



## Freight Master Plan Advisory Committee Agenda

April 2, 2015

3:30 p.m. – 5:10 p.m.

Location: Seattle Municipal Tower, 700 Fifth Avenue, Seattle  
41<sup>st</sup> Floor, Conference Room 4155

Project Team: Kevin O'Neill (SDOT), Sara Zora (SDOT), Ian Macek (SDOT), Gabriela Vega (SDOT), Chris Eaves (SDOT), Ron Borowski (SDOT), Craig Moore (SDOT), Chad Lynch (SDOT), Bridget Wieghart (PB)








- 1. Welcome and Introductions (5 minutes)** **3:30 – 3:35 p.m.**  
All
  
- 2. Existing Conditions Report (10 minutes)** **3:35 – 3:45 p.m.**  
SDOT
  
- 3. FMP Policy Framework: Vision and Goals (30 minutes)** **3:45 – 4:15 p.m.**  
SDOT and Committee
  
- 4. Infographic (20 minutes)** **4:15 – 4:35 p.m.**  
SDOT and Committee
  
- 5. Future Conditions Analysis (40 minutes)** **4:35 – 5:05 p.m.**  
SDOT
  
- 6. Future Meetings (5 minutes)** **5:05 – 5:10 p.m.**  
SDOT







# Freight Master Plan

Advisory Committee Meeting  
April 2, 2015

# Existing Conditions Report - feedback

	Status	Notes
Correct output volumes for Olympic Pipeline		
Add topo map		Scale for clarity of topo difficult to achieve on letter size paper
Explain the importance to Alaska		Additional information included in report
Missing volumes/add more count stations		10 key locations added
Where/what restrictions in Seattle for flammable and hazardous materials. What routes can trucks use?		<a href="http://www.seattle.gov/transportation/freight.htm">http://www.seattle.gov/transportation/freight.htm</a> . Reference added in report.
Incorporate FAP information and recommendations into the FMP		Some has been included in existing conditions report. Other sections as FMP progresses
Understanding crashes with more detail		Will expand in Existing Conditions
How much curbspace is available?		Loading space numbers provided within report

# Existing Conditions Report - feedback

	Status	Notes
Local supply chain graphic		Infographic created
Include additional data on health/environmental impacts		Section 3.3 of Existing Conditions report
Include more specific information on Port facilities		Will review FAP information to include
Show % of all traffic with truck volume map		Will generate with new counts
Include a multimodal facilities map		Map included in report
Include Freight Economic Corridors and other routes in addition to MTS		Will review for inclusion
Additional assessment of locations with high crash rate – why? who?		Will review for inclusion
Future analysis		Discussion of future analysis during April 2, 2015 meeting

# SDOT's mission, vision, and core values

**Mission:** deliver a high-quality transportation system for Seattle

**Vision:** connected people, places, and products

Committed to **5 core values** to create a city that is:

- Safe
- Interconnected
- Affordable
- Vibrant
- Innovative



# Draft FMP Vision Statement

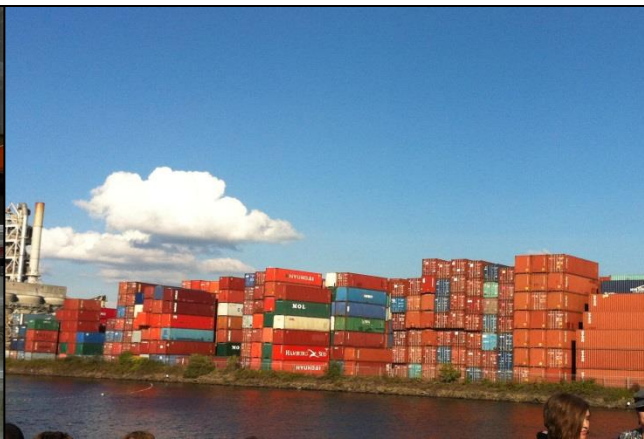
**VISION (January 29):** A vibrant city and thriving economy connecting people and products.

**PROPOSED VISION:** A vibrant city and thriving economy connecting people and products within Seattle and to regional and international markets.



# Draft FMP Goals

- **Economy (new)** – Provide a freight network that supports a growing economy for Seattle and the region.
- **Safety (no change)** - Improve safety and the predictable movement of goods and people.



# Draft FMP Goals (continued)

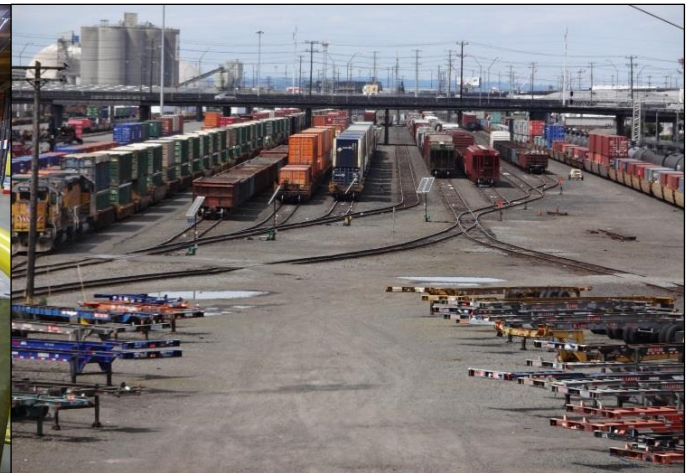
- **Mobility (no change)** - Reliably connect manufacturing/industrial centers and business districts with the local, state, and international freight networks.





# Draft FMP Goals (continued)

- Preservation (January 29) - Improve the state of good repair of the freight transportation network.
- State of Good Repair (proposed) – Maintain and improve the freight transportation network to ensure safe and efficient operations.



# Draft FMP Goals (continued)

- **Equity (January 29)** - Benefit residents and businesses of Seattle through equity in investments and public engagement relating to freight mobility.
- **Equity (proposed)** – Benefit residents and businesses of Seattle through equity in freight investments and improve the health of communities impacted by freight movement.



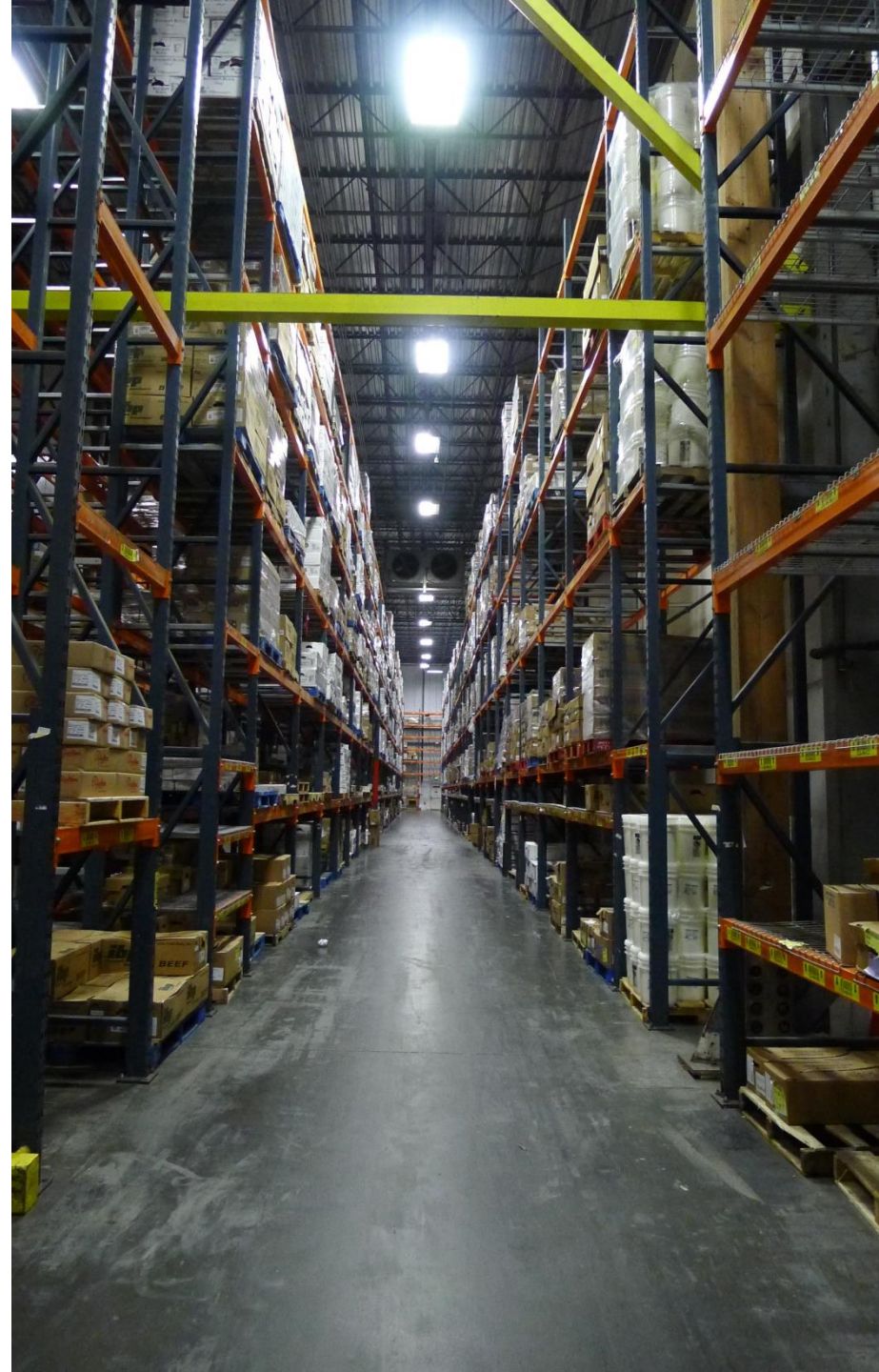
# Draft FMP Goals (continued)

- **Environment (January 29)** - Improve the environment through a resilient freight system.
- **Environment (proposed)** - Improve freight operations in Seattle and the region by making goods movement more efficient and reducing its environmental footprint



# Supply Chain: Infographic

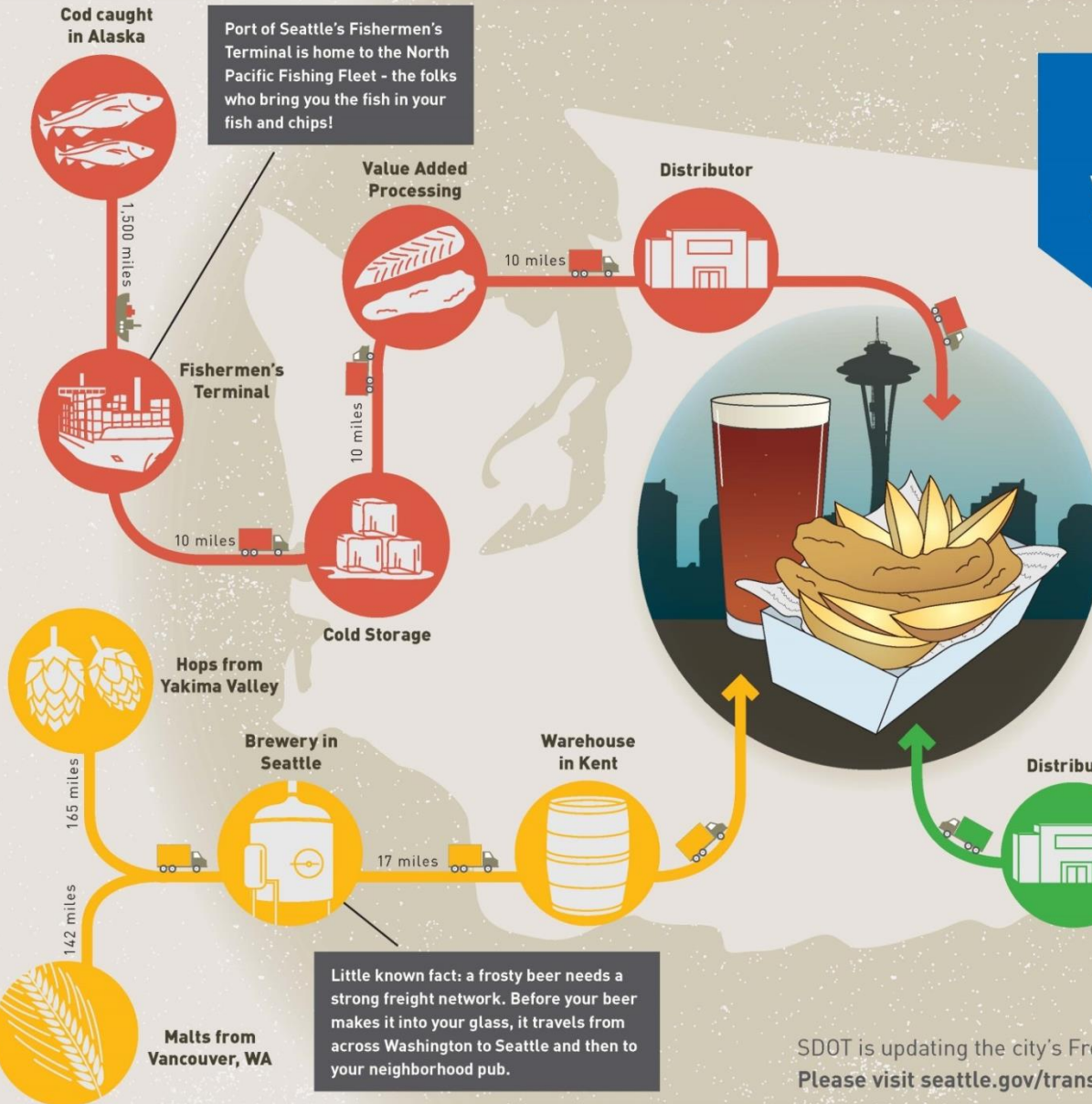
- Provide goods and services from a source of production to the point of consumption
- Many logistical steps to move one product
- Infographic will serve as educational tool for the Freight Master Plan



# This meal brought to you by Seattle's freight networks!

This meal has to travel nearly **2,000 FREIGHT MILES** to get to your plate

(and that doesn't even include the glass, paper plate and more!)



Potatoes grown in Eastern Washington

In order to make it to the big leagues (your plate) Washington potatoes depend on trucks to get them to a processor, a fryer, and finally to their place of honor next to your fish.

SDOT is updating the city's Freight Master Plan and we want your input. Please visit [seattle.gov/transportation/freight\\_fmp.htm](http://seattle.gov/transportation/freight_fmp.htm) to learn more.

# Future Conditions Analysis Methodology

## Overview

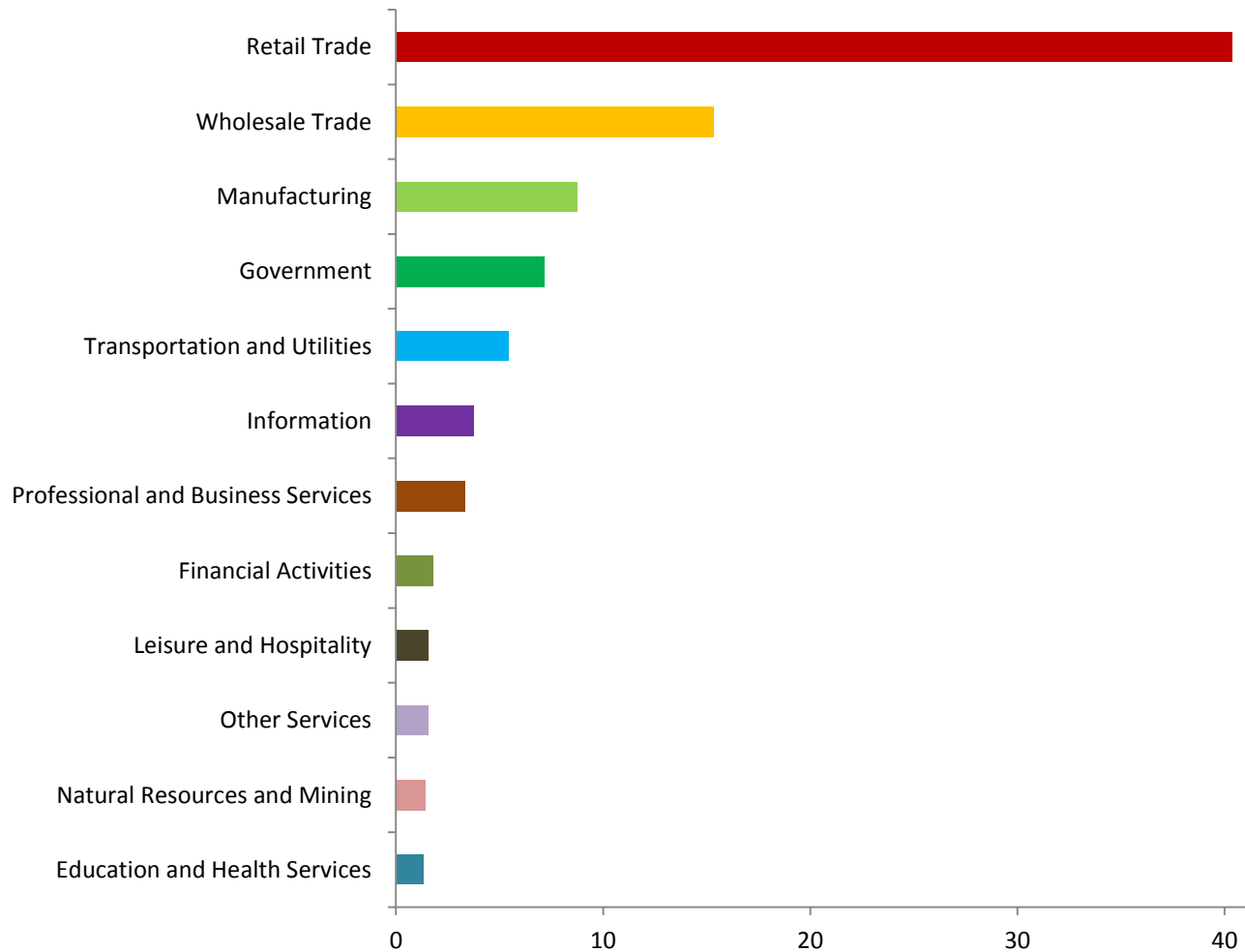
1. Seattle's Economy and Freight
2. Economic and Freight Trends
3. Projected Regional Freight Growth
4. Applying Truck Growth Factors
5. Next Steps

# Seattle's Economy and Freight

- Seattle's development as a port city
- Analyze freight generating industries
- Freight forecast based on employment and freight trends
- Consider broader trade forecasts



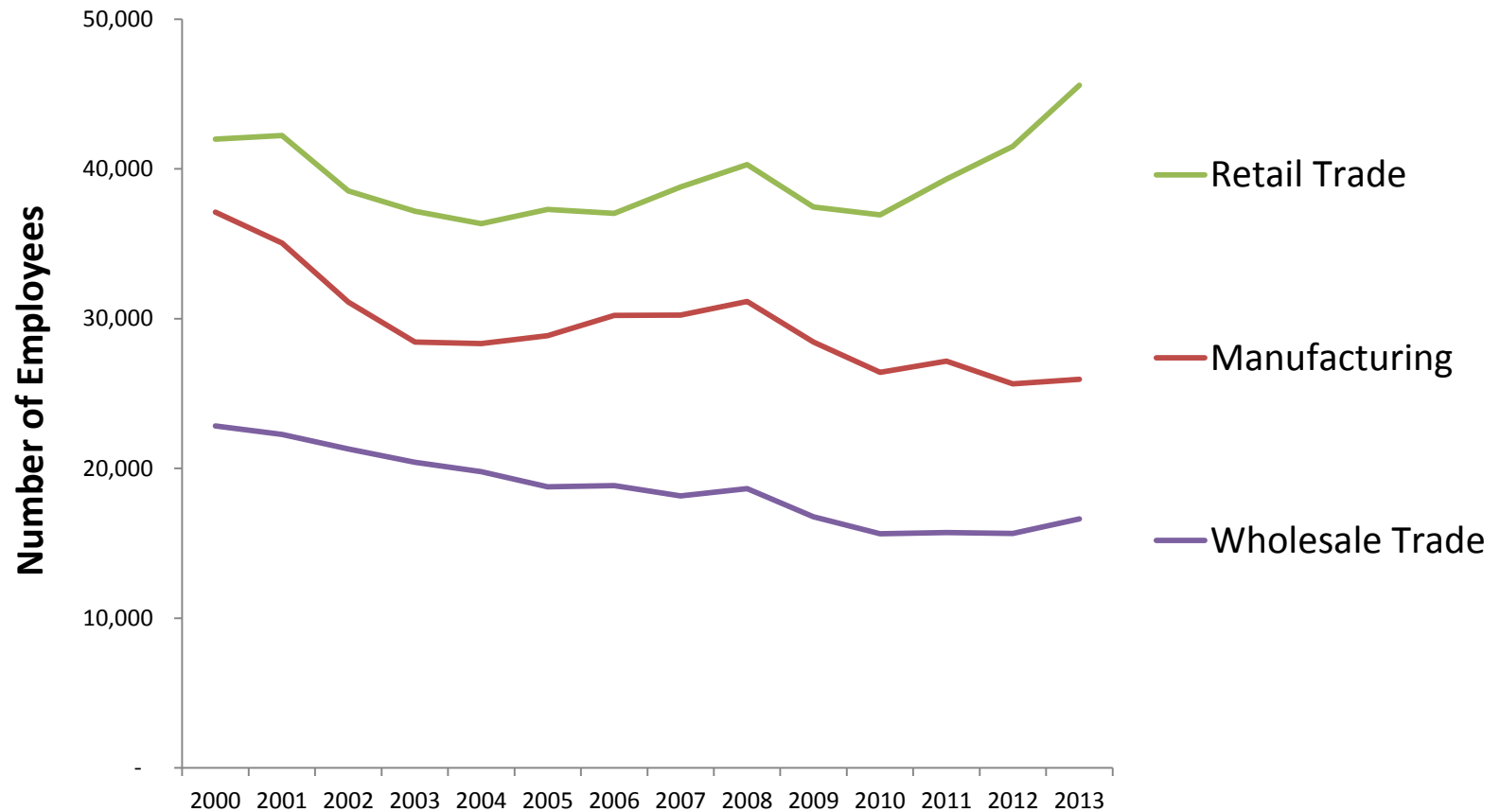
# US Industry Use of Trucking and Warehousing (\$Billions)



Source: US Bureau of Economic Analysis and Parsons Brinckerhoff Analysis



# Seattle's Employment in Freight Generating Industries



Source: Puget Sound Regional Council and Parsons Brinckerhoff analysis

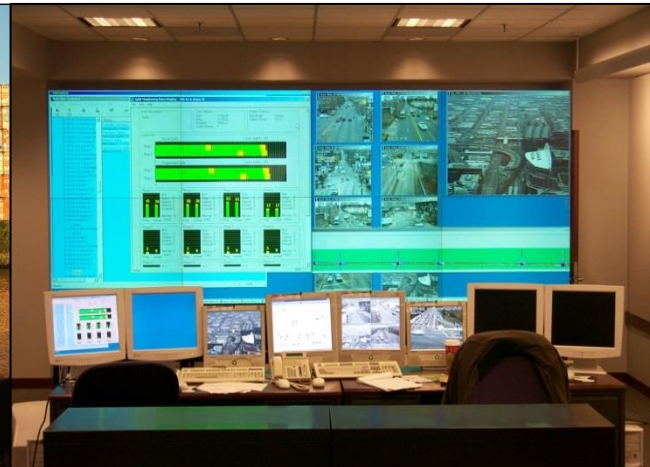
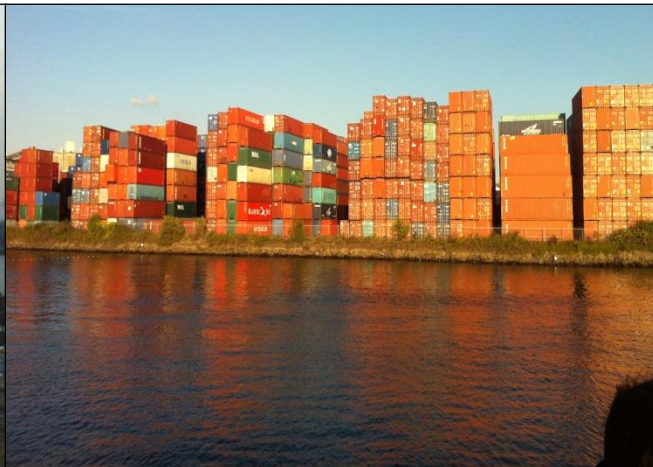
# Transportation Services

	US Total	King County	County Share of US
<b>Total Private</b>	112,958,334	1,041,080	0.9%
<b>48-49 Transportation and warehousing</b>	4,246,329	41,296	1.0%
<b>481 Air transportation</b>	448,618	9,914	2.2%
<b>483 Water transportation</b>	65,988	3,230	4.9%
<b>4841 General freight trucking</b>	941,184	4,202	0.4%
<b>4883 Support activities for water transportation</b>	92,095	2,196	2.4%
<b>4885 Freight transportation arrangement</b>	187,720	4,063	2.2%
<b>493 Warehousing and storage</b>	708,067	2,905	0.4%

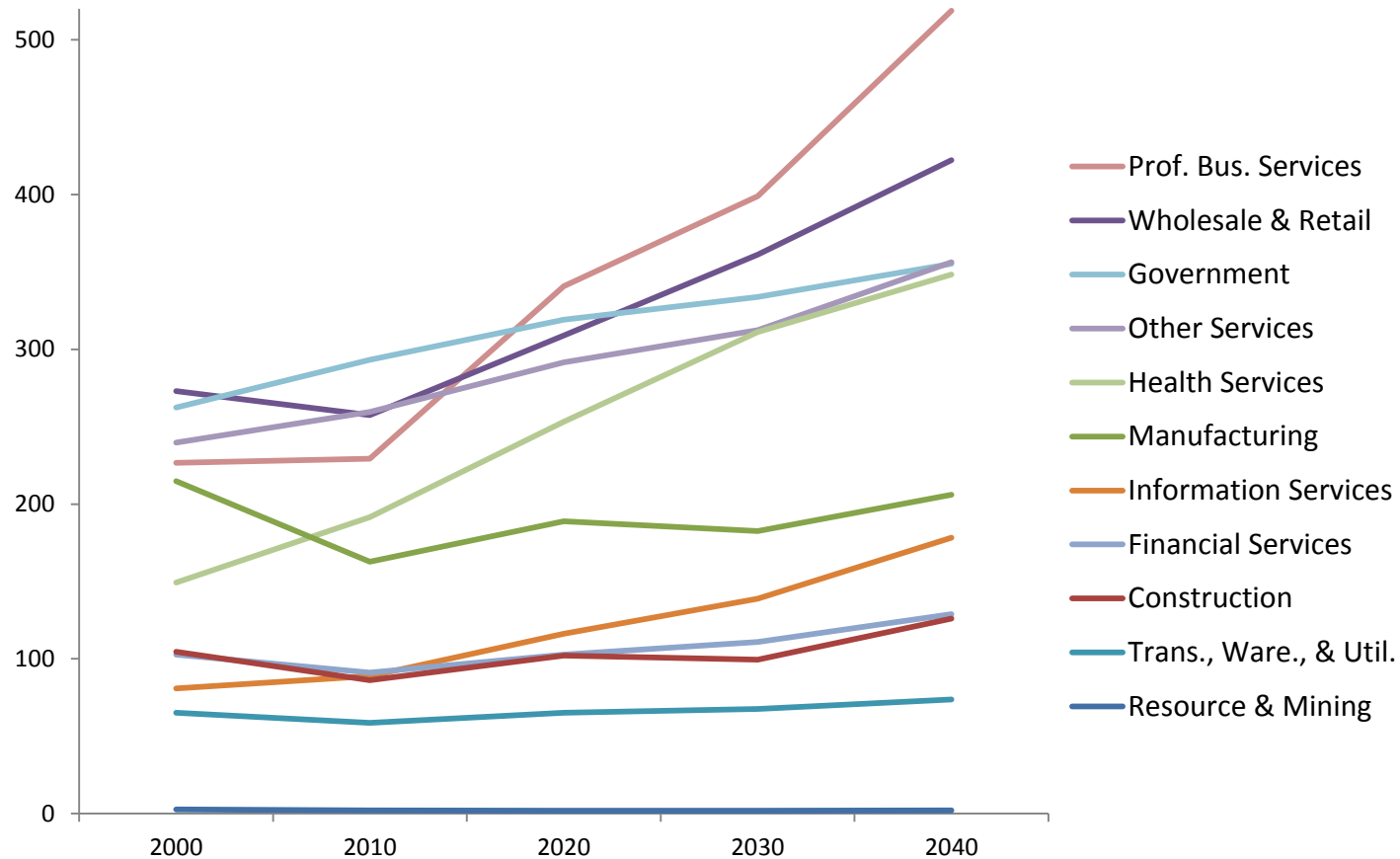
2013 Freight-Related Transportation Services Employment in the US and the Seattle Region

# Distribution Economy Beyond Seattle

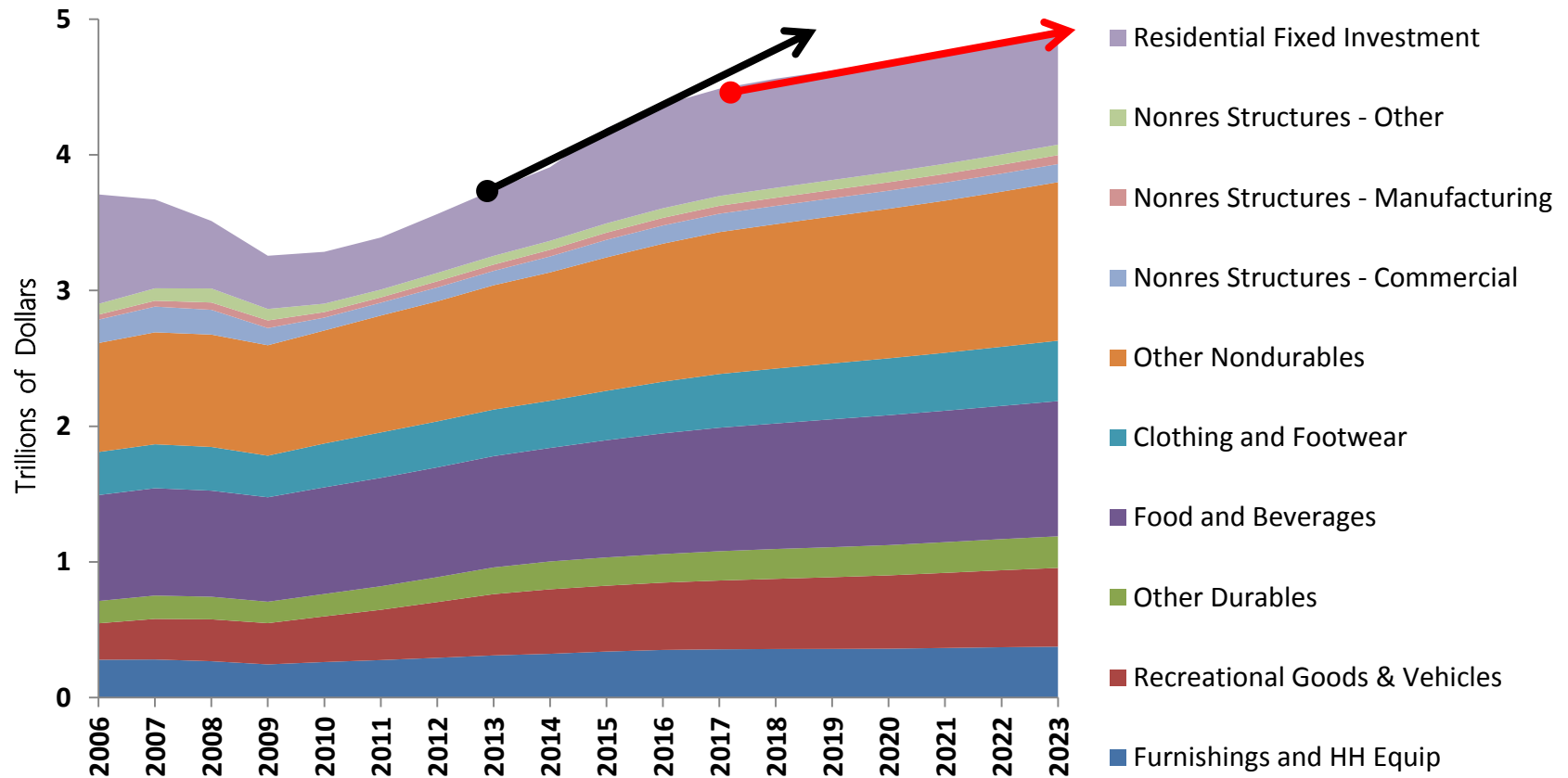
- 60 million tons total for combined Ports of Seattle and Tacoma
- 45-48% to/from Washington State
- Midwest is next most significant destination
- California (7%) and Oregon (2.8%) imports
- Air Cargo at Sea-Tac, Boeing and Paine Fields
- Truck is a critical component for most trips



# Seattle's Future Employment Forecast by Sector



# Total of Real GDP Components



Source: Parsons Brinckerhoff, Los Angeles Economic Development Corporation International Trade Outlook Conference, June 5, 2014

# Port Mode Share Trend

- Major growth in waterborne trade through Seattle
- Greater portion of imports will be by rail, exports by truck
- Exports growing faster than imports
- Trucks will be increasing

# Regional Freight Growth

## Domestic

- Retail and wholesale employment growing faster than other industries
- Manufacturing employment is declining relatively but productivity is increasing
- Overall employment is growing at 1.6%
- Freight related employment expected to grow faster

## International

- Short term high increase due to residential demand
- Flattening to 1.6% over long term

# Regional Truck Forecast

- 2035 Future Year
- 1.6-2.5% growth annually
- Assume average of 2%
- For a total truck volume increase of 55% by 2035





# Other Recent Projections

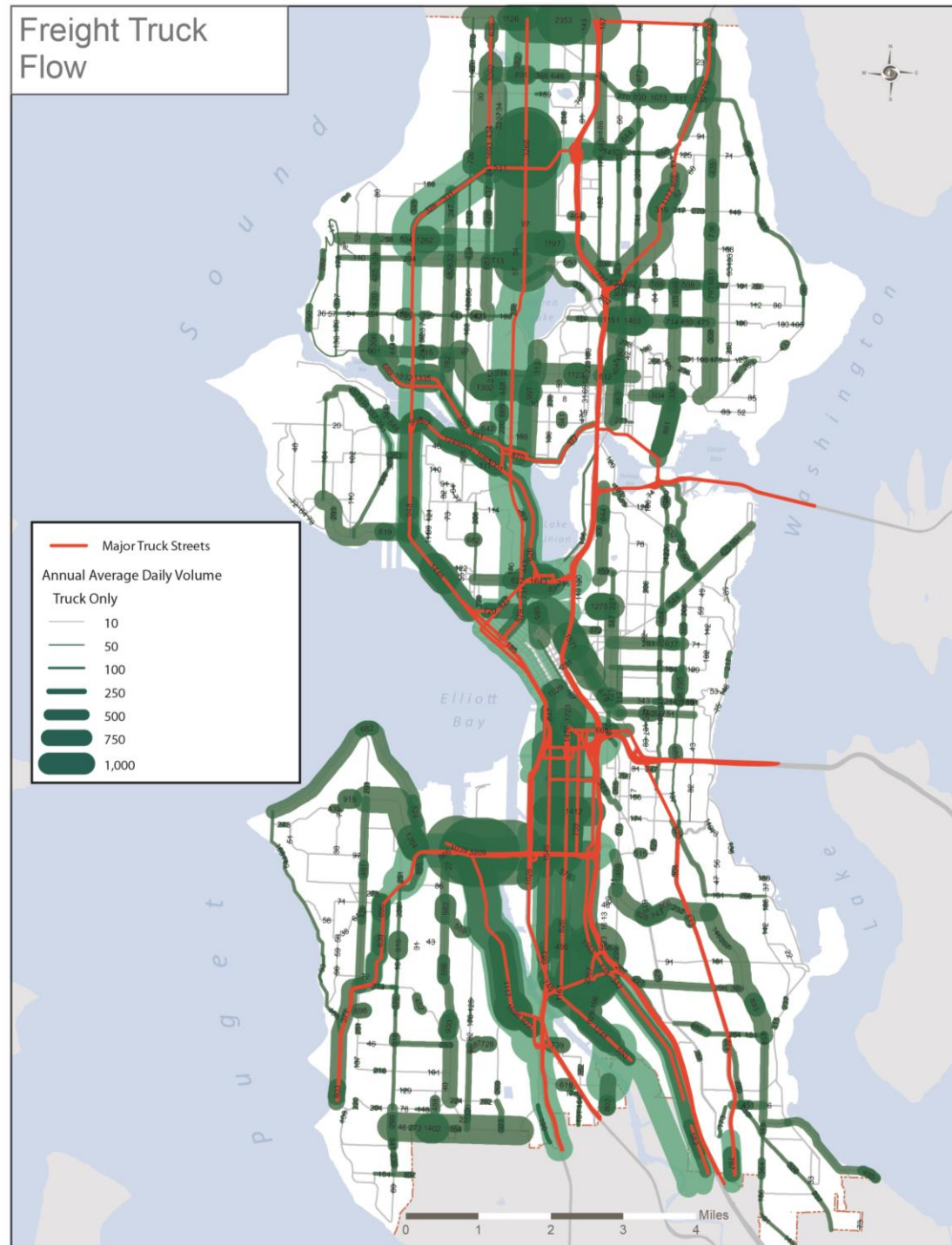
Source	Time Period	Estimate and Assumptions
WSDOT Freight Mobility Plan	2011-2030	Statewide truck annual growth = 3.1%
FHWA Freight Analysis Framework (FAF3)	2012-2035	Annual domestic freight = 2.4%
FHWA Freight Analysis Framework (FAF3)	2012-2040	Annual domestic freight = 2.16%
Cambridge Systematics for Freight Access Project based on FAF3	2011-2035	Annual domestic = 2.7%
American Trucking Association	2013-2024	Annual national total general and bulk TL, LTL and private carrier = 2.0%

# Future Truck Volume Assignment

1. Update Existing Truck Flow map
2. Define geographic districts
3. Assign growth factors
  - Employment
  - Residential
  - Adjusted truck growth
4. Calibrate based on other studies
5. Apply growth factors

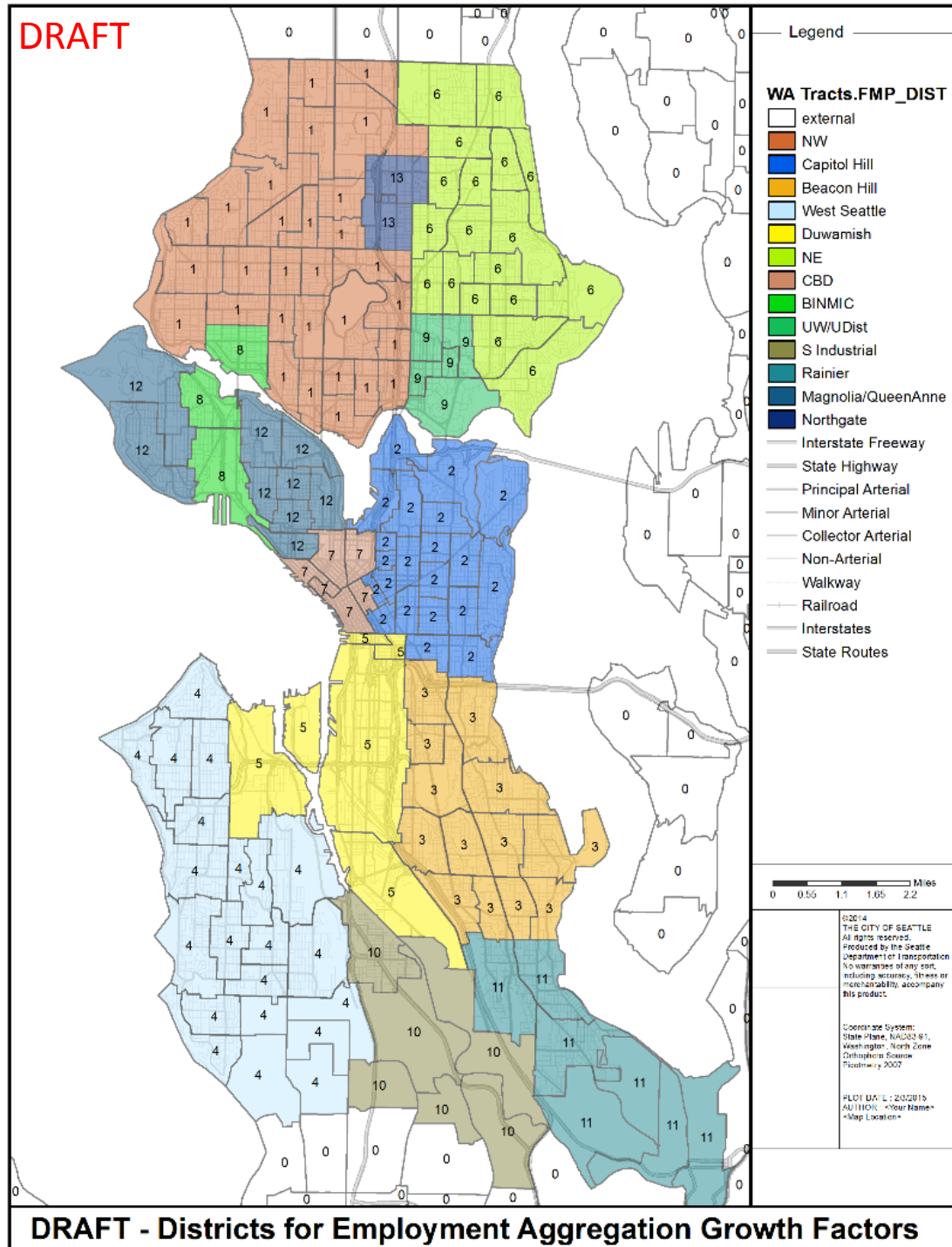
# 1 Update Truck Flow Map

- 780 existing count locations
- 10 additional count locations



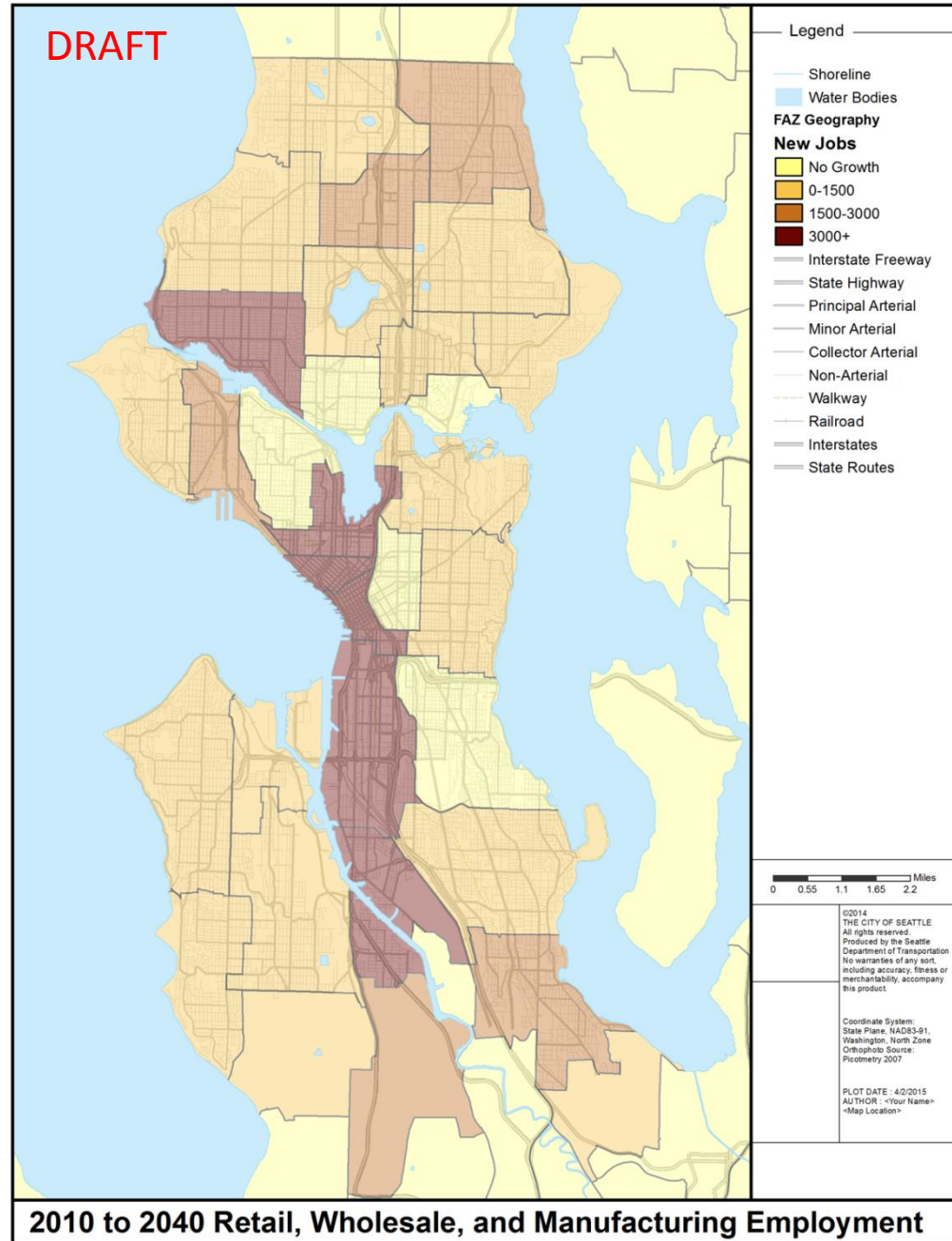
# 2 Define geographic districts

- Comprised of census tracts
- Grouped by similar land use



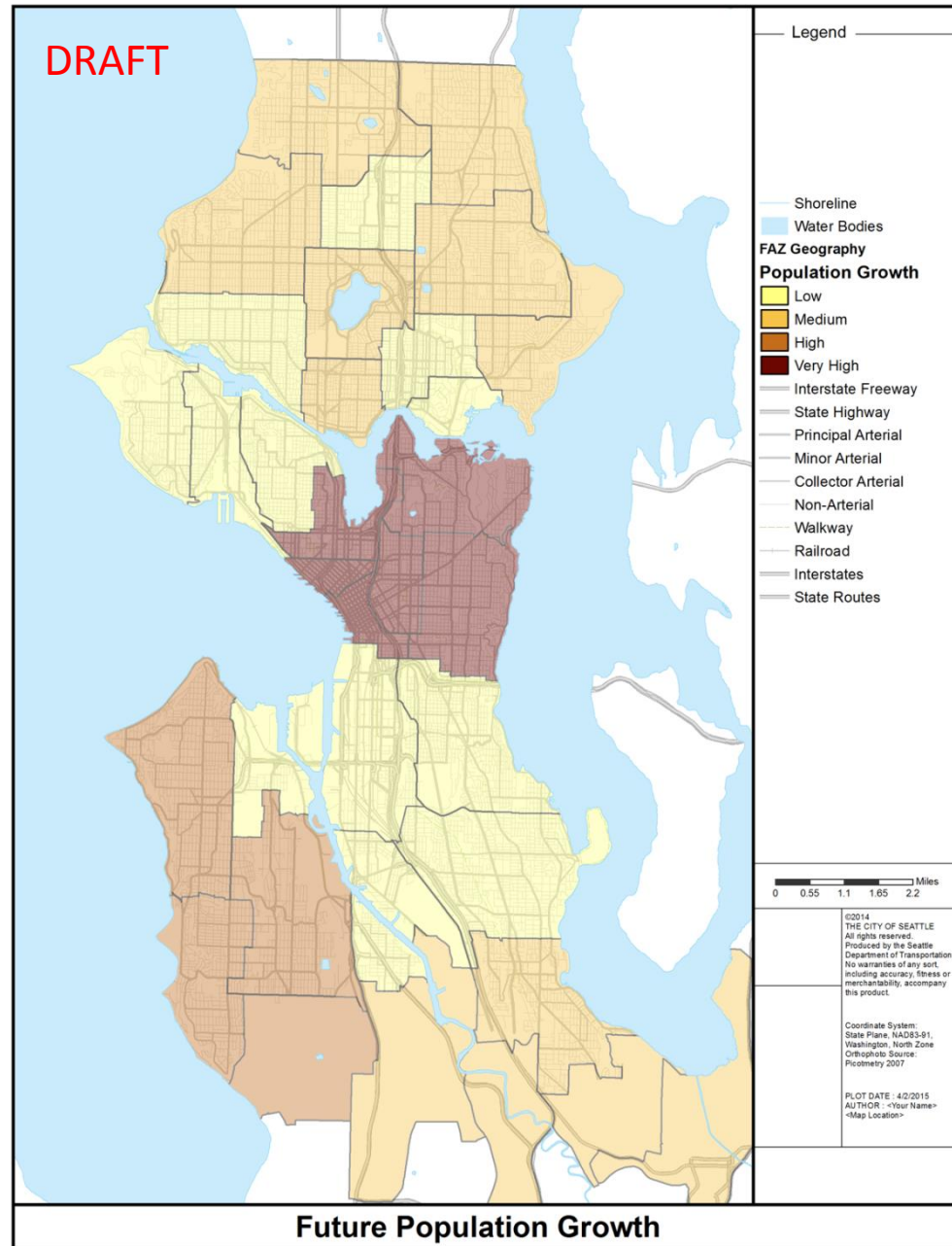
# 3 Assign Growth Factors

- Employment growth in freight generating industries



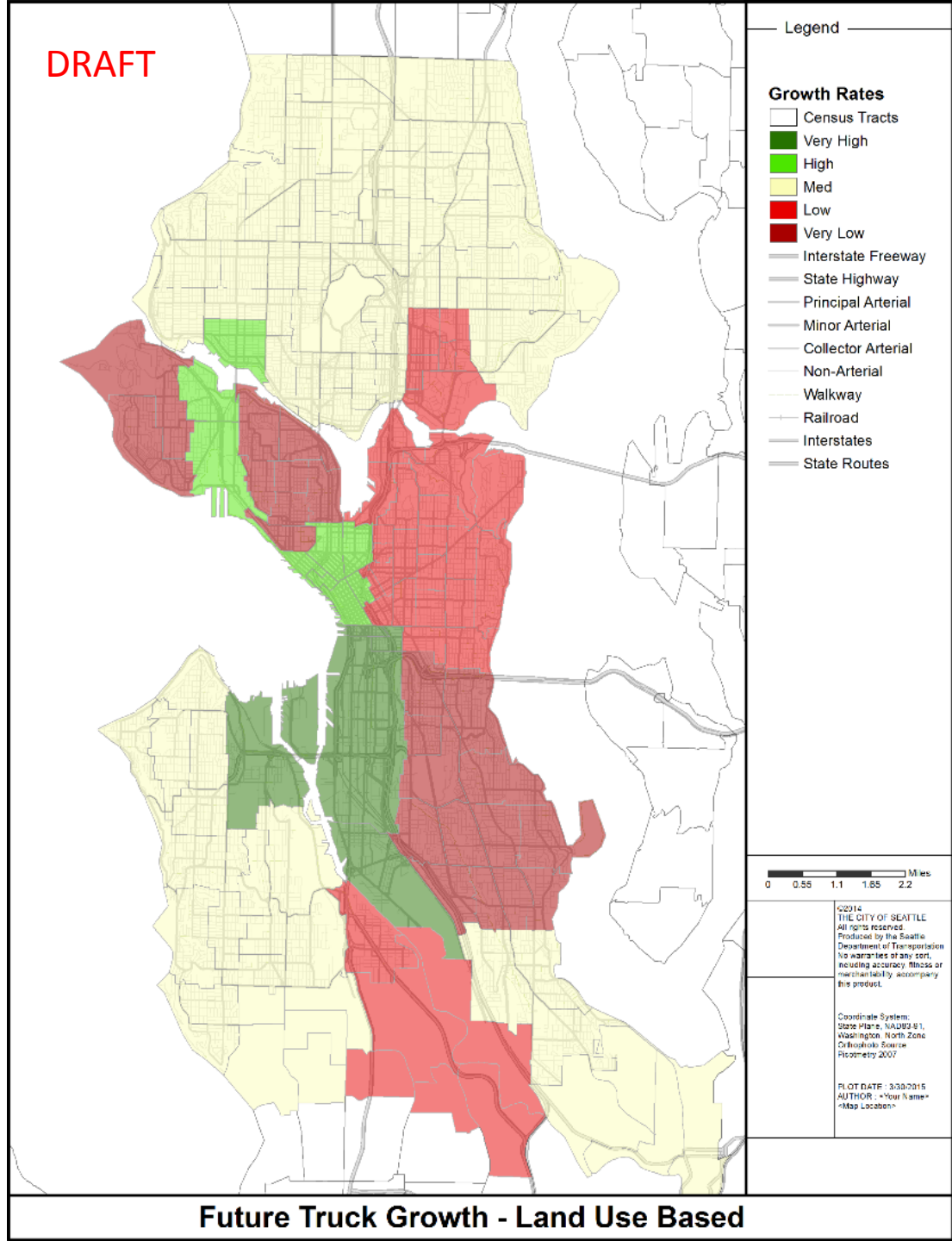
# 3 Assign Growth Factors

- Residential growth citywide
- Overlay with Urban Village Strategy growth areas



# 3 Adjusted Truck Growth

- Rates based on new jobs in freight generating industries
- Increase areas with very high residential growth



# 4 Calibrate

Compare future volumes against other recent projections

- FAP truck volumes in Duwamish and Ballard
- PSRC truck volumes on major regional routes
- Container Terminal Access Study (if available)





# Next steps

April - May	Evaluate Future Conditions
May - June	Update Freight Network
Summer	Identify Needs, Improvements and Design Guidelines
Fall	Develop Implementation Strategy
Fall	Draft Plan
Winter	Recommended Freight Master Plan



STAKEHOLDER ENGAGEMENT AND PUBLIC OUTREACH

# Questions?

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<http://www.seattle.gov/transportation/freight.htm>

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