

Goods Movement Collaborative Goods Movement Plan



Round Table Presentation: Regional Goods Movement Trends and Issues

July 23, 2014

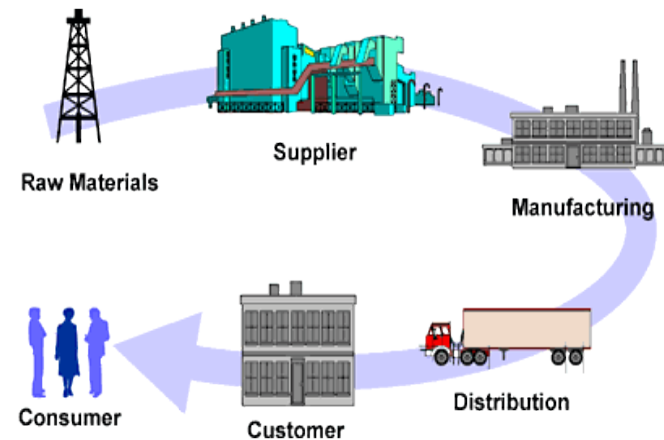
Goods Movement Overview

Why Goods Movement?

Integral part of the region's economy

- Over \$600 billion of goods flow within/through the region each year
- 32 percent of jobs in the region (and 33 percent of jobs in Alameda County) are in goods movement dependent industries; key source of job diversity in the region.
- Heavily reliant on transportation system
- Nation's 5th largest marine port and important niche ports (auto, oil)

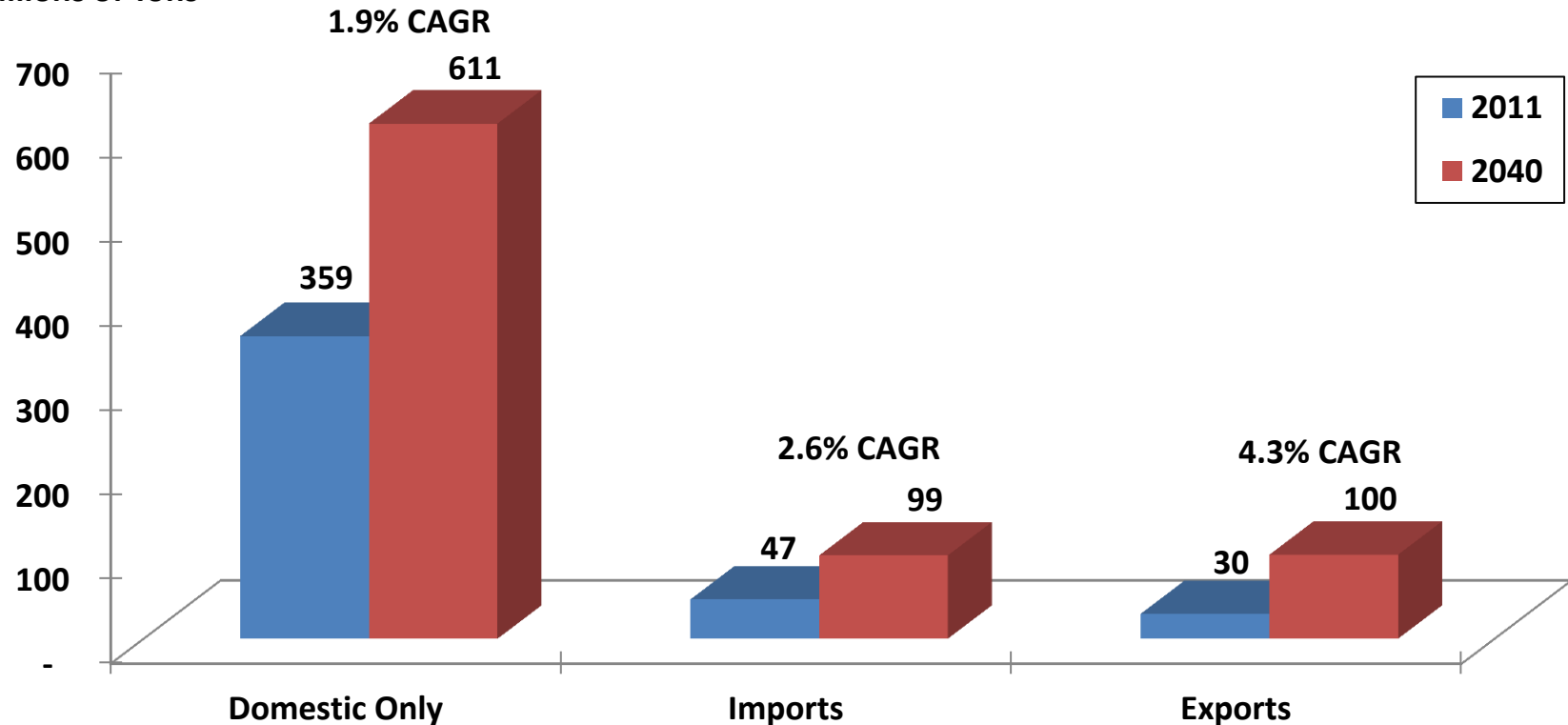
- Two major cargo airports
- Major highway and rail corridors
- Local streets and roads
- Significant public health and quality of life impacts on local communities



The goods movement system provides connections between each of these steps in this conceptual supply chain.

Goods Movement in the Bay Area by Trade Type – 2011 and 2040

Millions of Tons

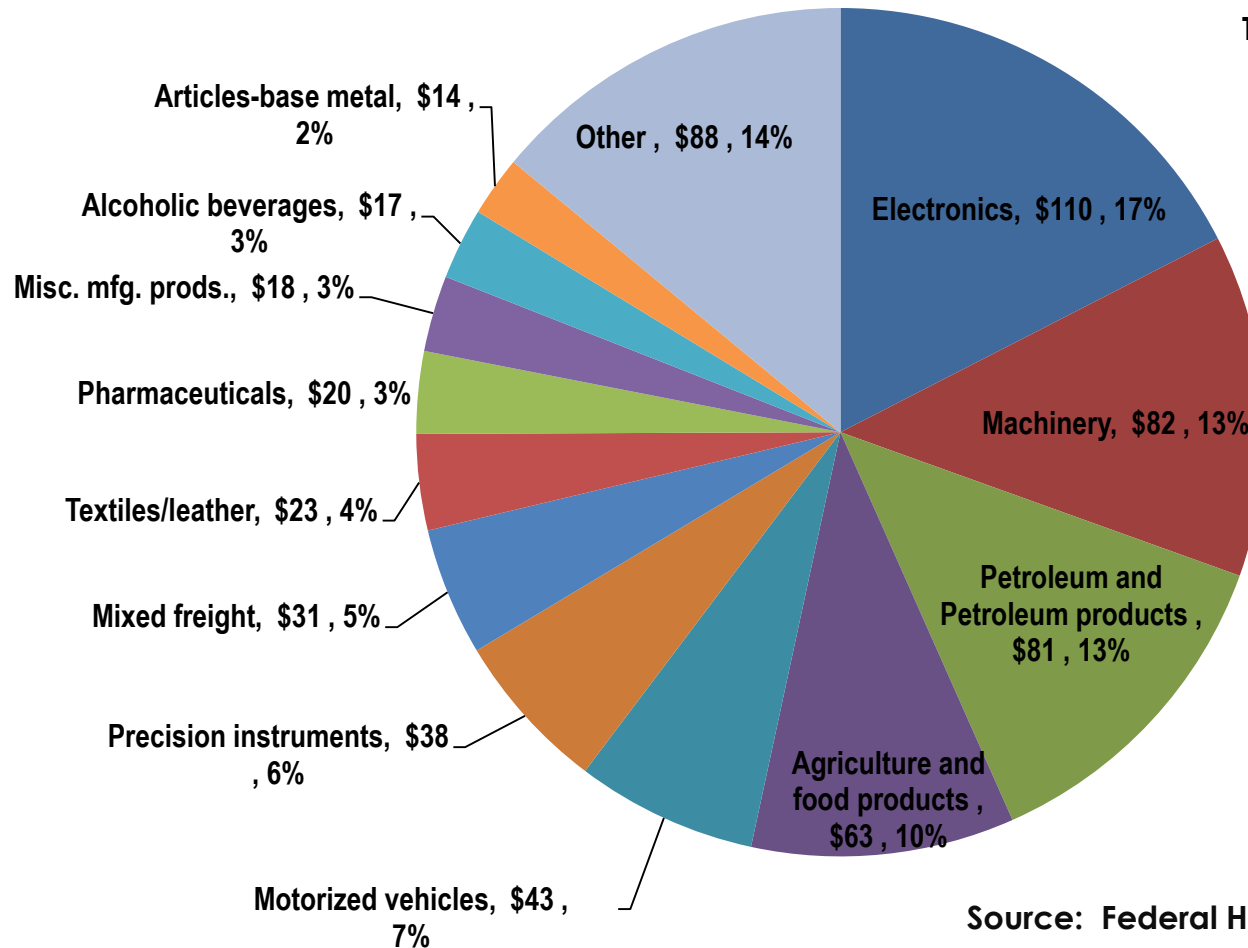


CAGR – Compound Annual Growth Rate

Source: Federal Highway Administration FAF3.

Bay Area Freight Flows by Commodity, 2011- \$Billions

Total = \$628



Source: Federal Highway Administration FAF3.

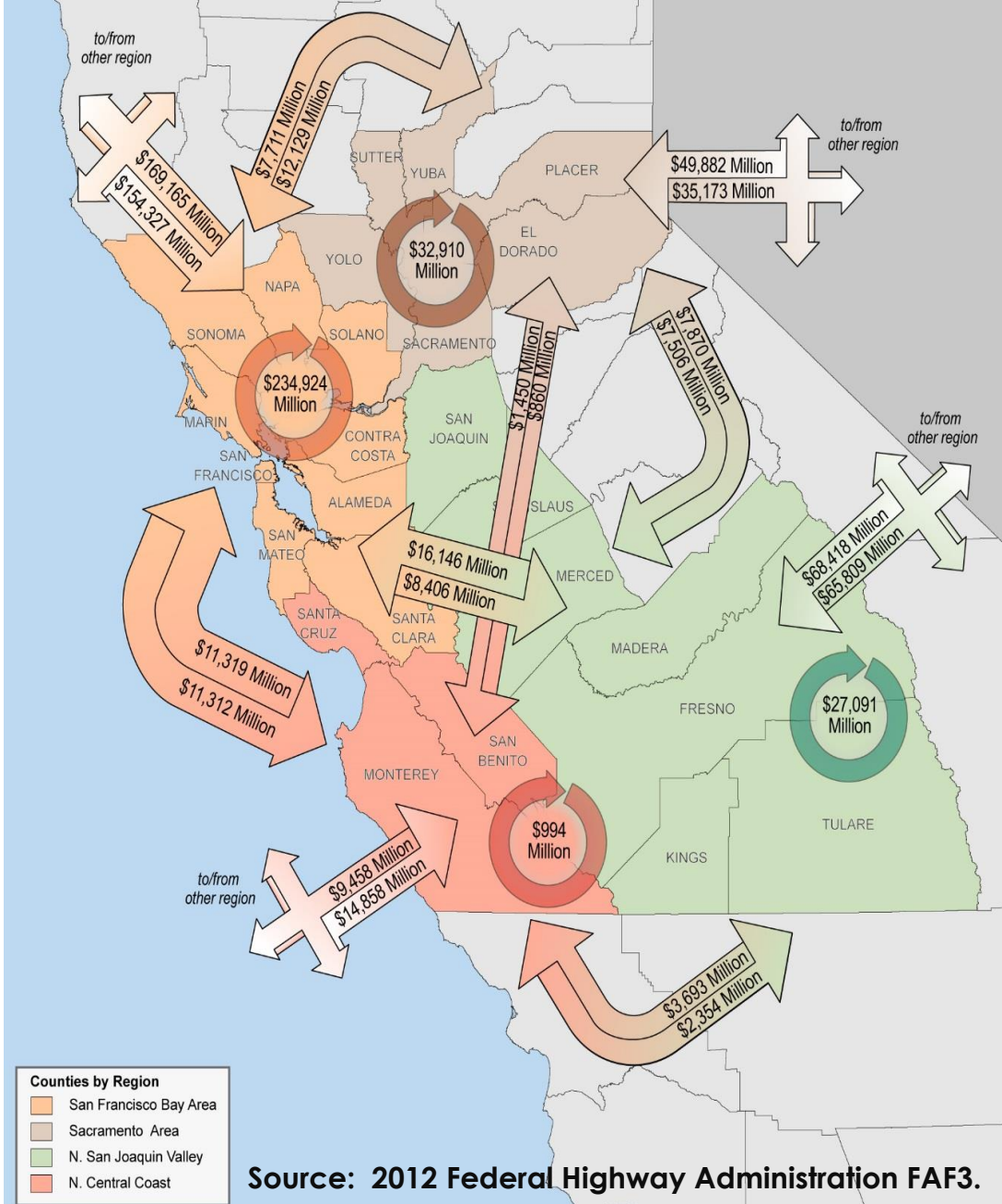
Northern CA Megaregion

Bay Area - international trade hub, specializing in high value manufacturing products as well as agriculture and petroleum products

Sacramento Area – Ag/food products, high value manufacturing, regional warehouse center, connection to Bay Area via I-80 and UP Rail

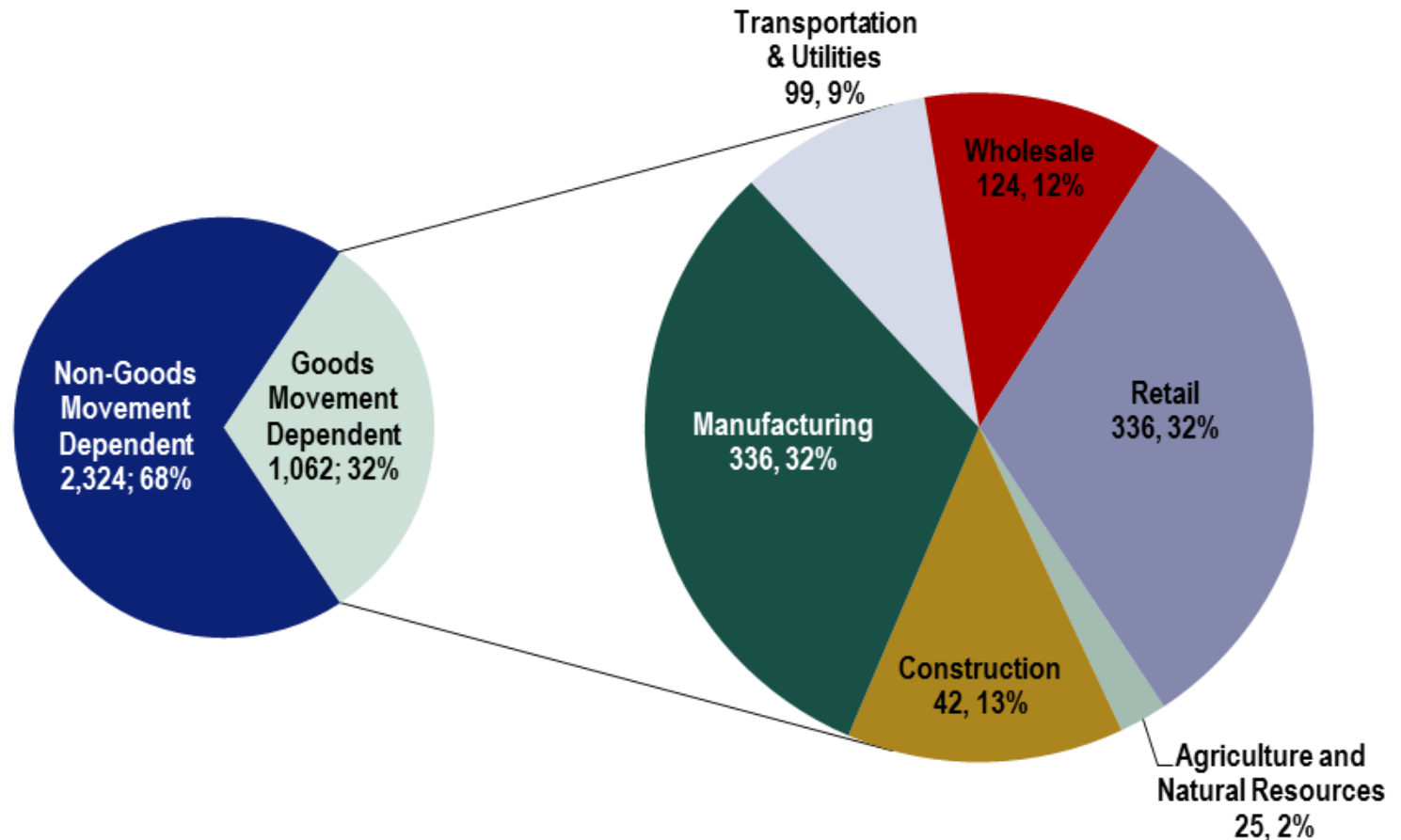
N. San Joaquin Valley – ag/food products, regional DC, Bay Area connections via I-580 (rail and barge) and SR 152

N. Central Coast – wine, fish and ag products, critical ag linkage with San Joaquin Valley



Source: 2012 Federal Highway Administration FAF3.

Goods Movement Dependent Industries in the Bay Area



**Employment in Bay Area, 2010
in Thousands of Employees**

Source: ABAG *Plan Bay Area Economic Forecasts*; factors from CCSCE and Cambridge Systematics Analysis.

Job Diversity

Area	Goods Movement		Percentage of such Jobs in Goods Movement
	Total Jobs that do not need college degree	Occupations Jobs that do not need college degree	
Oakland-Fremont-Hayward MD – Alameda Co.	240,880	38,411	16%
Total	721,807	102,219	14%

Occupational Title	Median Hourly Wages – Alameda Co.
Cleaners of Vehicles and Equipment	\$10.1
Crane and Tower Operators	\$32.2
Excavating and Loading Machine and Dragline Operators	\$28.7
Industrial Truck and Tractor Operators	\$20.3
Laborers and Freight, Stock, and Material Movers, Hand	\$13.3
Machine Feeders and Offbearers	\$15.1
Material Moving Workers, All Other	\$20.2
Packers and Packagers, Hand	\$10.8
Pump Operators, Except Wellhead Pumpers	\$19.9
Refuse and Recyclable Material Collectors	\$28.0
Truck Drivers, Heavy and Tractor-Trailer	\$23.0
Truck Drivers, Light or Delivery Services	\$15.8
All Bay Area Occupations	\$24.7

Source: Wages and Employment Data from Occupational Employment (May 2012) and Wage (2013 – First Quarter) Data, California EDD; Educational-Level Data from BLS.

Note: Jobs that do not require a college degree are selected if more than 90 percent of the jobs in that occupation do not require a college degree.

Issues and Needs Identified from Stakeholders

Who We Talked To

- *Ditching Dirty Diesel Collaborative*
 - Representing various community and public health groups
- *Alameda Labor Council*
 - Teamsters, IBEW, ILWU
- *Shippers/receivers*
 - Farmers, wine producers, manufacturers
- *East Bay Biomedical Manufacturing Network*
 - Representing various pharmaceutical, biomed companies
- *Transportation Providers*
 - CA Trucking Association, UP, shortline operators
- *East Bay Transportation and Logistics Partnership*
- *North Bay Leadership Council & Sonoma County Alliance*

Who We Talked To (Continued)

- *East Bay EDA- Infrastructure Committee*
 - EBMUD, Matson Logistics, PMSA
- *Area Transportation Agencies*
 - Congestion Management Agency Executive Directors from all nine counties
 - Contra Costa and Solano Transportation Authority Boards, West Contra Costa TAC
- *Businesses Groups*
 - East Bay Leadership Council, Bay Area Council, San Leandro Chamber of Commerce, Oakland Chamber of Commerce, Hispanic Chamber of Commerce
- *California Capital and Investment Group*

Additional outreach in progress

Goods Movement Functional Elements



Global Gateways

- Handle international trade, and cover entry and exit points that are essential to moving imports/exports.
- *Example Infrastructure: Port of Oakland, Oakland International Airport, Rail Intermodal Terminals.*



Interregional and Intra-regional Corridors

- Interregional corridors link Alameda County and the Bay Area with the rest of the U.S.
- Intra-regional corridors connect the cities and counties of the Bay Area with each other and provide freeway access to major freight hubs.
- *Example infrastructure: I-80, I-580, I-880, U.S. 101, I-680, SR 12, SR 152, SR 4 and Highway 37; BNSF and UP Rail Corridors.*



Local Goods Movement System

- Links global gateways and the interregional and intra-regional corridors.
- Connects to major freight generators and provide last-mile pick-up and delivery service in communities.
- *Example Infrastructure: local city truck routes and local streets, and last-mile connectors to locations with key freight activities.*

Issues and Needs - Global Gateway

- High concentration of activity at trade hubs results in quality of life and public health impacts on local communities
- Port of Oakland marine terminal congestion and its associated impacts on drayage drivers and neighborhoods
- Insufficient port rail services and need to attract first port of call
- Intensifying port competition
- Heavy-haul network needs
- Conflicts between industrial/warehouse space needs to support growth and impacts on neighborhoods
- Changing mix of air cargo and uncertain growth in domestic markets

Issues and Needs - Interregional and Intraregional Corridors

- Congestion and delay on shared use freight corridors with passenger traffic such as I-880, I-580, I-80, US 101 and Capitol Corridor
- Rail bottlenecks especially along Martinez Subdivision
- Truck safety issues along freight corridors due to merging and weaving; Safety issues at rail-highway grade crossings
- Pavement and bridge condition issues along freight corridors
- Shifting crude supplies leading to increased rail usage and community concerns regarding safety

Issues and Needs - Urban Goods Movement System

- Public health impacts on neighborhoods with intense freight activities
- Land use conflicts in traditional industrial corridors
- Lack of truck parking/neighborhood parking encroachment
- Conflicts between trucks and other street users (autos, pedestrians, bikes, transit) on collector routes and in commercial areas, and problems with roadway and street design that impedes truck deliveries
- Cut through traffic to avoid congestion on major corridors
- Lack of truck route connectivity across city boundaries
- Local road and street pavement damage

Trends and Opportunities

Key Goods Movement Trends – Global Gateways

- Growth in high-value and bulk commodity exports
- Growth in transloading of import consumer products
- Continuing attention on export markets at national level
- Technology innovation – Freight Advanced Traveler Information Systems (FRATIS)
- Continuing reductions in emissions but needs for continued research and application of new technologies

Key Goods Movement Trends - Interregional and Intraregional Corridors

- Growth in intermodal rail demand
- Growth in advanced and specialty manufacturing processes (e.g., specialty foods) that favor Bay Area producers
- Income growth driving consumer demand and e-commerce
- Advances in new vehicle technologies and ITS technologies
- Expanding rail markets and opportunities at Port of Oakland, Solano County, and North Bay

Key Goods Movement Trends – Urban Goods Movement System

- Income growth driving consumer demand and e-commerce
- Increasing densification of development patterns
- New approaches to managing urban delivery systems (e.g., off-peak delivery, electronic management of parking, ITS applications)