Greater Charlotte Regional Freight Mobility Plan

Steering Committee Meeting 2 of 5

December 10, 2015
10:00 a.m. – 12:00 p.m.

Kannapolis Train Station
201 S. Main Street
Kannapolis, NC 28081

AGENDA

I. Welcome & Introductions

- Welcome and Opening Remarks – Jim Prosser, Executive Director, Centralina COG

II. Presentation and Discussion on Existing Conditions Analysis - Greater Charlotte Regional Freight Mobility Plan

- Presentation – Pat Anater, Senior Project Manager, CDM Smith
- Roundtable Discussion – Jim Prosser, Executive Director, Centralina COG

1. With most trucking parking facilities in the region fully utilized, what are the impacts to the safety of semi-truck drivers and to fellow motorists?
   a. What are some infrastructure solutions that the public sector can provide?
   b. What are solutions that private industry can provide?
2. Incident management continues to be a major issue for the movement of freight in this region. Commercial vehicles, incidentally, make up a small percentage of overall crashes in the region, but freight is delayed due to any crash. What policies and/or technologies could be adopted to reduce crashes and/or improve the response and clearance times?
3. We know that freight transportation deficiencies, locations of loading zones, and physical location of distribution centers have been identified as key policies that impact the movement of freight. What general land use and transportation planning policies do you think are creating issues for freight mobility in the region?

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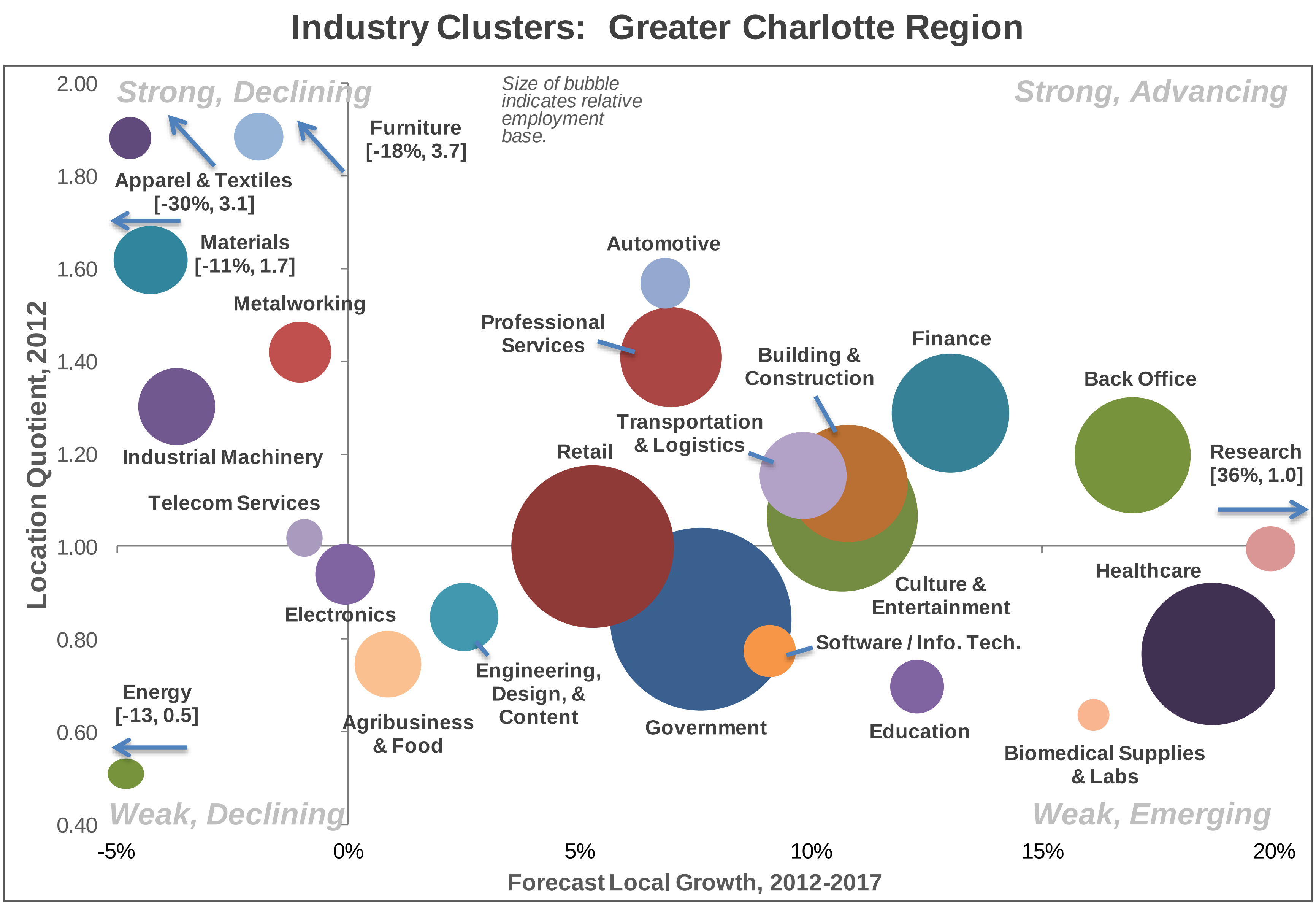
4. Based on your personal knowledge and that of the Comprehensive Economic Development Strategy (CEDS), what are the new emerging sectors, where are they locating in the region, and how can transportation infrastructure investment play a role by improving freight efficiency, reliability, and safety?
    a. What are solutions that local and state governments can provide?
5. Critical actions for a successful freight mobility plan are regional cooperation and coordination among and between the public and private sectors and developing a funding plan.
    a. What immediate actions need to occur?
    b. What form should cooperation and coordination take?

III. Closing Remarks & Next Steps

- Thank you for joining us in this regional initiative to ensure the economic competitiveness of the greater Charlotte Region – Jim Prosser, Executive Director, Centralina COG
- Next Freight Steering Committee meeting will be on Thursday, May 19, 2016.

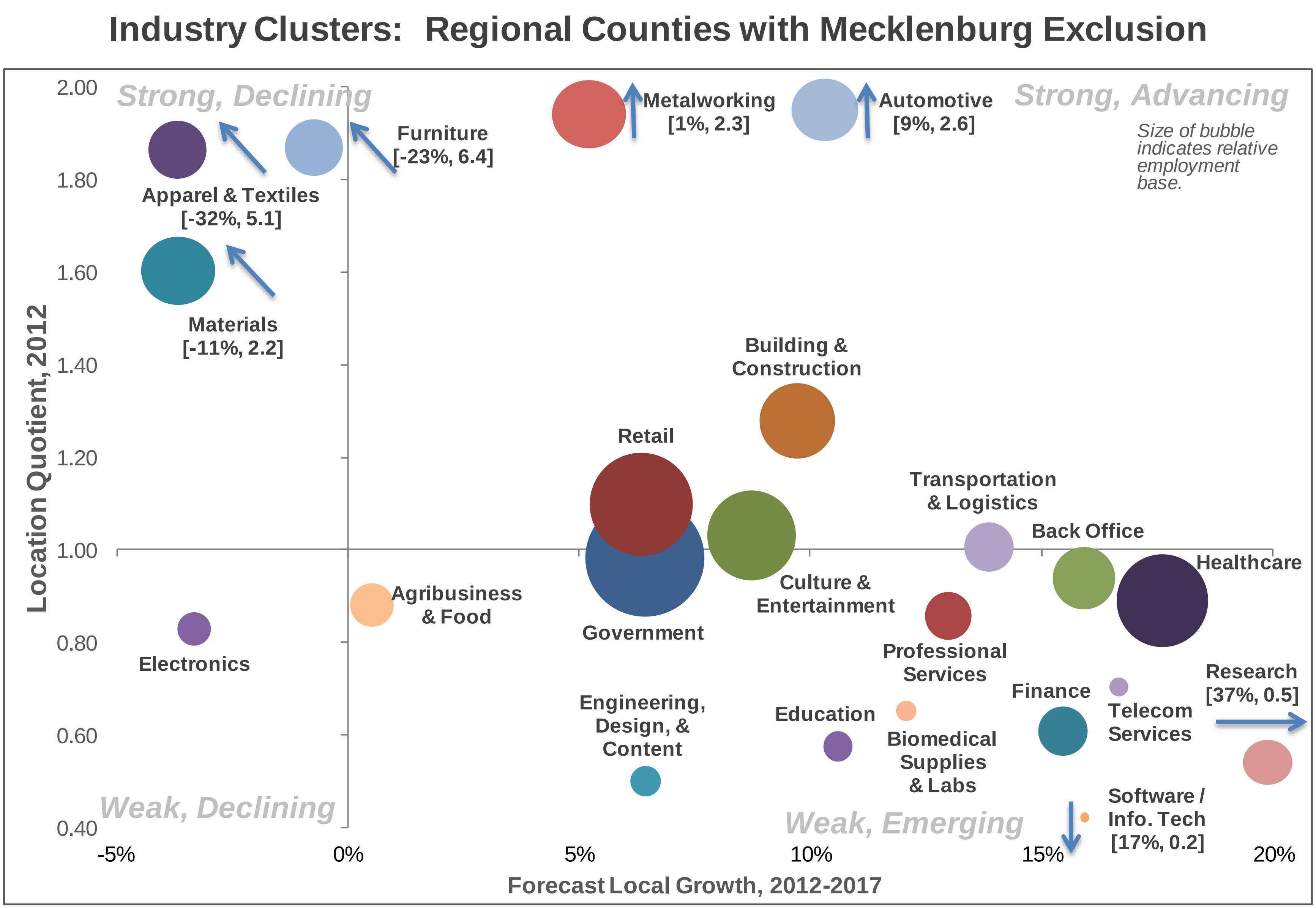


Source: Avalanche Consulting using data from EMSI

Greater Charlotte Region
Industry Cluster Competitiveness

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	754	0.18	12.5%	84	(26)	-3.4%	0.2%
Agribusiness & Food	23,166	0.74	-12.0%	(3,147)	200	0.9%	1.9%
Apparel & Textiles	13,194	3.09	-46.6%	(11,506)	(3,928)	-29.8%	-20.1%
Automotive	13,289	1.57	-19.2%	(3,159)	913	6.9%	-6.0%
Back Office	71,964	1.20	-2.2%	(1,631)	12,211	17.0%	8.3%
Biomedical Supplies & Labs	5,492	0.64	7.7%	393	886	16.1%	8.0%
Building & Construction	74,433	1.14	-31.5%	(34,178)	8,053	10.8%	5.3%
Consumer Goods Mftg	4,967	0.93	-18.7%	(1,146)	(165)	-3.3%	-0.6%
Culture & Entertainment	121,988	1.07	5.9%	6,752	13,030	10.7%	6.2%
Education	15,372	0.70	23.1%	2,880	1,892	12.3%	13.2%
Electronics	19,311	0.94	-8.6%	(1,810)	(12)	-0.1%	1.3%
Energy	6,675	0.54	-9.6%	(707)	(862)	-12.9%	-1.5%
Engineering, Design, & Content	24,343	0.85	-16.8%	(4,933)	614	2.5%	2.0%
Finance	74,617	1.29	-6.3%	(4,999)	9,725	13.0%	3.2%
Furniture	13,175	3.68	-38.2%	(8,138)	(2,418)	-18.4%	-3.5%
Government	176,400	0.84	4.1%	7,008	13,469	7.6%	4.0%
Healthcare	108,750	0.77	11.1%	10,890	20,332	18.7%	11.8%
Industrial Machinery	31,529	1.30	-8.8%	(3,061)	(1,170)	-3.7%	-1.2%
Logging & Metal/Mineral Mining	1,414	0.88	-23.7%	(440)	(58)	-4.1%	-2.2%
Materials	23,306	1.65	-15.2%	(4,166)	(2,630)	-11.3%	-7.2%
Metalworking	20,054	1.42	-17.9%	(4,381)	(207)	-1.0%	-5.1%
Non-Profits	5,383	0.48	-38.1%	(3,315)	482	9.0%	6.3%
Professional Services	54,245	1.41	5.8%	2,990	3,790	7.0%	5.5%
Research	15,175	0.99	31.8%	3,658	5,421	35.7%	21.5%
Retail	141,718	1.00	-3.2%	(4,755)	7,492	5.3%	3.3%
Shipbuilding	14	0.01	-48.1%	(13)	(9)	-64.3%	-6.0%
Software / Info. Tech.	14,724	0.77	8.3%	1,129	1,345	9.1%	16.5%
Telecom Services	7,167	1.02	-1.9%	(141)	(67)	-0.9%	-2.0%
Transportation & Logistics	40,590	1.15	-8.9%	(3,944)	3,996	9.8%	4.6%
Total	1,123,206	1.00	-5.7%	(68,238)	92,289	8.2%	5.2%

Source: Avalanche Consulting using data from EMSI



Source: Avalanche Consulting using data from EMSI

Regional Counties with Mecklenberg Exclusion
Industry Cluster Competitiveness

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	575	0.28	7.5%	40	(33)	-5.7%	0.2%
Agribusiness & Food	13,920	0.88	-14.1%	(2,288)	74	0.5%	1.9%
Apparel & Textiles	11,093	5.11	-50.3%	(11,209)	(3,542)	-31.9%	-20.1%
Automotive	11,339	2.63	-20.4%	(2,902)	1,044	9.2%	-6.0%
Back Office	28,668	0.94	-0.9%	(247)	4,566	15.9%	8.3%
Biomedical Supplies & Labs	2,865	0.65	2.2%	63	346	12.1%	8.0%
Building & Construction	42,608	1.28	-30.5%	(18,742)	4,135	9.7%	5.3%
Consumer Goods Mftg	3,012	1.11	-22.9%	(896)	(304)	-10.1%	-0.6%
Culture & Entertainment	60,025	1.03	0.3%	199	5,242	8.7%	6.2%
Education	6,440	0.57	15.9%	884	682	10.6%	13.2%
Electronics	8,654	0.83	-14.5%	(1,472)	(287)	-3.3%	1.3%
Energy	4,106	0.65	-4.6%	(198)	(316)	-7.7%	-1.5%
Engineering, Design, & Content	7,306	0.50	-13.1%	(1,105)	471	6.4%	2.0%
Finance	17,886	0.61	-2.3%	(415)	2,765	15.5%	3.2%
Furniture	11,656	6.40	-41.1%	(8,146)	(2,672)	-22.9%	-3.5%
Government	104,723	0.98	1.1%	1,160	6,723	6.4%	4.0%
Healthcare	64,060	0.89	5.6%	3,371	11,281	17.6%	11.8%
Industrial Machinery	13,926	1.13	-14.8%	(2,418)	(797)	-5.7%	-1.2%
Logging & Metal/Mineral Mining	1,199	1.47	-22.7%	(352)	(71)	-5.9%	-2.2%
Materials	15,654	2.18	-13.9%	(2,524)	(1,663)	-10.6%	-7.2%
Metalworking	16,588	2.31	-17.0%	(3,388)	190	1.1%	-5.1%
Non-Profits	2,688	0.47	-24.7%	(884)	328	12.2%	6.3%
Professional Services	16,773	0.86	12.2%	1,830	2,177	13.0%	5.5%
Research	4,212	0.54	51.2%	1,427	1,575	37.4%	21.5%
Retail	79,309	1.10	0.8%	619	5,025	6.3%	3.3%
Shipbuilding	14	0.03	-48.1%	(13)	(9)	-64.3%	-6.0%
Software / Info. Tech.	1,650	0.17	10.7%	160	282	17.1%	16.5%
Telecom Services	2,519	0.70	6.7%	158	420	16.7%	-2.0%
Transportation & Logistics	17,985	1.00	-3.4%	(641)	2,495	13.9%	4.6%
Total	571,499	1.00	-8.0%	(49,922)	40,139	7.0%	5.2%

Source: Avalanche Consulting using data from EMSI