



GREATER CHARLOTTE REGIONAL FREIGHT MOBILITY PLAN

ADVISORY COMMITTEE MEETING

April 12, 2016

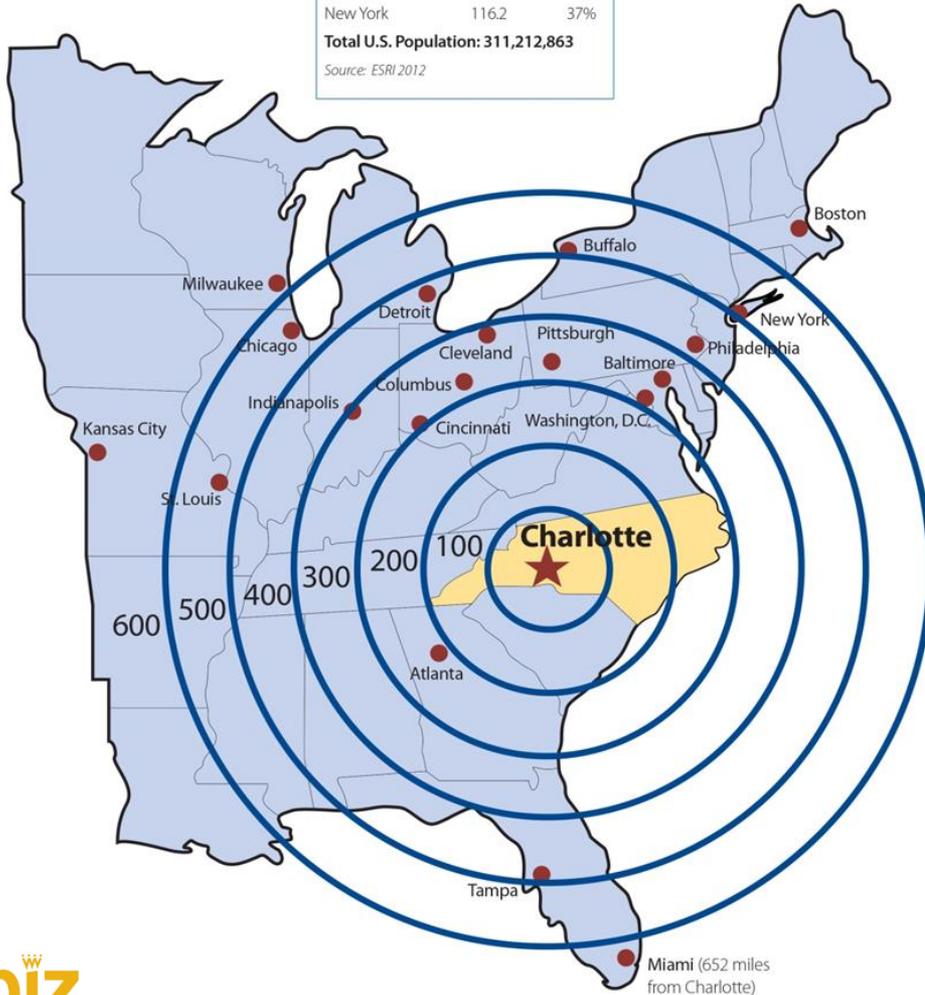
Charlotte's Market Accessibility

Charlotte's central East Coast location and excellent transportation network provide businesses with a strategic advantage in receiving and shipping goods and services.

Population Comparison 650 Mile Radius		
	Pop. (mil.)	% of U.S.
Charlotte	164.2	53%
Atlanta	139.9	45%
New York	116.2	37%
Total U.S. Population: 311,212,863		
<small>Source: ESRI 2012</small>		

Within 650 miles of Charlotte are:

- 164 million U.S. and Canadian consumers
- 55 of the country's top 100 metropolitan areas



Welcome

- Safe, reliable, & efficient movement of goods is essential for continued economic success
- Every day, products designed and manufactured in the Region are shipped to markets nationwide and around the world.

Introduction to Project Team

- **Centralina Council of Governments**



- Form of local government
- Serve the 9-counties and municipalities in region
- Provide assistance & technical expertise in the areas of planning, community & economic development, workforce development, and advocate for aging services

- **CDM Smith**



- Private consulting firm assisting in the development of the Plan
- Completed numerous State & Regional Freight Plans

Introductions of Committee Members

- State your NAME and ORGANIZATION
and answer:

What are your two biggest
freight challenges today?



Jim Prosser, Centralina COG

GREATER CHARLOTTE REGIONAL FREIGHT MOBILITY PLAN

Plan Purpose

1. Understanding the Current Freight Climate

The efficient, reliable, and safe movement of goods and commodities in the Greater Charlotte region is required to sustain private sector commerce.

Manufacturing, logistics, distribution and agricultural sectors rely on freight transportation to connect their supply chains.

In order for existing businesses to grow and attract customers, the freight system must provide mobility to get goods to market.

2. Looking Toward the Future

The Greater Charlotte Region should look to position itself as an emerging trade hub in Southeast.

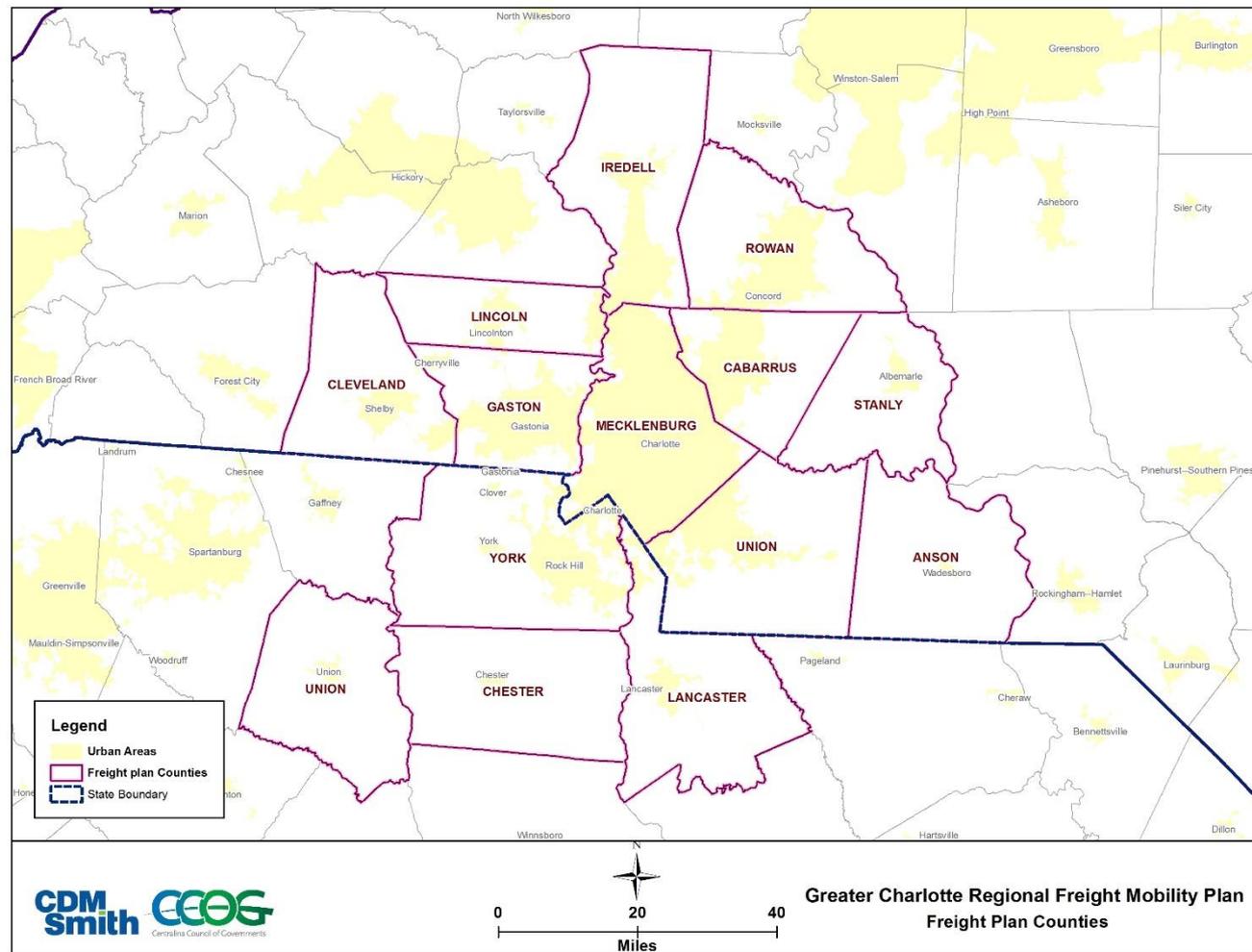
The region is rich in the attributes and characteristics to become a national and global trade hub.

The major west-east and south-north highway corridors, and first class access to the rail network with Charlotte as a hub.

The Charlotte-Douglas International Airport recently developed their multimodal strategic plan and should serve as a tool to inform the Freight Mobility Plan.

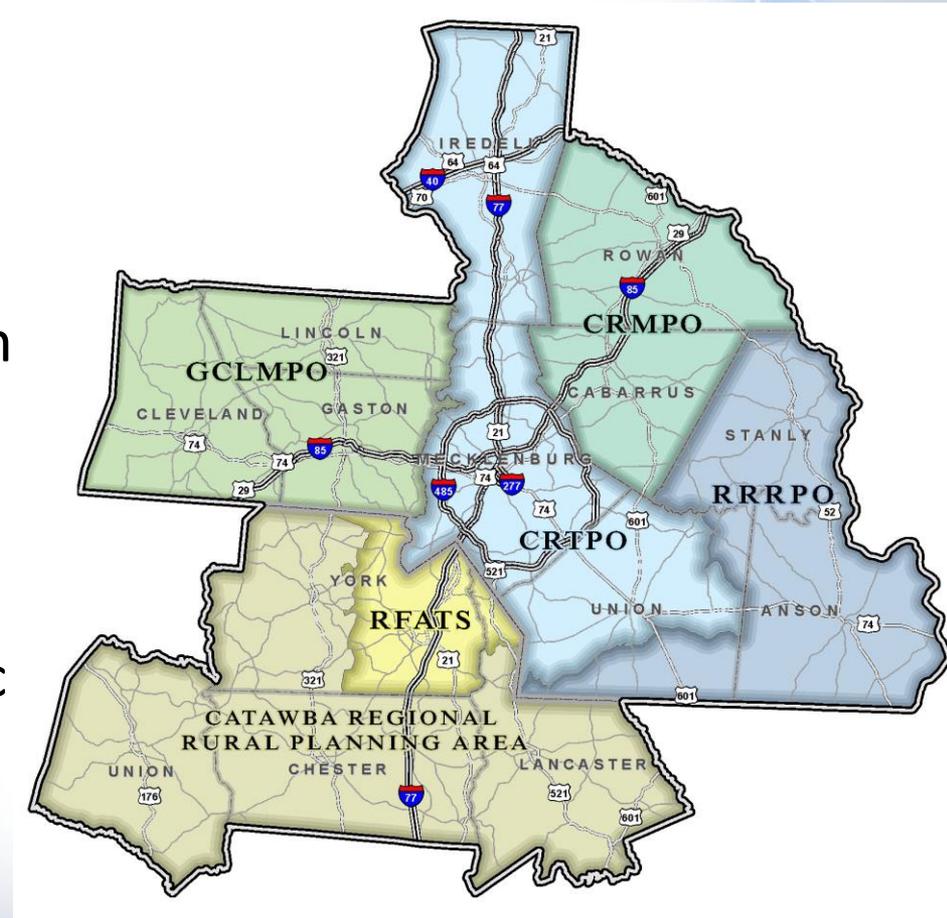
Regional Freight Mobility Plan

Study Area



Process - Project Partners

- 6 Transportation Planning Organizations
- NC & SC Department of Transportations
- Federal Highway Administration
- US Department of Commerce Economic Development Administration
- Local Governments & Economic Development Commissions
- NC State Ports Authority
- Private Sector



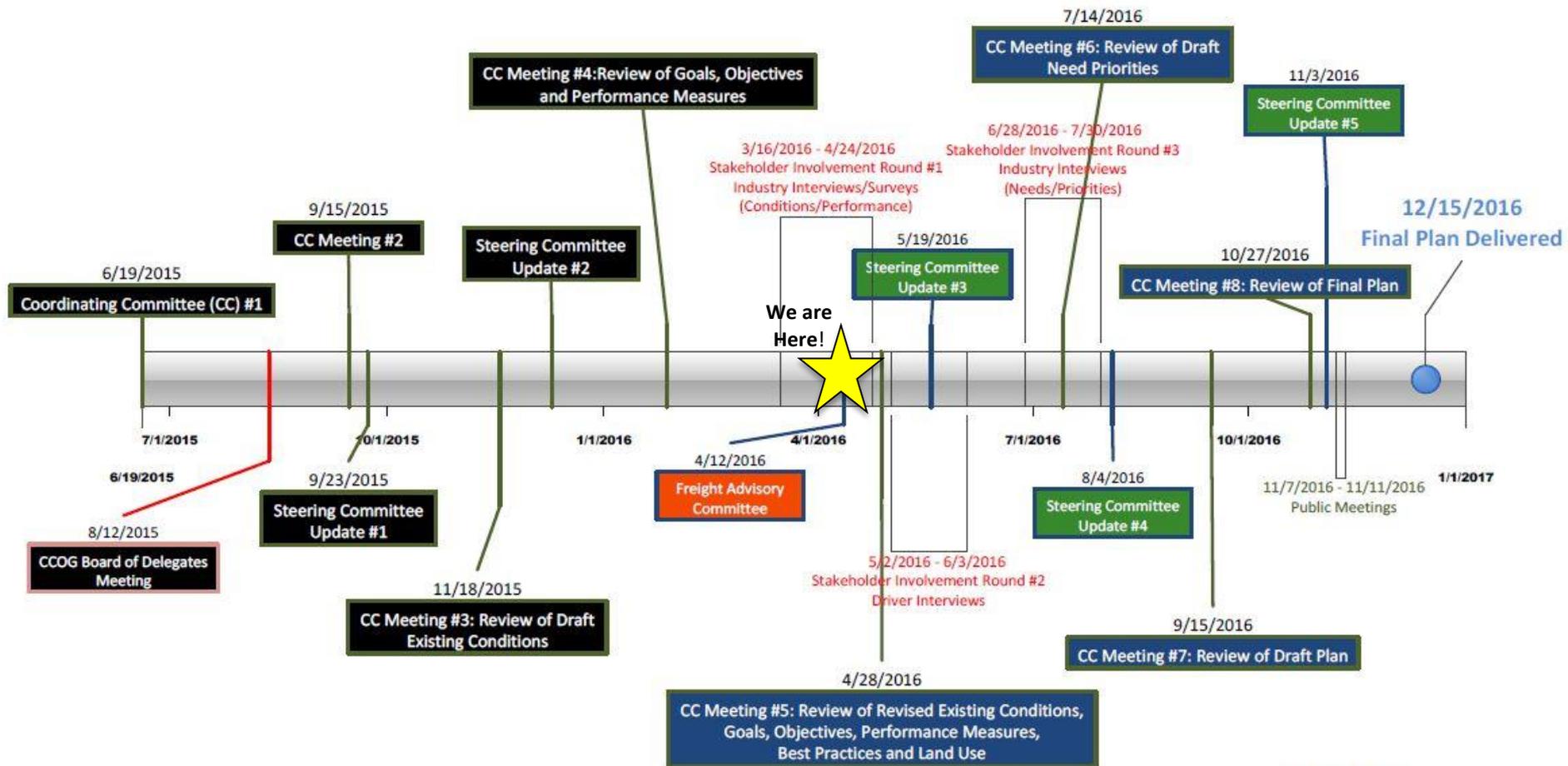
Process-Stakeholder Engagement

- Three Freight Plan Committees
 - **Coordinating Committee** – comprised of region's MPO, RPO, NC DOT, FHWA, SC DOT staff representatives.
 - **Steering Committee** – comprised of key regional experts in transportation and land use planning, economic development, logistics, and local government elected officials.
 - **Advisory Committee** – comprised of freight systems providers (rail, trucking, air cargo firms) and users (manufacturing, distribution, and logistics firms).

Greater Charlotte Regional Freight Mobility Plan

Committee and Stakeholder Engagement

DRAFT Revised Plan Moving Forward (as of March 28, 2016)



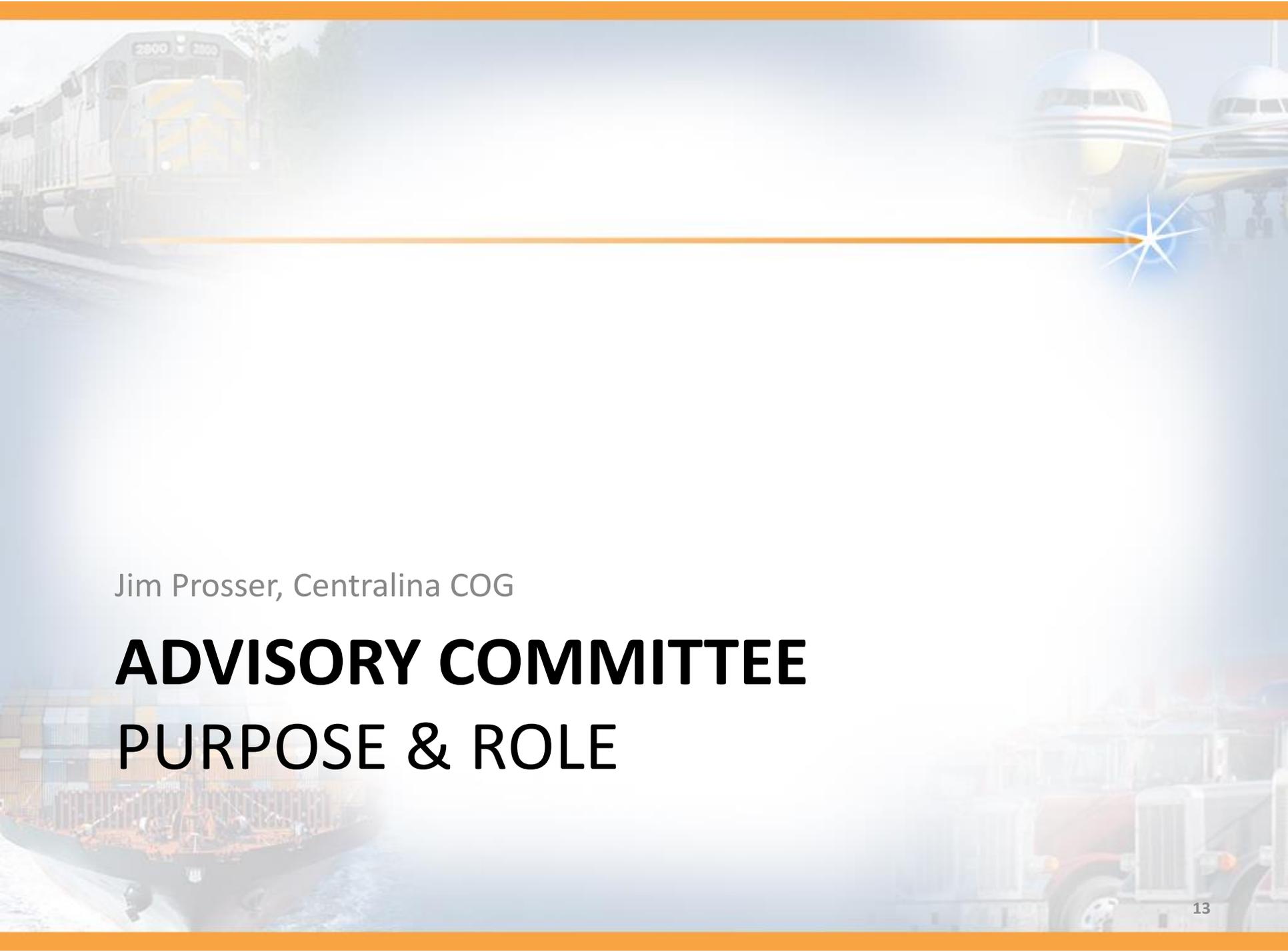
Plan Outcomes-Transportation

- Recommendations and guidance for actions, policies and investments
- Project prioritization processes for Strategic Transportation Investments
- Opportunity to increase federal share of funding
- Freight transportation conditions, performance, needs and opportunities
- Freight logistical, infrastructure, land use and economic impacts

It is critical that the Charlotte region prioritize needs that provide the greatest impact to freight mobility and opportunity.

Plan Outcomes - Economic

- Establish a decision-making process & feasible solutions
- Create a network of active & engaged Partners
- Leverage existing regional assets
- Improve productivity of region's manufacturing, logistics & shipping operations
- Attract new businesses & help the region be more competitive
- Meet the growing demand for efficient, reliable, & safe movement of goods



Jim Prosser, Centralina COG

ADVISORY COMMITTEE PURPOSE & ROLE

Advisory Committee's Purpose

- To help guide and inform the development of the region's first Freight Mobility Plan.
- By providing technical expertise and operating experience in the freight realm and in the project region.
- Identify solutions & recommendations for inclusion in the Plan to address private sector's freight needs.

Advisory Committee's Role

Committee members agree to volunteer to:

- Focus on initiatives to benefit the entire region;
- Ensure public and private sector objectives met;
- Provide insight on long-term strategies;
- Participate in Advisory Committee meetings;
- Participate in stakeholder engagement events;
- Reflect the interests of your organization and peers; and
- Communicate information back to your agency

Project Team's Role

Centralina COG and CDM Smith agree to:

- Provide Advisory Committee members the opportunity to collaborate with other agencies and groups on making recommendations for the project;
- Keep Advisory Committee members informed of progress;
- Provide technical expertise;
- Provide documentation for Study Task deliverables;
- Manage logistics for meetings; and
- Conduct broader engagement activities as necessary to inform and engage other stakeholders



QUESTIONS?



Jessica Hill, Centralina Council of Governments

GREATER CHARLOTTE REGIONAL FREIGHT MOBILITY PLAN VISION & GOALS DISCUSSION

Draft Goals

- **Goal 1: Economic Competitiveness and Efficiency**
 - Support economic competitiveness by making investment decisions for freight transportation modes that make the most efficient use of resources, and pursue sustainable funding possibilities
- **Goal 2: Safety and Security**
 - Improve the safety and security of the freight transportation system.
- **Goal 3: Infrastructure Preservation and Maintenance**
 - Improve the state of good repair of the freight transportation system
- **Goal 4: Environmental Stewardship**
 - Reduce adverse environmental and community impacts of the freight transportation system.



Draft Goals Continued

- **Goal 5: Congestion and Reliability**
 - Reduce travel times and increase the reliability of the freight transportation system
- **Goal 6: Performance and Accountability**
 - Develop methods to track and improve performance and accountability of the operations and maintenance of the freight transportation system

Draft Vision Statement

Reflecting the diversity of the Greater Charlotte Region and the various ways in which freight contributes to the region's economy, this vision will guide the development of this plan.

“With its unique logistical and global competitive advantage for domestic and international commerce, the Charlotte region enhances economic competitiveness by collaboratively developing and investing in an integrated, multimodal freight transportation system that provides safe, reliable, efficient and sustainable freight mobility and by coordinating transportation and land use decisions across the region. This goods movement system supports the region's economy, creates jobs, and provides the mechanisms to maintain and improve quality of life for the region's residents.”



Vision & Goals

- What does this mean for the region's future?
- How should this Vision guide our Plan's solutions and recommendations?



Pat Anater, CDM Smith

GREATER CHARLOTTE REGIONAL FREIGHT MOBILITY PLAN EXISTING CONDITIONS ANALYSIS

Greater Charlotte Regional Freight Mobility Plan

Freight Advisory Coordinating Committee Meeting #1

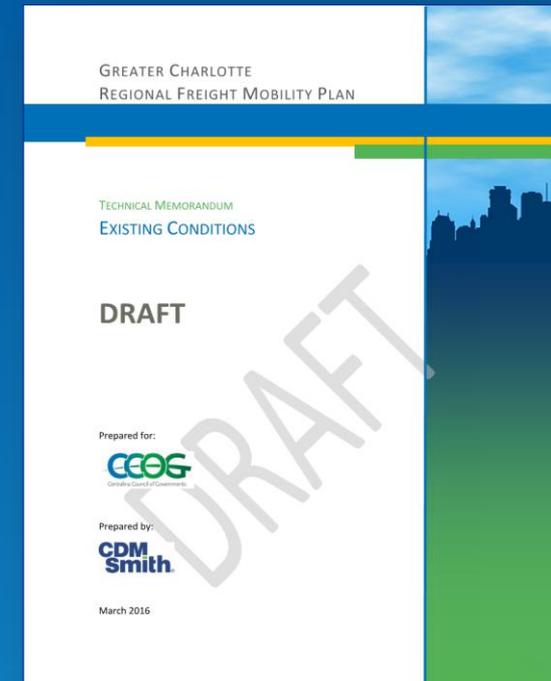
Existing Conditions Summary

April 12, 2016
8:00am—10:00am



Existing Conditions Purpose

- Identifies, inventories, and assesses the current condition and performance of the freight transportation system.
- The starting point for understanding necessary actions and investments to the Region's freight needs.
- Includes:
 - Relevant freight information from other regional planning documents
 - Draft freight goals and objectives
 - Freight trends and issues
 - Current condition of the freight transportation system
 - Commodity flow analysis
 - National and state freight policies

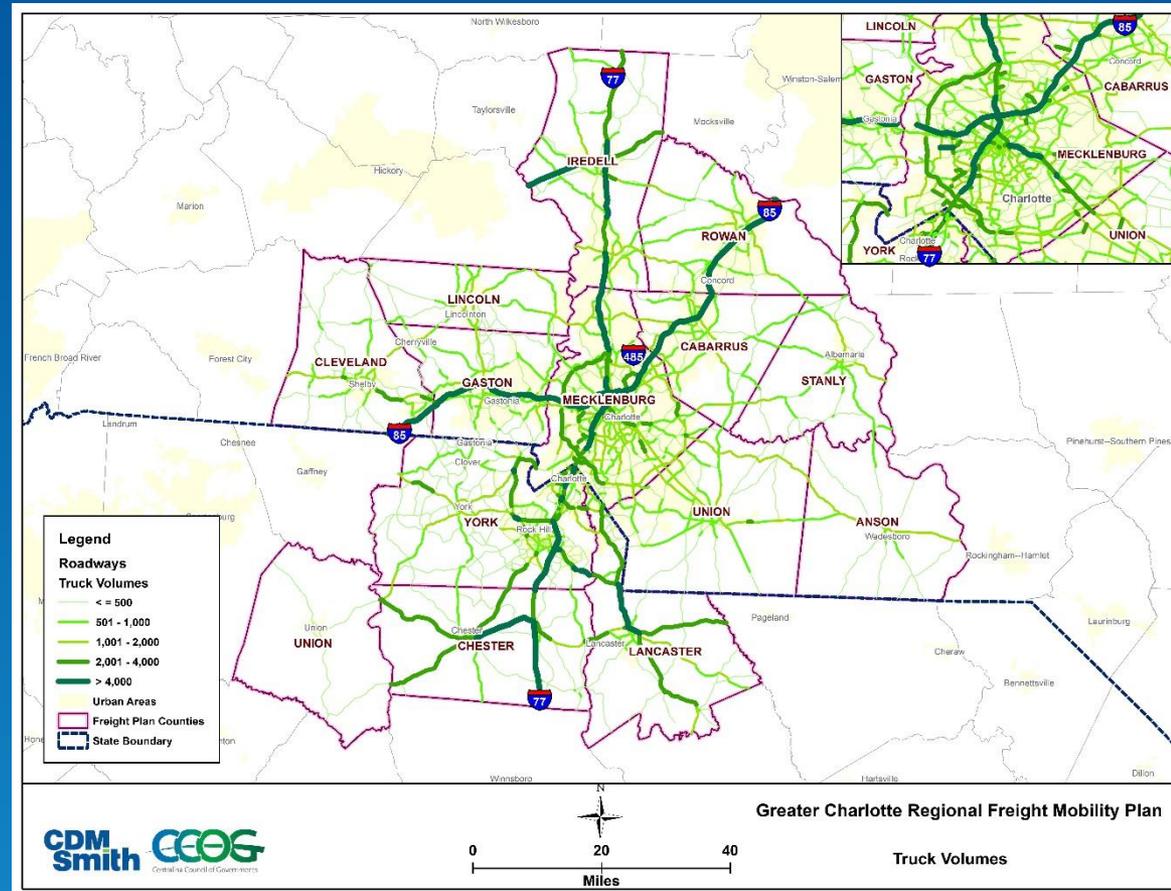




TRUCKING

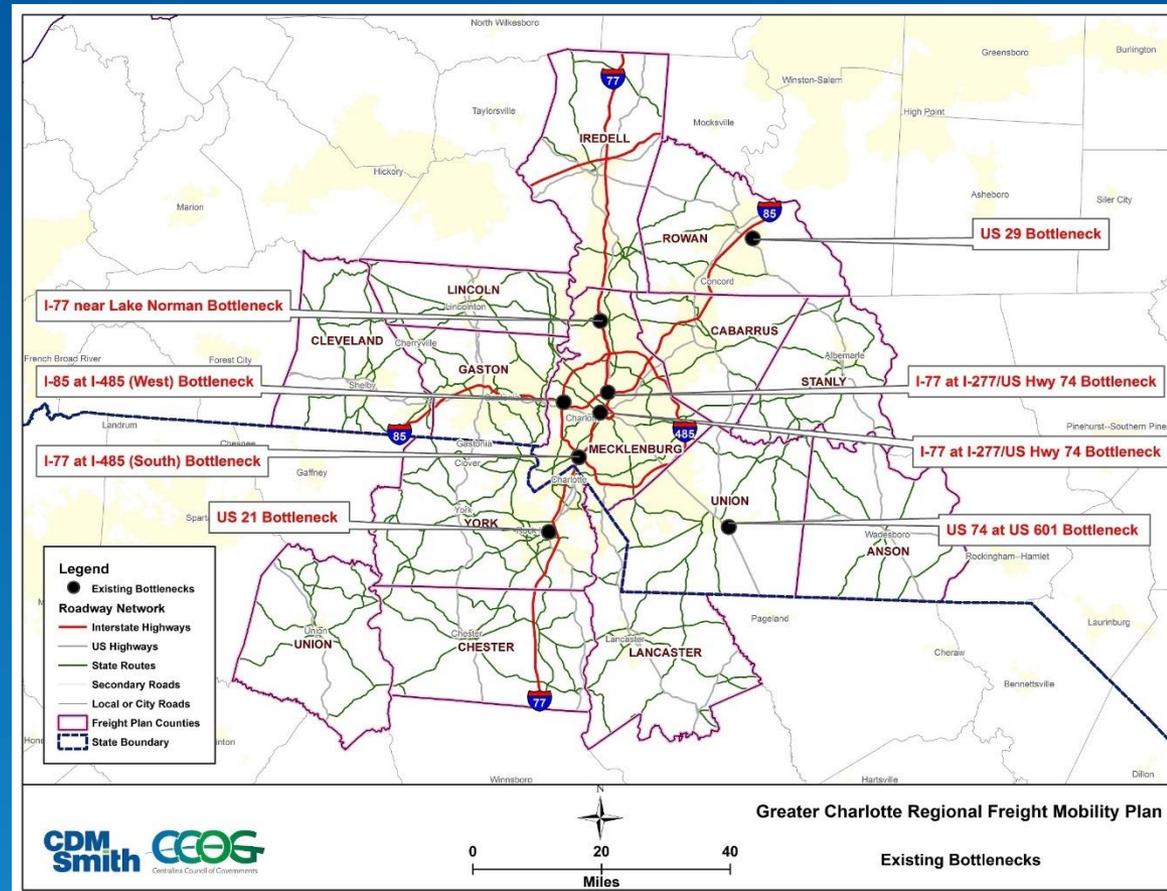
Truck Volumes

- The interstates carry the bulk of the region's daily truck traffic.
- I-85 and I-77 constitute the critical freight corridors throughout the region.
- Other roadways that play a critical role in the movement of truck freight are I-485, US 74, US 321, NC 160 (near the airport), and SC 9 through Chester and Lancaster, SC.



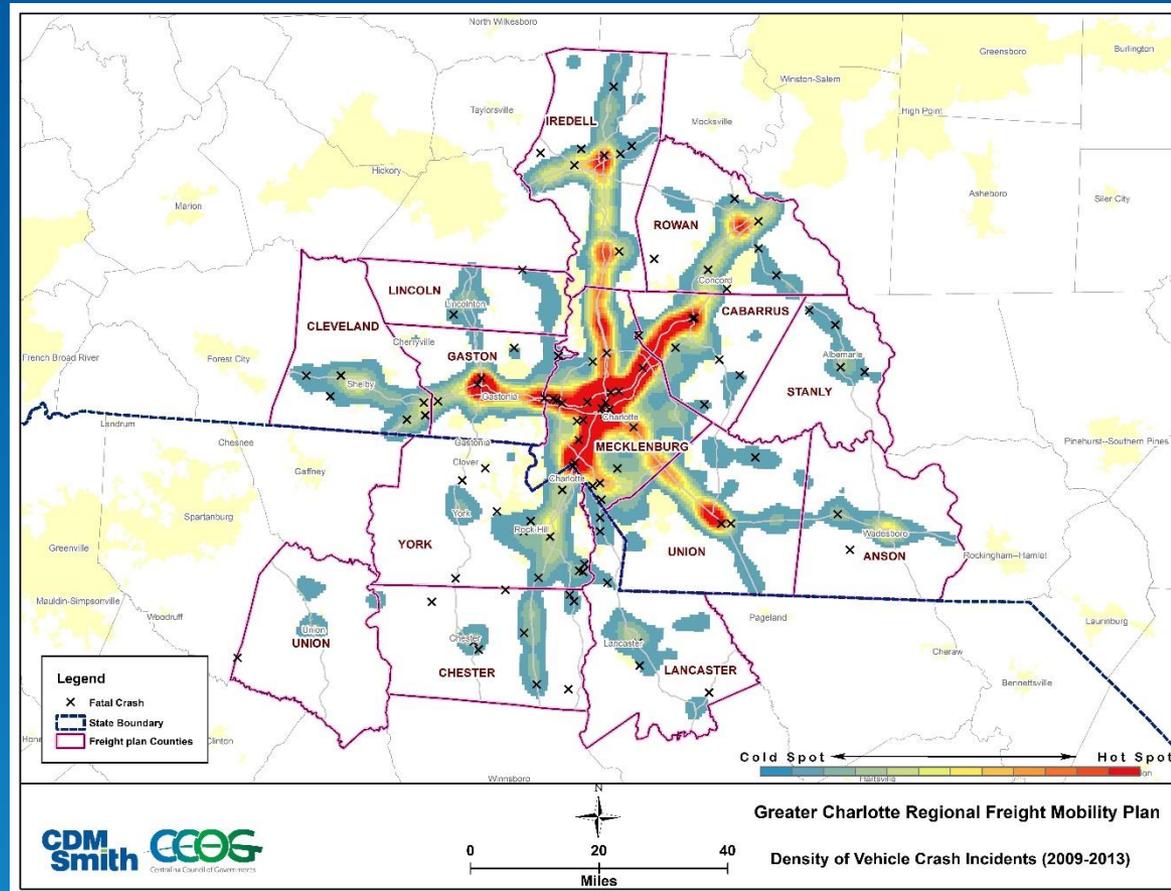
Truck Bottlenecks

- Real time speed data was collected to analyze truck bottlenecks.
- Locations were analyzed where truck bottlenecks cause significant problems on interstates and on major regional roads.
- Five on-interstate bottlenecks and three off-interstate bottlenecks were found based on one month of truck speed data from October 2015.



Crashes Involving Trucks

- Corridors with particularly high densities of crashes involving commercial vehicles include I-85 from Kannapolis to Charlotte and I-77 from Charlotte to Ft. Mill, SC.
- Other crash hotspots are in more densely populated areas such as Gastonia, Statesville, Mooresville, Salisbury and Monroe.

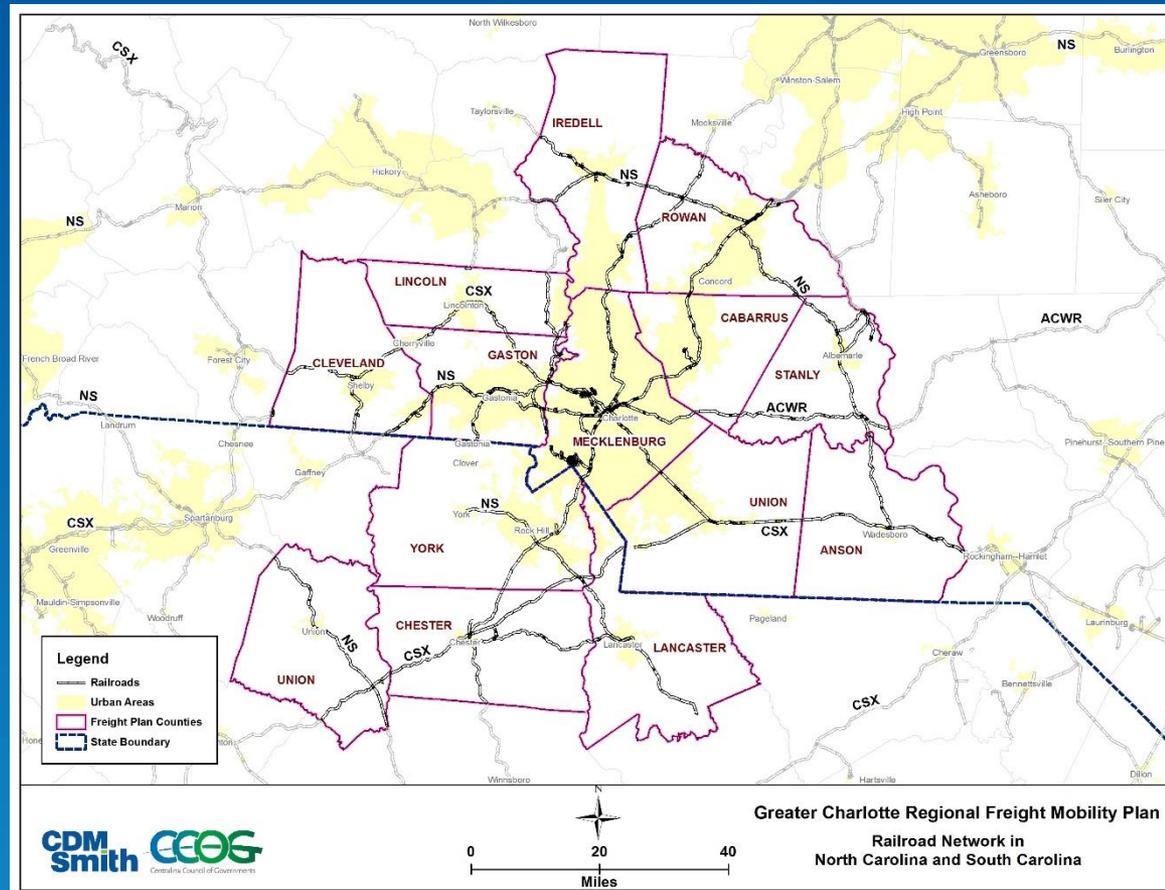




RAILROADS

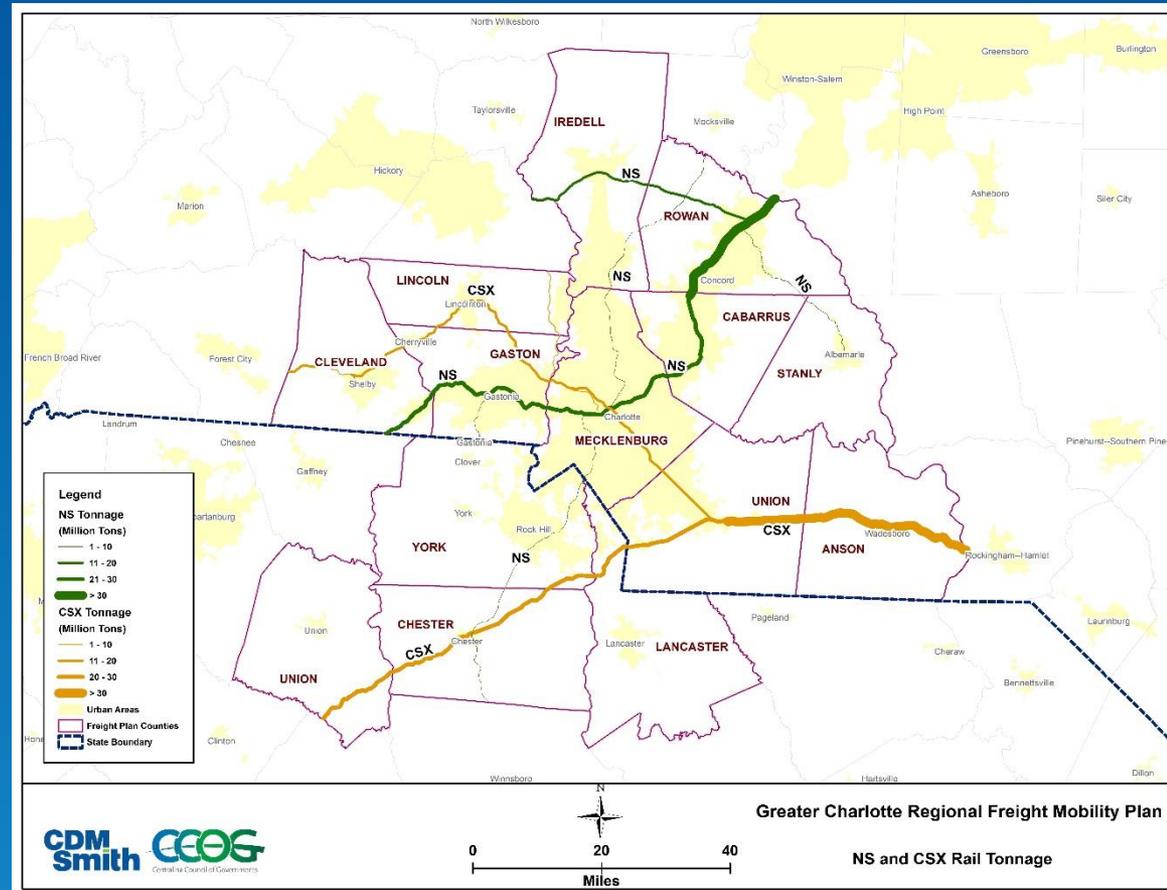
Region's Railroads

Railroad Owner	Miles
Aberdeen Carolina & Western Railway	50.8
Alexander Railroad Company	13.6
Carolina Coastal Railway	13.5
CSX	335.0
NCDOT	1.0
Norfolk Southern	593.7
Piedmont & Northern Railway	15.5
Winston-Salem Southbound Railway	42.10
Lancaster & Chester	66.8
Others/Unknown	10.0



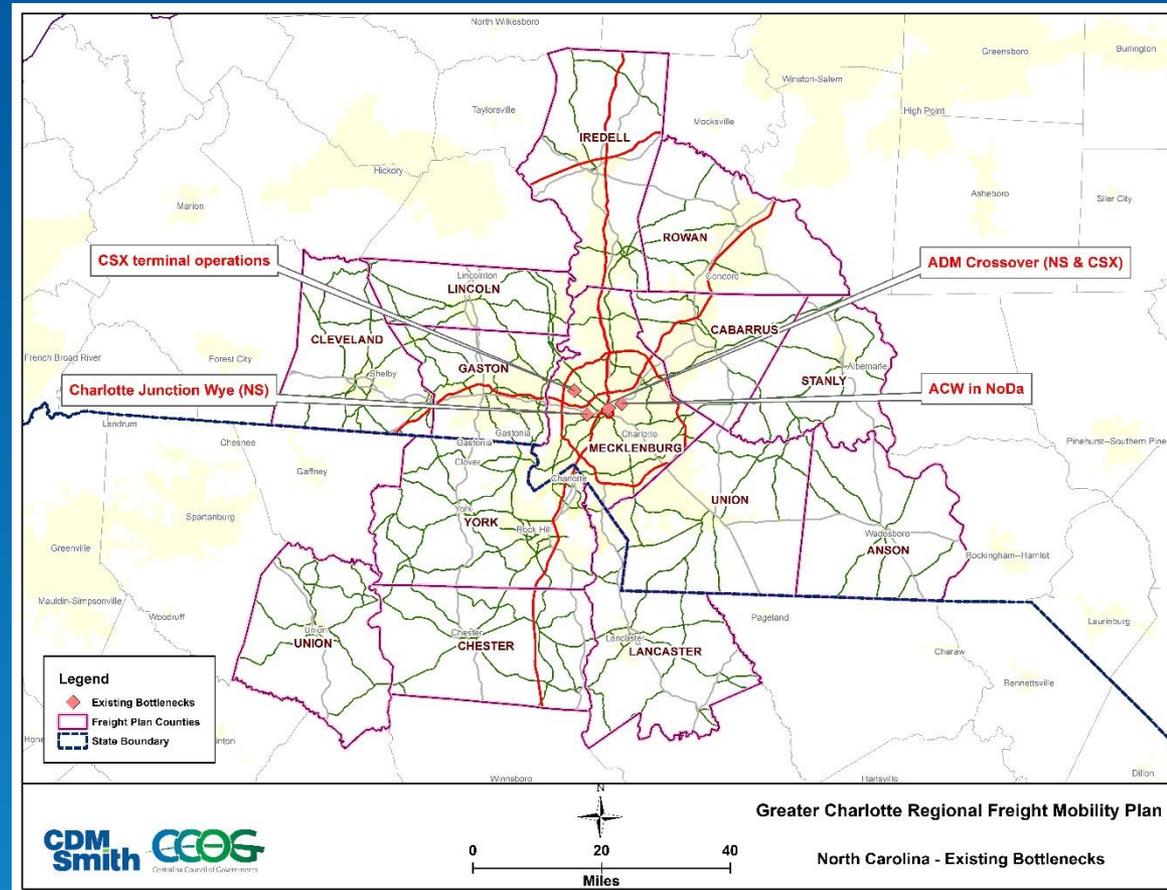
Rail Freight Tonnage Densities

- Norfolk Southern's (NS) Main Line operating through Kannapolis, Charlotte and Gastonia serving the Charlotte-Douglas Intermodal Yard is one of the busier corridors on the east coast.
- The CSX Transportation (CSXT) SE Line connects to the Port of Wilmington and Hamlet Yard.
- Grains, Coal and chemicals make up the bulk of the regional rail tonnage.



Rail Bottlenecks and Constraints

- Along both the NS Main line and the CSX SF line at the ADM Mill in downtown Charlotte.
- The Charlotte Junction Wye, located west of downtown Charlotte, connecting the NS Main line and the R line.
- Aberdeen Carolina & Western Railway (ACW) corridor creating bottlenecks in CSX's North Davidson yard.
- Extensive CSX northwest yard terminal operation impacting local roadway networks.

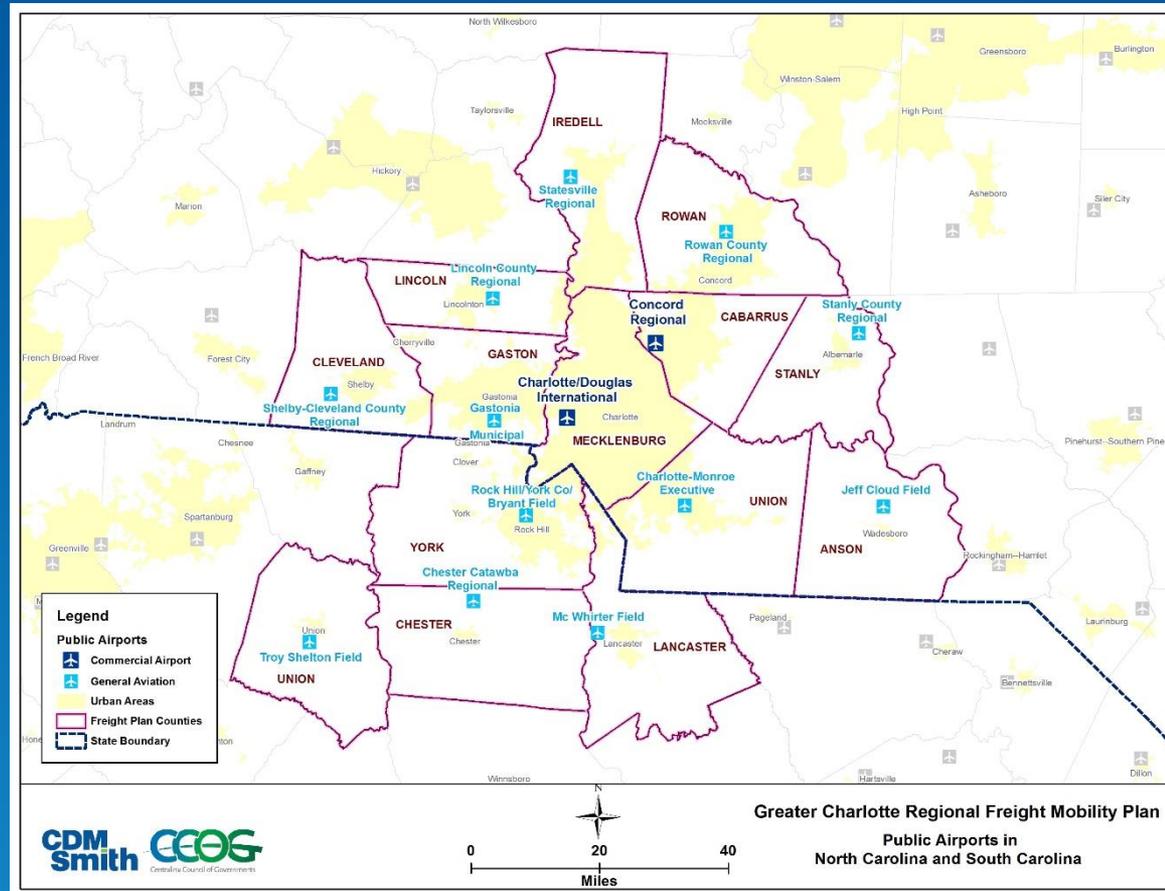




AIRPORTS

Regional Airports

- Airborne freight has the highest value per ton of any mode.
- Typical commodities include goods from the pharmaceutical, automotive, and high-tech manufacturing sectors.
- Charlotte-Douglas International Airport (CLT) handles virtually all air cargo in the Greater Charlotte Region and 42 percent of all air cargo in North Carolina.



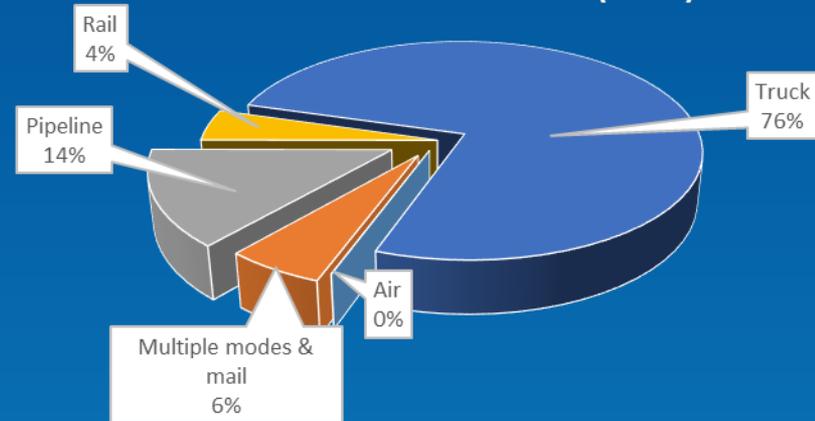


COMMODITY FLOWS

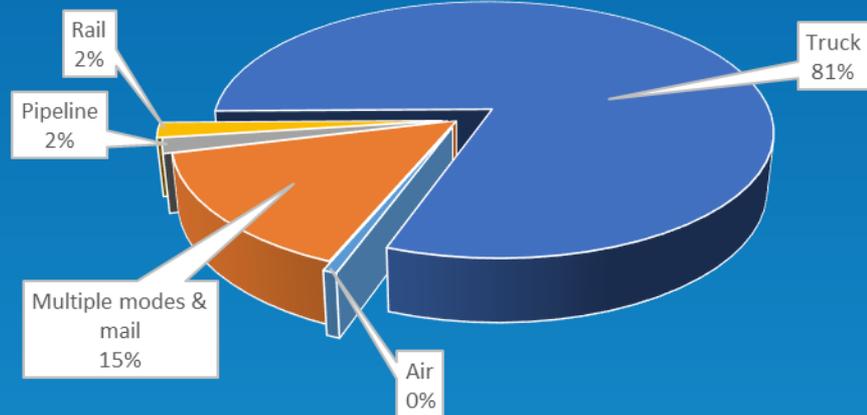
Regional Freight Tonnage and Value by Mode

- The majority of the region's freight tonnage and value is handled by trucks.
- Multiple modes & mail (intermodal containers and parcel deliveries) accounts for the 2nd highest mode in terms of value and 3rd in terms of tonnage.
- Rail accounts for 4% of the regions freight tonnage and 2% of its value.

FREIGHT TONNAGE BY MODE (2012)

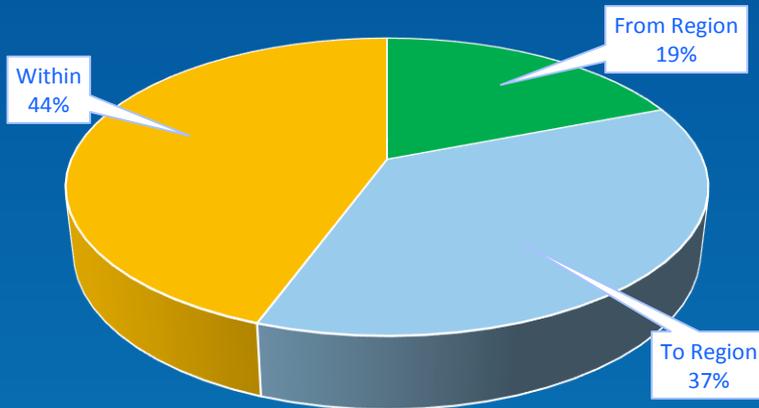


FREIGHT VALUE BY MODE (2012)

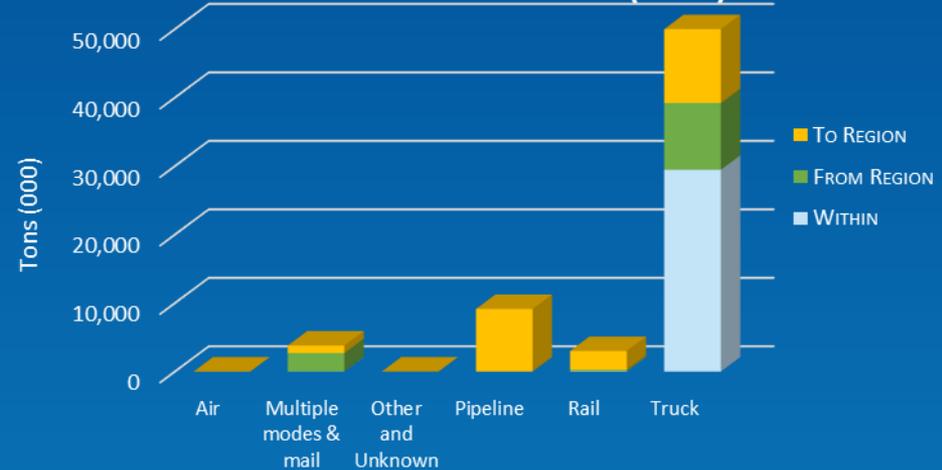


Regional Freight by Direction and Mode

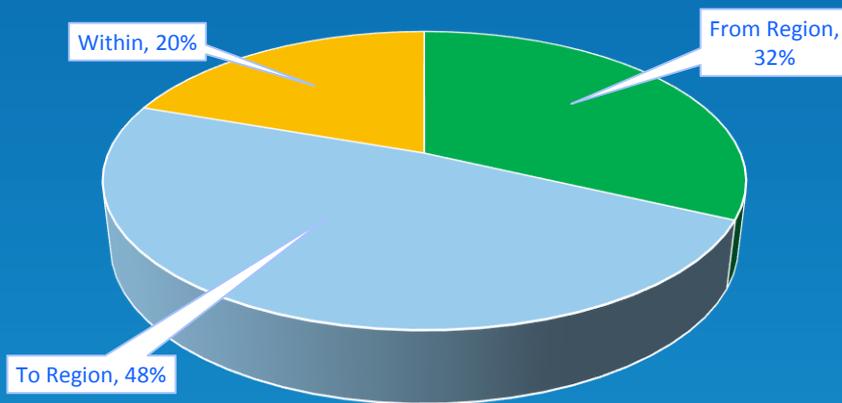
FREIGHT TONNAGE BY DIRECTION (2012)



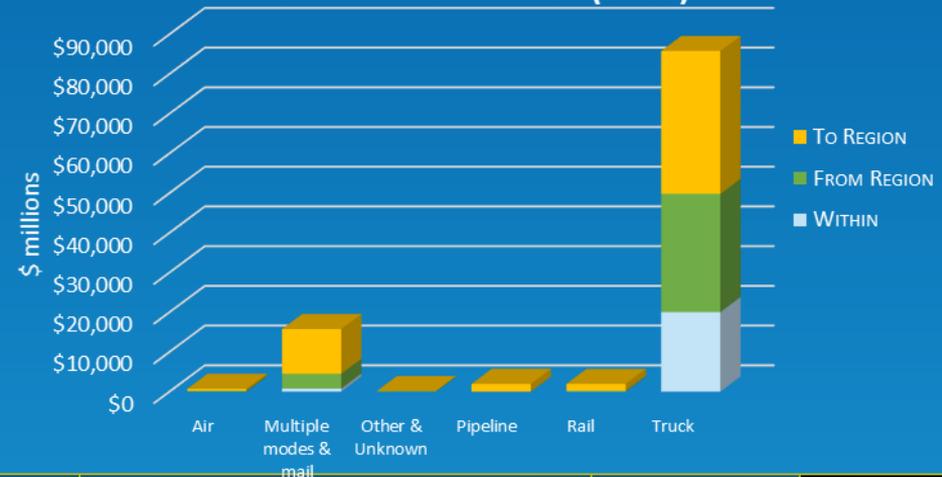
FREIGHT TONNAGE BY MODE (2012)



FREIGHT VALUE BY DIRECTION (2012)



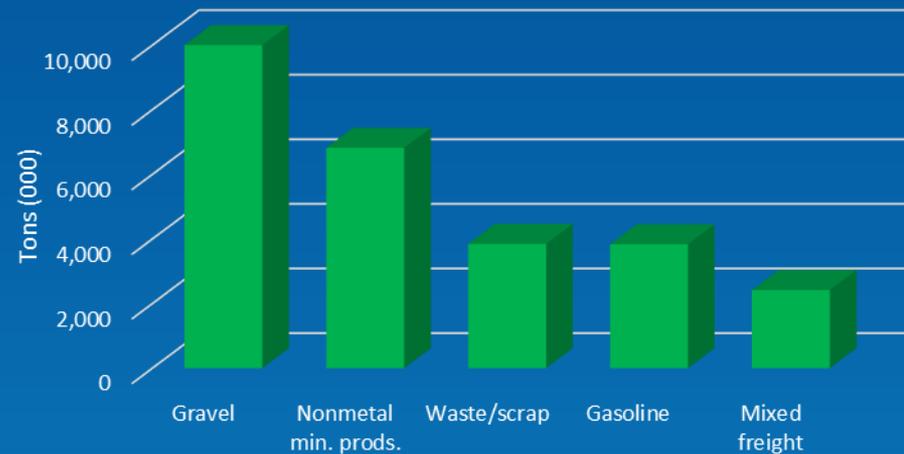
FREIGHT VALUE BY MODE (2012)



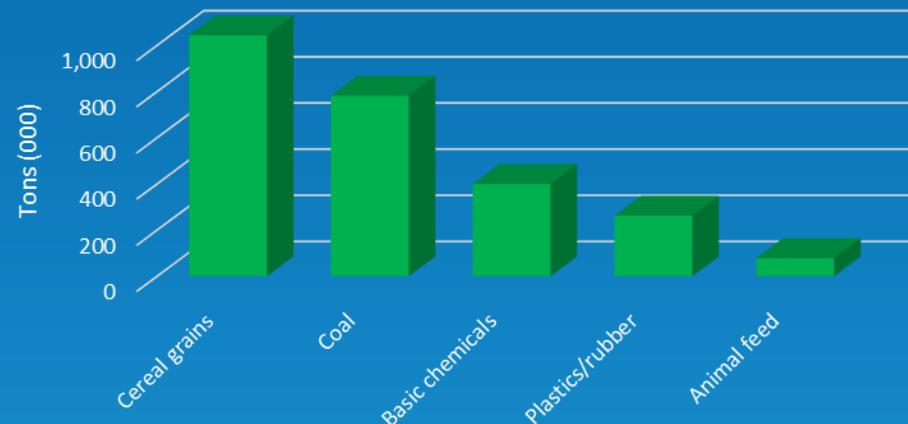
Top 5 Regional Freight Commodity Tonnages

- Knowing the major commodity groups allows the region to focus its freight transportation efforts on those most critical to the economy.
- Bulk materials dominate the tonnage being moved by both truck and rail.
- It is anticipated that coal shipments by rail will decrease in the coming years, providing additional capacity for other commodities.

TRUCK FREIGHT TOP COMMODITY TONNAGES (2012)

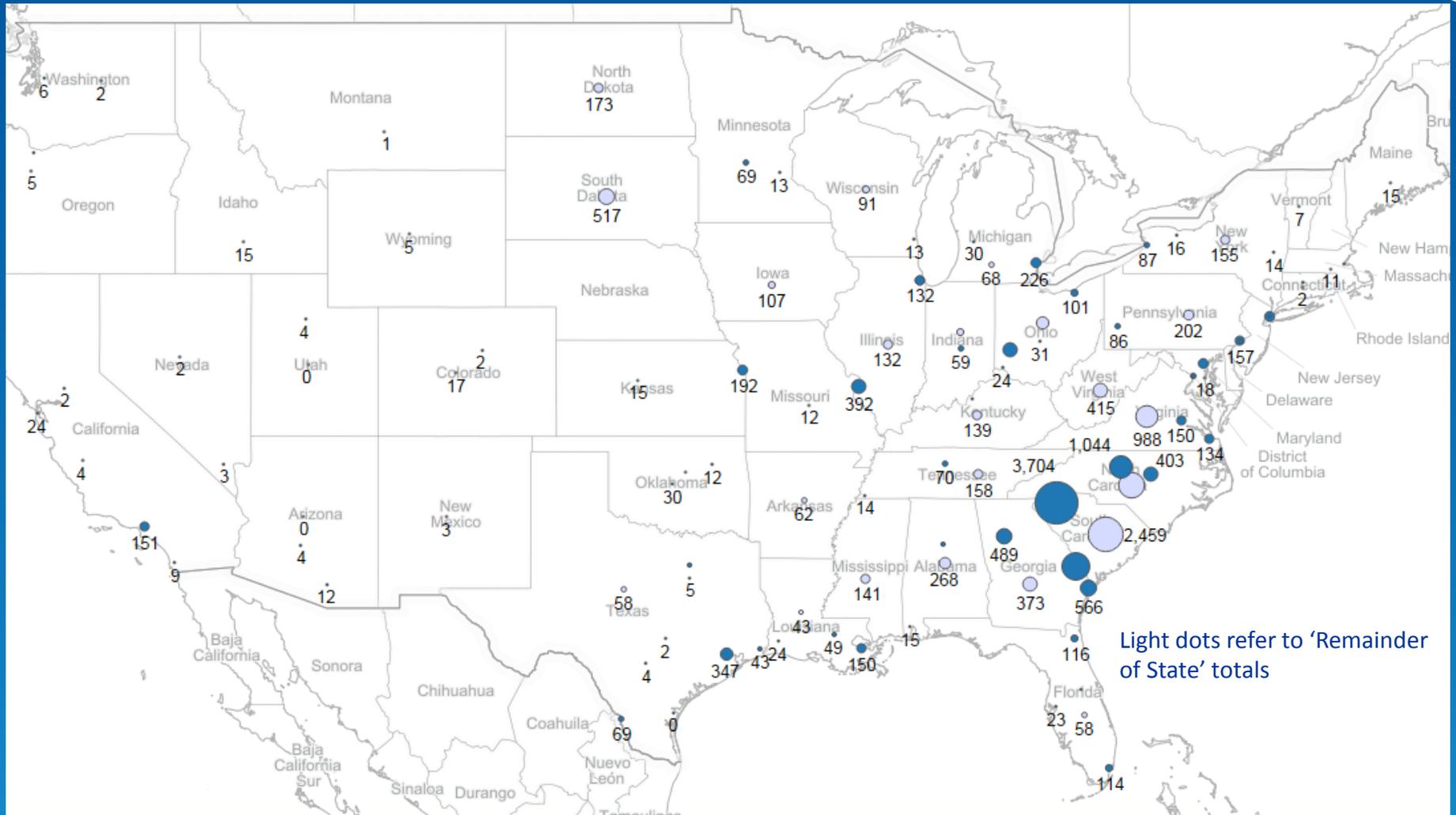


RAIL FREIGHT TOP COMMODITY TONNAGES (2012)



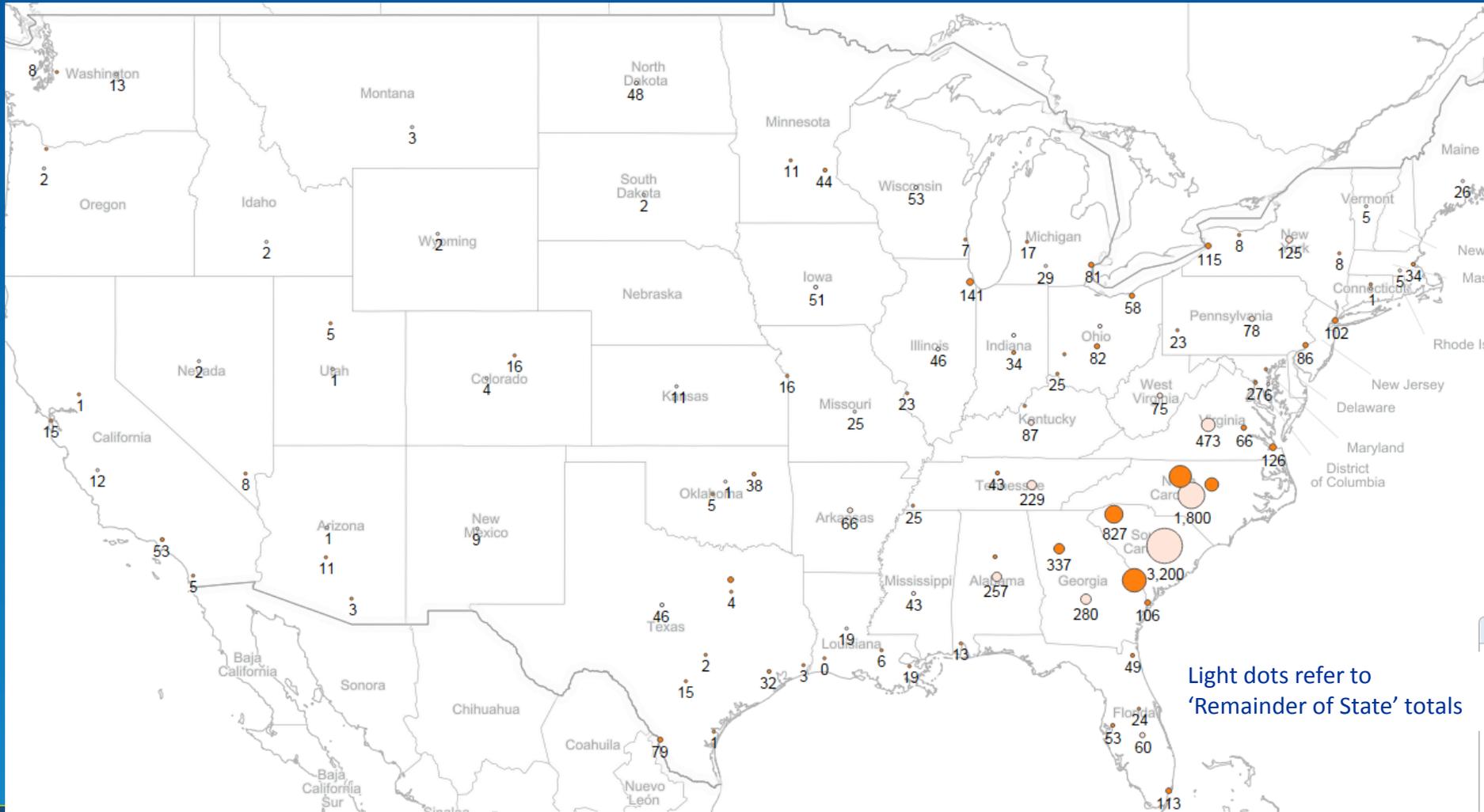
Origins of Freight Destined for the Region

Tons (000') in 2012



Destinations of Freight Originated in the Region

(Tons (000') in 2012)



Light dots refer to
'Remainder of State' totals

Greater Charlotte Regional Freight Mobility Plan

Freight Advisory Coordinating Committee Meeting #1

Questions?



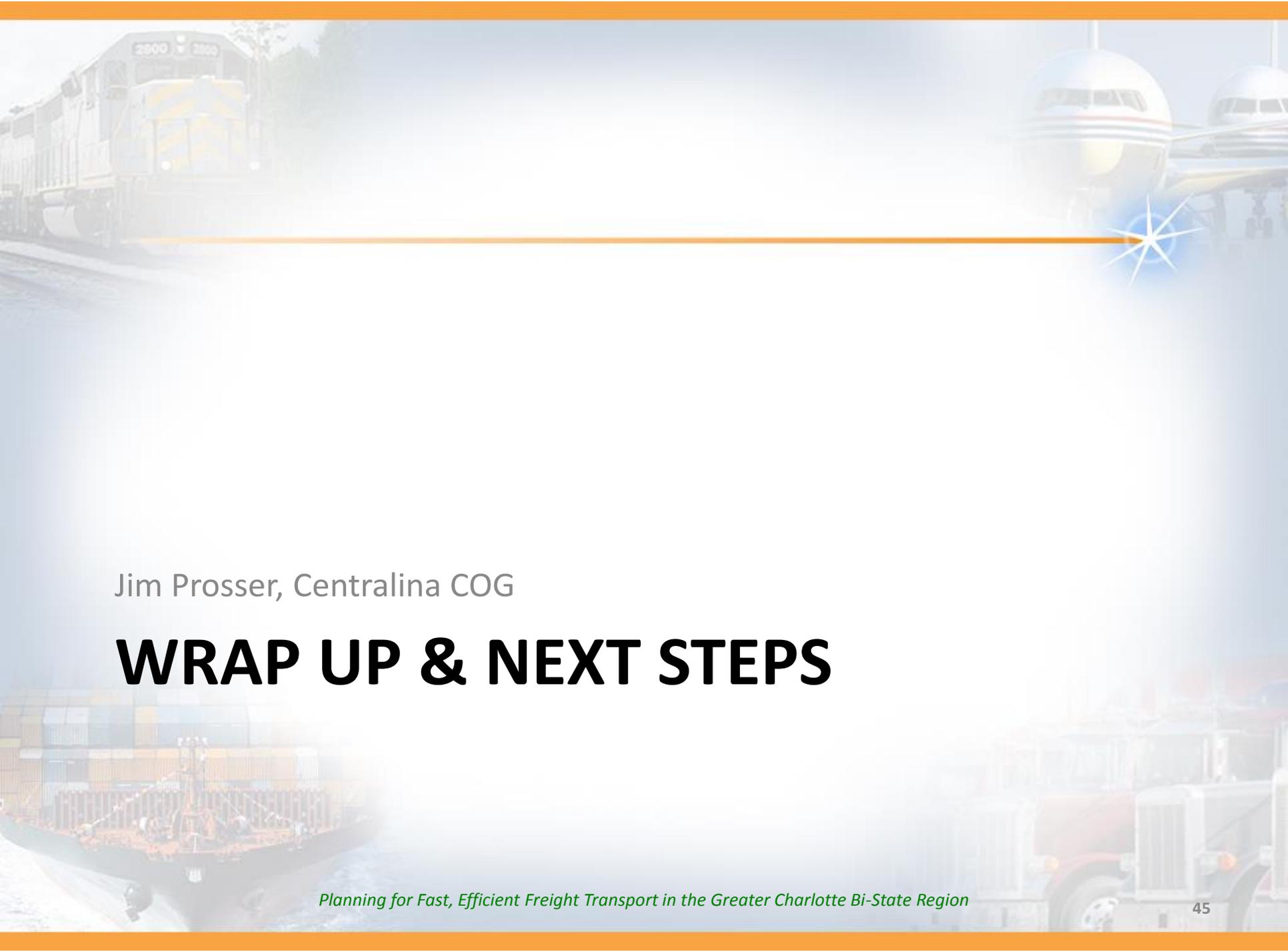


Jessica Hill, Centralina Council of Governments

GREATER CHARLOTTE REGIONAL FREIGHT MOBILITY PLAN EXISTING CONDITIONS DISCUSSION

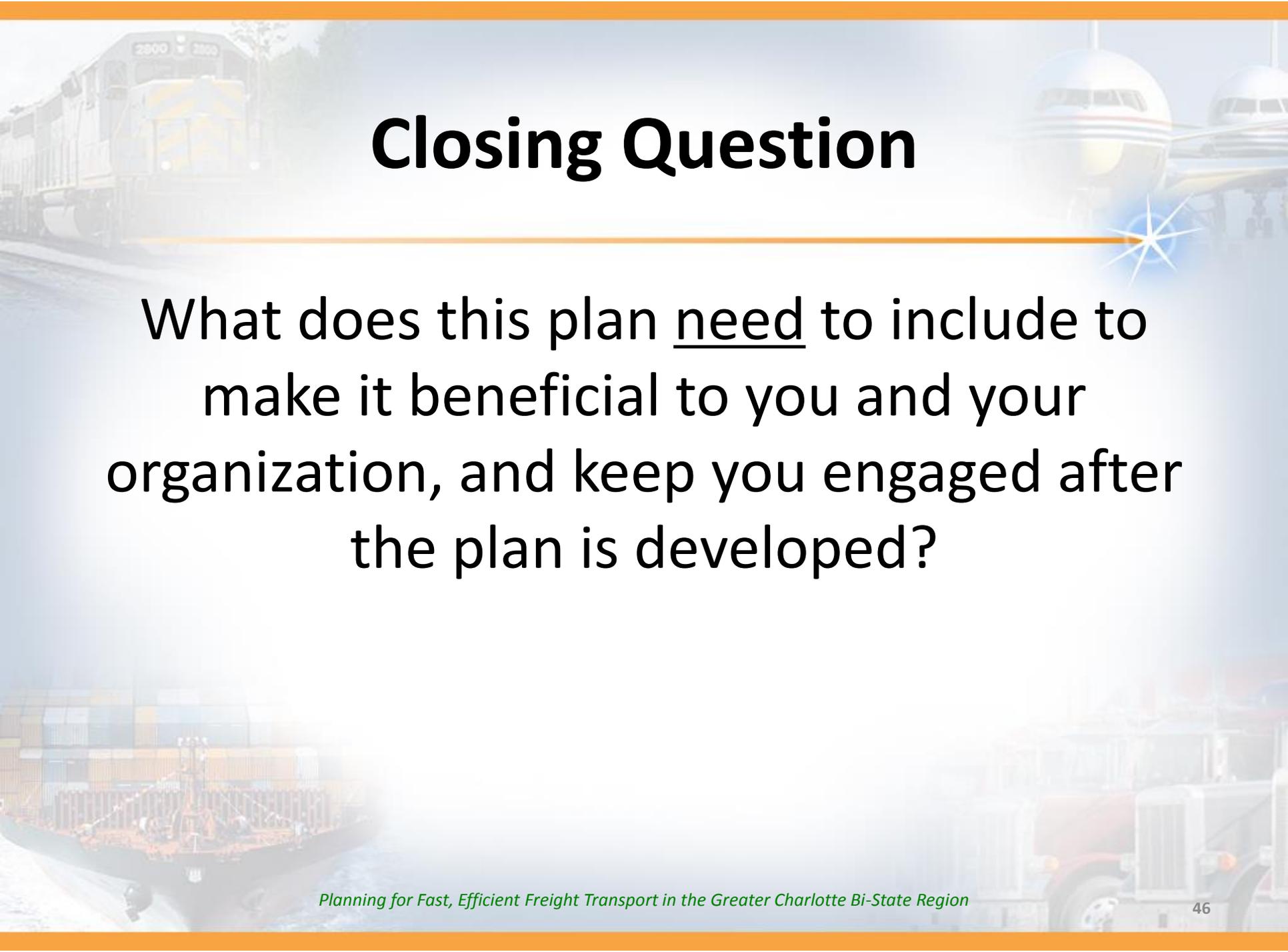
What should we be doing?

- What opportunities should a coordinated regional freight plan target?
- What actions should the region take to have a safe, reliable and efficient freight system?
- What changes to this region's freight system should we consider to help strengthen our economy?
- What can be done to enhance private sector participation in freight planning and coordination?
- What does this mean for our future?
- How do you see yourself helping to manifest?



Jim Prosser, Centralina COG

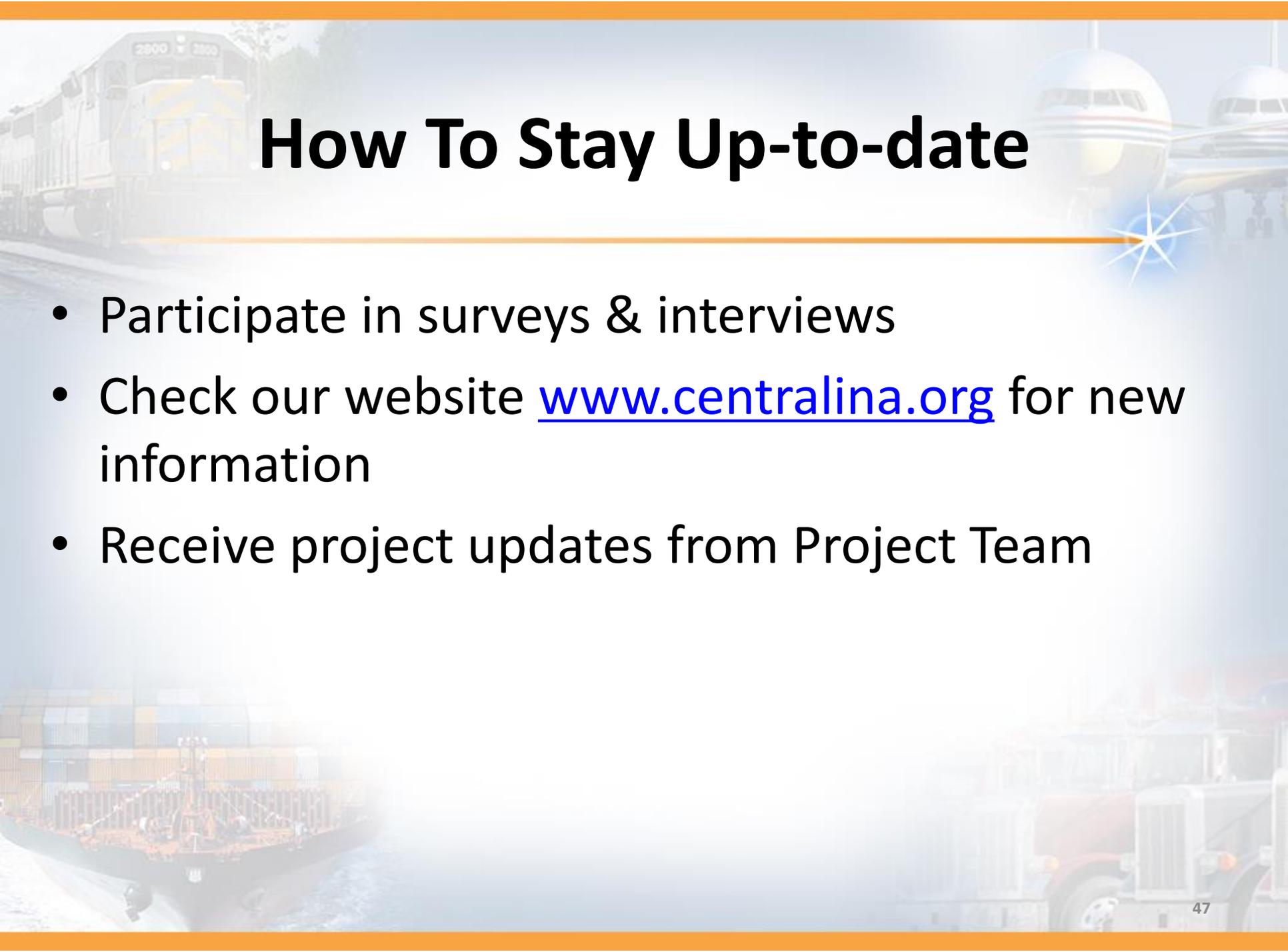
WRAP UP & NEXT STEPS



Closing Question

What does this plan need to include to make it beneficial to you and your organization, and keep you engaged after the plan is developed?

How To Stay Up-to-date



- Participate in surveys & interviews
- Check our website www.centralina.org for new information
- Receive project updates from Project Team

Thank You!

We are excited to work with each of you and get your input on the region's first Freight Mobility Plan to ensure that our region will continue to be economically competitive and a great place to live and work.

For more information, contact:

Jessica Hill, Centralina Council of Governments Senior Planner, at 704-348-2731 or jhill@centralina.org.

Pat Anater, CDM Smith Senior Project Manager, at 919-325-3555 or anaterpr@cdmsmith.com