

# Bay Area Goods Movement Collaborative

## Why do Alameda County and the Bay Area Need a Goods Movement Plan?

The efficient movement of goods is essential to the daily lives of residents and to the overall economic prosperity of the region. **The Bay Area is a major hub for goods movement, which supports our economy, serves our residents, and provides an array of jobs both within the region and throughout Northern California.** Alameda County plays a critical role in the goods movement system due to its central location and infrastructure, experiencing both the economic benefits and local community impacts of goods moving to and through the region.

**Freight transport and goods movement underpin economic activity in the Bay Area region**, which is home to a number of goods movement dependent industries. In the nine-county Bay Area, goods movement dependent industries account for \$490 billion in total output (51 % of total regional output); and provide over 1.1 million jobs (32 % of total regional employment).

**Goods movement partners must collaborate to create a thoughtful yet flexible approach to planning and management that facilitates the safe, reliable and efficient movement of goods while reducing impacts on local communities.**

Internal and external forces work simultaneously to drive demand in Alameda County and throughout the Bay Area. Transportation facilities provide the connectivity to local markets and consumers, while supporting global logistics and supply chains for major industries located elsewhere in California and the nation.

The goods movement industry transcends jurisdictional borders and serves a broad range of industrial and consumer needs. Goods movement partners must collaborate to create a thoughtful yet flexible approach to planning and management that facilitates the safe, reliable and efficient movement of goods while reducing impacts on local communities.

**Goods movement industries are major Bay Area economic drivers, supporting 32% of regional jobs and 51% of regional economic output.**

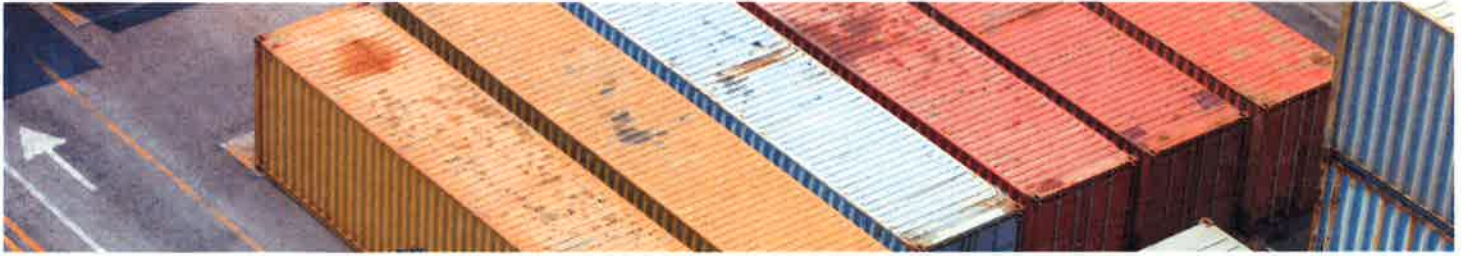
## PLANNING PROCESS

Recognizing the importance of goods movement to the region, the Metropolitan Transportation Commission (MTC) and the Alameda County Transportation Commission (Alameda CTC) are working together to build a robust, Bay Area Goods Movement Collaborative to ensure the region continues to play a vital role in the Northern California economy.

The Bay Area Goods Movement Collaborative brings together partners, community members, and other stakeholders from across the region to understand goods movement needs and identify, prioritize, and advocate for short- and long-term strategies to address these needs. The Collaborative creates an organized structure to bring goods movement interests to the table and to ensure effective advocacy for goods movement needs in Alameda County and the Bay Area region at-large.

The Collaborative also provides the basis for a comprehensive outreach program to support the development of the **Alameda County Goods Movement Plan and the update to MTC's Regional Goods Movement Plan**. The Plans will provide a vision for the countywide and regional goods movement systems and will describe both short- and long-term strategies, including projects, programs and policies for achieving the goods movement vision.

The planning process will occur over a two-year period, which began in October 2013. The Collaborative will include both public and private sector participants, including the public at large, as well as organizations representing local jurisdictions, economic development, public health, railroads, trucking and freight industries, business, and community interests.



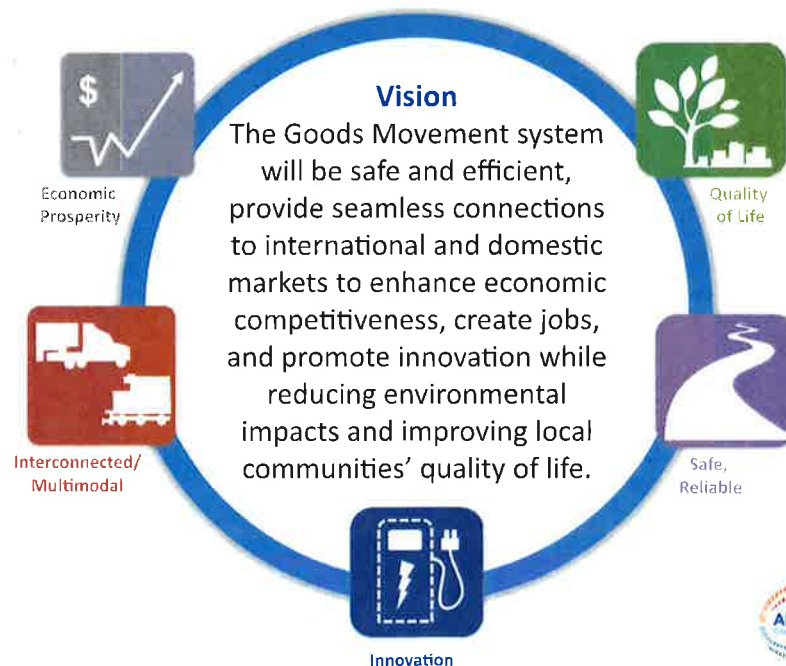
## VISION

The goods movement system will be safe and efficient, provide integrated connections to international and domestic markets to enhance economic competitiveness, create jobs, and promote innovation while reducing environmental impacts and improving residents' and employees' quality of life.

## GOALS

- Reduce and mitigate impacts from goods movement operations to create a healthy and clean environment, and support improved quality of life for people most impacted by goods movement.
- Provide safe, reliable, efficient, resilient, and well- maintained goods movement facilities and corridors.
- Promote innovative technology and policy strategies to improve the efficiency of the goods movement system.
- Preserve and strengthen an integrated and connected, multimodal goods movement system that supports freight mobility and access, and is coordinated with passenger transportation systems and local land use decisions.
- Increase jobs and economic opportunities that support residents and businesses.

## Goods Movement Vision and Goals



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# Bay Area Goods Movement Collaborative

## Outreach Overview



## GOODS MOVEMENT COLLABORATIVE

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## THE COLLABORATIVE INCLUDES THE FOLLOWING ELEMENTS:

- The **Executive Team** comprised of executive level staff from Alameda Countywide Transportation Commission (Alameda CTC), Metropolitan Transportation Commission (MTC), Port of Oakland, Caltrans, East Bay Economic Development Alliance, Bay Area Air Quality Management District, and regional Congestion Management Agency Executive Directors from Solano, Contra Costa and Santa Clara counties;
- The **Technical Teams** including staff from the agencies represented on the Executive Team as well as other stakeholders from cities, counties, regional agencies, transit and transportation partners, in addition to stakeholders representing public health, community and business interests related to the goods movement system;
- **Interest Groups** including private sector goods movement organizations (shippers, carriers and logistics service providers), businesses, environmental and public health organizations, community and social justice groups, labor and other key stakeholders from across the Bay Area region who will provide frequent, structured input on goods movement issues; and,
- The **Goods Movement Roundtables** will provide a regular forum and information exchange platform for all key stakeholders to foster dialogue between stakeholders from all groups and help build a platform for advocacy.





## ROLES OF THE COLLABORATIVE

The process for including partner and stakeholder input will be extensive and multi-layered. **The Executive Team provides strategic guidance** and advocates for goods movement priorities among key decision-makers. **The Technical Teams review and provide feedback on strategies for improving goods movement**, regulatory recommendations and other technical issues, and provide extensive knowledge of local needs and issues. The Technical



Teams also provide technical guidance and review for all analyses and products developed to support the Alameda Countywide Goods Movement Plan and the update to MTC's Regional Goods Movement Plan.

**The Interest Groups offer frequent and meaningful input** through a series of focused discussion sessions to ensure an effective dialogue on the needs, issues and priorities for goods movement throughout the development of the Plan. Meetings with Interest Groups may occur in one-on-one interviews, group meetings, or presentations at regularly scheduled meetings.

In addition, the **Roundtable sessions bring a wide range of groups together for an opportunity to share information and give input on the policy, planning, prioritizing and financing discussions around goods movement.** Several Roundtable sessions will be conducted as workshops, held at multiple locations over the course of the project to support the development of both Goods Movement Plans.

## COUNTYWIDE AND REGIONAL GOODS MOVEMENT PLANS



The Alameda Countywide Goods Movement Plan and the update to MTC's Regional Goods Movement Plan will outline short- and long-range strategies to move goods

effectively in the region by road, rail, air, and water while reducing impacts on local communities. The Plans will establish a vision for the sustainable movement of freight and other goods to ensure that Alameda County and the Bay Area continue to play a vital role in the Northern California economy. The Collaborative will also establish an on-going method for discussing and advocating for goods movement needs.

The Plans will support the goods movement vision by promoting community livability goals and environmental quality, and by meeting the needs of businesses and residents that rely on the goods movement system. **The Collaborative will play a critical role in developing the Plans by informing the vision, needs assessment, strategy development, evaluation, education and advocacy efforts for goods movement in Alameda County and the Bay Area.**



## OUTREACH FOR GOODS MOVEMENT PLANNING

Stakeholder participation is an integral part of the development of the Goods Movement Plans. The various components of the Collaborative will provide the basis for stakeholder engagement in the development of the Plans. By providing multiple mechanisms for stakeholder engagement, the Collaborative structure will reach a wide range of business, environmental, and community interests throughout Alameda County, the Bay Area region, and beyond to achieve balanced and effective Goods Movement Plans.

Each outreach element will be scheduled in consideration of activities occurring in the region beyond the Goods Movement Plans. This includes activities related to other Alameda CTC modal plans and the Countywide Transportation Plan. The other activities may also include updates to the California Statewide Rail Plan, the update of MTC's Regional Transportation Plan and Sustainable Communities Strategy, development of the Caltrans' Freight Mobility Plan and requirements consistent with Assembly Bill 14, and the reauthorization of MAP-21. The Collaborative will coordinate key Plan decision points with these ongoing efforts.

# Bay Area Goods Movement Collaborative

## Economic Impact



### THE IMPORTANCE OF GOODS MOVEMENT IN NORTHERN CALIFORNIA

The Northern California megaregion refers to the economically and geographically linked set of regions comprised of the Bay Area, Sacramento, Northern San Joaquin Valley and the Central Coast.

The Northern California megaregion is an economic powerhouse, with over \$953 billion in freight flows moving to, from, and through the region in 2012. This is expected to grow by 168% to \$2.6 trillion in value by 2040. \$387 million or 40% of freight flows move solely within the megaregion, an amount growing to almost \$1 trillion annually by 2040, highlighting the importance of inter- and intra-regional trade to the megaregion's economy.

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Each of the four regions within the megaregion has separate characteristics and regional strengths, yet they are tied together through the goods movement system and the patterns of domestic and international trade. Exports of high value, specialty agricultural products from the San Joaquin Valley and wine from the North Bay move through the Bay Area's Ports. Medical supplies and precision instrumentation, products of a growing high tech manufacturing sector in the Bay Area, traverse through domestic and international air cargo centers for shipment all over the world.

### Regional Profiles within the Northern California Megaregion

| REGION            | Bay Area  | Sacramento Region   | N. San Joaquin Valley   | Central Coast  |
|-------------------|---|---|---|--|
| POPULATION (2013) | 7.44 Million  | 2.12 Million  | 3.14 Million  | 0.735 Million  |
| KEY FACTS         | <ul style="list-style-type: none"> <li>International trade hubs – Port of Oakland, SFO</li> <li>Fuels producer</li> <li>High value manufactured products</li> <li>Consumer center</li> <li>Agricultural and food products</li> <li>Major highways include I-880, I-80, I-580, U.S. 101; Key rail corridors include UP and BNSF<sup>1</sup> rail lines connecting Oakland to Sacramento and the Central Valley.</li> </ul> | <ul style="list-style-type: none"> <li>Agricultural and food products – domestic and exports</li> <li>Consumer center</li> <li>High value manufactured products</li> <li>Regional warehouse center</li> <li>Bay Area connection via I-80 and UP rail</li> </ul> | <ul style="list-style-type: none"> <li>Agricultural/food products – domestic and export</li> <li>Regional distribution center for Bay Area and Sacramento</li> <li>Bay Area connection via I-580, SR 12, and M-580 Marine Highway and UP and BNSF rail</li> </ul> | <ul style="list-style-type: none"> <li>Wine, fish and agricultural products – domestic and export</li> <li>Critical agricultural linkages with San Joaquin Valley</li> <li>Bay Area connection via U.S. 101</li> </ul> |

Source: Population data from U.S. Census Population Estimates for July 2013

<sup>1</sup> Union Pacific and Burlington Northern Santa Fe



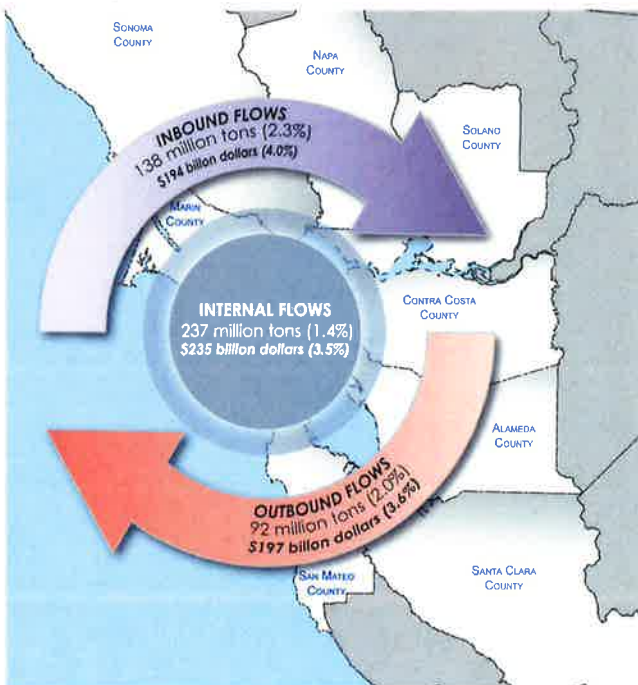


## THE IMPORTANCE OF GOODS MOVEMENT IN THE BAY AREA

The nine-county Bay Area is the most significant contributor to the megaregion economy. **Alameda County is the center point of goods movement in the region**, as it is home to many of the freight facilities in the megaregion and is located in the geographic center, providing major connections to all parts of the region. The County has a diverse manufacturing base that includes high-technology sectors such as electronics, precision instrumentation, and medical supplies, yet also includes traditional manufacturing operations in metal products, food products, and machinery. Goods movement, including imports, exports, and domestic movements to consumer markets, plays a significant role in the Bay Area economy.

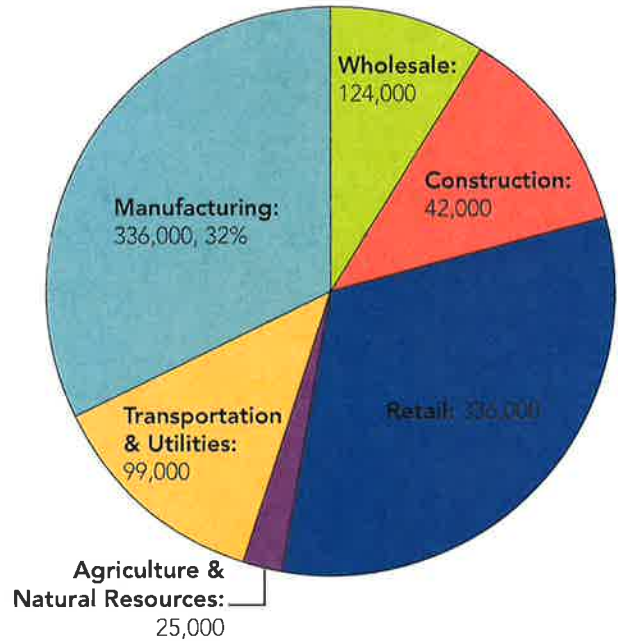
In 2012, the predominant freight movements by weight in the Bay Area were intraregional commodity flows. These short-haul freight movements include freight traveling along local supply chains, as well as locally produced products that are moved to the seaports and airports for export, or from the region's seaports and airports to local consumers and industries.

### Bay Area Goods Movement Flows and Annual Growth, 2012



Source: Freight Analysis Framework (FAF) 3.5 Provisional Data and Forecasts.

### Employment in Goods Movement-Dependent Industries in the Bay Area, 2011



Source: ABAG (Plan Bay Area 2013), Center for Continuing Study of the California Economy (CCSCE), and Cambridge Systematics Analysis.

## CONTRIBUTION TO JOBS

Goods movement provides a diversity of employment opportunities for residents with a range of skills, education and experience. **More than 1.8 million people were employed in goods-movement dependent industries** (i.e., manufacturers, distributors, retailers, and others which rely on freight and the movement of products for their business practices) in the Northern California megaregion in 2012. Just under 1 million of these goods movement jobs are in the Bay Area, which has more than 300,000 jobs in the Manufacturing and Retail Trade Sectors. Alameda County accounts for 21.5% of regional goods movement employment and is anticipated to have the fastest growing job market in the region from 2010 to 2040.



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## Goods Movement System Infrastructure



The goods movement system is comprised of infrastructure that serves a number of different, yet interrelated functions. In the Bay Area, these functions include Global Gateways, Interregional and Intraregional Corridors, and the Local Goods Movement System. Each of these functions and their associated infrastructure are described below.

### GLOBAL GATEWAYS

The global gateways that make up the Bay Area's freight transportation system consist of the major maritime facilities and international airports that handle freight, as well as passenger cargo. It covers those entry and exit points that are essential to moving high volumes of trade into and out of the region.

The elements that make up the global gateways function include the region's maritime ports (Port of Oakland, Port of Richmond, Port of Benicia, Port of Redwood City and Port of San Francisco) along with their associated inland connections. The Port of Oakland is the region's largest port and only container handling facility, and is distinguished from other major West Coast ports as it handles more exports than imports.

Other elements include international airports that handle both freight that is stored under the main deck of an aircraft and dedicated freight aircrafts, including the San Francisco International Airport (SFO) and the Oakland International Airport (OAK).

### INTERREGIONAL AND INTRAREGIONAL CORRIDORS

The inter- and intraregional corridors consist of primary highways and rail lines that serve to connect the central Bay Area and Alameda County to the rest of the state and to domestic markets. This network provides primary access to major facilities such as the Port of Oakland, San Francisco and Oakland International Airports, rail yards, and warehouse/industrial districts. Key interregional and intraregional truck corridors in the Bay Area include I-80, I-238, I-580, I-880, U.S. 101, and I-680. Union Pacific rail connections along the Martinez Subdivision and Oakland Subdivisions, as well as the BNSF Stockton Subdivision line are important interregional rail corridors.

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**Many elements of the international gateway infrastructure in the Bay Area are located within Alameda County.**

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A handful of key state highway corridors also provide east-west linkages to key goods movement industries. For instance, State Route (SR) 4 provides connections between oil refineries and other industries with the rest of the network and customers. SR 152 provides an important connection to Central Coast agricultural producers. SR 12 and Highway 37 provide key connections along the northern part of the region serving the North Bay and northern Central Valley. Exports such as wine, electronics and medical equipment utilize these corridors to reach the global gateways. Imported consumer products, parts and automobiles also utilize these routes to reach distribution facilities in San Joaquin Valley to be delivered to the Bay Area and beyond.







## LOCAL GOODS MOVEMENT SYSTEM

The local goods movement system refers to networks of city streets that move freight to and from its origins and destinations. Last-mile connectors which are also part of the local goods movement system, providing the critical connections between major freight facilities (global gateways, domestic rail terminals, warehouse/ industrial centers and industrial parks) and the interregional and intraregional systems. The growing use of e-commerce and the shift towards a knowledge-based economy means parcel service and deliveries to commercial and residential areas are becoming increasingly important. Major arterial truck routes are often used as alternatives to congested freeways for city-to-city truck movements. Farm-to-market roads in the rural parts of the region are also a vital part of the local goods movement system and serve important economic functions.



## Summary of Preliminary Goods Movement System Needs and Issues by Function

### GLOBAL GATEWAYS

- Port of Oakland land constraints, deficiencies in cargo handling equipment
- Intensifying port competition
- Marine terminal congestion and its associated impacts on drayage drivers and neighborhoods
- Need for improved communication between truck drivers and marine terminal operators
- Impacts and opportunities for heavy haul networks around ports
- Expanding demand for bulk export facilities
- Conflicts between industrial/warehouse space needs to support growth and impacts on neighborhoods
- Changing mix of air cargo (less computer related exports) and uncertain growth in domestic markets

### INTER- AND INTRA-REGIONAL CORRIDORS

- Congestion and delay on shared use freight corridors with passenger traffic such as I-880, I-580 and I-80, and Capitol Corridor
- Truck safety issues along freight corridors due to merging and weaving
- Pavement and bridge condition issues along freight corridors
- Rail bottlenecks especially along Martinez Subdivision
- Safety issues at rail-highway grade crossings
- Safety concerns regarding the movement of crude by rail

### LOCAL 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
- Cut through traffic to avoid congestion on major corridors
- Lack of truck route connectivity across city boundaries
- Local road and street pavement damage
- Problems with roadway and street design that impedes truck deliveries



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