

# North Florida Freight, Logistics & Intermodal Framework Plan

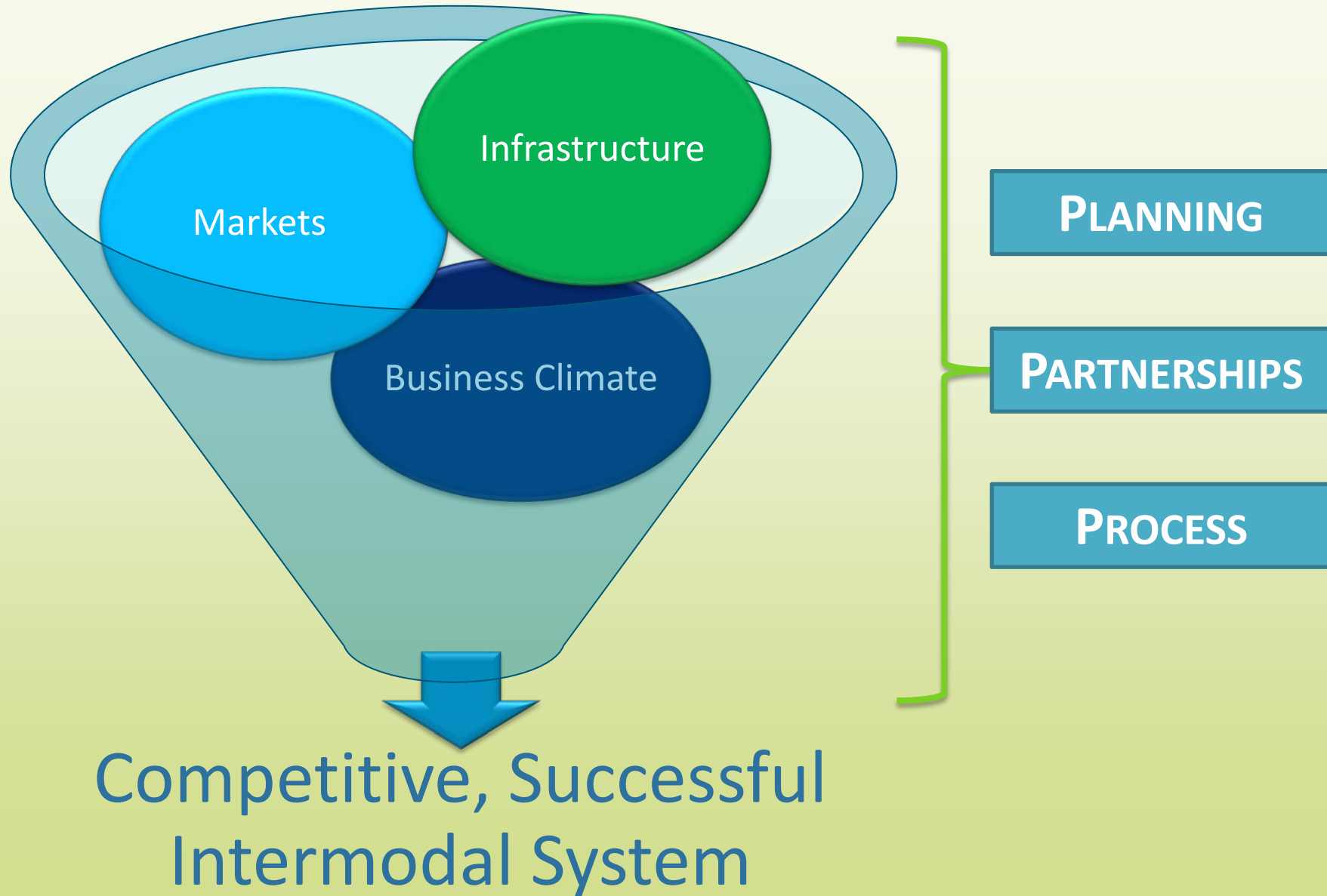
Presentation to the Florida Transportation Commission  
December 5, 2012



LOGISTICS ADVISORY GROUP (LAG)



# What We Have Learned



# Timeline of Key Activities





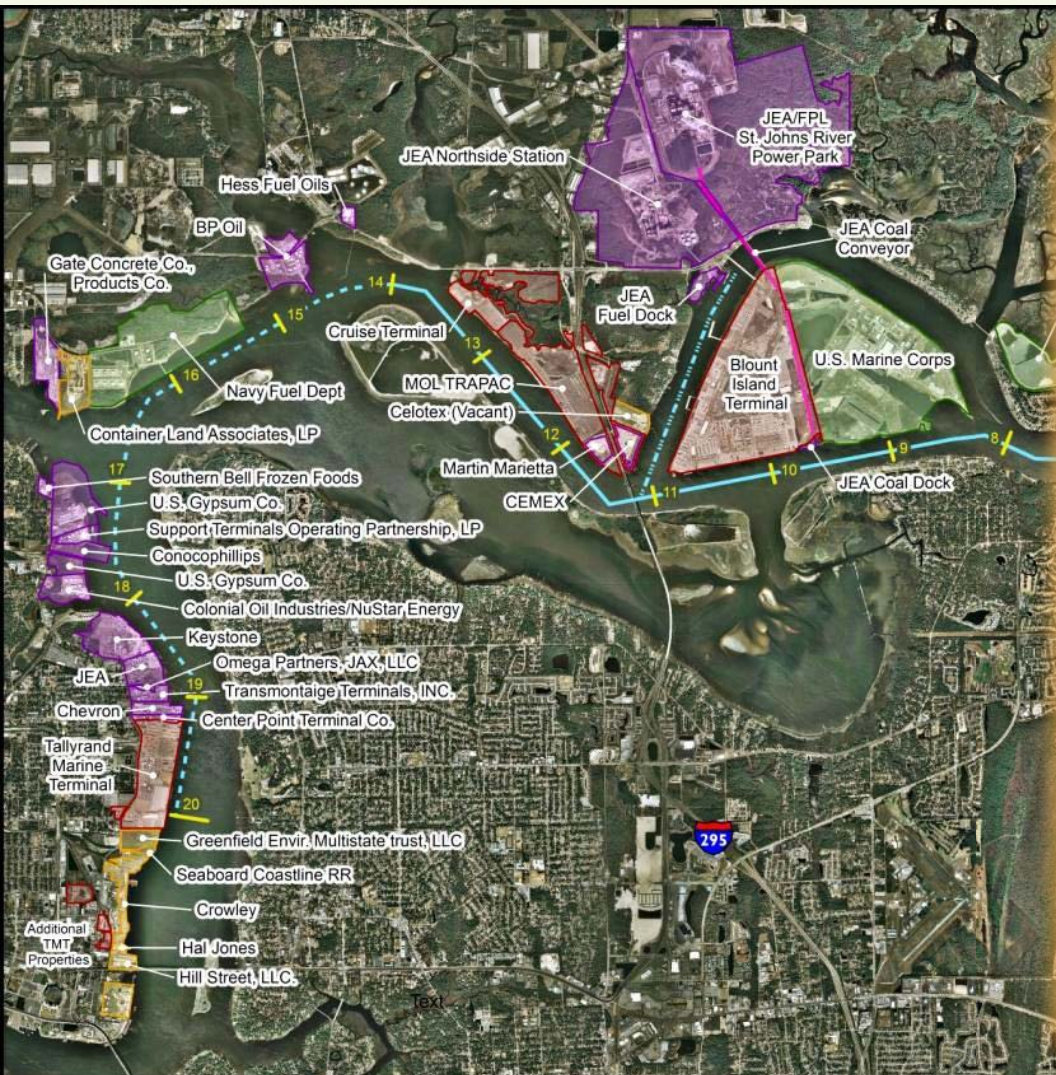
# Marine Infrastructure

No. 1 container port in Florida

No. 1 vehicle exporter port in United States

Leader in Steel Exports

Primary Florida port handling military (STRANET) equipment





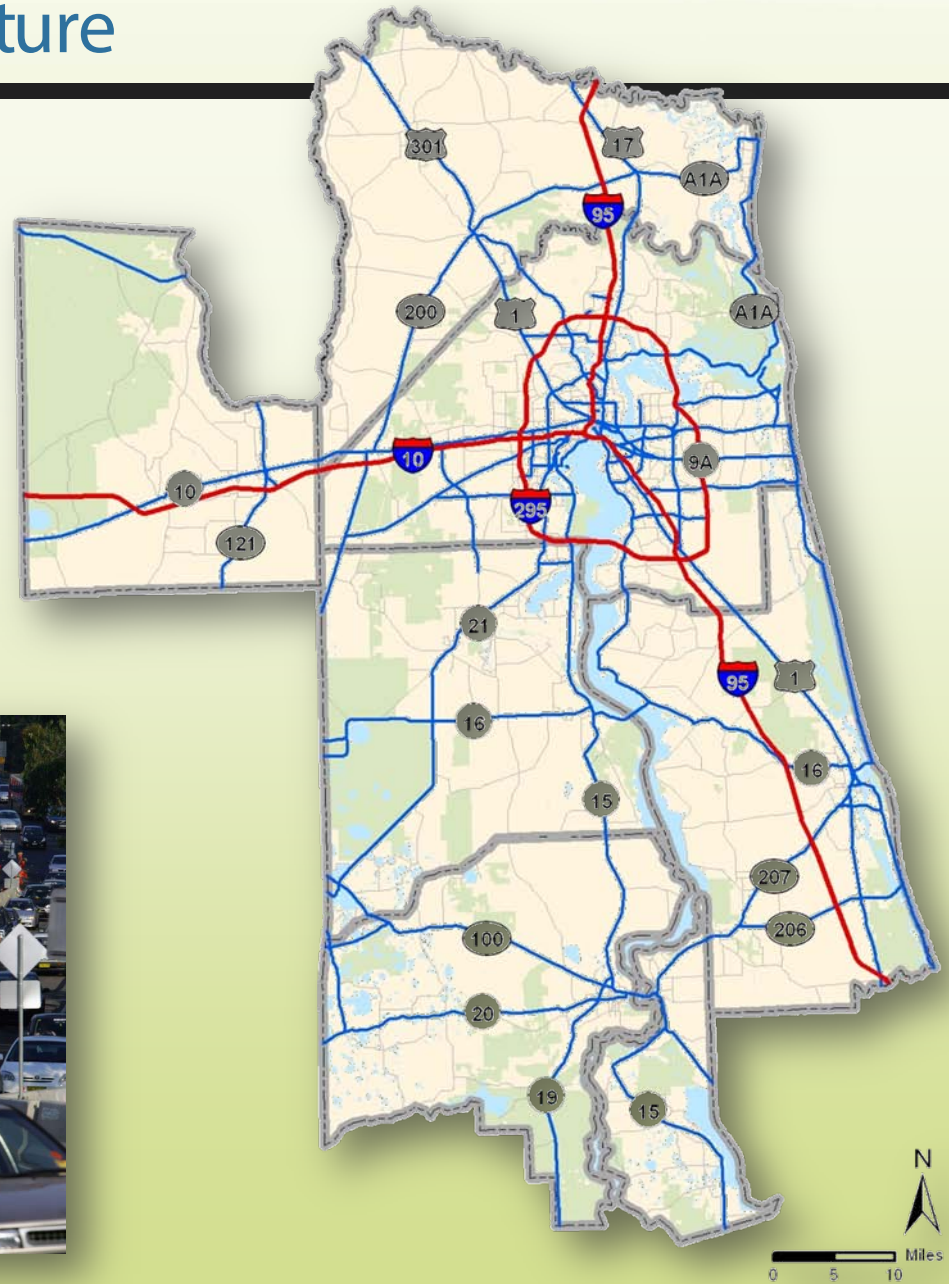
# Surface Infrastructure

I-95

I-295

I-10

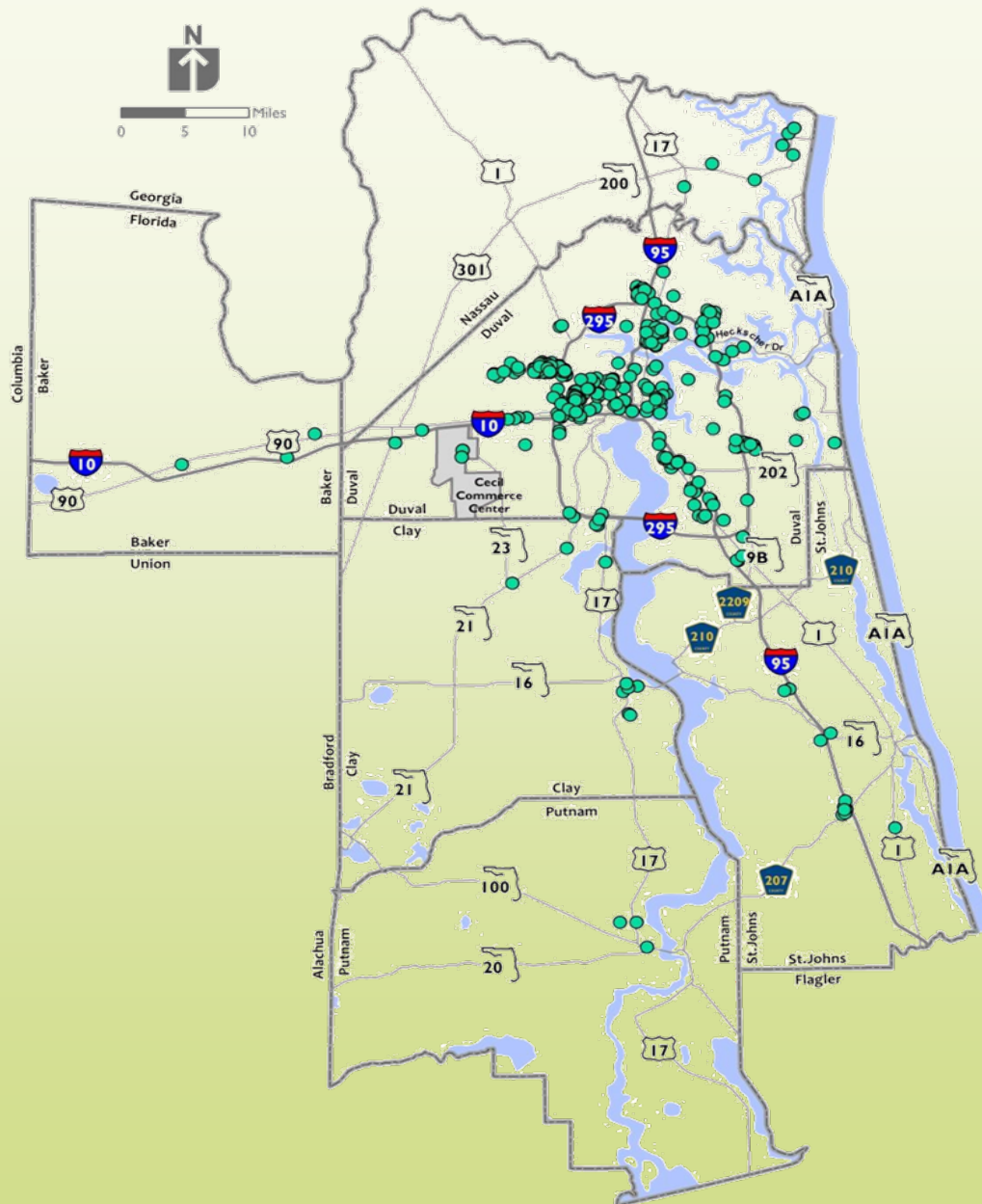
I-75



# Surface Infrastructure



# Land-Based Infrastructure



Northeast Florida Market:  
**100 million SF**  
industrial, warehousing,  
distribution centers

2012

SanMar  
Bedrosians  
Samsung

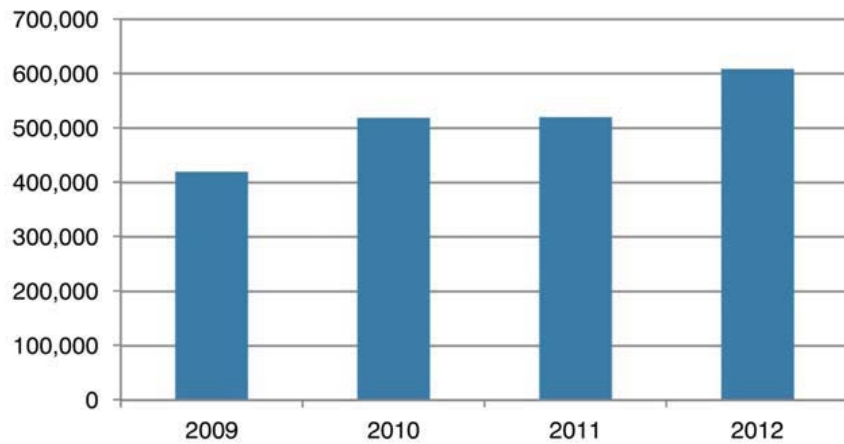
1.1 m SF

*2<sup>nd</sup> Quarter, 2012 Cushman and Wakefield*

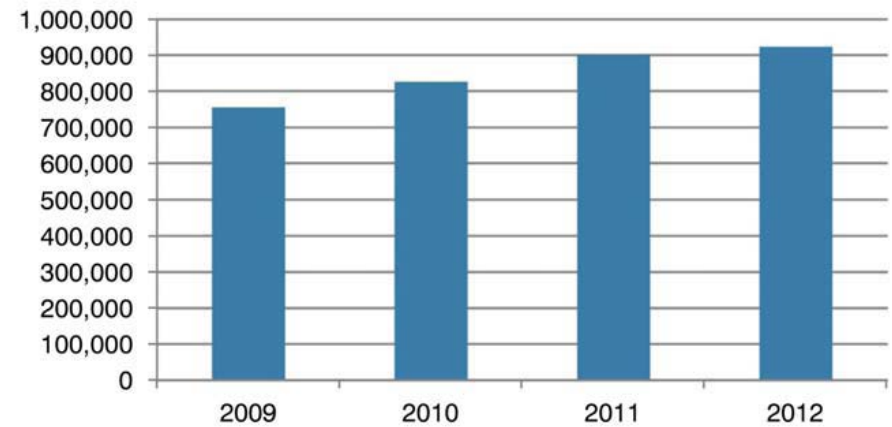


## ■ Recent Trends

**JAXPORT Auto Units**



**JAXPORT TEUs**

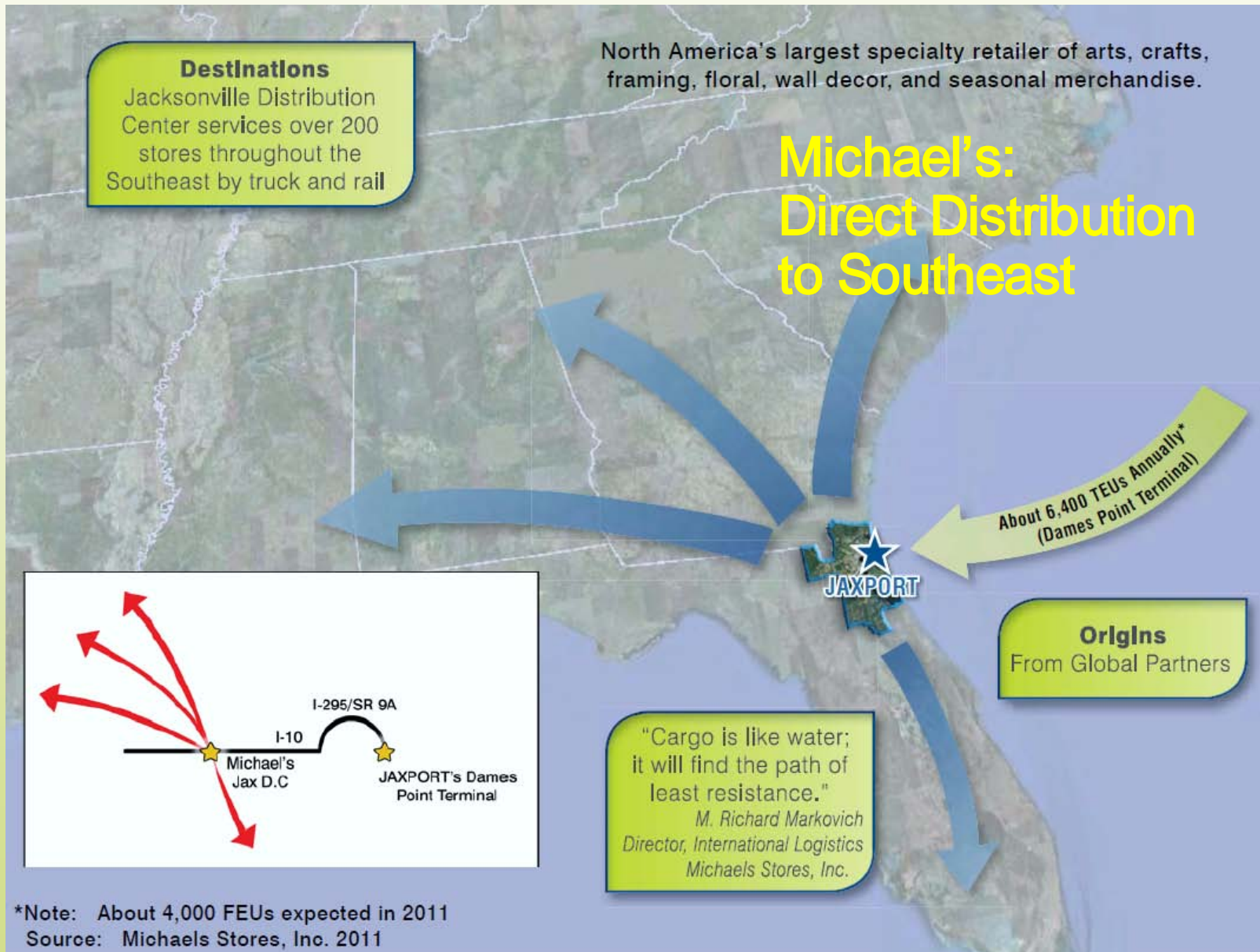


2009	2010	2011	2012
419,691	518,880	520,142	608,726

2009	2010	2011	2012
754,352	826,580	900,433	923,660



# "Face of Freight"—Dames Point Imports

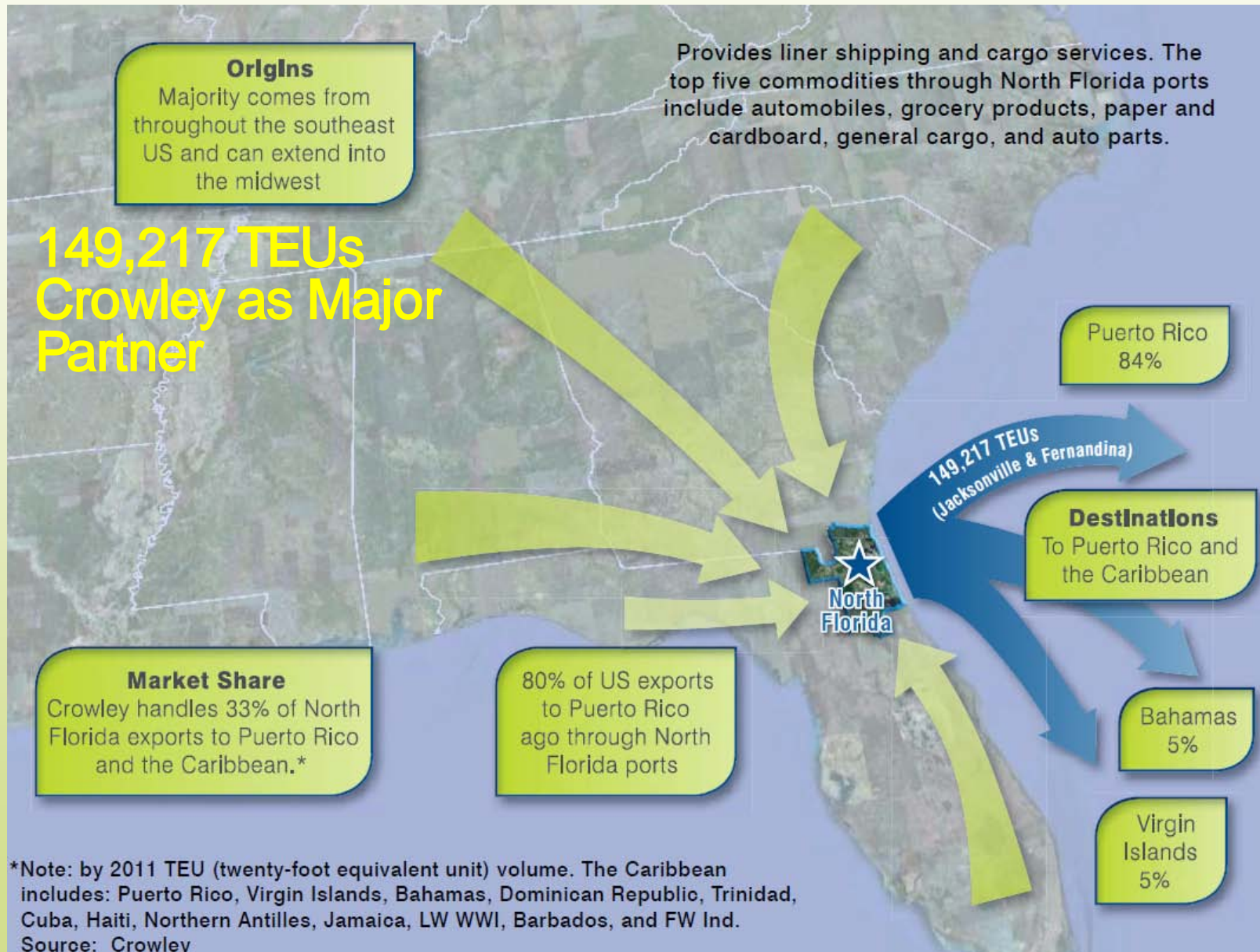


# “Face of Freight”—Fernandina Exports



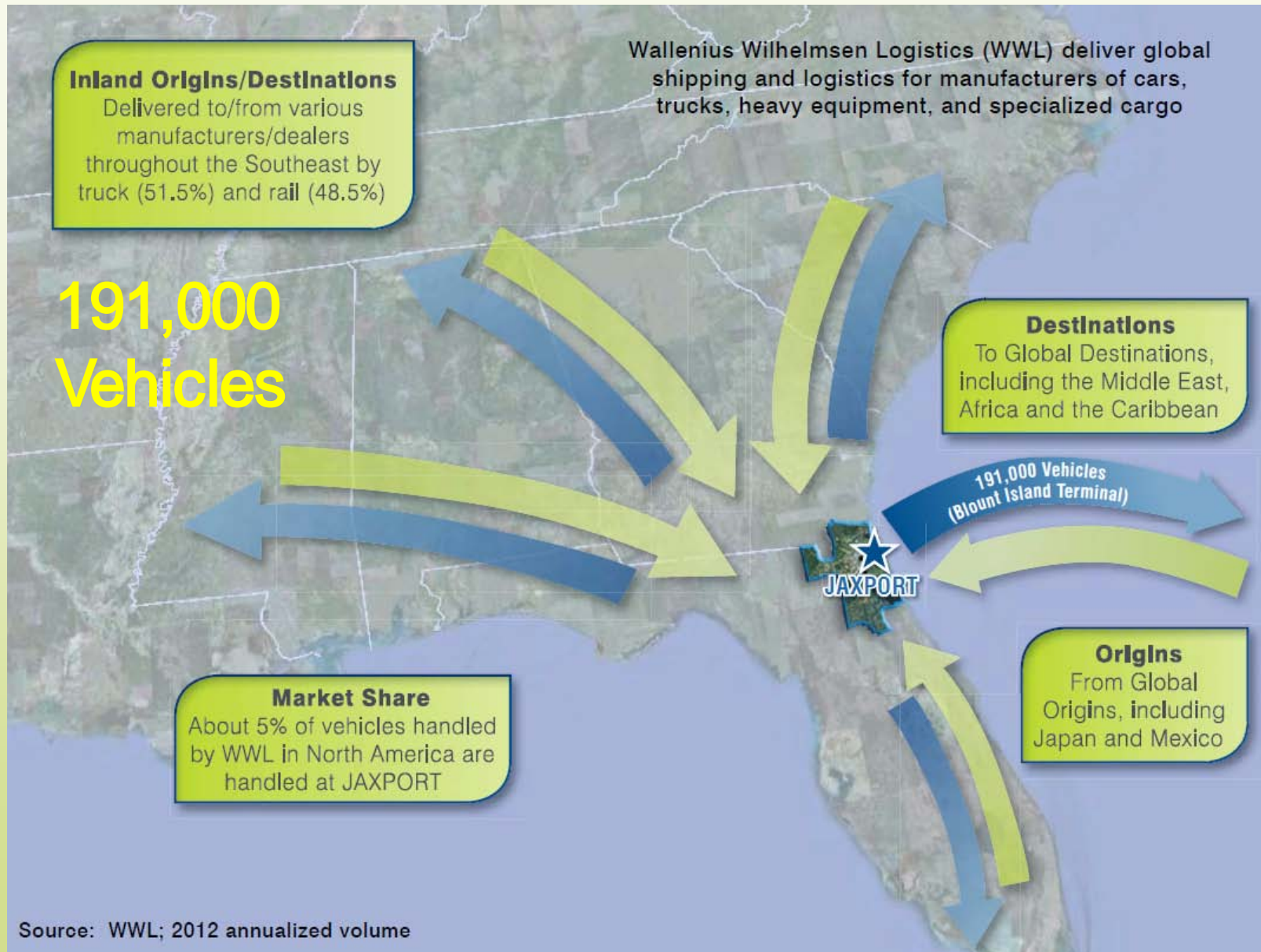


# "Face of Freight"—Crowley/Puerto Rico Exports

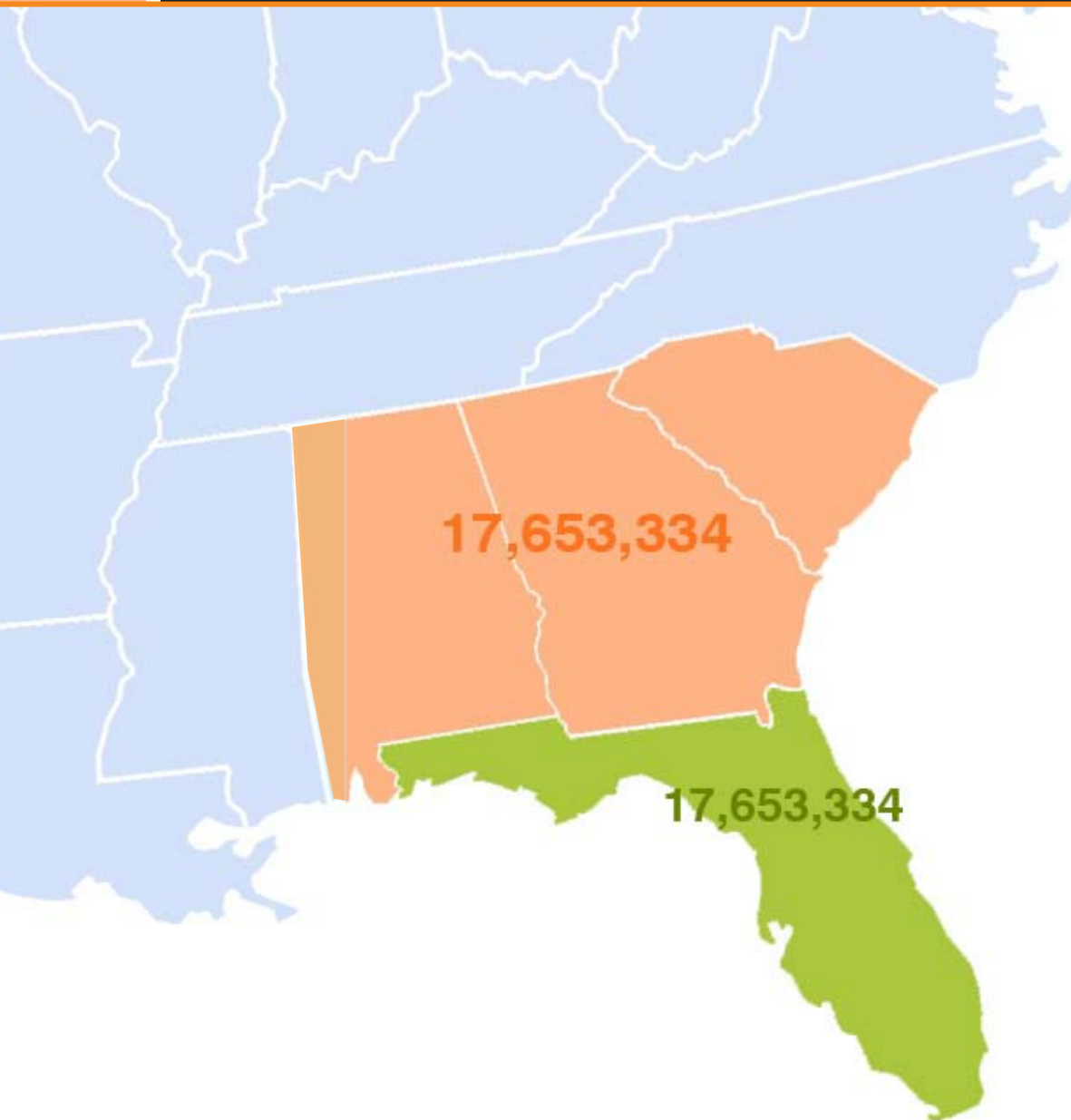




# “Face of Freight”—Blount Island Vehicles



# Immediate Markets Reach



Florida Market  
= GA/SC/AL

# Business Climate – We are competitive!

## Total Logistics Cost to Serve Florida Retail Markets

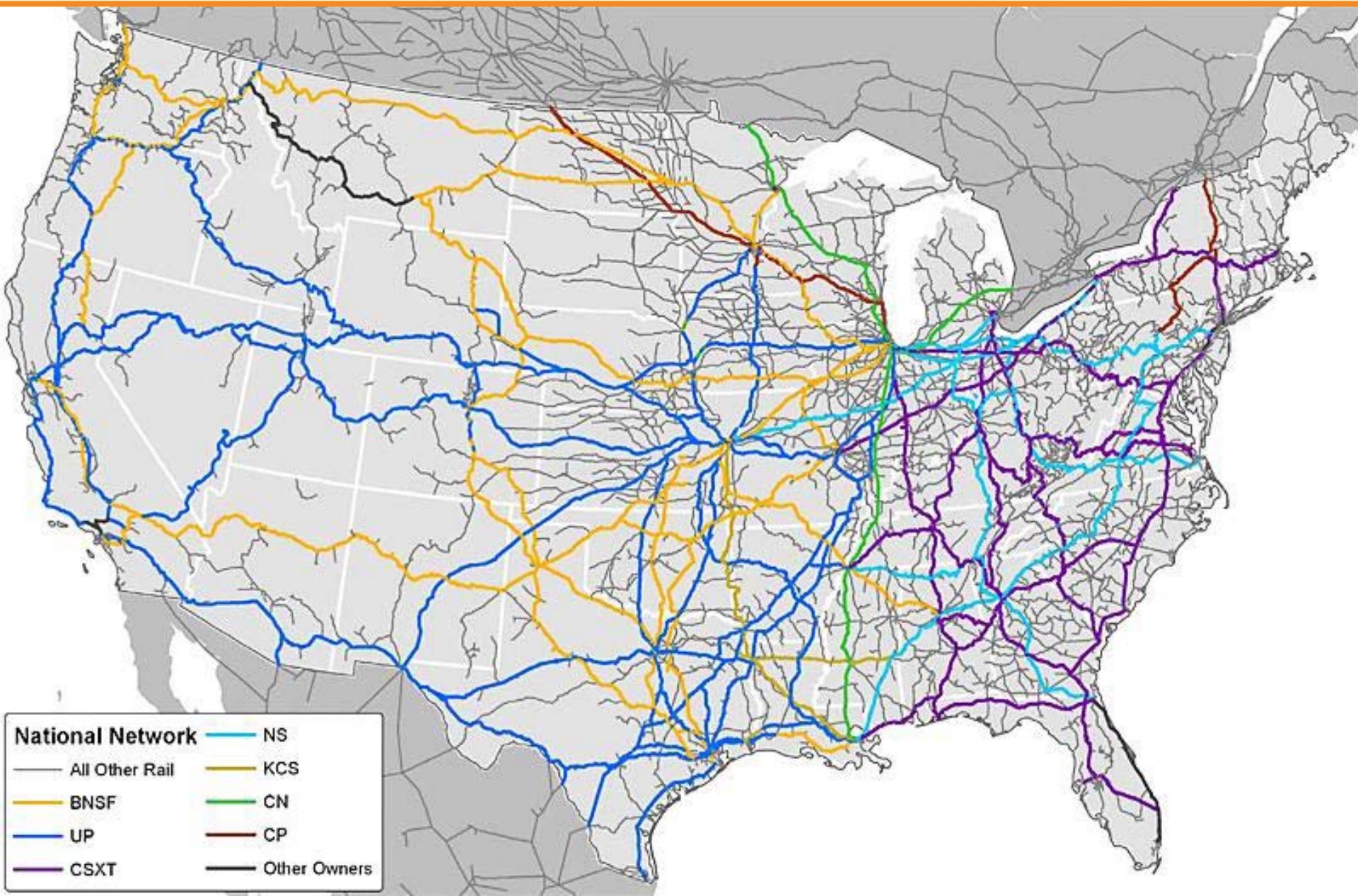
(assumes Distribution Center Site located in Jacksonville, Florida area)

Port of Entry>>>	South Florida	North Florida	Gulf Florida	Savannah	Los Angeles, Atlanta Intermodal	Los Angeles, Jacksonville Intermodal
DC Square Footage	250,000	250,000	250,000	250,000	250,000	250,000
Vessel Size	4,800	4,800	4,800	4,800	6,000	6,000
Total Cost via Truck	\$3,784	\$3,090	\$3,494	\$3,345	N/A	N/A
Total Cost via Intermodal Rail	\$3,525	N/A	N/A	N/A	\$3,743	\$3,170

Cost Effective Routing to Key Intermodal Hub (Atlanta) – From Singapore via Suez					
Port of Entry >>>	Jacksonville	Savannah	Miami	Los Angeles	Norfolk
Pre Panama Expansion	\$2,857	\$2,909	\$3,067	\$3,488	\$3,756
Post Panama Expansion	\$2,150	\$2,222	\$2,358	\$2,922	\$3,073

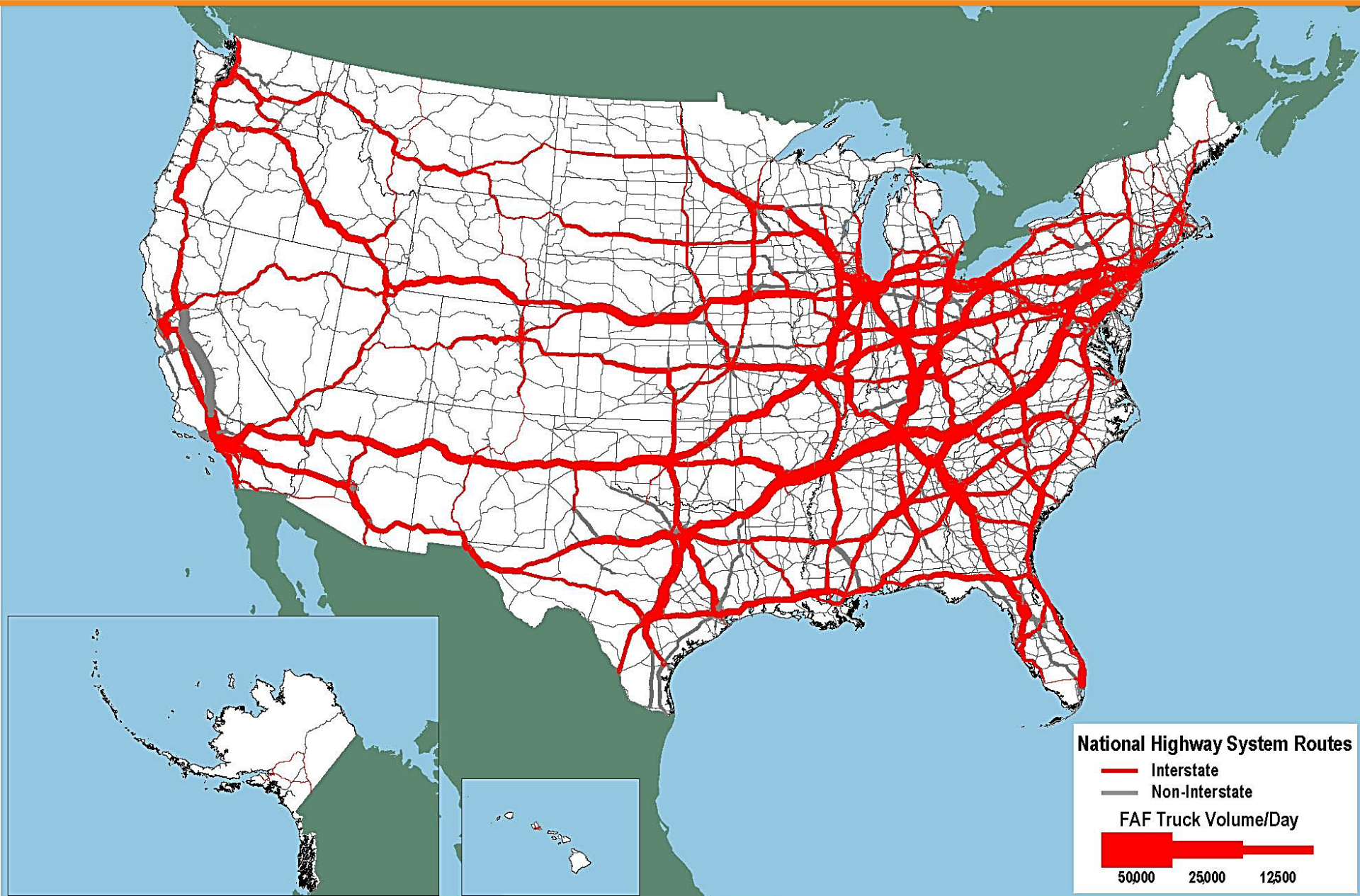


# National Rail Connectivity

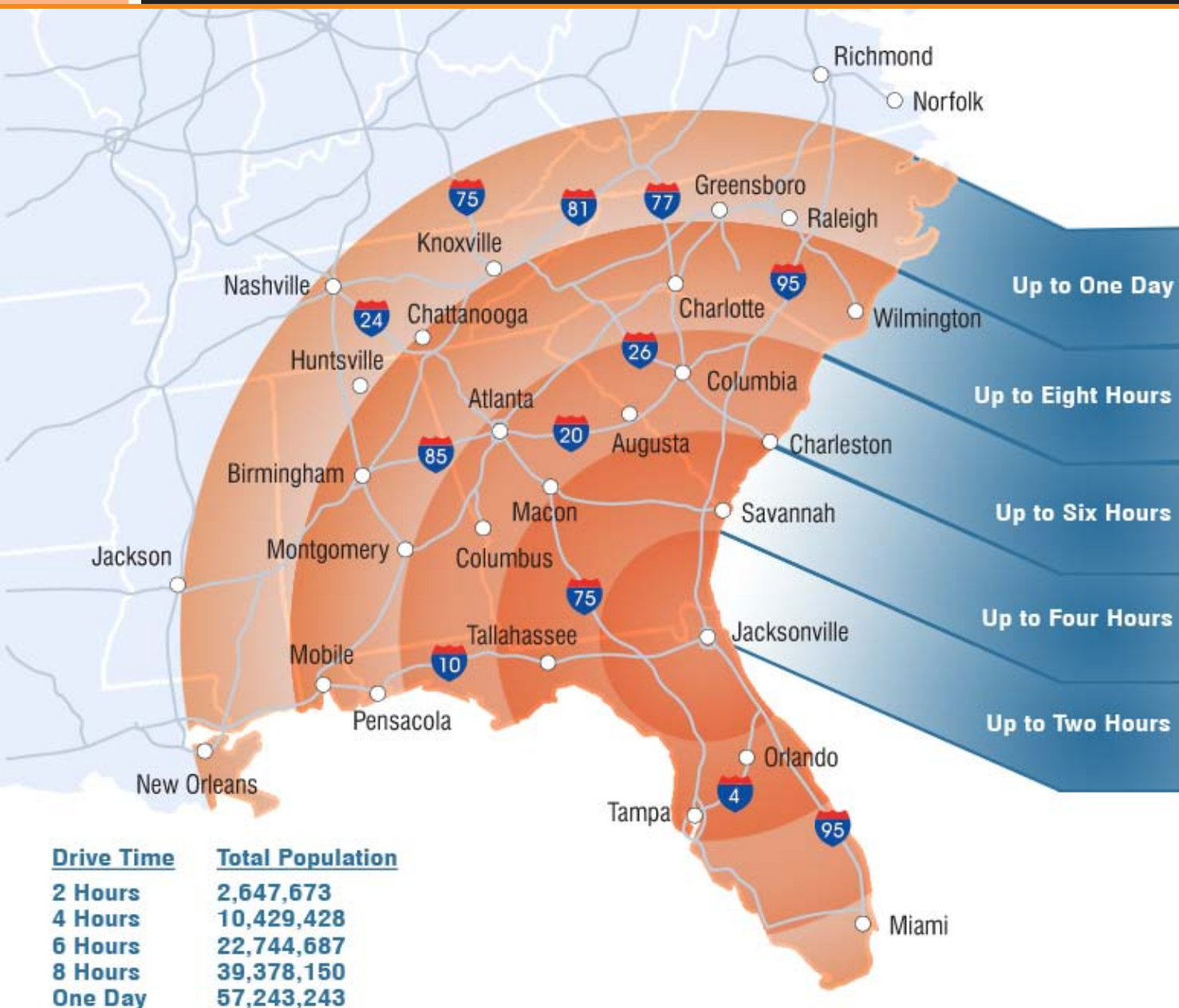




# National Truck Traffic



# Regional Truck Connectivity



**Truck Transit Time:**  
One Day Reach  
60 million consumers  
or  
20% of U.S. Population



## What does this mean?



## What does this mean to the region?

**gate•way** /' gāt, w ā/  
*n.*

1. Something that serves as an entrance or a means of access....allows an entity to achieve a desired goal.

# Guiding Principles for Plan

- **Gateway Role for State and Nation**
  - This is a given based on geography and infrastructure
  - Leverage our existing niches at current channel depths
- **Coordination/Collaboration as an Asset**
  - Unique North Florida TPO, FDOT, JAXPORT relationships
  - Integrate into business & public partners
- **One Florida Business Approach**
  - JAX and Miami Chamber MOU
  - Include *National / State Significance* “metrics” for decisions





# "The BIG 3" – Status Update

## ■ Mile Point Navigational Fix

- Pre-construction Design-2013
- Est. Construction 2016/17



## ■ Intermodal Container Transfer Facility (ICTF)

- Late 2014/15



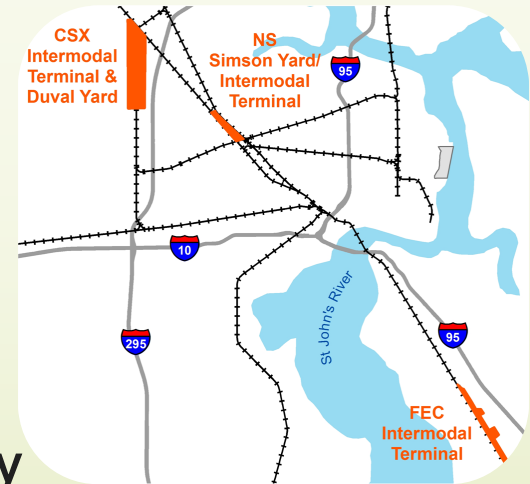
## ■ Jacksonville Harbor Deepening

- April 2013 Economic
- 2018 Opening Year



# Recommendations - INFRASTRUCTURE

- **Intermodal Yard Improvements Focus**
  - CSX, NS & FEC expansion plans
  - Truck access to yards or “last mile”
  - Co-locate manufacturing near yards
- **North Area/JIA Corridor Future Rail Feasibility Study**
  - Linkage to Intermodal Container Transfer Facility (ICTF)
  - Economic development concentration
  - Evaluate opportunities at JIA and Tradeport
- **Alternative Fuels & Green Ports**
  - Develop policies and programs for freight, logistics and municipal users
  - Enhance “green” practices in Port Master Plans



# Recommendations – MARKETS

- **Protect Existing Markets & Developing Niche**
  - Leverage the strength of “existing markets” (40’ channel)
  - Strategic Plan Priority for JAXPORT and Port of Fernandina
- **Asian Containers Recapture**
  - Identify next 3 Disney “redirects”
  - Define *goal* for 3.1 m TEU “leakage”
- **Manufacturing/Distribution Center Expansion**
  - Update 2005 Industrial Land Use Plan (COJ)
  - Develop *regional* Intermodal Logistics Center, “inland port” & DC Plan





- **Return on Investment (ROI) Assessment for NE FL**
  - Completed Infrastructure + Future Investments
  - Opportunity Costs related to “capacity in system”
- **Innovate Northeast Florida Recommendations**



## Advanced Transportation

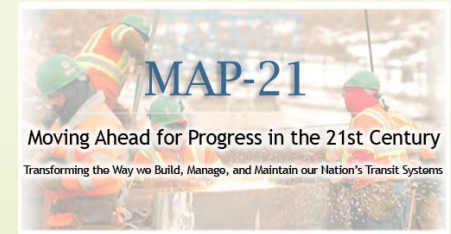
- Aviation
- Clean Fuels
- Rail & Port Logistics
- Power Storage
- Propulsion Systems
- Tracking Device & Security Systems
- Distribution Centers
- Supply Chain Management & IT

- **Regional Transportation Initiatives**
  - Regional Transportation Study Commission (RTSC) projects inclusive of port, freight, and intermodal
  - Develop regional transportation focused business alliance

# Priorities for North Florida: Next 12 months

## POSITION NORTH FLORIDA AS NATIONAL, STATE AND REGIONAL GATEWAY

### ■ National Freight Network & Strategic Plan



- Work with FDOT and partners to **maximize** North Florida's network mileage and facilities on the *National Freight Network*
- Demonstrate national **significance** of North Florida

### ■ Florida's Freight Mobility and Trade Plan



- Provide leadership and high level of engagement in Plan
- Conduct analysis and studies to demonstrate State **significance**

Cooperation is  
civil....

Collaboration is  
**TACTICAL**

