

REGIONAL GOODS MOVEMENT: LINKS TO OUR PAST AND TO OUR FUTURE



The economic productivity of the Tampa Bay region relies on a transportation system that can accommodate market expansion at regional, national and international levels.

Highways. Seaports. Waterways. Airports. Railroads. Distribution Centers. Pipelines. These are the elements that comprise the freight system of the Tampa Bay region which have long governed the area's economic prosperity. Markets emerged in a young, growing nation with the successful development of rail lines and seaport facilities that transported goods from growing industries. Eventually, markets in Europe, the Caribbean, and ultimately Asia, also became destinations for local agricultural products and manufactured goods. The early freight delivery system met consumer demands through a multimodal approach to goods movement, a model that is still used today.

The economic productivity of the region relies on a transportation system that can accommodate market expansion at regional, national, and even international levels. As business markets become more diverse, the need to reach global markets and access international consumers is paramount. The region's freight infrastructure provides a critical link to these expanding markets.

To meet anticipated increased production and logistics demands, the freight intermodal activity centers within the region are projected to intensify their activities and expand operations. As in the past, the anticipated growth and the ability to meet the demands of changing world markets will largely depend on the capacity to improve and maintain efficient transportation connections.

Virtually every business and household in the region is dependent on the freight delivery system for shipping and receiving goods. The area's highways, seaports, waterways, airports, railroads, and pipelines sustain the region's economic productivity through the following activities:

- Delivering products consumers demand to stores
- Transporting raw materials and finished products from industries
- Hauling materials for the construction of roads, schools, businesses, and homes
- Distributing energy resources that power our cities

Trailers and containers represent jobs and production, and indicate a thriving economy. But as the amount of freight increases and the scale and number of facilities required expands, the activities associated with freight transport increasingly – and perhaps inevitably – begin to impact the local communities that host them. While both freight interests and communities are concerned with improving the safety, accessibility, and mobility provided by the regional transportation system, the priorities and perspectives of the two sides can be very different. Communities are also affected by unintended impacts to land uses as well as social and business activities within freight corridors. These impacts resulting from freight transport activities are both real and perceived. Thoughtful solutions that provide for good freight accessibility and are sensitive to the land uses and activities

within freight corridors are needed to support economic growth and prosperous communities in the Tampa Bay region.

STRATEGIC FREIGHT PLAN INTENT

The Tampa Bay Regional Strategic Freight Plan defines an integrated and connected regional freight transportation network and identifies regional freight investment priorities needed to sustain economic growth in the Tampa Bay region. The plan identifies strategic transportation investments needed for better mobility and accessibility for trucks. It also identifies improvements to address the unique operational characteristics of trucks that can often be implemented at relatively low costs. Additionally, guidance is provided to assist planners and engineers to define and develop freight improvement strategies that are appropriate given the freight corridor function, the land uses and activities within the corridor, and the shared uses of the corridor.

The Strategic Freight Plan was undertaken in response to steadily increasing emphasis on freight mobility concerns and economic development in recent years. The Strategic Freight Plan accomplishes the following objectives:

Identify strategic freight transportation investments that promote and foster economic development in the region

Providing a well-planned transportation system to efficiently move goods while preserving personal mobility is a significant concern as our roads become more congested. The Tampa Bay region's economic productivity relies on a transportation system that can handle goods efficiently and safely. Priority transportation investment strategies that improve accessibility and reliability of freight transport and support growth in the region's economic centers have been defined.

Respond to the inherent tension between goods movement and community livability and to the rising cost of traffic congestion

Truck freight volumes in the Tampa Bay area are projected to increase by as much as 65 percent by the year 2040¹. Goods movement and personal travel are increasing simultaneously. Freight industry needs and community livability are at a crossroads. Creative solutions are needed to balance freight accessibility and personal mobility.

Nationally, the effect of traffic congestion on economic productivity is notable. As shown in **Figure 1-1**, the average cost per hour of delay for trucks is \$88 compared to \$16 for personal vehicles. For large semi-trucks that transport the overwhelming majority of freight, the cost exceeds \$250 per hour of delay. In the Tampa Bay area, truck congestion costs total \$210 million annually. These added transportation costs are passed on to consumers in the form

¹ Freight Analysis Framework 3.1.2, 2010 / Federal Highway Administration Office of Freight Management and Operations

Strategic Freight Plan Emphasis

- Accessibility to Freight Activity Centers
- System mobility
- Roadway operating conditions
- Freight and commuter conflicts
- Freight and land use compatibility

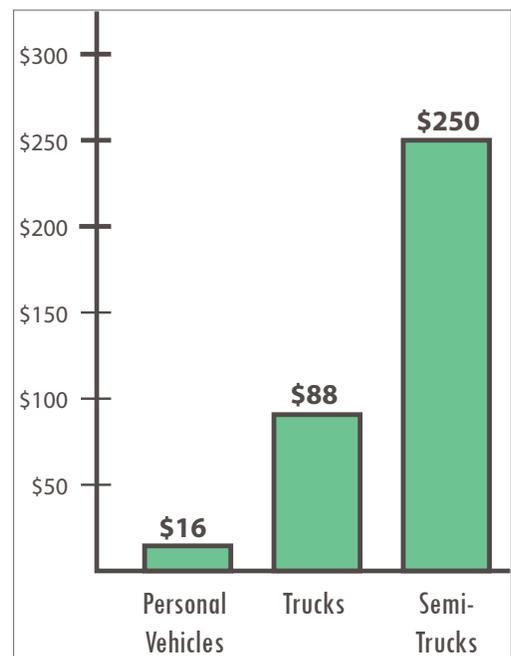


Figure 1-1: Average Cost per Hour of Delay (2010)

Source: Texas Transportation Institute, Texas A&M University

of increased costs for most products sold on the open market.

The Strategic Freight Plan identifies investment strategies to facilitate freight transport on the region's priority freight corridors with thoughtful consideration of the effects that the particular strategies have on roadway congestion, adjacent land uses, and social and business activities.

Position the Tampa Bay region to take advantage of the rapid growth in the global economy

Tampa Bay is geographically situated to benefit from the emerging economies of Central and South America and other events including the widening of the Panama Canal and anticipated opening of Cuba to trade with the United States. However, in order for our region to take advantage of a constantly changing world economy, infrastructure improvements are needed to the freight transportation system, especially the facilities serving the region's seaports and major intermodal freight activity centers. A transportation system that provides good accessibility and travel flow is a key factor affecting a region's business costs, market access, and overall competitiveness for attracting large-scale business investments. Implementing policies, strategies, and actions that improve transportation accessibility and provide a seamless conduit between intermodal facilities can stimulate economic growth.



The Strategic Freight Plan will guide the Tampa Bay region in creating a freight transportation network capable of handling regional and global market expansion.

Position the region for new funding opportunities to implement infrastructure improvements on the regional freight network

Since the passage of the landmark Intermodal Surface Transportation Efficiency Act (ISTEA) in 1991, subsequent federal legislation has increasingly emphasized the importance of planning for and implementing a transportation system that supports freight mobility and economic development. The latest federal transportation legislation, Moving Ahead for Progress in the 21st Century (MAP-21), provides incentives for states to prioritize projects that improve freight movement and foster economic development. The Strategic Freight Plan identifies priority investments to position the region to leverage these potential new opportunities for federal funding.

Integrate freight considerations into the planning, project development, and roadway design processes

There is an increasing awareness of the need to address freight mobility concerns when planning and improving our transportation system. To that end, a framework for integrating freight mobility considerations into the regional and local planning processes has been defined. It includes the processes, information, and tools that decision-makers and planners will need for effectively addressing freight mobility issues.

As with most transportation issues, freight mobility issues are multifaceted in nature and span a diverse spectrum of topics. However, as freight mobility concerns grow in importance, gaining a true

understanding of regional freight dynamics in the Tampa Bay area is paramount for our decision-makers and planners. A continued dialogue among the region’s transportation, economic, and land use planning experts, as well as with private freight providers and intermodal agencies is needed to properly plan for and implement strategies and policies that address freight transport needs.

STUDY AREA

Major economic generators within the Tampa Bay region including the Port of Tampa, Port Manatee, CSX Intermodal yards, as well as significant existing and planned distribution activities in Polk County and other areas in the region, rely on an efficient transportation system to transport freight to destinations within and outside the region. The freight transportation network includes the roadways, rail lines, waterways, and pipelines that provide connections between the region’s freight activity centers and to destinations outside the area.

Recognizing the regional dynamics of goods movement, the Strategic Freight Plan study area includes all of the counties (Citrus, Hernando, Hillsborough, Pasco, and Pinellas) that comprise Florida Department of Transportation (FDOT) District Seven and the counties of Polk, Manatee and Sarasota in FDOT District One. The study area is shown in **Figure 1-2**.

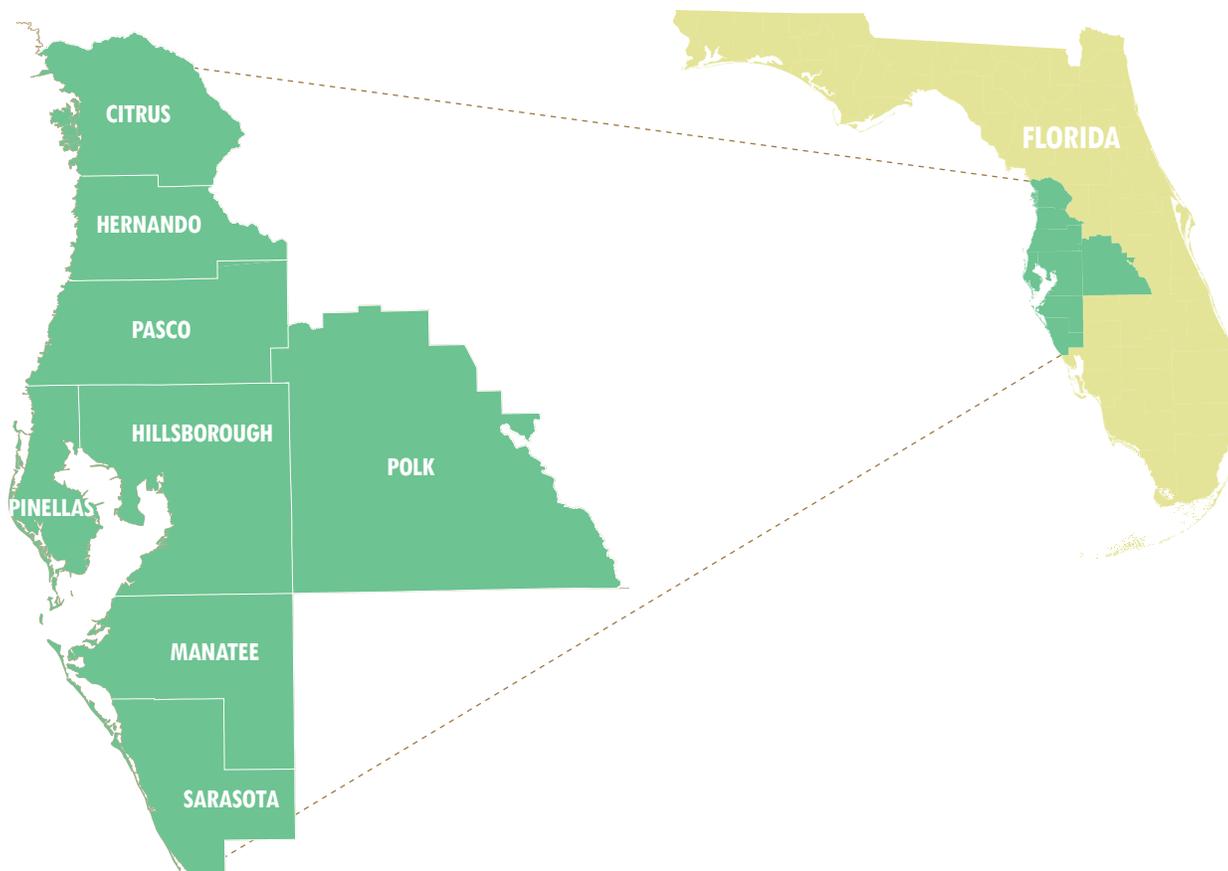


Figure 1-2: Study Area