, railroads/rail terminals, roadways).** Transportation land uses capture the major freight terminals as well as key roadway and rail corridors. Several of these terminals represent intermodal logistics centers. Figure 1.2 shows the terminals in dark purple and the major roadway corridors in orange (Strategic Intermodal System roads).
- **Industrial land uses (e.g., warehousing/distribution centers).** Industrial land uses represent warehouses, distribution centers, foreign trade zones, light manufacturing, and other light and heavy industrial uses. Based on the operation, several of these facilities also represent intermodal logistics centers. Figure 1.2 shows the location of these facilities in light purple.
- **Agricultural land uses (e.g., farms, packing facilities).** Miami-Dade County is home to an established and historic agricultural community, located largely to the south and west. These operations vary by season but represent significant freight activity. Figure 1.2 shows the location of agricultural operations in dark green.
- **Mining land uses (e.g., aggregate mining).** Aggregate mining has long existed in Miami-Dade County, generating significant truck and rail traffic throughout the region. These operations are concentrated in the Lake Belt in northwestern Miami-Dade County. Figure 1.2 shows the location of mining activity in dark blue.

The majority of existing industrial property is concentrated in the north central and northwestern portions of Miami-Dade County. This consists of warehouses, distribution centers, fulfillment centers, and light and heavy manufacturing. All of these facilities are located adjacent to or in close proximity to key transportation

Figure 1.1 - Miami-Dade County Designated Freight Logistics Zone

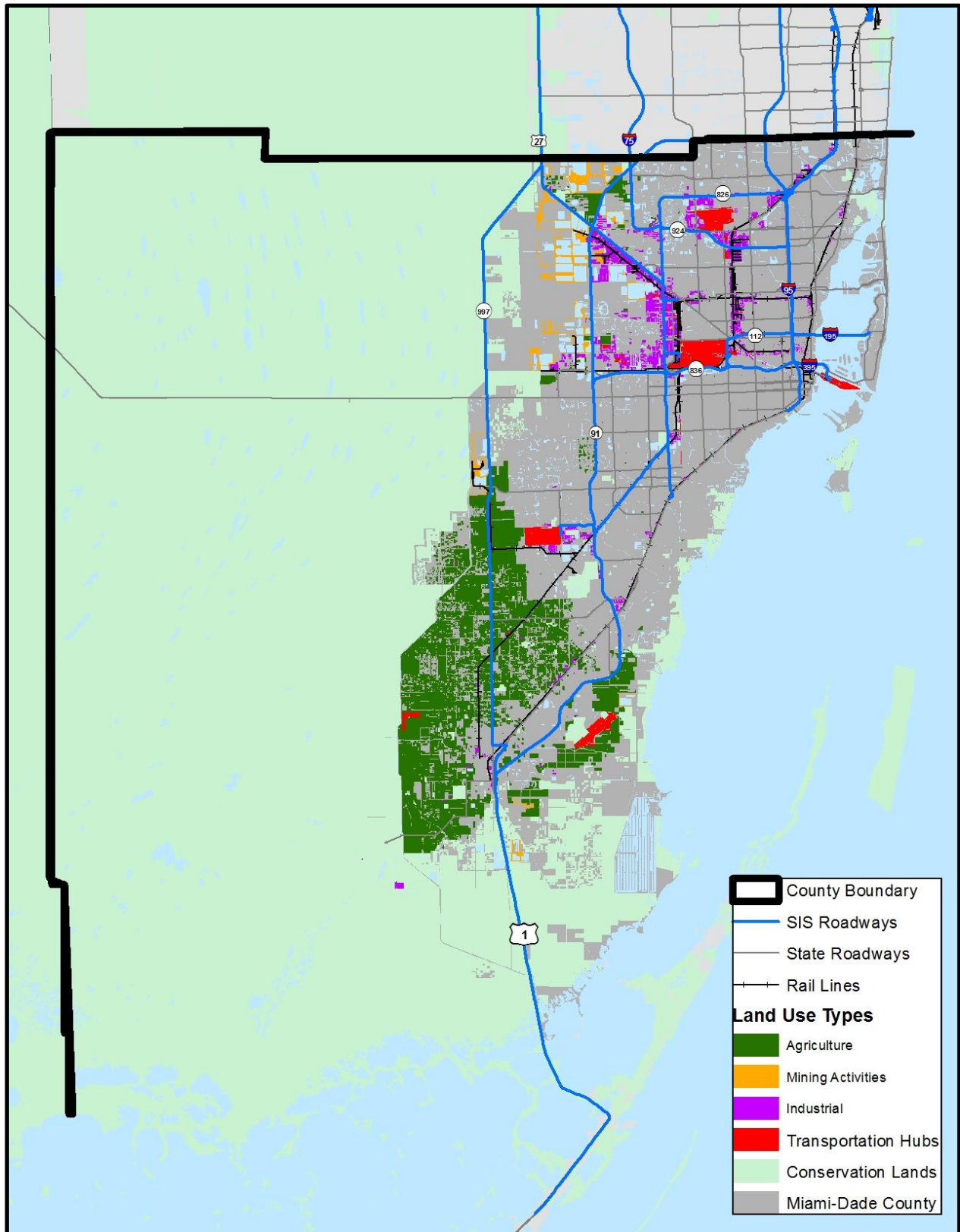
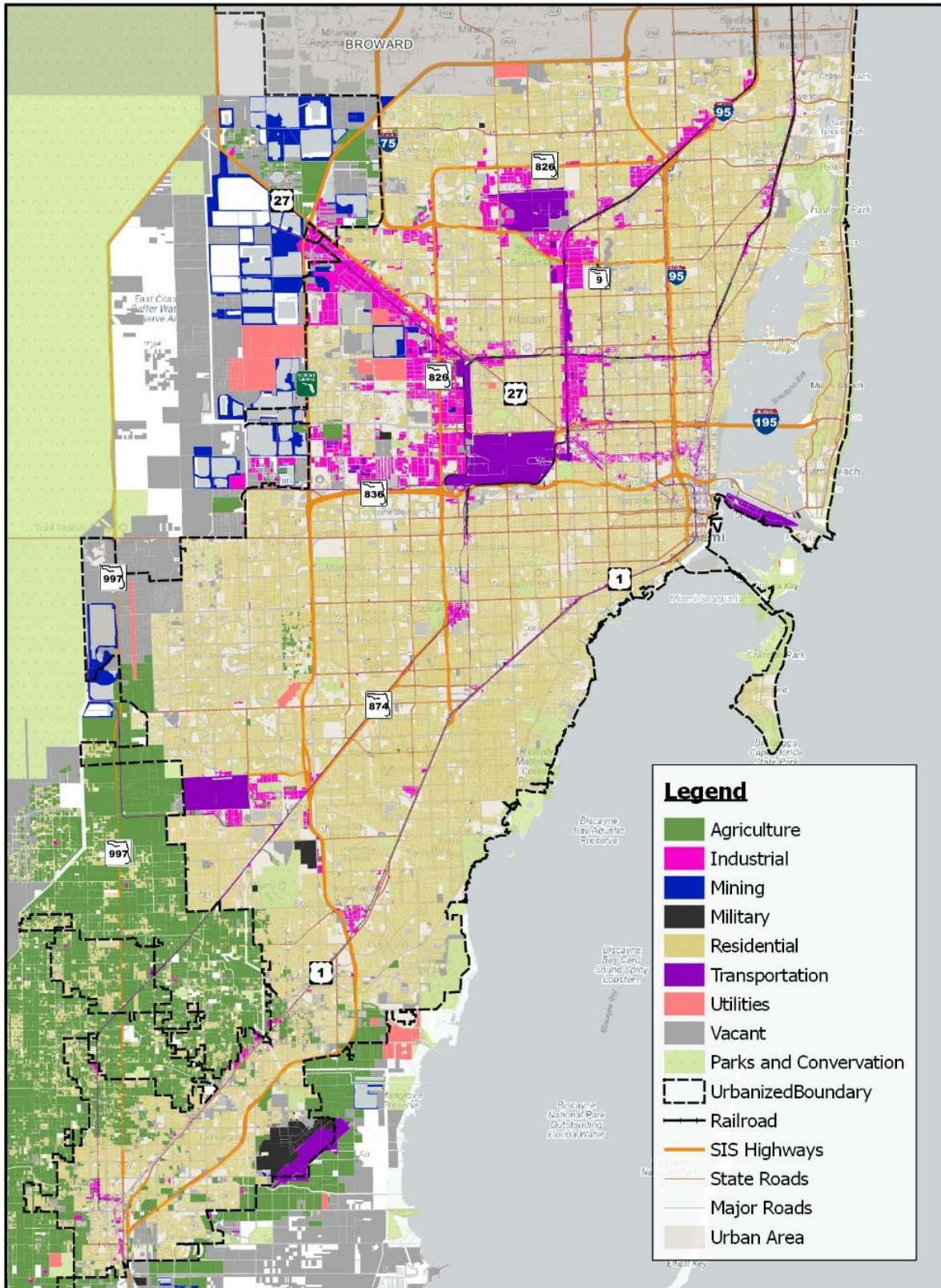


Figure 1.2 – Miami-Dade County Land Use Map



Source: Miami-Dade County GIS Hub

hubs and corridors. Miami-Dade County is home to over 200 million square feet of warehouse space. This is the largest concentration of warehouse space in Florida. With approximately 2,500 acres of developable land remaining, the county can accommodate an additional 40 million square feet of warehouse space before it is built out. Currently, about 5 million square feet is underdevelopment representing 12 specific projects as illustrated in Figure 1.3.

The southern portion of the county is home to the majority of agricultural operations, with transportation facilities throughout the county connecting them to distribution centers. Mining operations, consisting of aggregate mining, are located in the northwest part of the county and have direct rail access to many of the quarries. The remaining portions of the county are predominately developed as residential or are preserved for environmental purposes, such as the Everglades National Park.

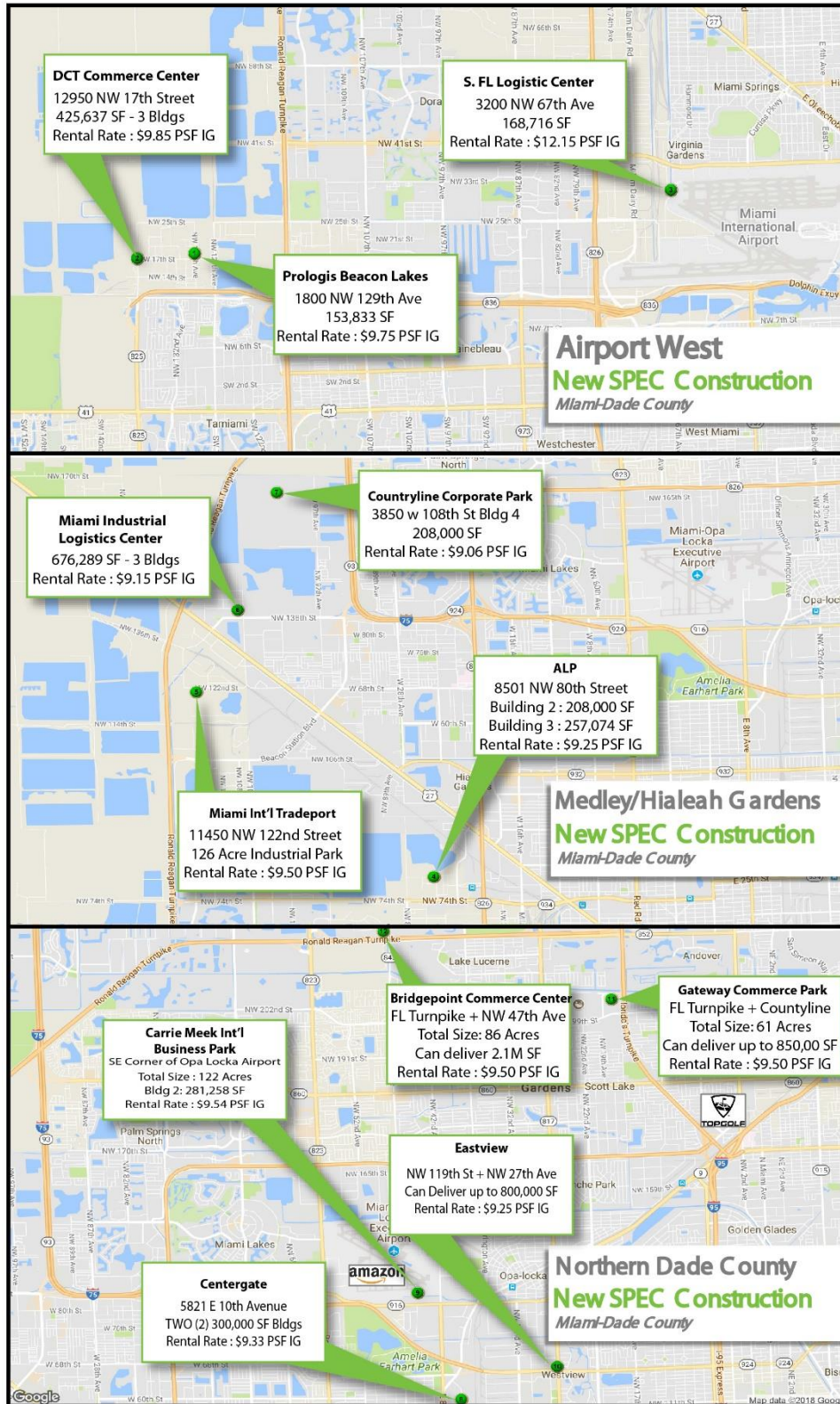
1.4 Transportation Infrastructure

Miami-Dade County has an extensive freight system encompassing all major modes of transportation. The modes work to complement one another to ensure a smooth flow of goods throughout the county and connecting the county to the region and international destinations. Figure 1.4 shows the extensive Miami-Dade County freight network. The network includes a system of roadways, railways, and freight hubs many of which are designated as Florida Strategic Intermodal System (SIS) facilities. The SIS is Florida's highest priority network of transportation facilities important to the state's economy and mobility. It was adopted in 2003 to focus the state's limited transportation resources on the facilities most significant for interregional, interstate, and international transport of people and goods. Being on the SIS is important as these facilities are the state's highest priority for transportation capacity investments and a primary focus for implementing the Florida Transportation Plan (FTP), the state's long-range transportation vision and policy plan. The SIS incorporates all aspects of freight needs: commercial airports, deep-water seaports, rail terminals and corridors, waterways, and highways. Within Miami-Dade, the following hubs have been designated as part of the SIS:

Airport: Miami International Airport and Miami-Kendall Executive Airport;

- **Railyard:** FEC Hialeah Yard;
- **Seaport:** PORTMiami;
- **Waterway:** Miami River; IntraCoastal Waterway
- **Roadways:** designated highways consist of Interstates, toll roads/expressways, and other key state highways as illustrated in Figure 1.4; and
- **Connectors:** each of the freight hubs has roadway, waterway and/or railway connectors designated to provide access to the SIS corridors.

Figure 1.3 - Examples of Warehouse Investments



Source: Michael Silver, CBRE, Miami-Dade FTAC presentation, April 2018.

Figure 1.4 - Miami-Dade County Freight Network

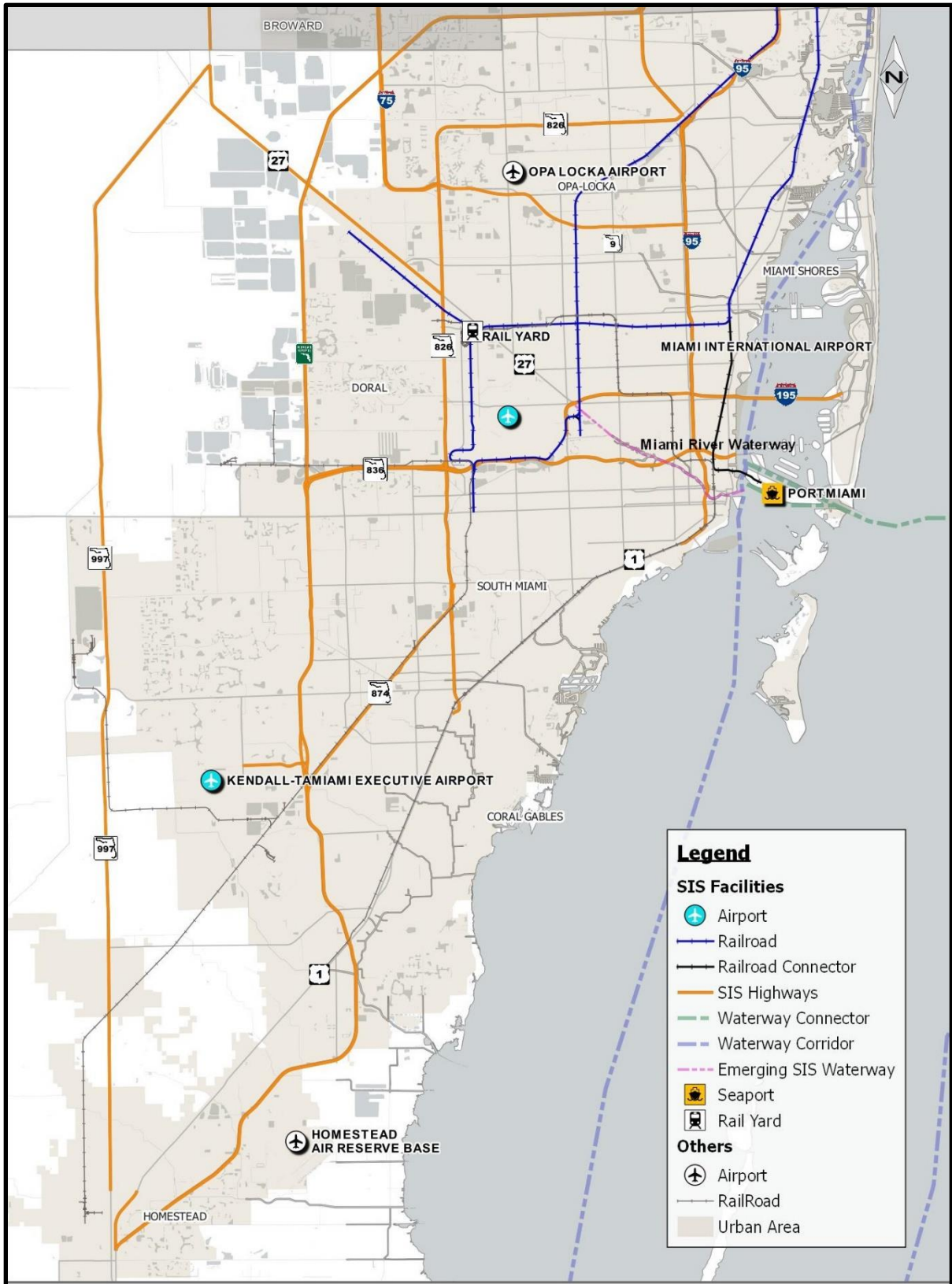
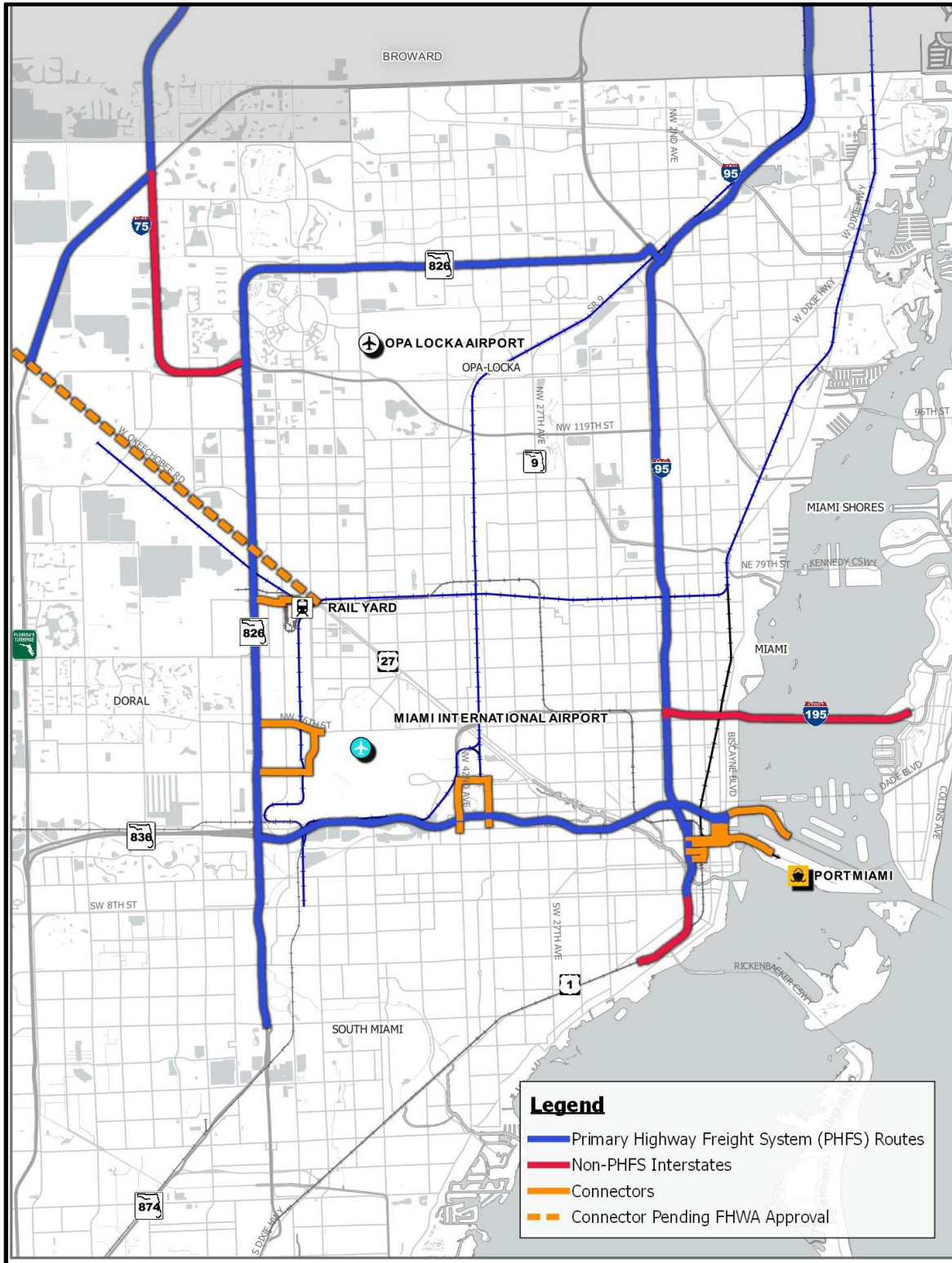


Figure 1.5 - National Highway Freight Network



Source: FDOT District 6

Miami-Dade County has a well-developed east/west and north/south highway network that provides access throughout the county and connects to the rest of the region and state. I-75, I-95, Florida's Turnpike Enterprise (FTE) facilities and U.S. 27 represent the primary interregional corridors. Other roadways, consisting of the expressways and state highways provide for internal movements and access to key freight hubs. The highway network includes segments of the National Highway Freight Network (NHFN), which was designated by FHWA. The initially approved network is shown in Figure 1.5. These segments are eligible for federal funding programs created by the Fixing America's Surface Transportation (FAST) Act. The NHFN consists of the following four subsystems: (1) the Primary Highway Freight System (PHFS); (2) those portions of the Interstate System not part of the PHFS; (3) Critical Rural Freight Corridors (CRFCs); and (4) Critical Urban Freight Corridors (CUFCs). (23 USC. 167(c)). Currently there are no CUFCs or CRFCs in Miami-Dade County, however, FDOT, in partnership with the Miami-Dade TPO and Broward MPO, is working to modify the network to add US 27 from I-75 in Broward County to SR 826 in Miami-Dade County as CUFC and CRFC networks.

1.5 Workforce Availability

Miami-Dade County is home to an established freight and logistics workforce that exceeds 130,000 persons. As of mid-2016, Miami-Dade County had approximately 2.5 million residents, with 1.1 million employees in the Miami-Miami Beach-Kendall Metropolitan Division. Since this time period, unemployment has fallen from 5.4 percent to 4.7 percent in January 2018. As of July 2016, the most recently available data from the Bureau of Labor Statistics, the average wage in this division was \$46,120, with logistics related positions providing higher wages than many other occupations with large pools of employees, as shown in Table 1.1. Miami-Dade has traditionally had a very strong tourism industry, resulting in a large number of workers employed in industries such as Food Preparation and Serving as well as Office and Administrative Support Occupations. These two industries account for over one-fourth of all jobs in Miami-Dade County. While unemployment is currently low, an expanded logistics workforce will be provided by growth in the county's population, increased workforce training programs (described in Section 1.6), and retraining of workers in lower paying industries. For instance, a position in Production, which can include things such as assemblers, machinists, and packaging operators, would pay an average annual wage almost 17 percent higher than one in Food Preparation. Similarly, a position in Transportation and Material Moving would pay nearly 16 percent higher than a position in Office and Administrative Support.

1.6 Workforce Training Capabilities

The presence of workforce training programs is a critical component to the Miami-Dade FLZ. Attracting new entrants to the workforce, and retraining those already in the workforce to serve the needs of the freight industry requires a variety of educational programs. Within Miami-Dade County there are several types of programs aimed at educating students about freight and logistics ranging from high school internships, to

Table 1.1 - Miami-Dade Workforce

Occupation Title	Employment	Share of Employment	Mean Annual Wage
All Occupations	1,125,720	100.0%	\$46,120
Transportation and Material Moving Occupations	90,730	8.1%	\$40,400
Office and Administrative Support Occupations	209,320	18.6%	\$34,880
Production Occupations	42,140	3.7%	\$29,750
Healthcare Support Occupations	29,910	2.7%	\$28,610
Personal Care and Service Occupations	30,190	2.7%	\$26,980
Food Preparation and Serving Related Occupations	108,040	9.6%	\$25,460
Building and Grounds Cleaning and Maintenance Occupations	39,890	3.5%	\$23,310
Farming, Fishing, and Forestry Occupations	2,050	0.2%	\$23,300

Source: Bureau of Labor Statistics, May 2016.

college degrees, to ongoing industry training seminars. Examples of these programs are summarized below:

- **Miami-Dade College** – Miami-Dade College offers several programs focused on trade and logistics including an Associate of Science degree in Transportation & Logistics¹ as well as a College Credit Certificate in International Freight Transportation.² These programs are designed to provide students with specialized knowledge in the freight industry allowing them to be employed within the industry in positions such as logistics analysts, transportation supervisors, and freight forwarders.
- **Florida International University** – Florida International University (FIU) also has programs designed to assist workers in joining the freight and logistics field. FIU offers a 10-week Trade and Logistics Immersive designed to be responsive to industry needs. This course is developed and taught by industry experts.³
- **Florida Customs Brokers & Forwarders Association, Inc. (FCBF)** – FCBF is considered the most active representative body of the Florida freight forwarding and customs brokerage community. Based in Miami-Dade County, FCBF is committed to fostering communications

¹ <http://www.mdc.edu/transportationlogistics/>

² <http://www.mdc.edu/internationalfreight/>

³ <http://cpe.fiu.edu/programs-and-certificates/trade-and-logistics-program.php>

between the trade community and federal agencies in order to expand Florida's trade communities and maximize Florida's ability to compete for international trade resources. As part of its activities, FCBF provides access to a variety of industry training programs and seminars to ensure the international trade community is up to date on all regulations. For example, FCBF provides a Customs Brokers Exam Preparation Course. Also with Miami-Dade College, the FCBF has created the Trade-Up program designed to provide high school students with the ability to participate in a trade and logistics internship.⁴ As part of the School of Business, students work at a paid internship for a two week period which will prepare them for two CSCMP SCPro Fundamentals certificates as well as provide professional development.⁵

- **Beacon Council's Trade and Logistics Committee** – The Beacon Council, Miami-Dade County's Official Economic Development Partnership, has begun a program at local high schools aimed at encouraging students to join trade and logistics programs. This program is aimed toward individuals who may not be interested in attending a traditional four-year college that are seeking an alternative path to success. The curricula has been designed at a high school level such that graduates have a solid background in the industry. Conversations with logistics companies may also provide the opportunity for internships for these students.

***“Miami Dade College
Transportation & Logistics Associate in
Science***

According to the U.S. Bureau of Labor Statistics, Transportation & Logistics operations is the second largest employment sector in the United States. The fluidity of integration in the field of Transportation & Logistics has expanded to include air, rail, sea, and truck transport.

As multinational corporations, governmental, and non-governmental organizations (NGOs) have expanded supply chain networks into an international industry, Transportation & Logistics management has become essential to the economic stability of this country. Every year, billions of dollars of cargo move through ports and corridors in South Florida – the gateway to the Americas. This rapidly growing industry is looking to hire those who have the knowledge and skills necessary to increase efficiency and output of product.

Estimated tuition cost: \$7,566
Program credits: 64
Estimated time to complete: 2+ years

Program Details

Students will focus on transportation logistics and management. They will learn to engineer solutions to operational problems while developing the analytical skills needed to excel in this fast-paced environment. Students can choose to work domestically or internationally for governmental agencies, global carriers, and private or public sector organizations.”

<http://www.mdc.edu/transportationlogistics/>

⁴ <http://myemail.constantcontact.com/Trade-Up-Logistics-Internship-Program---Place-your-Request-today.html?soid=1101964364852&aid=8YmSfsKdwS8>

⁵ <http://www.magaya.com/Portals/1/documents/Employer%20Packet%20Trade%20Up.pdf?ver=2017-06-21-121431-113>

- **Global Trade and Logistics Accelerator Program** – Developed in conjunction with Miami-Dade County, Miami-Dade College, and the Beacon Council, this 12-week program is designed to help business owners gather insight on growing within the Trade and Logistics community. This opportunities allows mentors and industry leaders to develop partnerships in order to grow local business.

1.7 Freight Plans

Miami-Dade County, and thus the proposed FLZ, has been included in several freight planning efforts at the local, regional, and state level. These plans ensure the county addresses the freight planning requirements defined by the FAST Act. These plans serve to position Miami-Dade as a leader in the freight and logistics industry and to best utilize key assets such as PORTMiami and Miami International Airport. The following are some of the key plans impacting the county and its freight goals:

- **Miami-Dade County Freight Plan** – The Miami-Dade County Freight Plan is an effort undertaken by the Miami-Dade Transportation Planning Organization. The plan serves to identify Miami’s key freight assets and document the freight investment needs for prioritization. The most recent Miami-Dade County Freight Plan was completed with 2014, with an update to be completed in 2018. The Freight plan represents the supporting document for the FLZ designation.
- **Southeast Florida Regional Freight Plan** – The Southeast Florida Regional Freight Plan is a tri-county, dual FDOT district effort. This plan encompasses Miami-Dade, Palm Beach, and Broward counties. Similar to the Miami-Dade Freight Plan, this effort also identifies the region’s key assets and needed investments moving forward, but at a more regional level. This plan was last updated in 2014.
- **Florida Transportation Plan** – The Florida Transportation Plan is the single overarching statewide plan guiding Florida’s transportation future. It fulfills all requirements established by Chapter 339.155, Florida Statutes and serves as a plan for all of Florida. This was created by and provides direct to FDOT and all organizations involved in planning and managing Florida’s transportation system at the local, regional, and statewide levels. This plan was updated in 2015 and includes three elements: Vision, Policy, and Implementation.
- **Freight Mobility and Trade Plan** – Florida’s Freight Mobility and Trade Plan was completed in accordance with federal legislation. This Plan identifies freight transportation hubs and facilities which are critical to the state’s economic growth. This plan worked to align strategies and objectives with the statewide priorities, network, and plans already existing within the Florida Transportation Plan and the Strategic Intermodal System. The two elements of the plan, the Policy Element and the Investment Element, were completed in June 2013 and September 2014, respectively.
- **Florida Trade and Logistics Study** – The Florida Chamber of Commerce Foundation led the development of a trade and logistics study. The purpose of the study was to identify key opportunities for Florida to compete as a global logistics hub. This study called for expansion of

warehouse and distribution center capacity, improvements to roadways and railroads, and the dredging of at least one seaport to -50 feet to complete for post-Panamax shipping vessels. Miami-Dade County and its private partners have led the state in many of these needs.

- **Subarea Freight Implementation Plans** – FDOT D6 initiated a series of subarea freight plans in key freight intensive communities in Miami-Dade County. These plans are designed to identify short, medium and longer term improvements that will support the county's overall freight industry grow and expand. These efforts support the FLZ. The subarea studies include: Medley (complete); Opa Locka (complete); Doral (complete); Miami River (complete); Miami Gardens (underway); and Hialeah (planned).

The Miami-Dade FLZ is consistent with, and complementary to, the above mentioned freight plans.

1.8 Development Incentives

Miami-Dade County and the State of Florida are continually seeking opportunities for economic growth. In order to attract such growth, multiple development incentives programs have been established. These opportunities are available to businesses operating within the designated FLZ and include:

- **Economic Development Fund** – This Fund is available due to the vote-approved Building Better Communities general obligation bond which allots \$75 million for countrywide projects and another \$15 million at targeted urban areas. Eligible projects include those which promote major, game-changing business expansions within the County.
- **Brownfields Program** – Redevelopers who are willing to clean up and develop contaminated sites in brownfield areas are eligible for economic incentives, tax credits, low interest loans, and waivers of contamination assessment report review fees. Both new and expanding businesses are eligible for this financial assistance.
- **Qualified Target Industry (QTI) Tax Refund** – The State of Florida offers an incentive for companies creating high wage jobs in targeted high-value added industries. Companies may be eligible for a tax refund of up to \$3,000 per new job created. This program is funded by the State of Florida (80%) and Miami-Dade County (20%).
- **Miami-Dade County Targeted Jobs Incentive Fund (TJIF)** – This fund seeks to retain existing businesses and encourage expansion by providing cash incentive awards. The fund provides up to \$3,000 per new job created.
- **Mom and Pop Business Grants** – This Grant Program, available through Miami-Dade County, provides financial and technical assistance to qualified for-profit small businesses that are approved

for funding. This program has allowed small owned and operated businesses the opportunity to interact with local government under favorable conditions.⁶

In addition to these incentive programs, several key transportation funding programs support freight mobility in Miami-Dade County. At the federal level, the FAST Act, through the National Highway Freight Program (NHFP), provides two key funding provisions including a discretionary grant program and formula funding to support eligible freight projects. The NHFP's formula funds provide an additional \$6.3 billion over five years for States to invest. Figure 1.5 above identifies the roadways eligible for this funding source. At the state level, FDOT's capacity funds are largely focused on the SIS. Figure 1.4 above identifies roadways, airports, railroads, seaport, and waterways eligible for SIS funding.

1.9 Consistency with Existing Plans

The proposed designation was prepared as part of the TPO 2018 Update to the Miami-Dade County Freight Plan. The findings and recommendations for this designation are supported by the Freight Plan and have been vetted through the Freight Transportation Advisory Committee (FTAC). The TPO also reached out to all municipalities informing them of the designation.

In addition to the TPO Freight Plan, Section 1.7 of this report documents consistency with the FDOT District 6 Subarea Freight Plans, Southeast Florida Regional Freight Plan, Florida Transportation Plan, FDOT Freight Mobility and Trade Plan and the Florida Chamber Trade and Logistics Study.

⁶ <http://www.miamidade.gov/business/business-assistance.asp>