



FREIGHT LOGISTICS ZONES

April 7, 2016



Hillsborough MPO
Metropolitan Planning
for Transportation



Polk Transportation
Planning Organization

AGENDA

1 Summary of Summit 1

2 Sources of FLZ Designation

3 DRAFT FLZ Boundary and Freight Clusters

4 FLZ Strategic Plan Content

5 Workshop on FLZ/Freight Cluster Boundaries

6 Schedule and Next Steps

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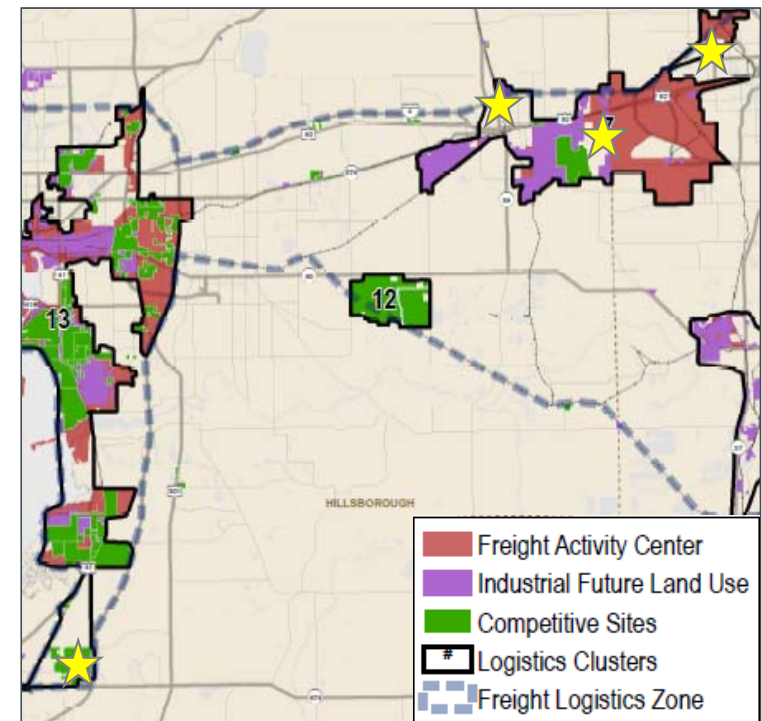
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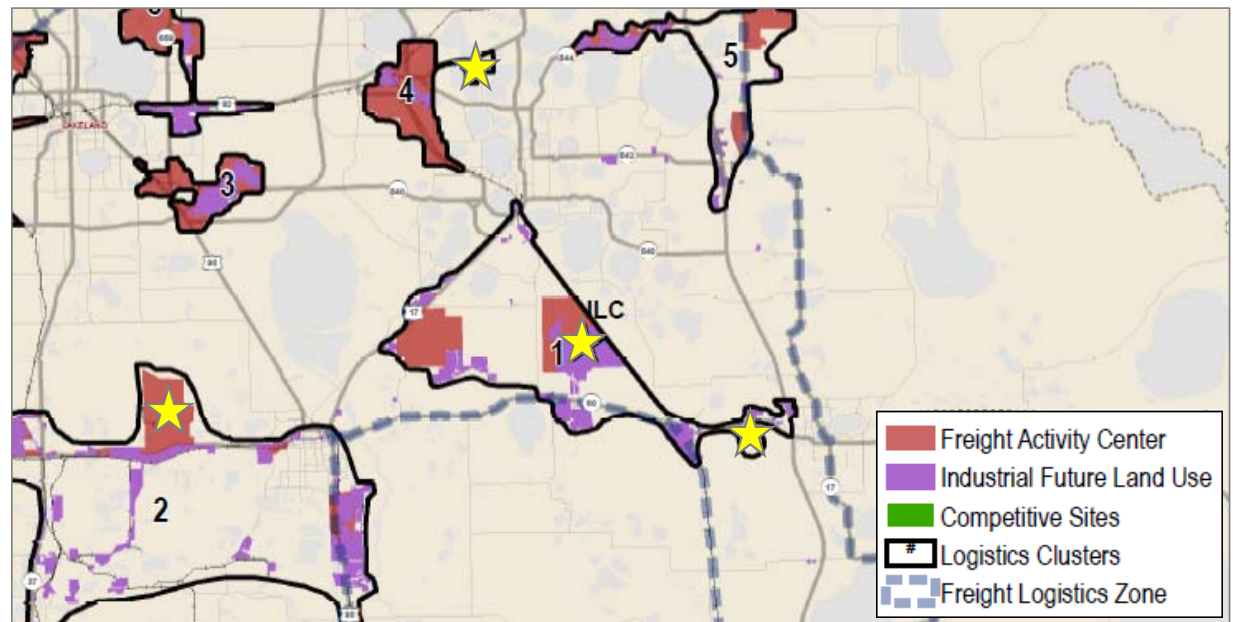
SUMMIT 1 – SUGGESTED AREAS FOR CONSIDERATION

- I-4 Corridor
 - ✓ Distribution center at Memorial and Wabash in Polk County
 - ✓ Industrial land uses on west side of County Line Rd south of US 92
 - ✓ Plant City Industrial/I-4
 - ✓ Amazon distribution center in Hillsborough Co.



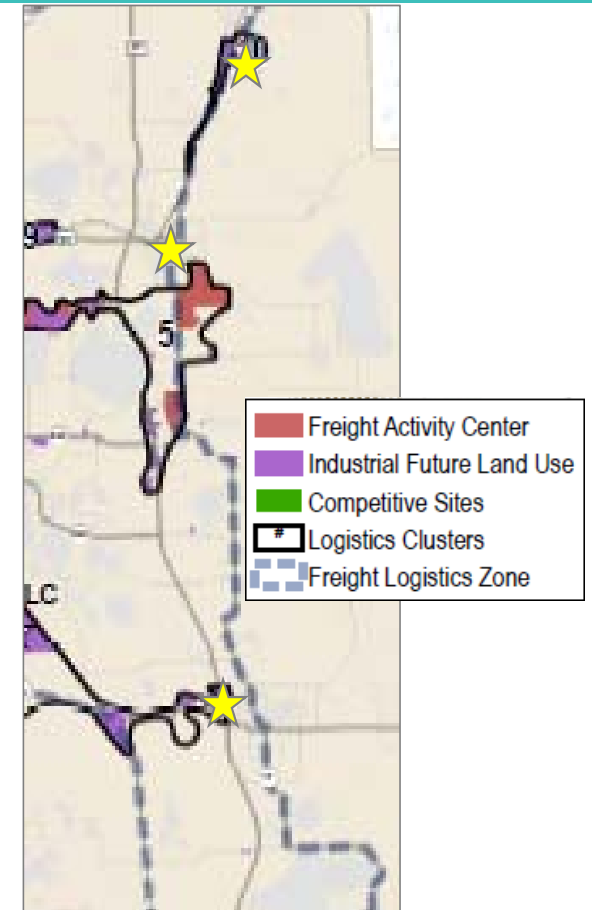
SUMMIT 1 – SUGGESTED AREAS FOR CONSIDERATION

- Central Polk
 - ✓ Winter Haven and Lake Wales Municipal Airport
 - ✓ Mosaic fertilizer plant
 - ✓ Stokes PUD to ILC FAC



SUMMIT 1 – SUGGESTED AREAS FOR CONSIDERATION

- US 27 Corridor
 - ✓ Packing houses in US 27 corridor
 - ✓ Industrial uses in Davenport along US 92 (Greenbay)



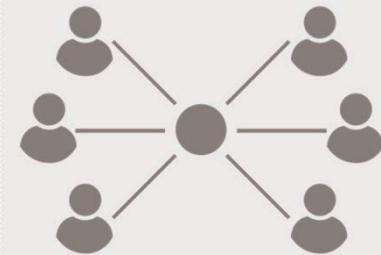
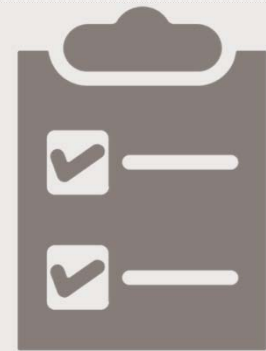
SUMMIT 1 – SUGGESTED AREAS FOR CONSIDERATION

- Other considerations for areas of interest
 - ✓ Future industrial land uses in FLUP
 - ✓ Freight rail destinations
 - ✓ "Smooth" areas to encompass larger clusters of industrial development



SUMMARY OF SUMMIT 1

- Strategic Plan considerations
 - ✓ Display available truck and rail volume in bandwidth
 - ✓ Proximity of workforce
 - ✓ Differentiate existing and future/emerging FACs
 - ✓ Growth potential around corridors impacting transportation
 - ✓ Freight/land use compatibility
 - ✓ Phase 2 of Bartow Northern Connector
 - ✓ Analysis of demographics/housing
 - ✓ Document activities around ILC (trips, employment, etc.)
 - ✓ Include State Economic Enhancement and Development Trust Fund and Export Finance Corp in incentive program narrative
- Strategic Plan adoption considerations
 - ✓ Adopt plan by resolution
 - ✓ Include in resolution to be updated regularly



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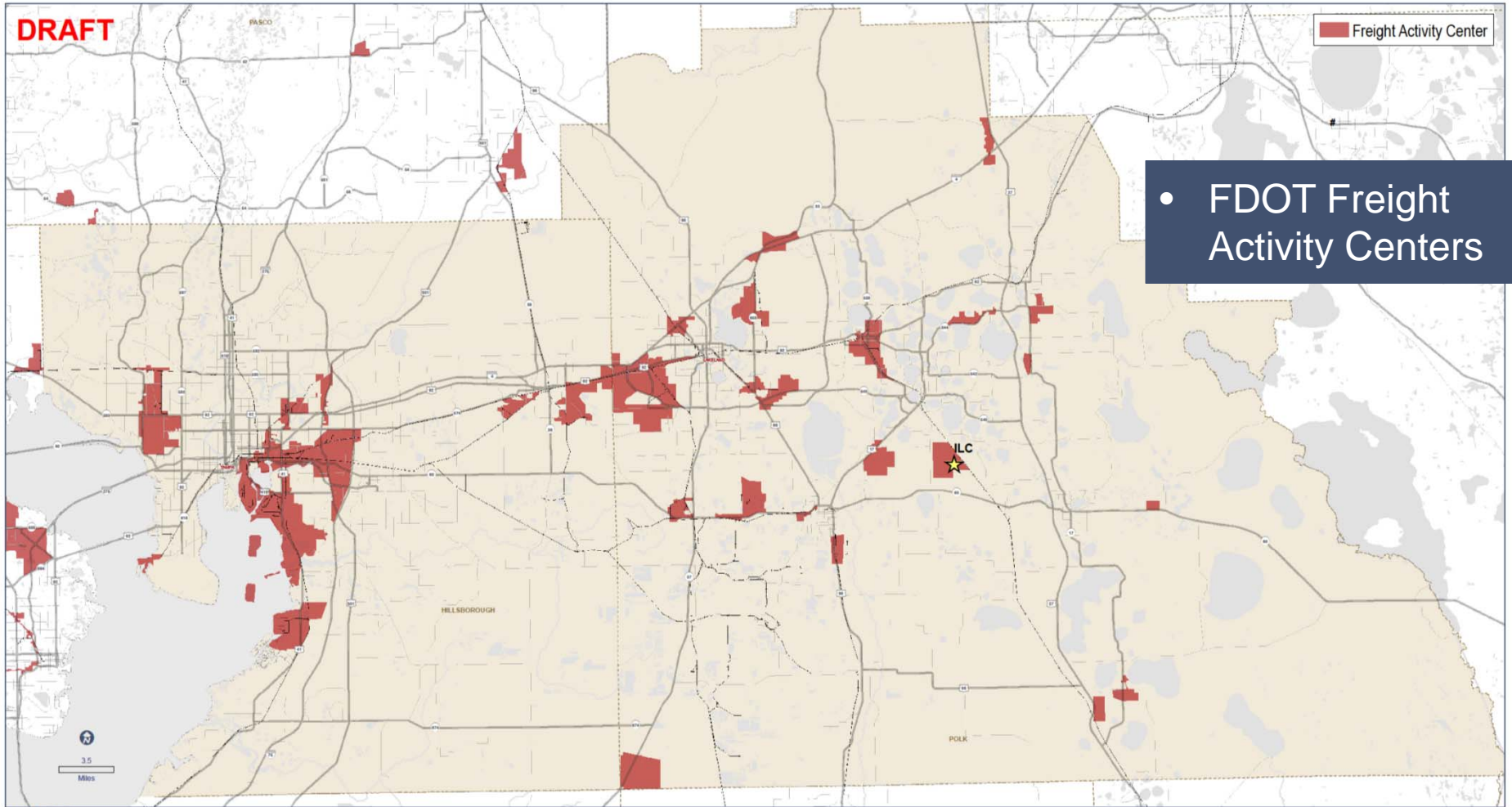
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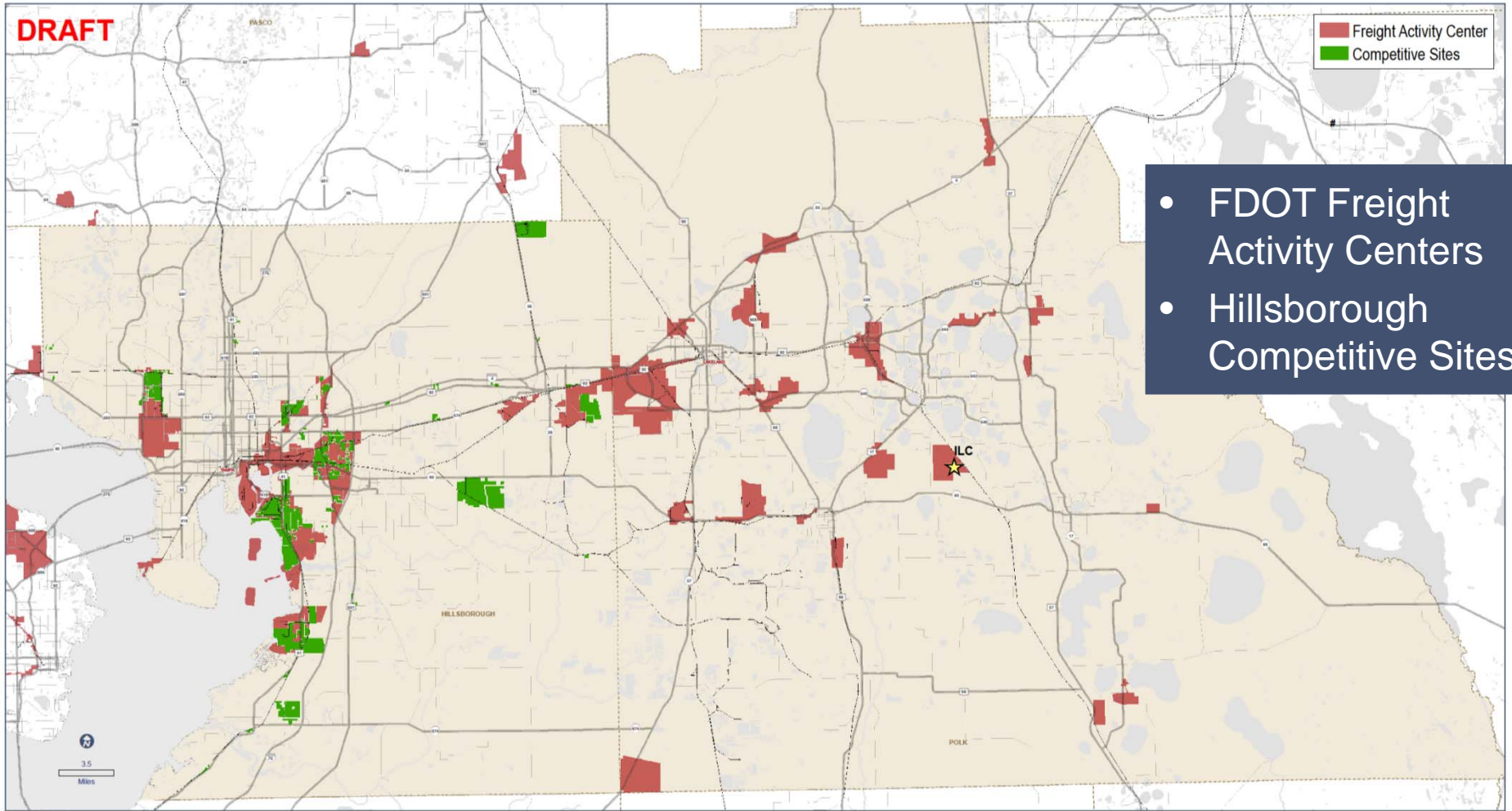
DIRECT SOURCES OF FLZ DESIGNATION

- FDOT freight activity centers (FAC)
- Hillsborough Competitive Sites with industrial entitlements or designation
- Industrially designated areas in local future land use plans in or near freight clusters
- Other (potential sites identified by working group)

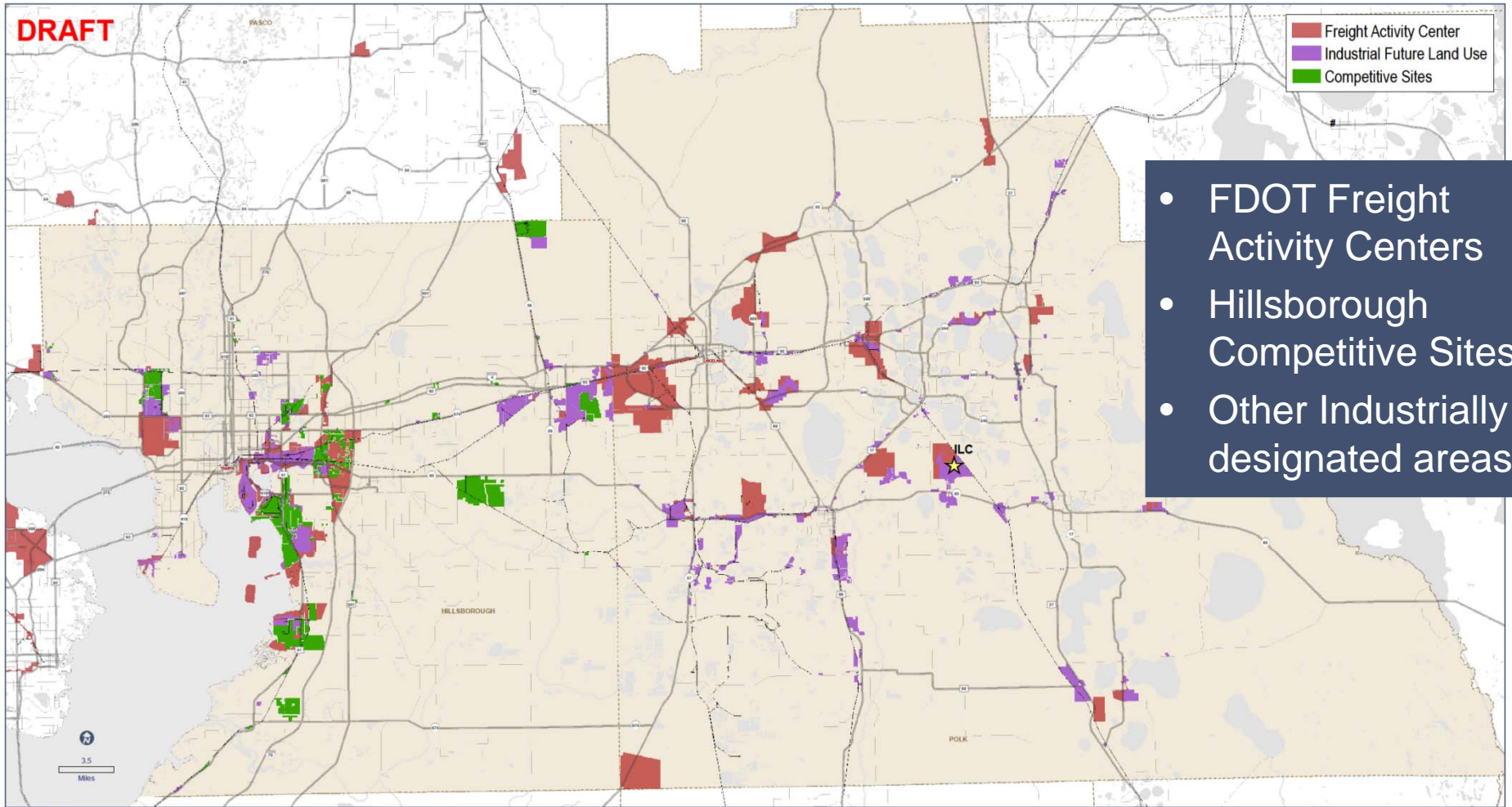




- FDOT Freight Activity Centers



- FDOT Freight Activity Centers
- Hillsborough Competitive Sites



- FDOT Freight Activity Centers
- Hillsborough Competitive Sites
- Other Industrially designated areas

INDIRECT SOURCES OF FLZ DESIGNATION

- ATRI truck origin/destination data
- Long range transportation plans
 - ✓ MPO plans
 - ✓ FDOT SIS plan
 - ✓ FDOT Freight Mobility and Trade Plan
- Heavy truck volumes
- Rail volumes
- Regional freight network



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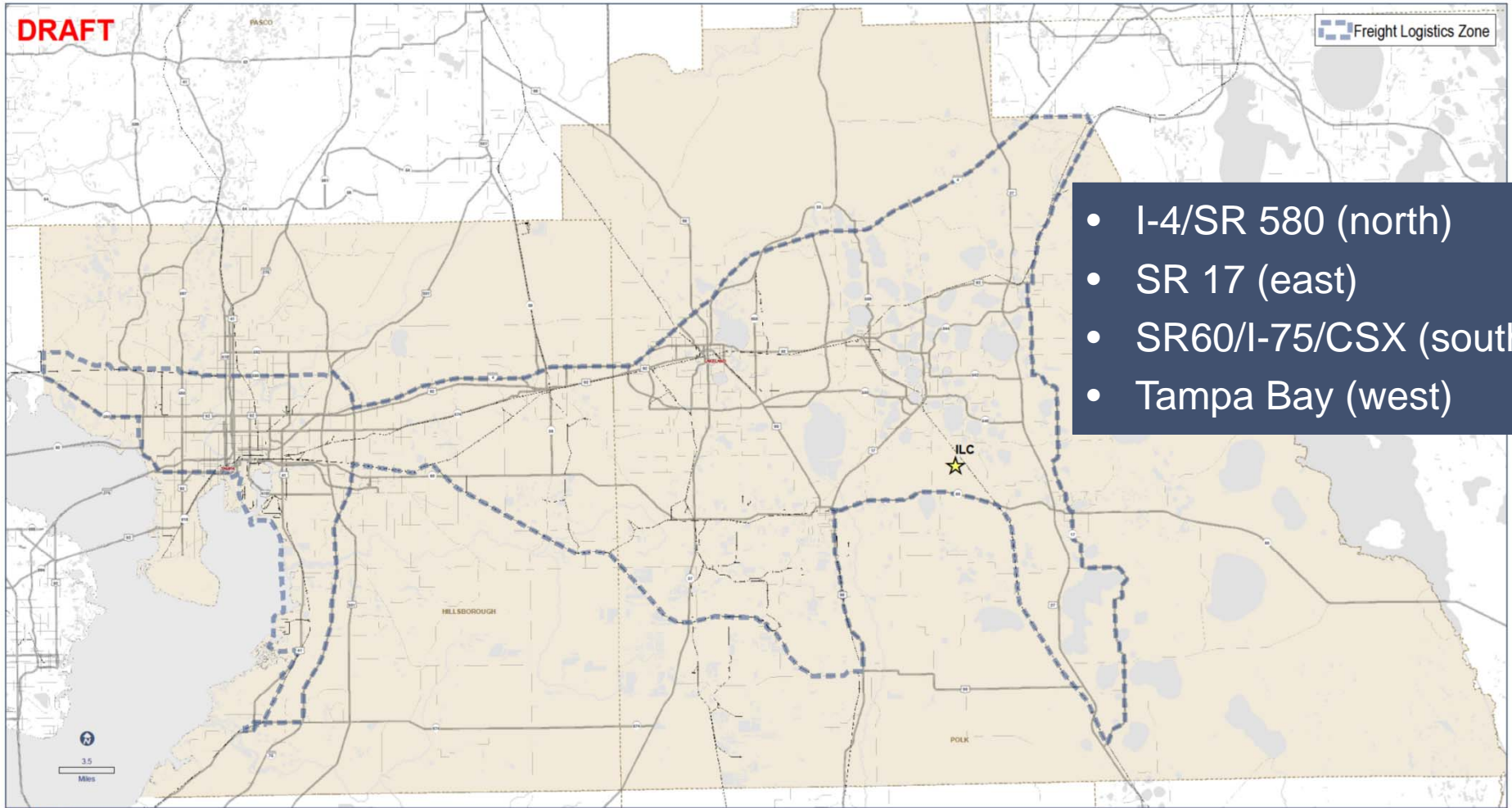
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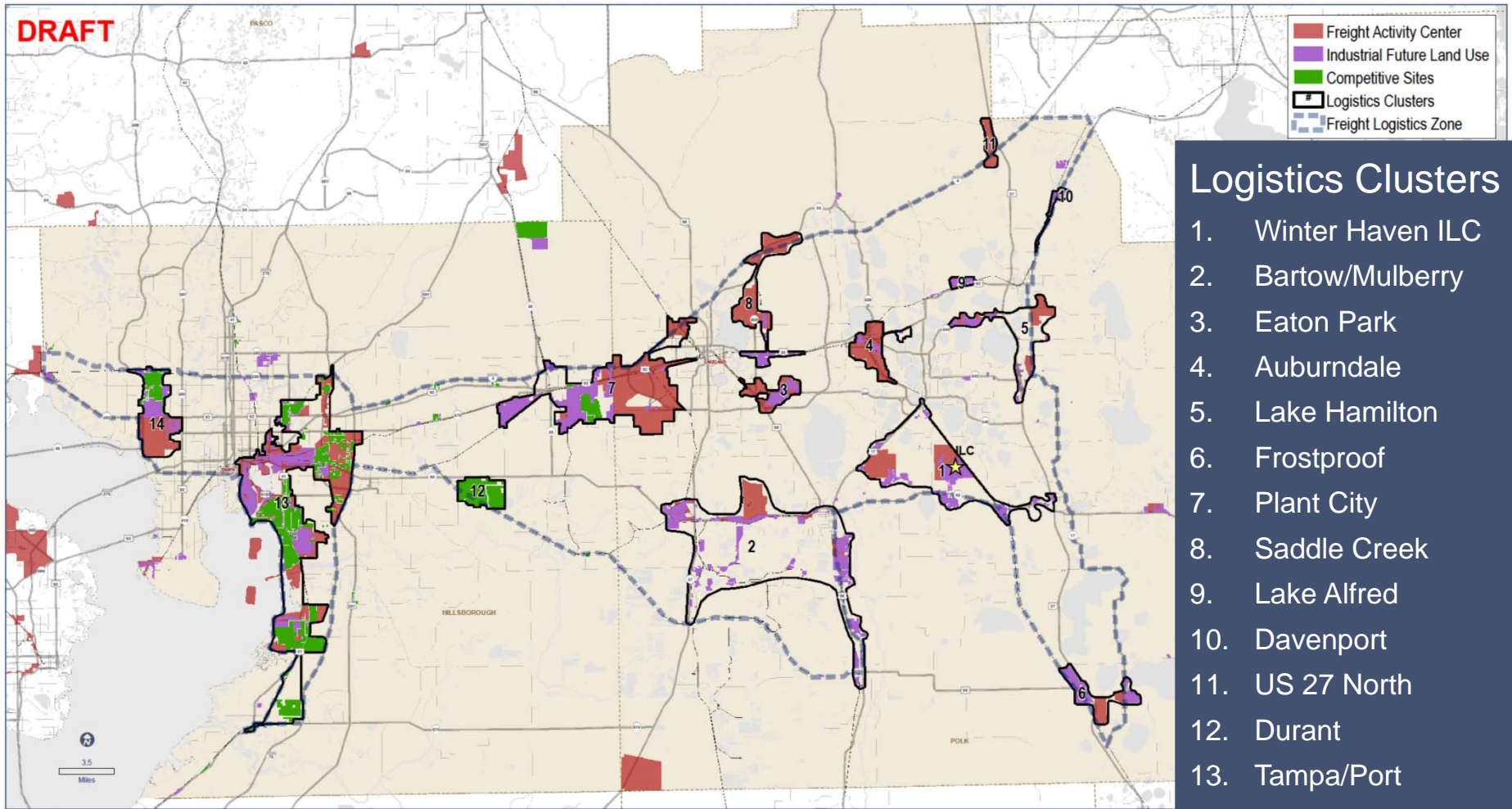
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April 5, 2016



- ### Logistics Clusters
1. Winter Haven ILC
 2. Bartow/Mulberry
 3. Eaton Park
 4. Auburndale
 5. Lake Hamilton
 6. Frostproof
 7. Plant City
 8. Saddle Creek
 9. Lake Alfred
 10. Davenport
 11. US 27 North
 12. Durant
 13. Tampa/Port
 14. Tampa/Airport

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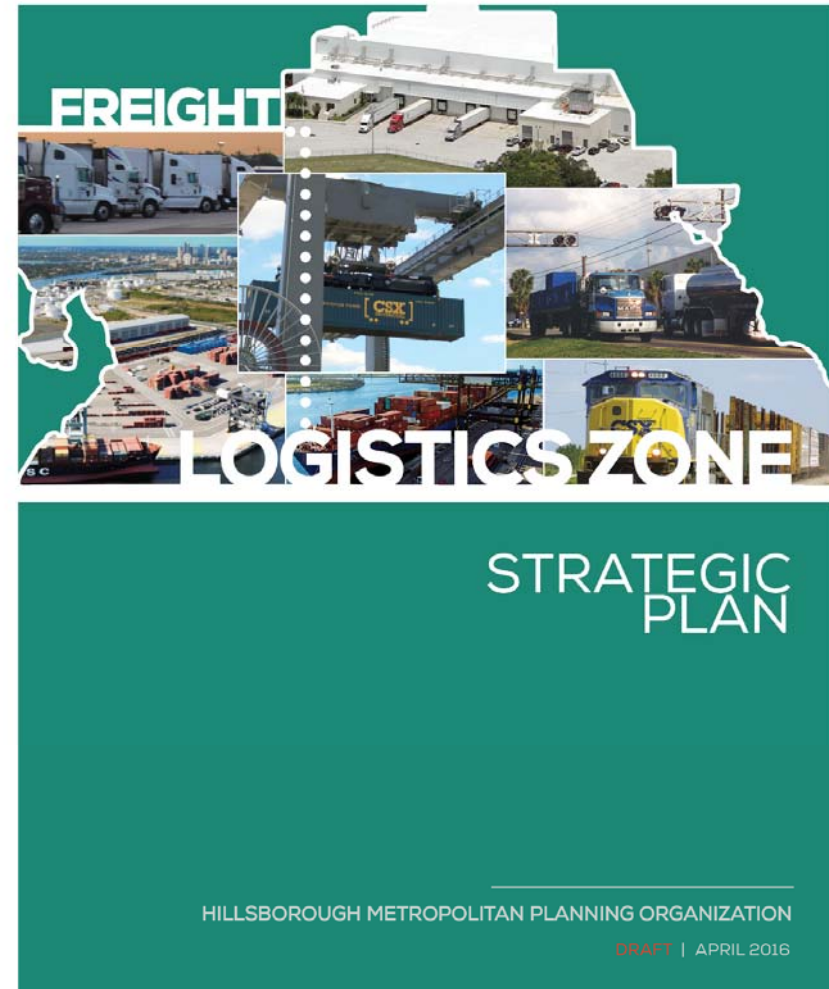
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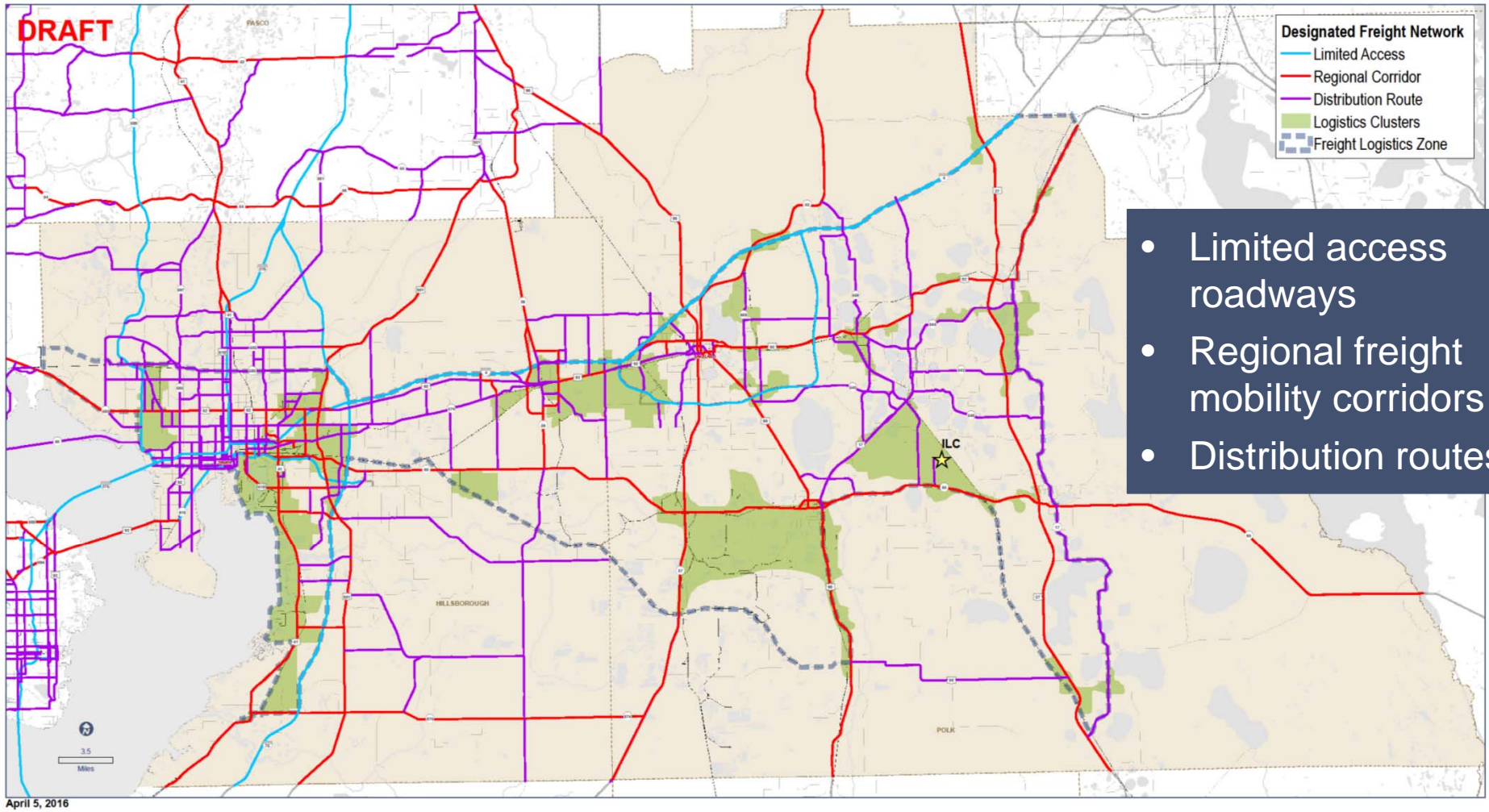
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FLZ STRATEGIC PLAN CONTENT

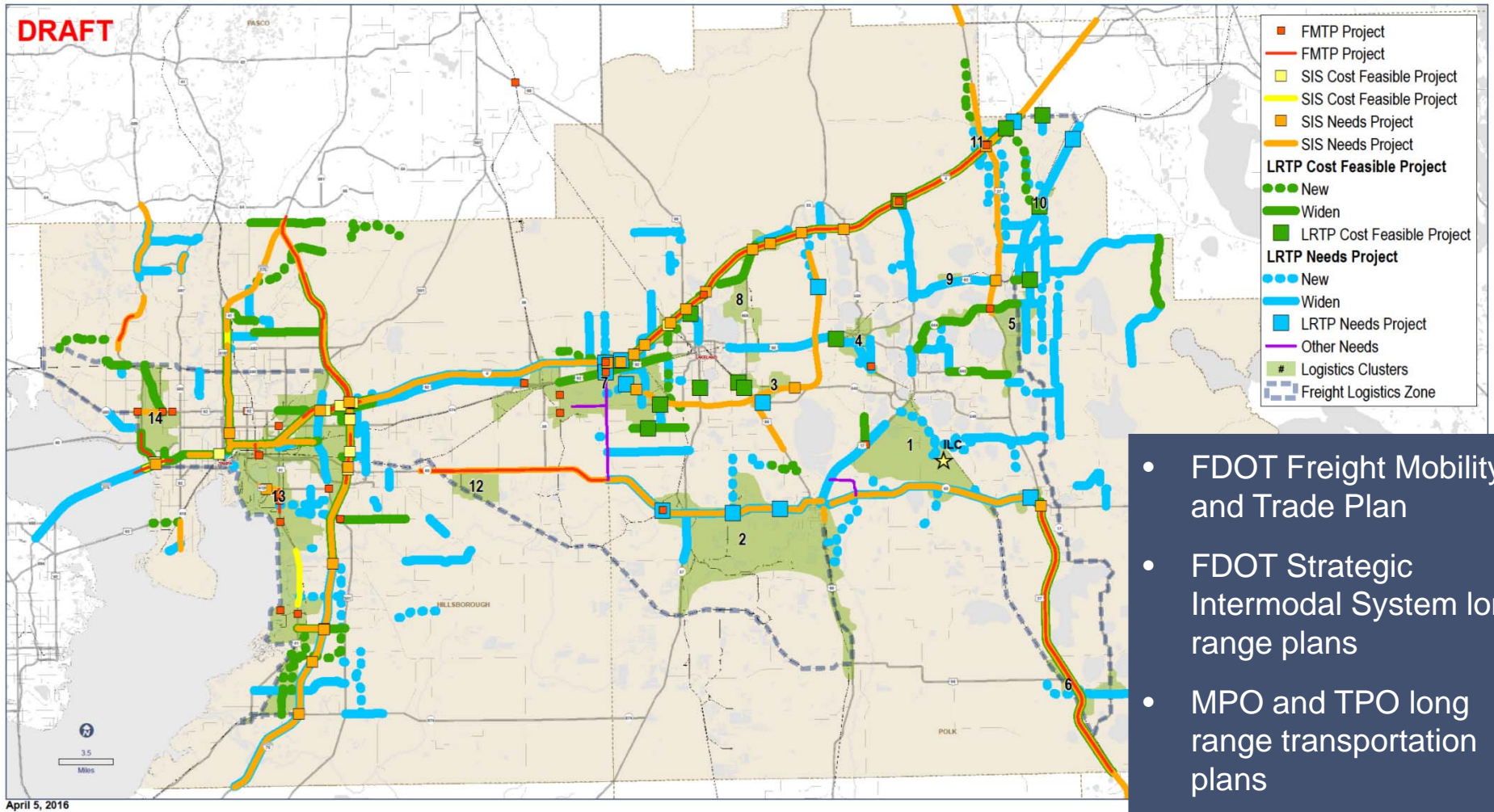
- FLZ boundary
- Designated freight network
- Infrastructure improvement needs
- Workforce availability
- Training capabilities
- Economic incentive programs
- Consistency with local comprehensive plans



DESIGNATED FREIGHT NETWORK

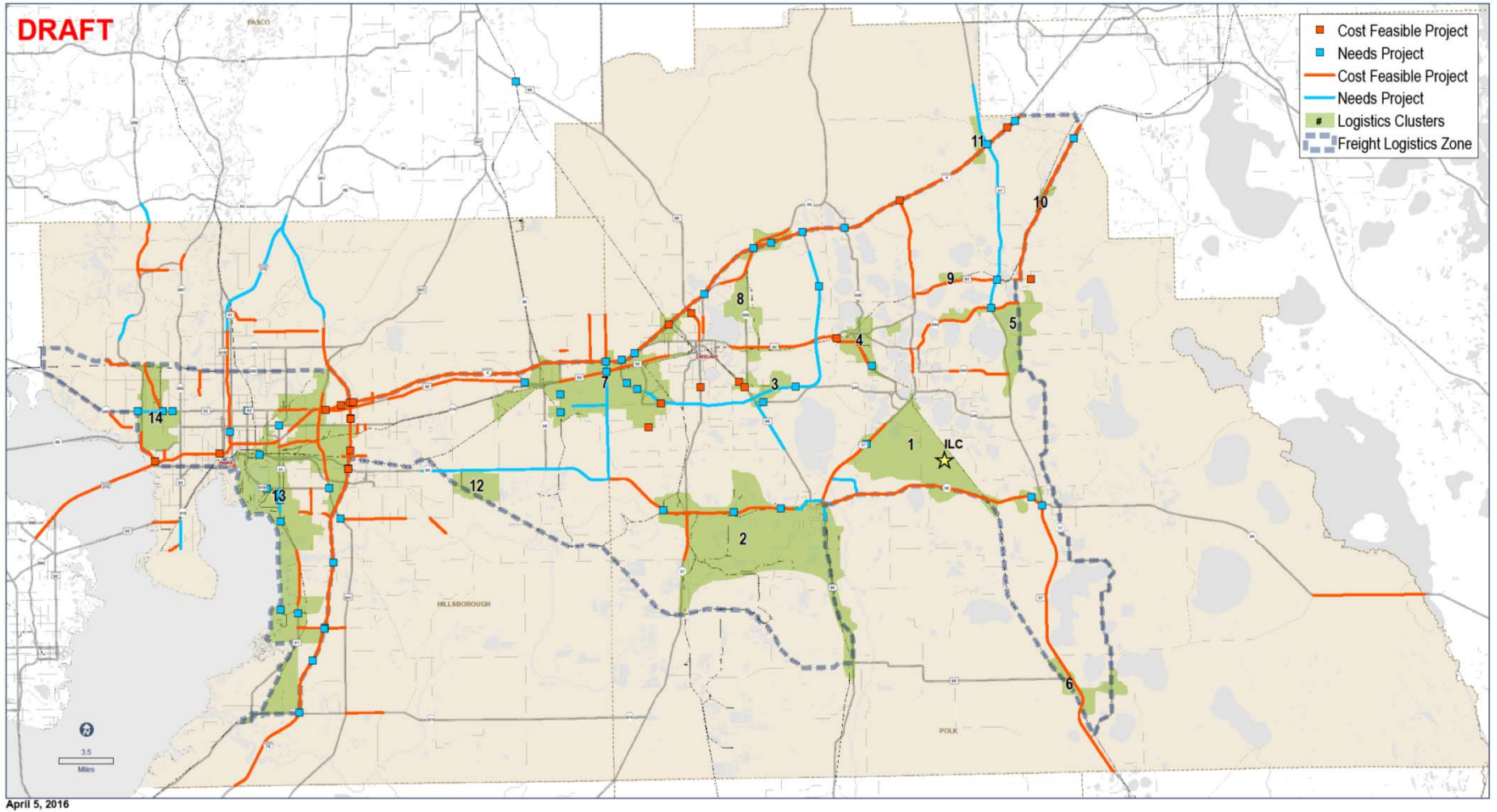


- Limited access roadways
- Regional freight mobility corridors
- Distribution routes

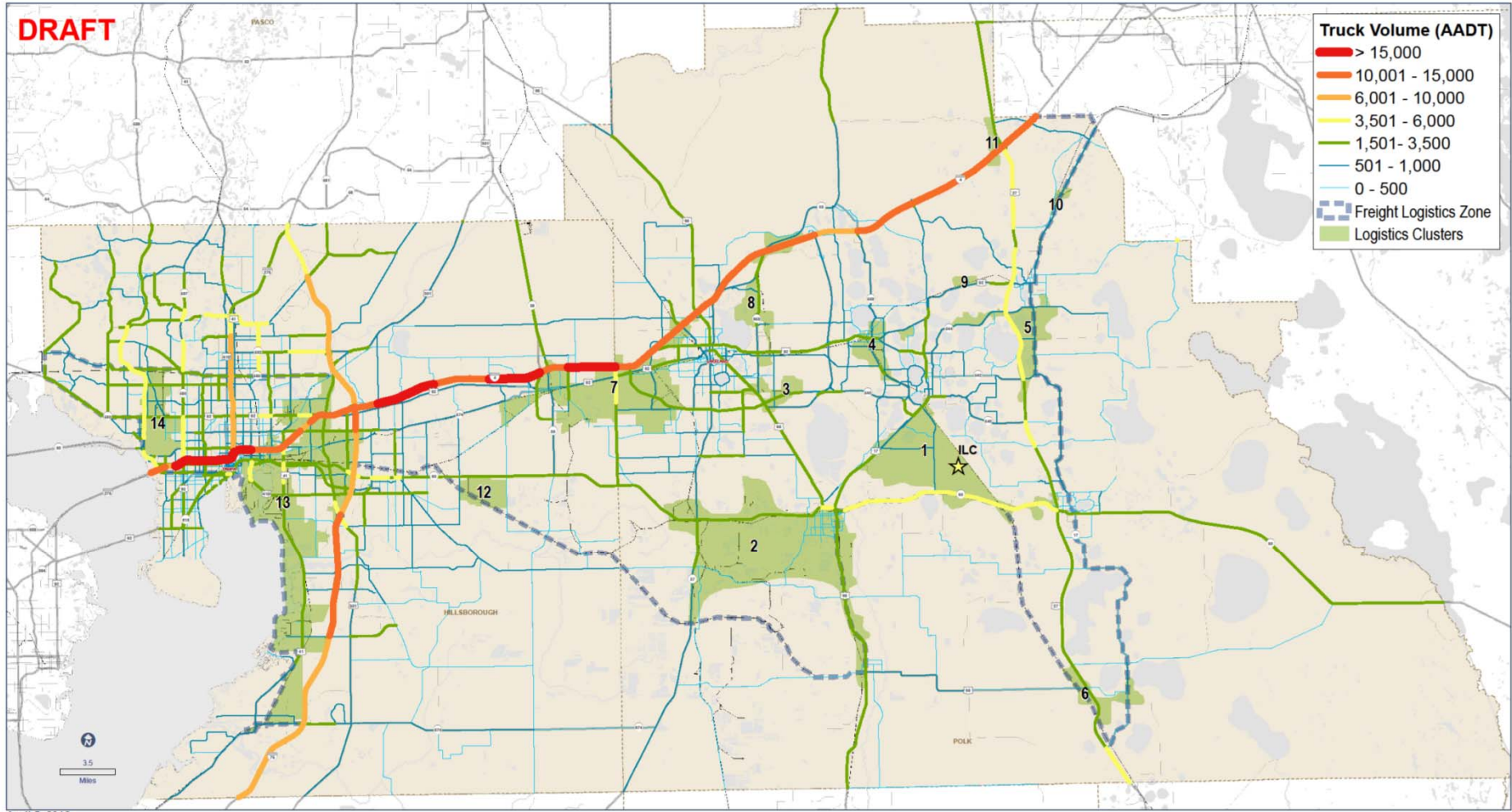


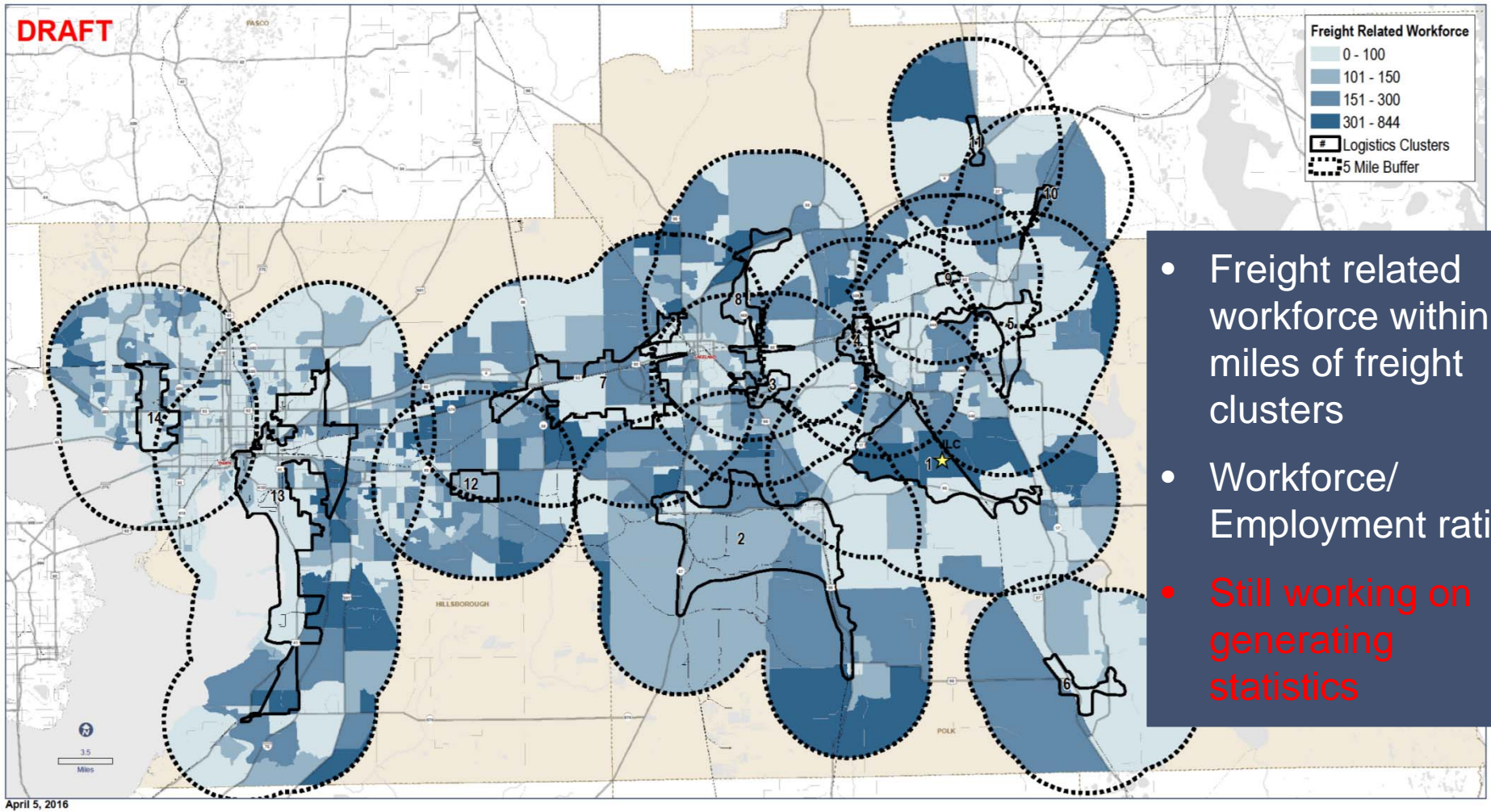
- FDOT Freight Mobility and Trade Plan
- FDOT Strategic Intermodal System long range plans
- MPO and TPO long range transportation plans
- No short term committed improvements

NEEDS ON FREIGHT NETWORK

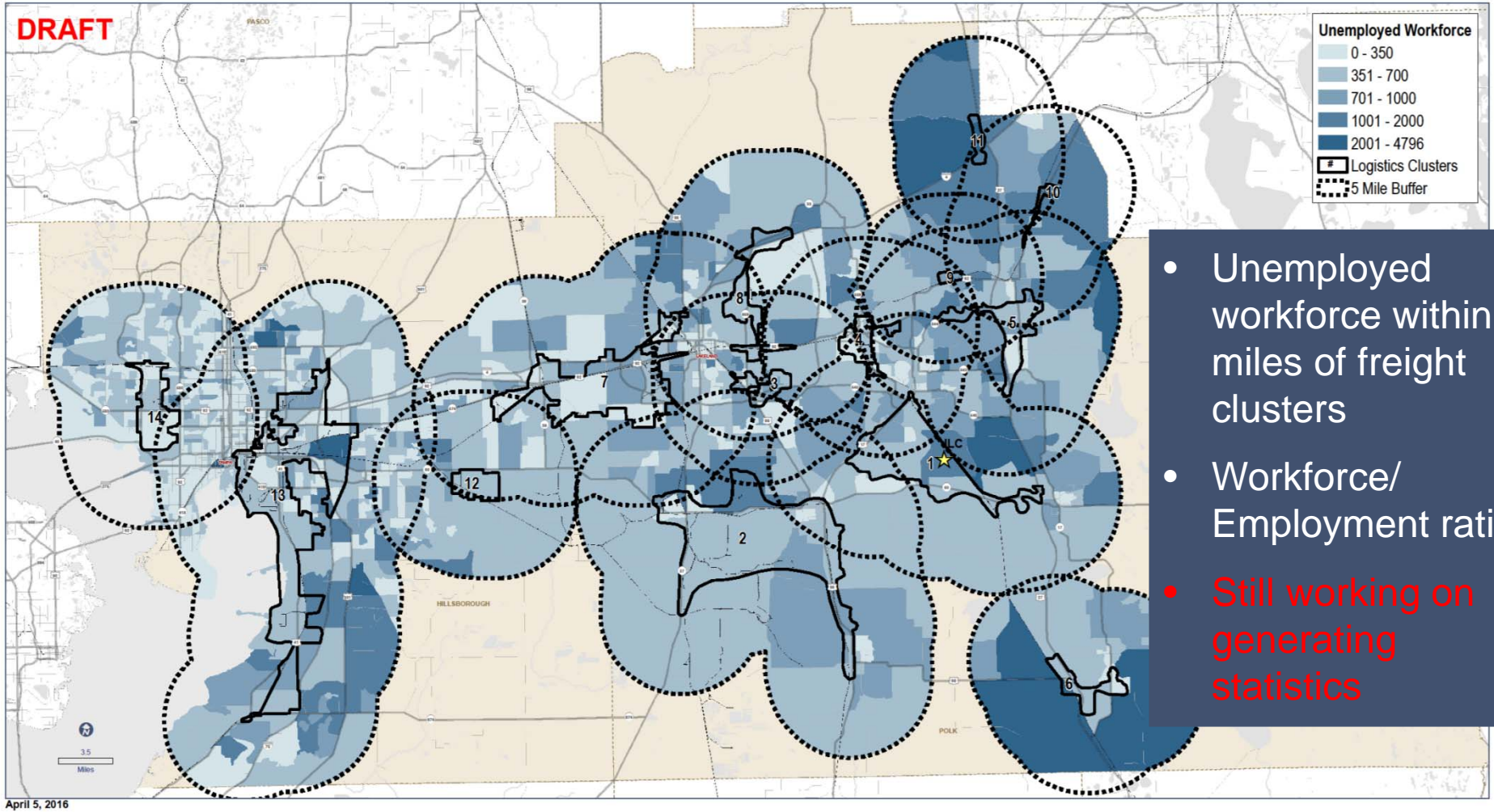


HEAVY TRUCK VOLUMES

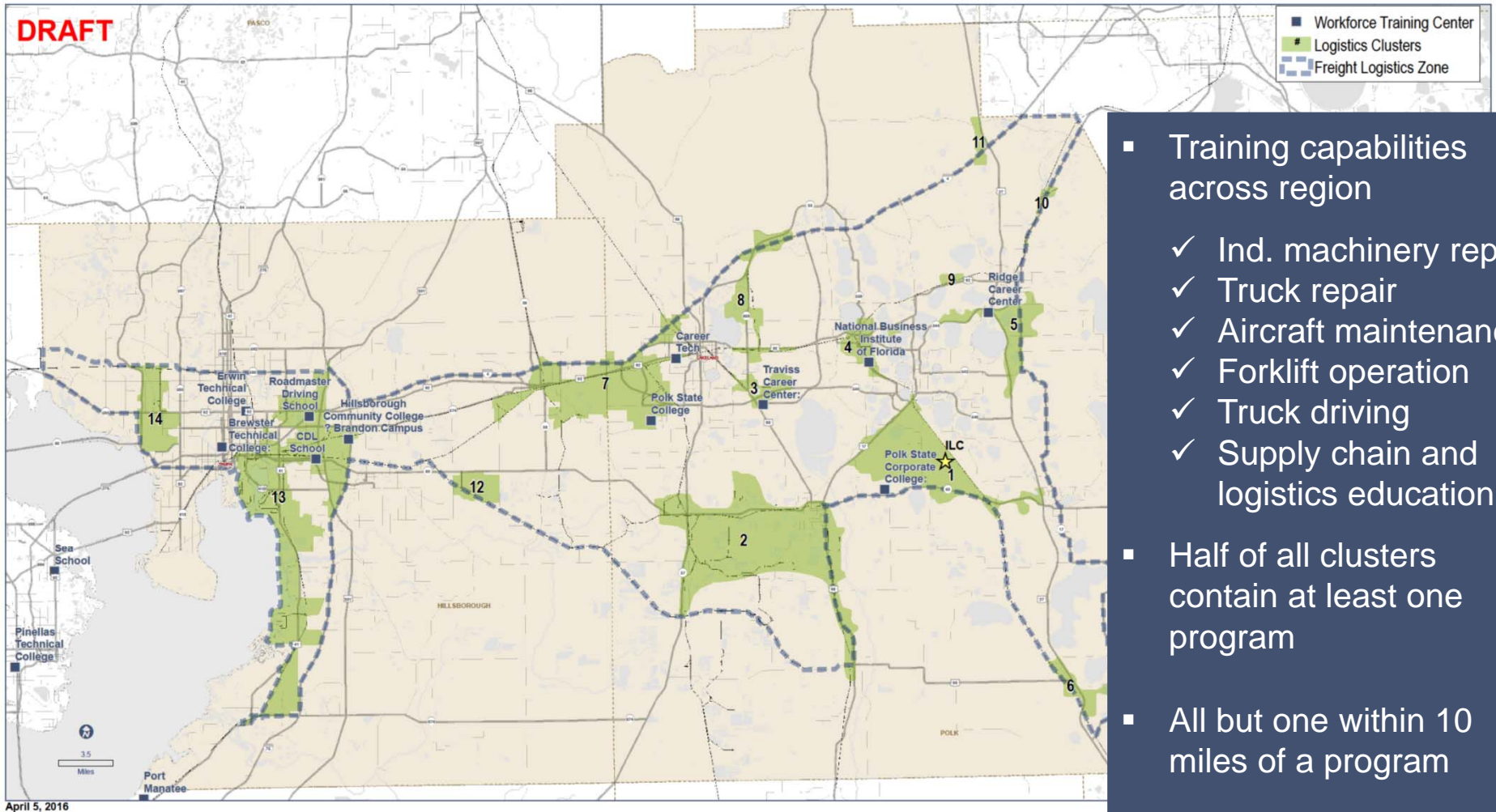




- Freight related workforce within 5 miles of freight clusters
- Workforce/ Employment ratio
- Still working on generating statistics



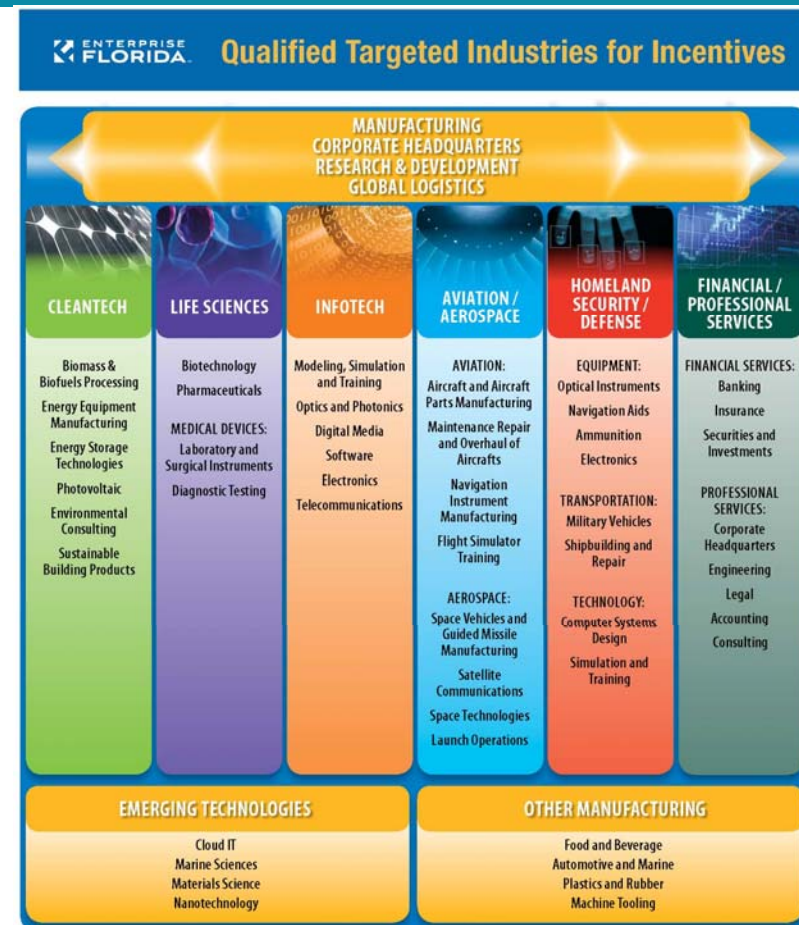
- Unemployed workforce within 5 miles of freight clusters
- Workforce/ Employment ratio
- Still working on generating statistics



- Training capabilities across region
 - ✓ Ind. machinery repair
 - ✓ Truck repair
 - ✓ Aircraft maintenance
 - ✓ Forklift operation
 - ✓ Truck driving
 - ✓ Supply chain and logistics education
- Half of all clusters contain at least one program
- All but one within 10 miles of a program
- All programs within FLZ

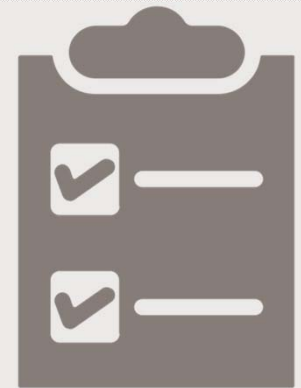
ECONOMIC INCENTIVE PROGRAMS

- Local and regional
 - ✓ Ad valorem tax exemptions
 - ✓ Impact fee exemption/mitigation
 - ✓ Regulatory and site selection assistance
- State and federal
 - ✓ Tax credits
 - ✓ Grant programs
 - ✓ Training programs



CONSISTENCY WITH LOCAL COMPREHENSIVE PLANS

- FLZ Strategic Plan not a regulatory document
- Comprehensive Plan amendments NOT required
- Consistency with comp plans a function of FLZ hierarchy
 1. Freight Logistics Zone – inclusive of large portion of 2-county area
 2. Freight Clusters – inclusive of broad areas of freight activity
 3. Individual sites – Sites within clusters include industrial AND non-industrial land uses
- Comp Plan “Finding of Consistency”
- For future consideration: FDOT Freight and Land Use Compatibility Analysis



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FLZ BOUNDARY & FREIGHT CLUSTERS

1. Review and comment on DRAFT FLZ Boundary definition

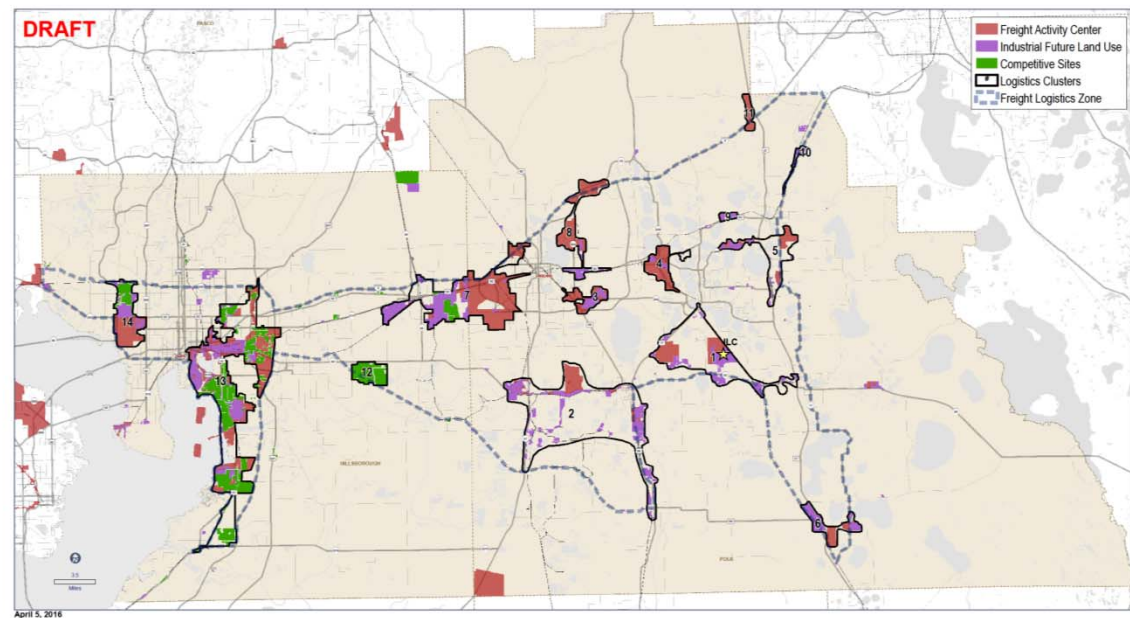
- Overall strategic direction
- Boundary definition

2. Review and comment on Freight Clusters definition

- Any missing freight generators?
- Boundary definitions

3. Additional improvement needs

- e.g. Rice Rd extension, County Line Rd



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SCHEDULE AND NEXT STEPS

- Prepare DRAFT Strategic Plan
- Present plan to working group
- Present plan to MPO/TPO committees
- Present plan to MPO/TPO boards
- Draft resolution and for approval by county boards





CONTACT US

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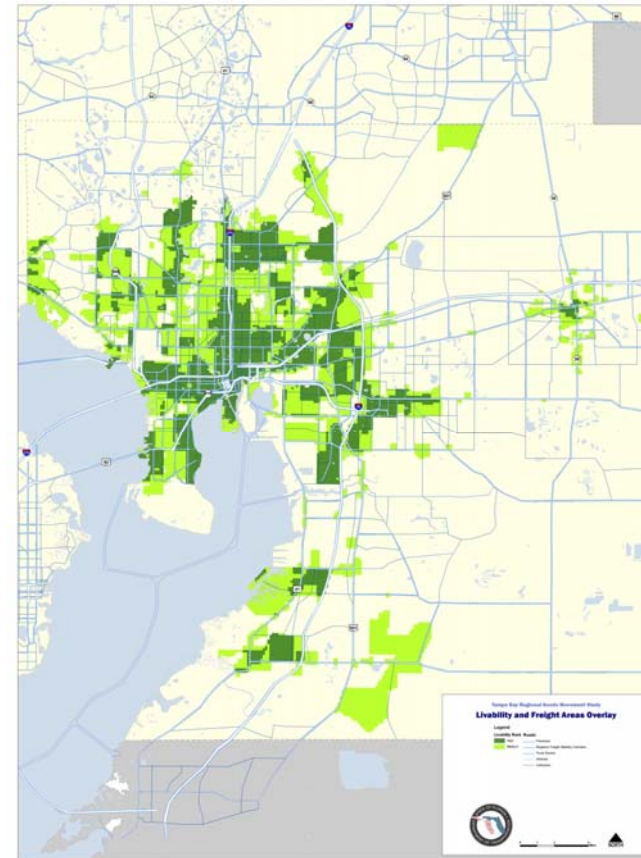
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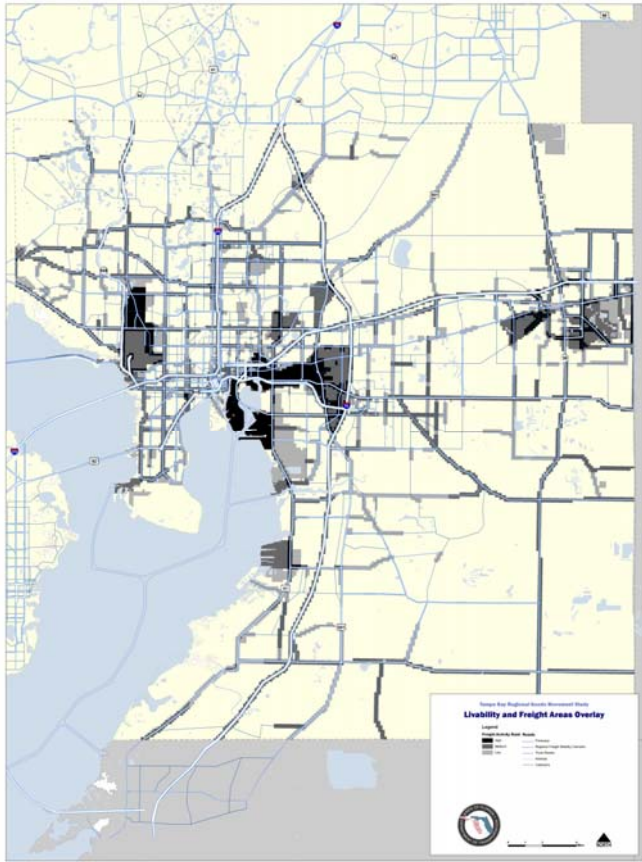
FREIGHT AND LAND USE COMPATIBILITY ANALYSIS

Livability Indicators	Score	
Station areas (1/2 mi buffer)	3	Station Areas
Livable FLUs	2	
Industrial FLUs	-1	Industrial Areas
CRA	1	
Activity Centers		
Hillsborough		
Primary	2	Activity Centers
Secondary	1	
Tampa		
Business Centers	2	Business Centers
Urban Villages	1	
Plant City		
Midtown	1	Plant City
CCC Regional Anchors		
Tier		
Low	1	Regional Anchors
High	2	
Freight Activity Centers	-1	
Hi	3 or more	Regional
Med	1 to 2	
Low	-1	

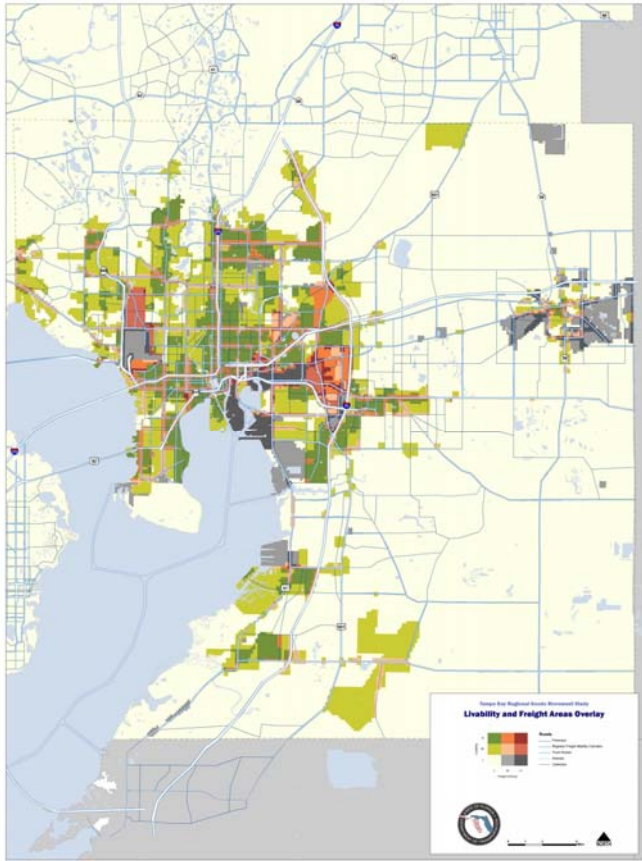
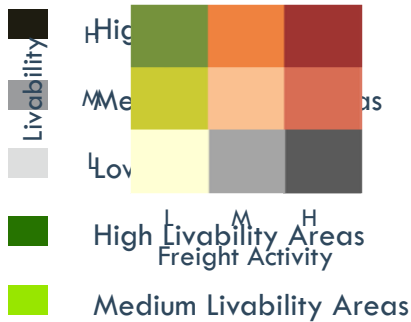


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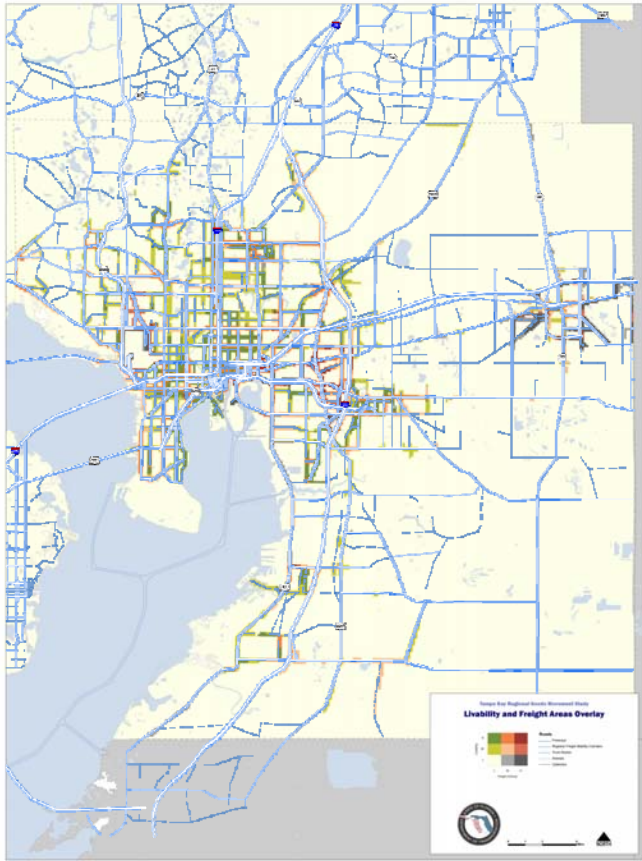
Freight Indicators		
Freight Activity Centers Intensity		0s Freight Areas
Low	2	10s Freight Areas
Medium	2	
High	3	
Industrial FLUs	1	5s Freight Areas
Percent Truck Traffic		Commercial
< 3%	0	<p>High Truck Traffic (over 10%)</p> <p>Medium Truck Traffic (5-10%)</p> <p>Low Truck Traffic (3-5%)</p>
3-5%	1	
5-10%	2	
> 10%	3	



FREIGHT AND LAND USE COMPATIBILITY ANALYSIS



CONSISTENCY WITH LOCAL COMPREHENSIVE PLANS



WHAT IS A FLZ?

Freight Logistics Zone

- grouping of activities and infrastructure
- associated with freight transportation and related services
- within a defined area around an intermodal logistics center

Intermodal Logistics Center

- A FDOT designated SIS facility or group of facilities serving as a point of intermodal transfer of freight
- in a specific area physically separated from a seaport
- designed to support shipping through one or more seaports



CONSIDERATIONS FOR DETERMINING PRIORITY FUNDING

- Presence of ILC within FLZ
- Project serves a strategic state interest
- Project facilitates cost-effective and efficient goods movement
- Project contributes to economic activity
- Project supports existing and planned transportation network
- Investment or commitment made by owner or developer
- Local government commitment to private sector
- Demonstrated local financial support and commitment to project



OPPORTUNITIES

- FLZ statute is permissive legislation, enabling state agencies to utilize FLZ for prioritization
- Flexible, possibly first example
- Visibility, education
- Two **NEW** Freight Programs in Fixing America's Surface Transportation (FAST) Act
 - \$1.2 b distributed by formula (\$60 m annually to Florida)
 - \$900 m of competitive grants or TIFIA loans available (nationally) for large projects (>\$100 m)
- State Strategic Intermodal System (SIS) funds >60% of total state/federal transportation funds for counties



FLZ STRATEGIC PLAN REQUIREMENTS

- Geography
 - Designated FLZ area(s)
 - Freight facilities/clusters
- Consistency
 - Comprehensive plans
 - MPO long range transportation plans
 - Strategic State interest
 - Must be adopted by one or more counties
- Freight Infrastructure
 - Roads, rail, airports, seaports
 - Planned network improvements
- Economic Development
 - Incentive programs
 - Workforce availability
 - Workforce training programs
 - Private/local gov't commitments



FLZ STRATEGIC PLAN

- What it is..

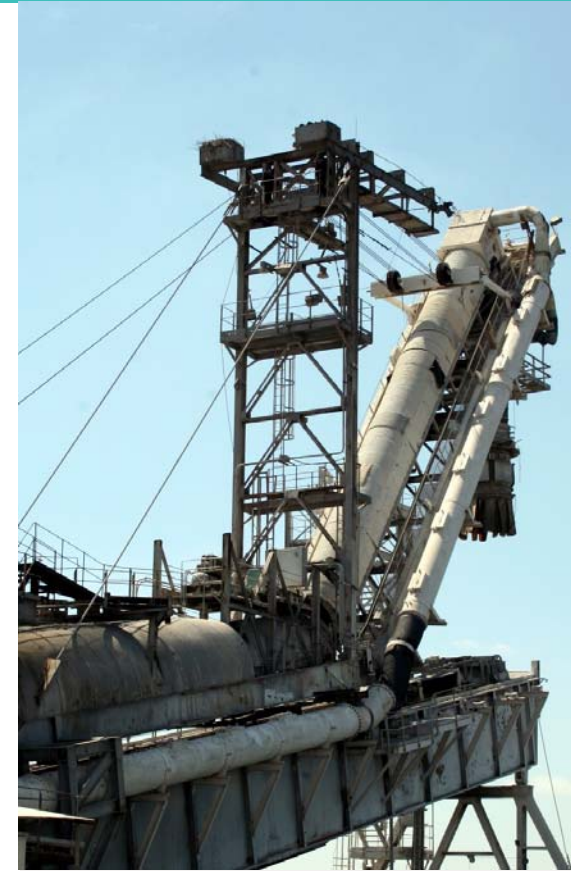
- Framework for directing potential funding to freight infrastructure
- Coordinating document linked to freight projects identified in state and local plans
- Economic development resource

A majority of this exits...

- What it is NOT..

- Infrastructure needs assessment
- Land use plan
- Re-invention of existing freight plans

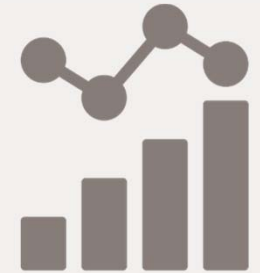
A brand new plan...



FLZ STRATEGIC PLAN PROCESS

- Compile data to inform process
- Identify FLZ criteria based on data and statute
- Apply criteria and identify FLZ's
- Relate FLZ's to existing plans, data
- Develop strategic plan document

- Next steps:
 - Summit #2 –late March/early April



TODAY'S GOALS

- Identify additional data resources
- Hear your thoughts on big picture issues and goals
- Collect feedback on area of interest



STAKEHOLDER COORDINATION



- Hillsborough MPO
- Polk TPO
- FDOT District Seven
- FDOT District One
- Port Tampa Bay
- Hillsborough County
- City of Tampa
- City of Plant City
- Polk County
- City of Lakeland
- City of Winter Haven
- CSX
- Tampa International Airport

1 FLZ Background and Process

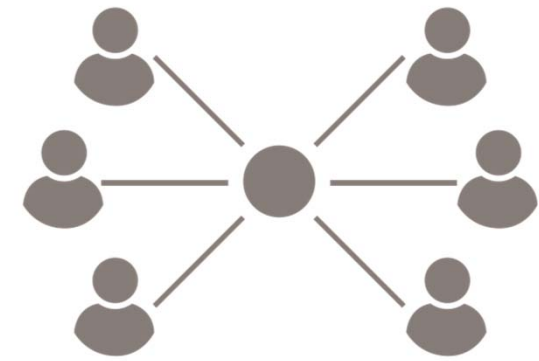
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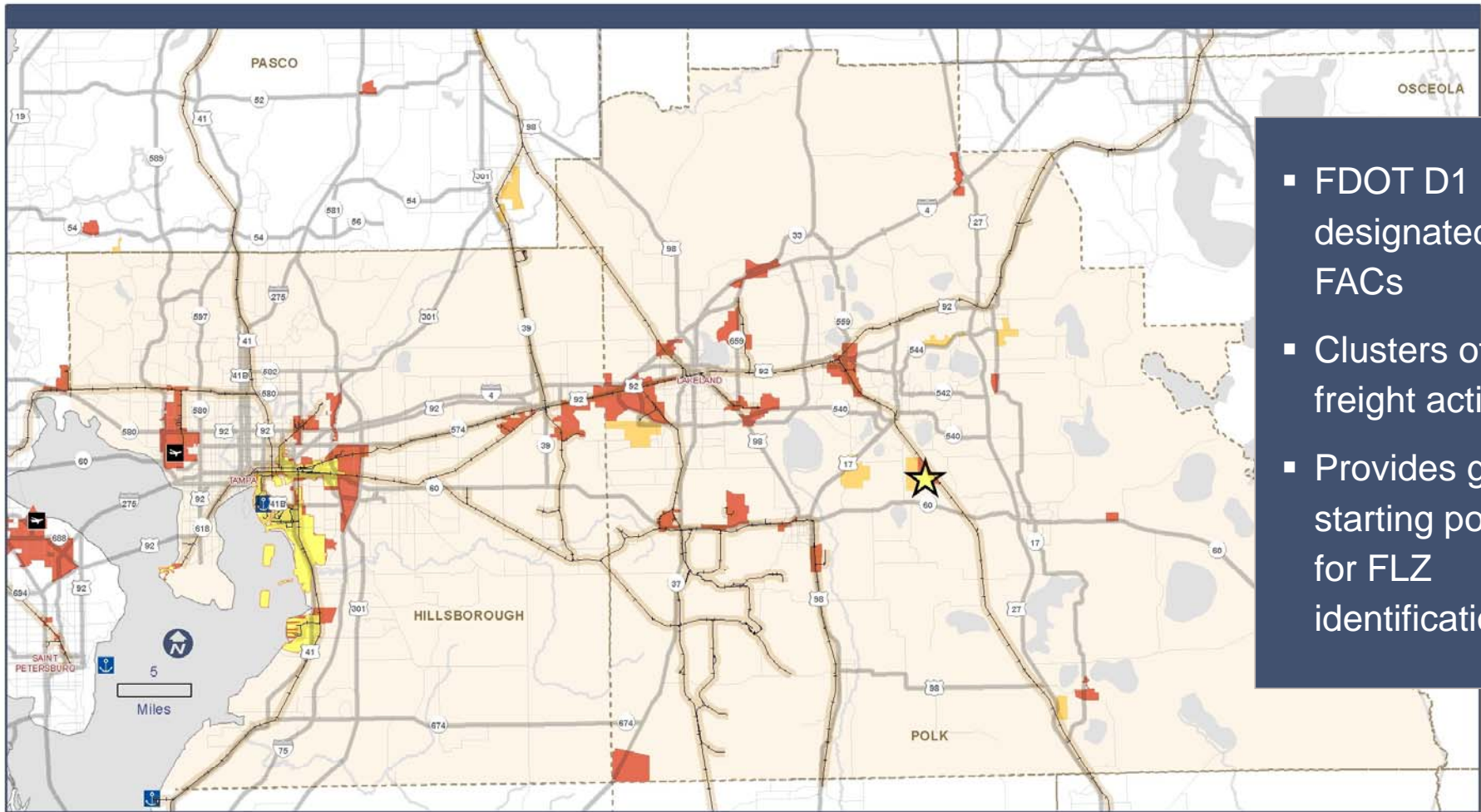
4 Next Steps

COORDINATION OF EFFORTS

- FDOT D7 warehousing geodatabase
- FDOT D7 Logistics Activity Center analysis
- FDOT D1 and D7 freight planning efforts
- FDOT SIS and Freight Mobility and Trade Plan
- Airport/Seaport Master Plans
- State/county/municipal development incentive programs
- Hillsborough County Competitive Sites



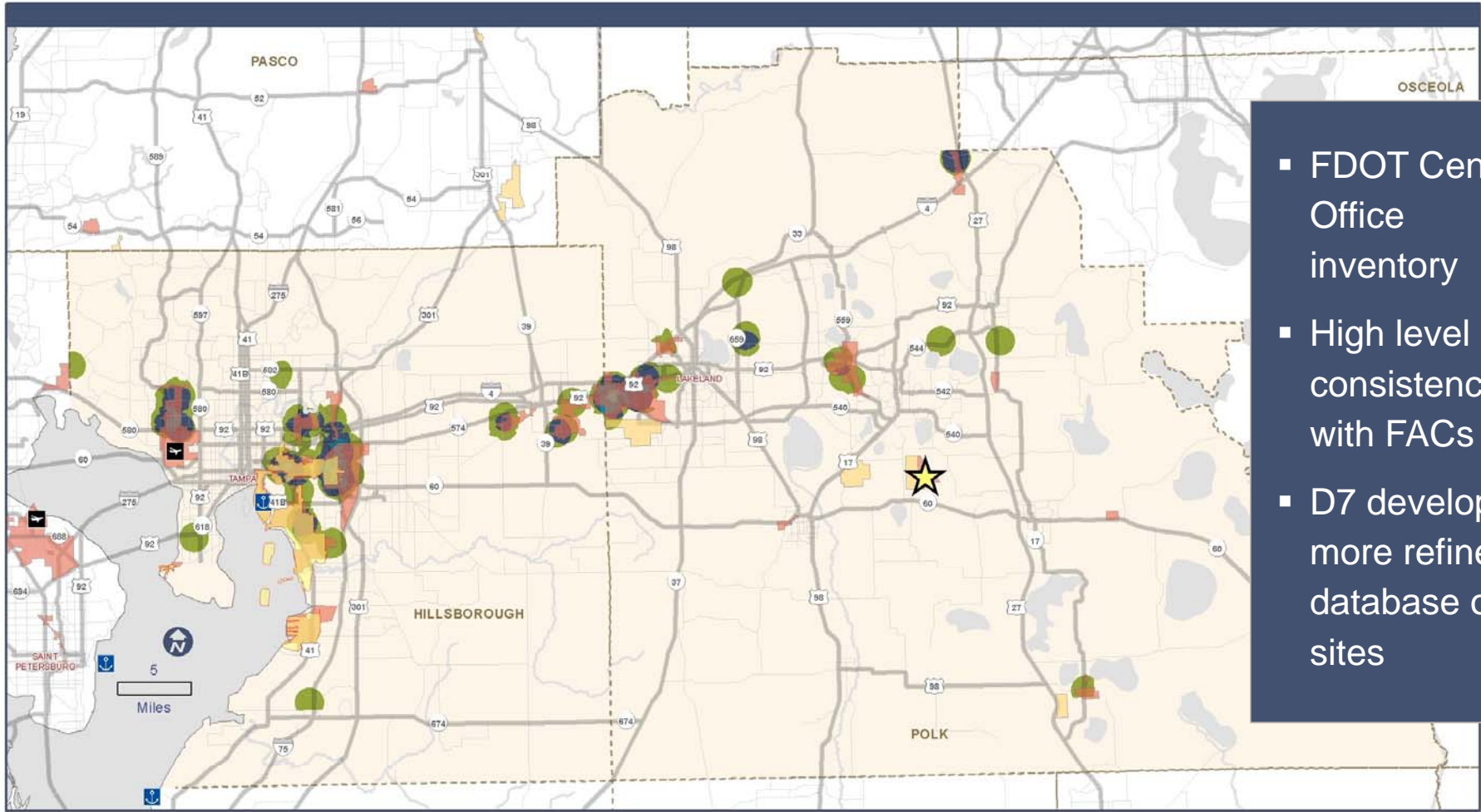
FDOT FREIGHT ACTIVITY CENTERS



- FDOT D1 & D7 designated FACs
- Clusters of freight activity
- Provides good starting point for FLZ identification



FREIGHT RELATED SITES >100K SQ FT

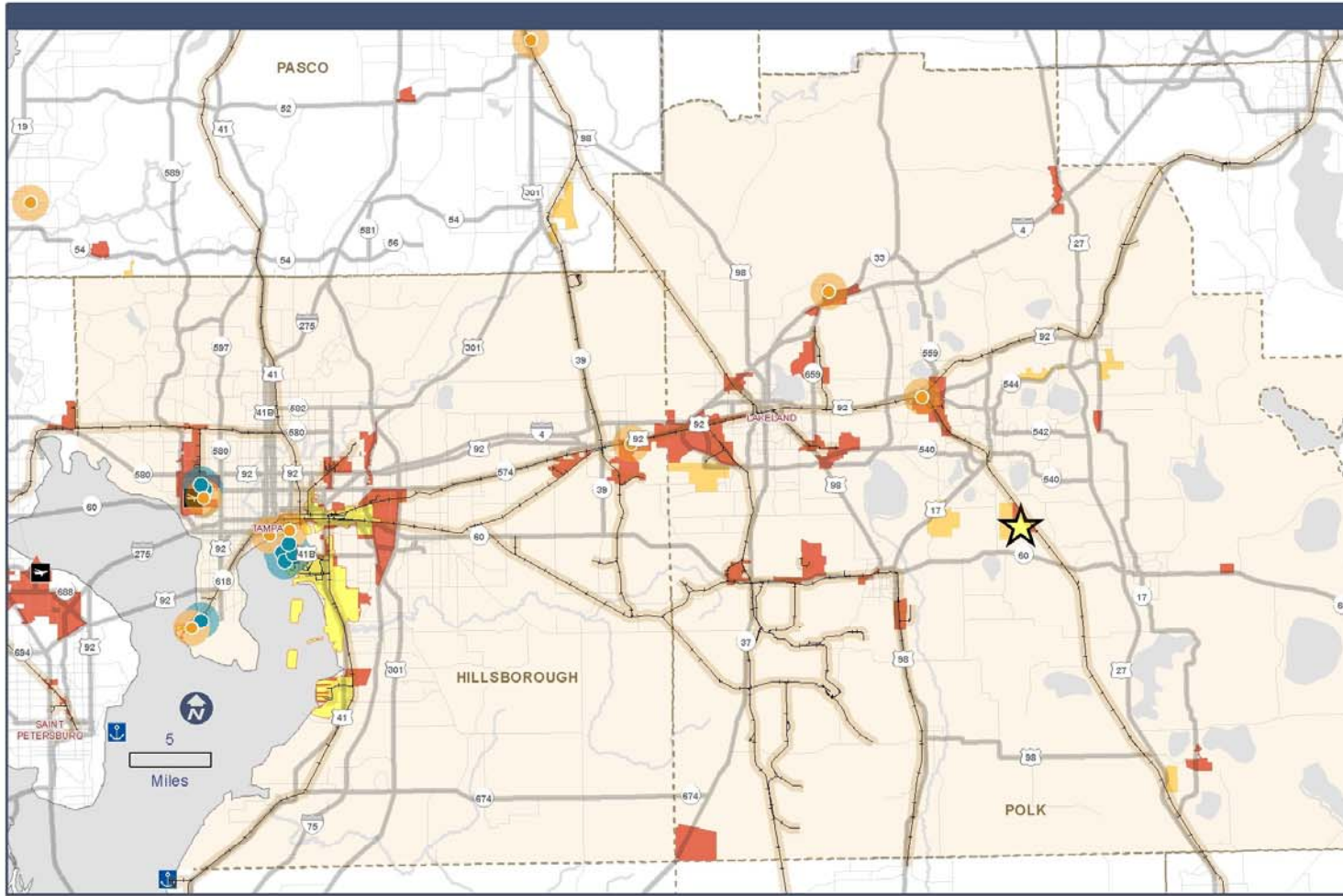


- FDOT Central Office inventory
- High level of consistency with FACs
- D7 developing more refined database of sites

Seaport	Freight Activity Center
Airport	Emerging, Future
Intermodal Logistics Center	Existing
	Port Activity Center

WAREHOUSING, DISTRIBUTION TERMINALS, TRUCKING TERMINALS, VAN AND STORAGE WAREHOUSING
 TOTAL SQ FT OF FACILITIES LARGER THAN 100,000 SQ FT WITHIN 1 MILE [DOR USE CODE = 48]

< 500 K	500 K - 1,500 K	1,500 K - 3,000 K	3,000 K - 5,000 K	5,000 K >
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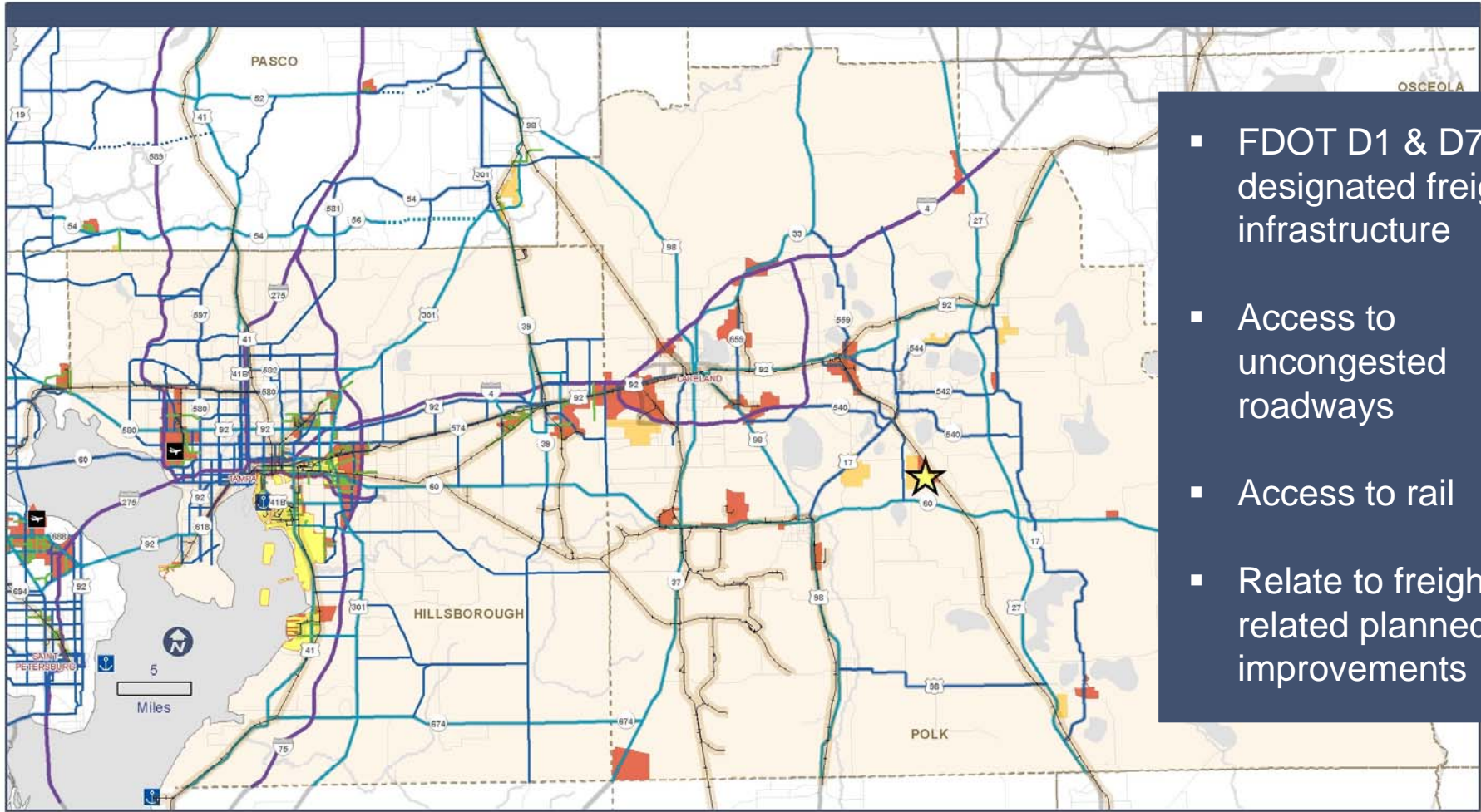


- Includes area within 60 mile radius
- Goods in FTZs considered international commerce
- Legally outside U.S. Customs territory
- Duty deferral, reduction, avoidance

- Seaport
- Airport
- Intermodal Logistics Center

- Freight Activity Center**
- Emerging, Future
 - Existing
 - Port Activity Center

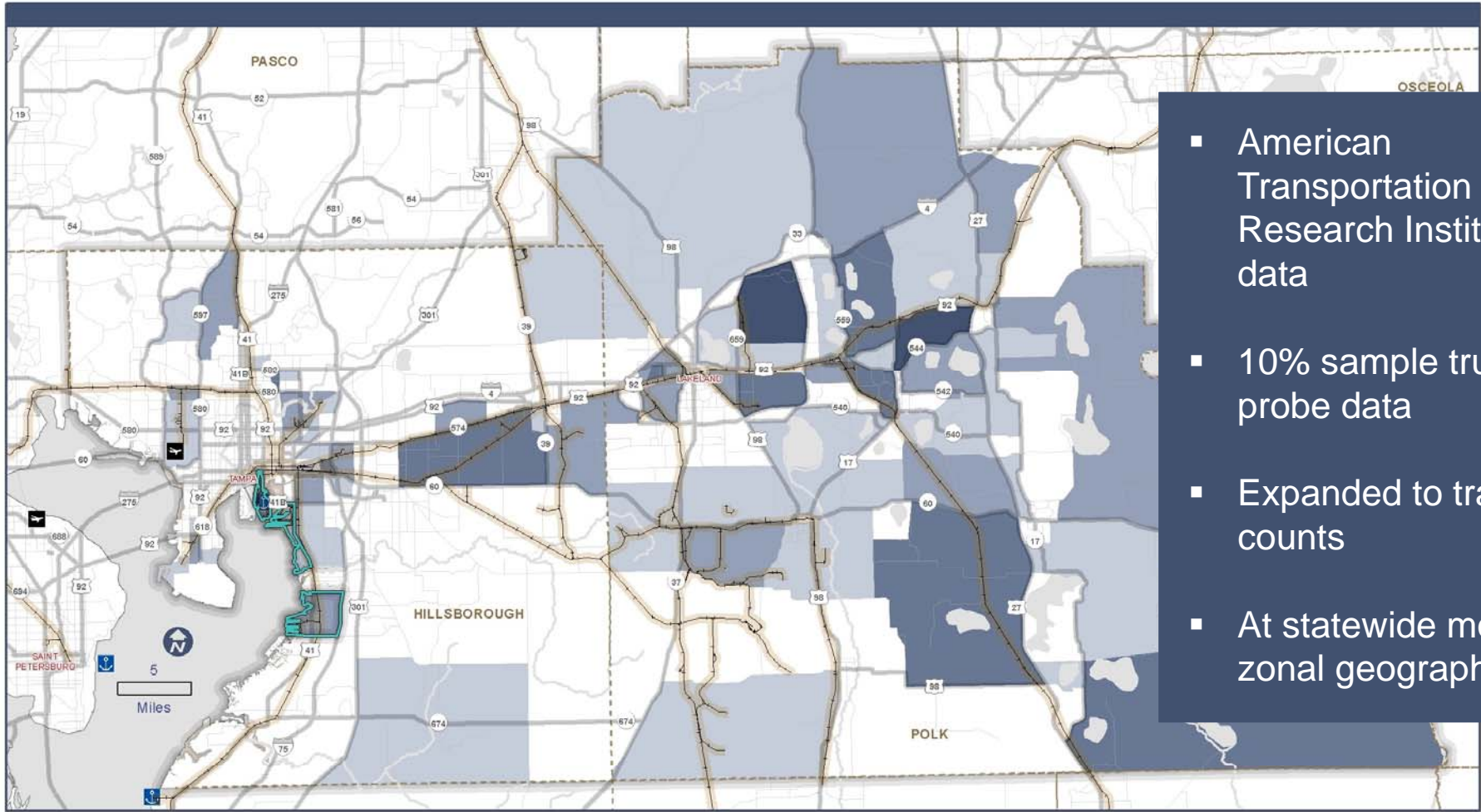
- Foreign Trade Zones**
- Active
 - Inactive



- FDOT D1 & D7 designated freight infrastructure
- Access to uncongested roadways
- Access to rail
- Relate to freight related planned improvements



ATRI TOTAL TRUCK ORIGINS & DESTINATIONS

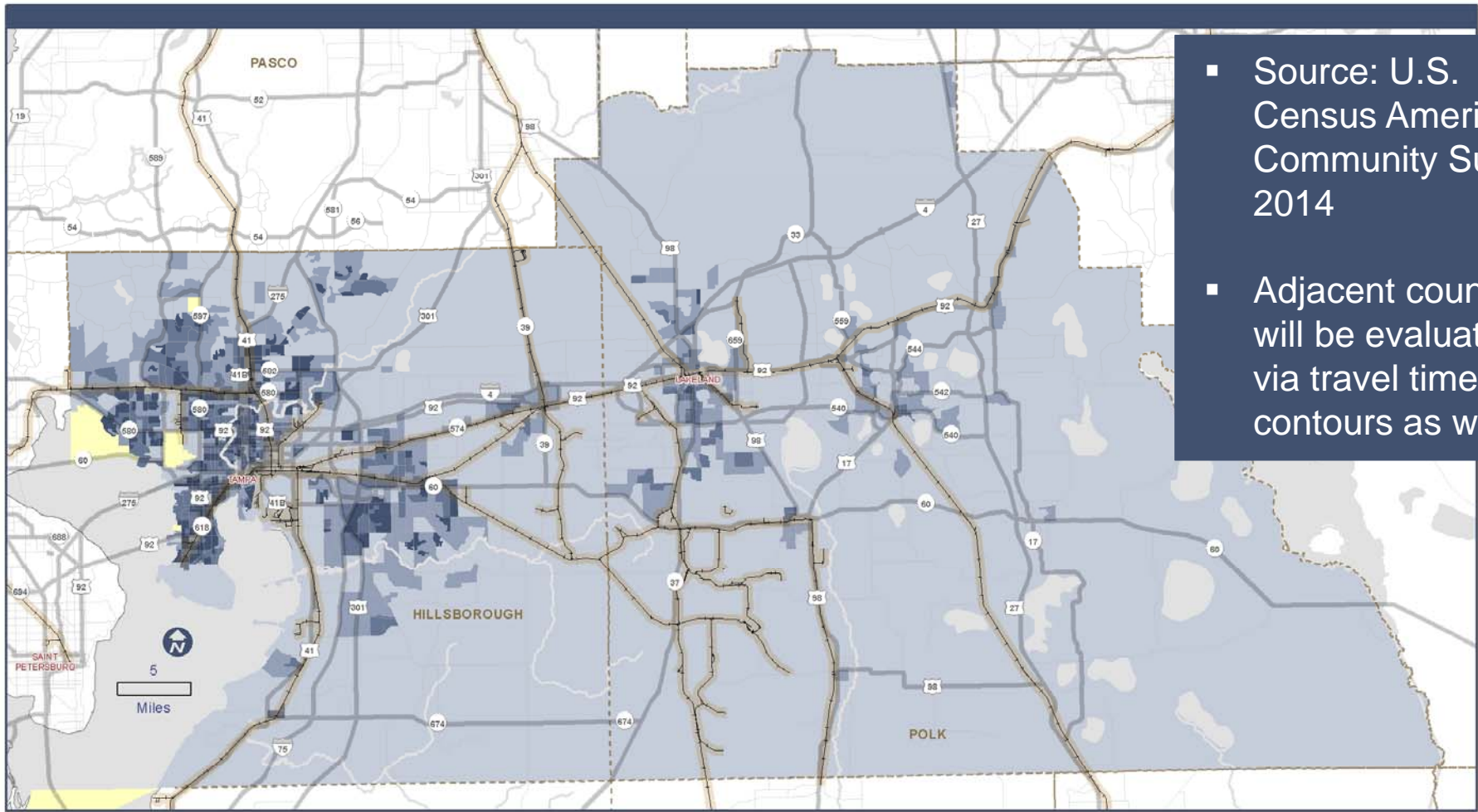


- American Transportation Research Institute data
- 10% sample truck probe data
- Expanded to traffic counts
- At statewide model zonal geography

DAILY TRUCK TRIPS TO AND FROM EACH ZONE
High [Dark Blue] [Medium Blue] [Light Blue] [White] Low

Source: American Transportation Research Institute [ATRI]

TOTAL WORKFORCE

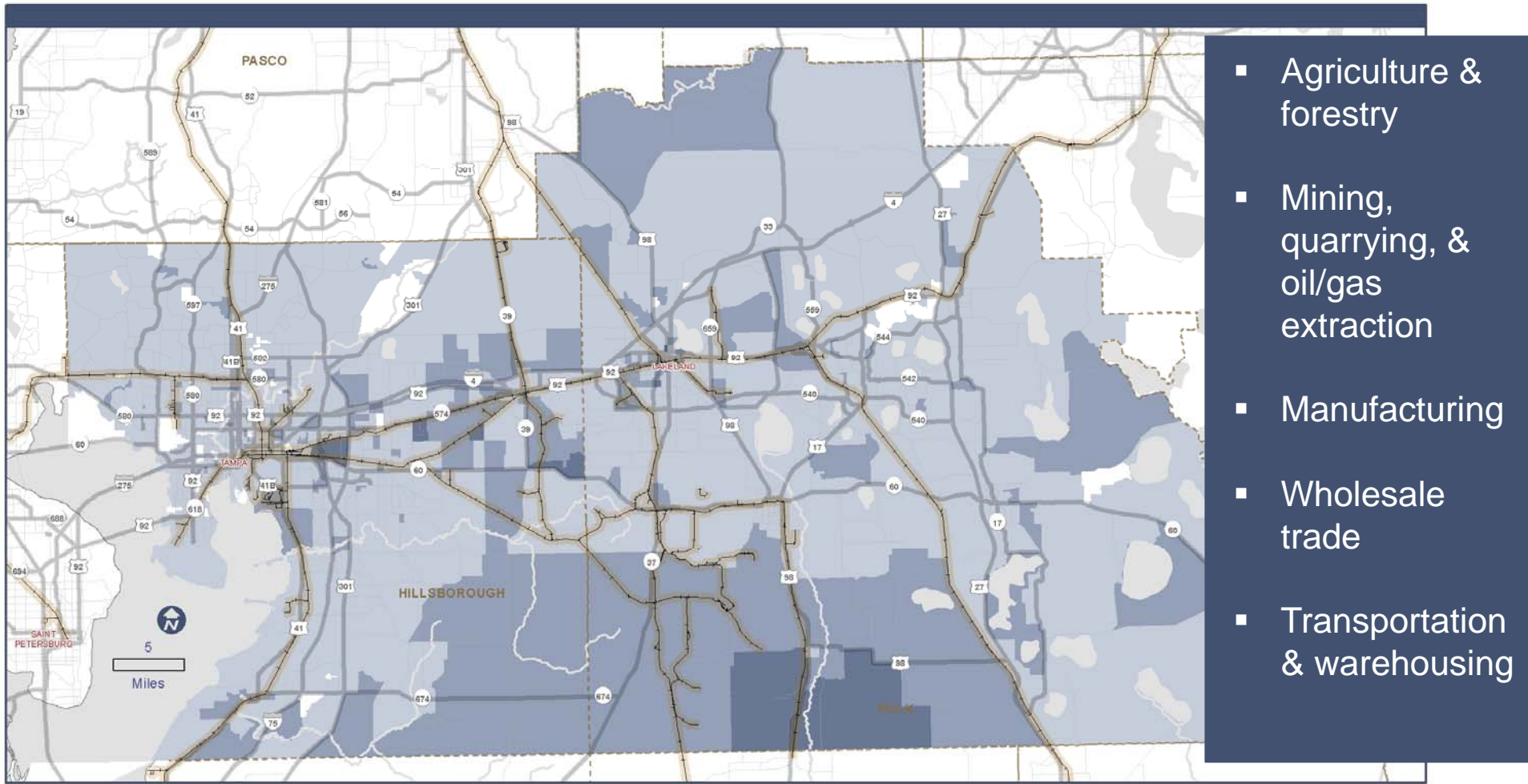


- Source: U.S. Census American Community Survey 2014
- Adjacent counties will be evaluated via travel time contours as well

WORKFORCE PER SQUARE MILE
ACS 2014 5 YEAR DATA



FREIGHT RELATED WORKFORCE



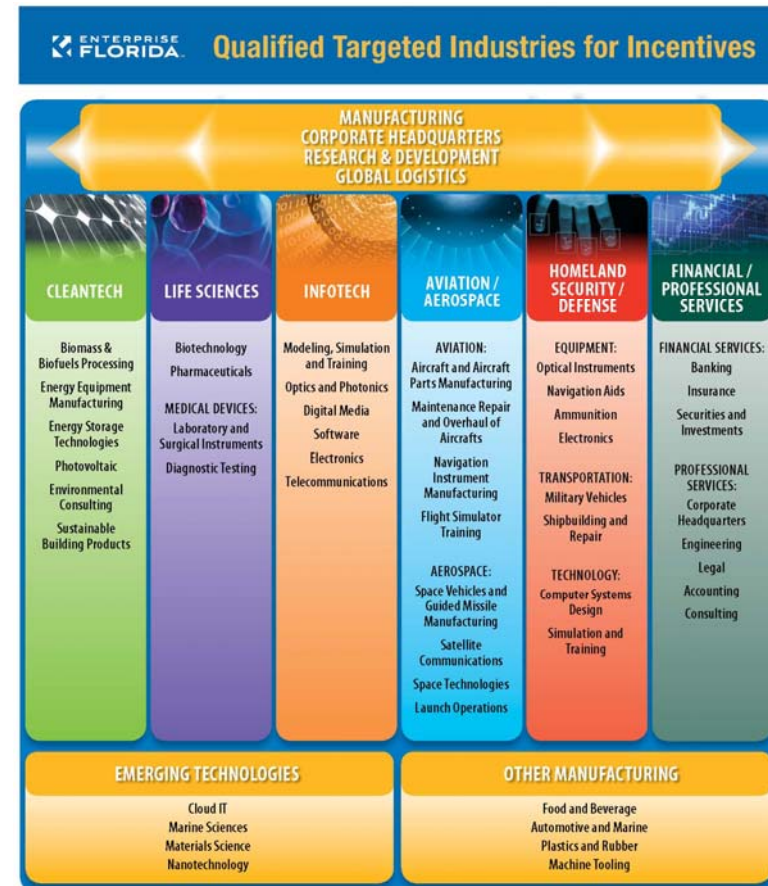
- Agriculture & forestry
- Mining, quarrying, & oil/gas extraction
- Manufacturing
- Wholesale trade
- Transportation & warehousing

PERCENT FREIGHT RELATED WORKFORCE
ACS 2014 5 YEAR DATA



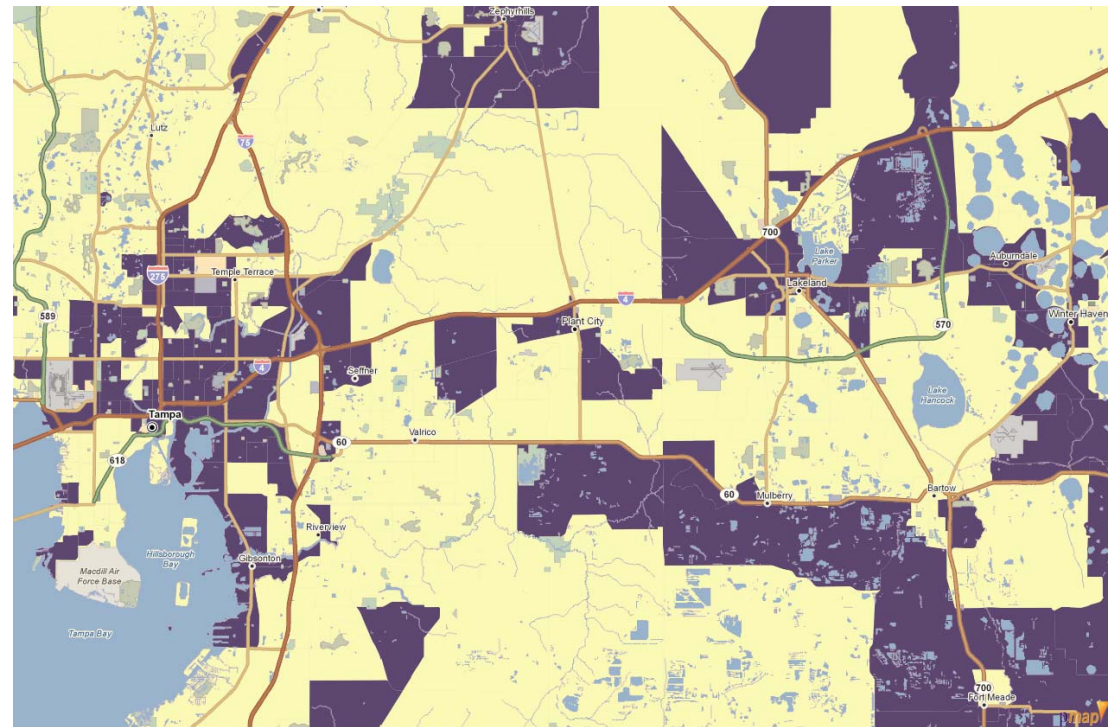
STATE AND REGIONAL INCENTIVES

- Tax Incentives
 - State Qualified Targeted Industry Tax Refund Program
 - Capital Investment Tax Credit
- Grant Programs
 - High Impact Performance Incentive Grant
 - Energy Utility Economic Development Programs
- Training Programs
 - Quick Response Training Program
 - Incumbent Worker Training Program



LOCATION-SPECIFIC STATE AND FEDERAL INCENTIVES

- State Urban Jobs Tax Credit
- State Brownfield Redevelopment Bonus
- New Markets Tax Credits
- HUBZone Procurement Opportunities
- Tampa Foreign Trade Zone



CENSUS TRACTS QUALIFIED FOR NEW MARKETS TAX CREDITS

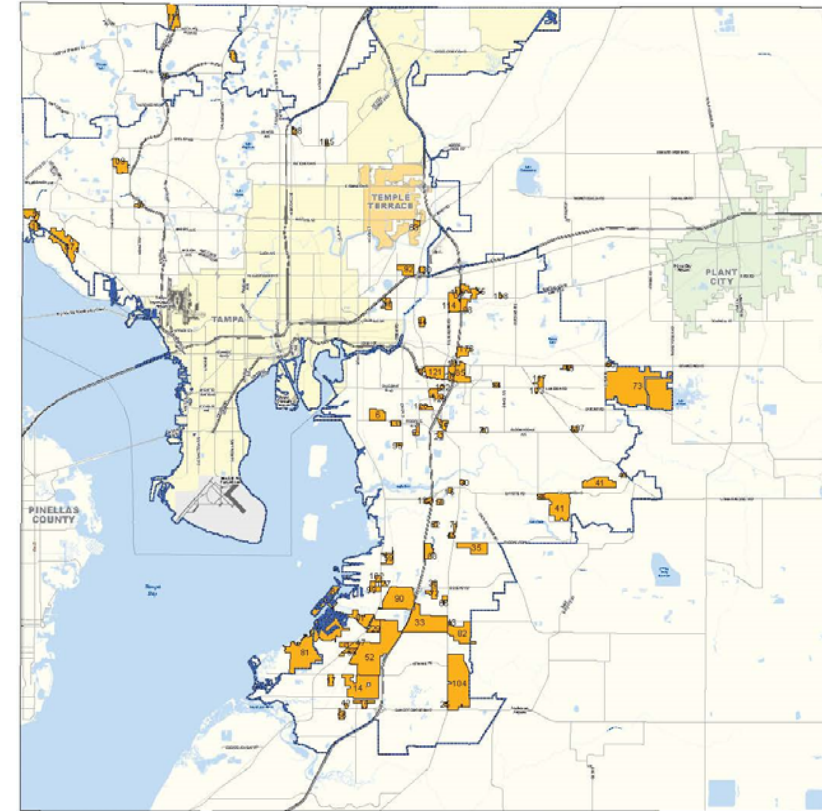
LOCAL INCENTIVES – KEY TOOLS

- The most common local incentive tools are exemptions from property taxes and impact fees
 - Ad Valorem Tax Exemption available in Hillsborough County, Tampa, Plant City, and Polk County
 - Impact Fee Exemption/Mitigation in Tampa, Polk County, Lakeland: and Winter Haven



OTHER LOCAL INCENTIVES

- Hillsborough County Competitive Sites Program
 - Prospective sites for targeted industry development
 - Seize opportunities and facilitate fast-moving private sector decision making
- Polk County Programs
 - Soft Landing Incentive
 - Permitting and Regulatory Assistance
 - Industrial Revenue Bonds
 - Career Source Polk County Resources



HILLSBOROUGH COUNTY COMPETITIVE SITES

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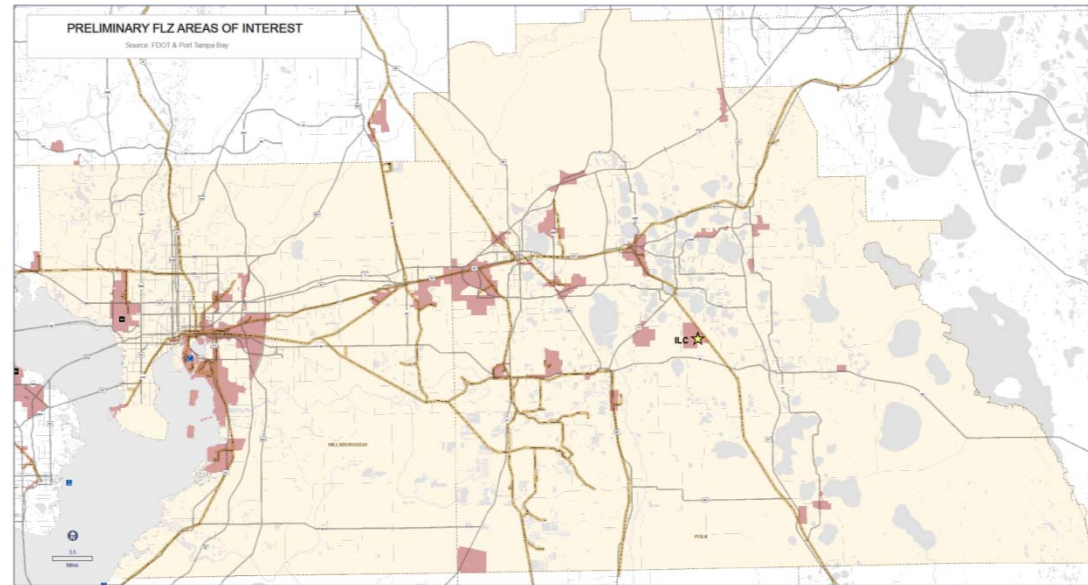
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WORKSHOP PROGRAM

1. (20 min.) Review and comment on Preliminary Areas of Interest map
2. Discussion
 - (5 min.) What are we missing?
 - (5 min.) What distinguishes our 2-county area from the rest of the state?
 - (5 min.) What are our area's challenges relative to the rest of the state?
 - (5 min.) Other...



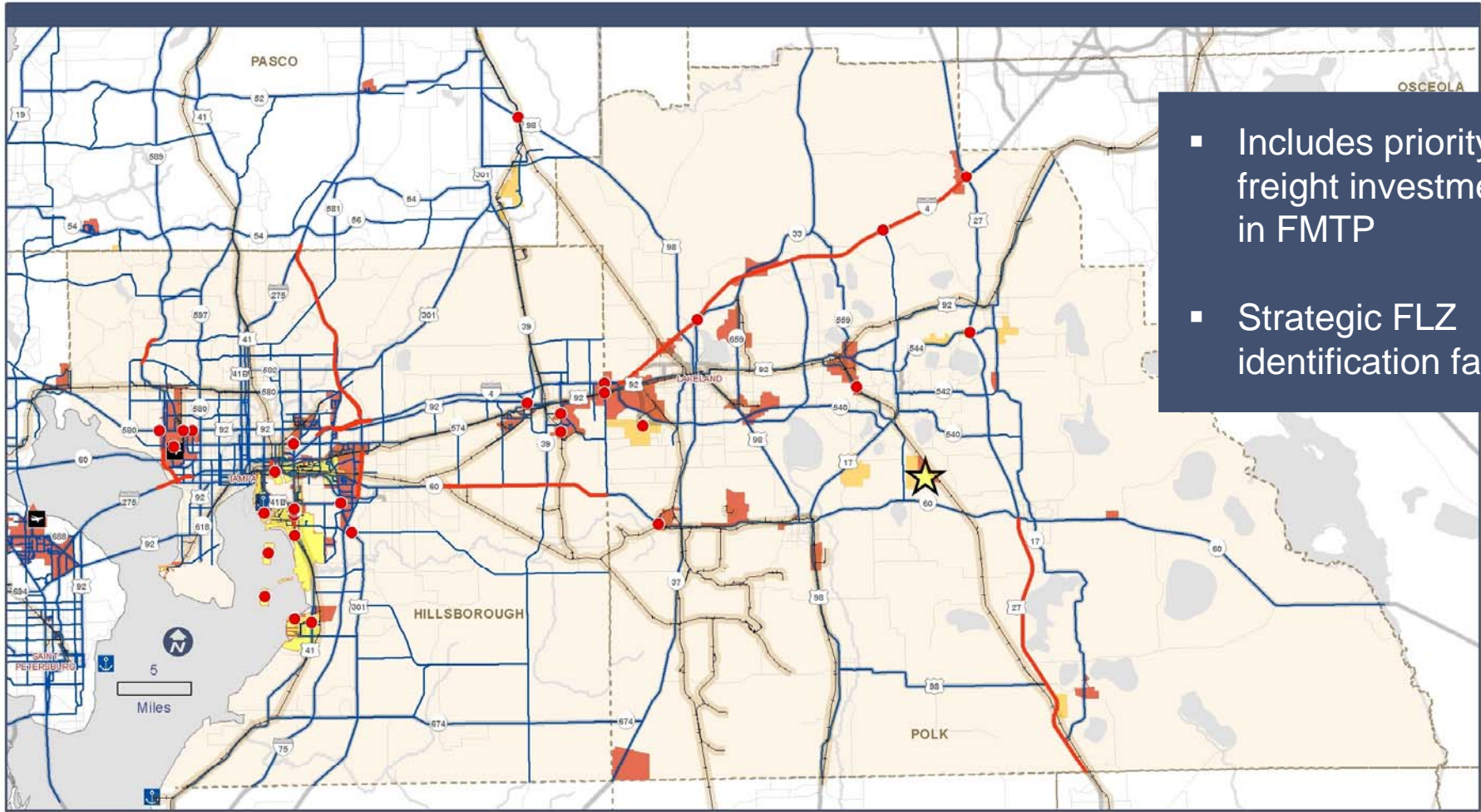
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- Includes priority freight investments in FMTP
- Strategic FLZ identification factor

Freight Activity Center

- Emerging, Future
- Existing
- Port Activity Center

FreightNetwork

- Freight Mobility & Trade Plan [FMTP] Projects

FLZ STRATEGIC PLAN



WINTER HAVEN ILC

- 318 acres
- Owned and operated by EVWR, serviced by CSX
- 14 miles mainline, terminal tracks
- 5 loading and unloading tracks
- 2 10,000 ft. arrival and departure tracks
- 3 cranes
- Plans for expansion..



FLZ DATA GATHERING

▪ **Legislation/requirements**

- ILC definition in statute includes shipping through one or more seaports. CSX has not provided data, but have divulged that there is no rail service between the Winter Haven ILC and Port Tampa Bay
- According to PTB, there is also no truck activity between the Port and ILC in Winter Haven. The reason is that the Port serves own distribution function to its primary market area (~75 miles)
- Not confirmed, but there must be activity between ILC and other ports (Jax or Miami?)
- Learned from Jasmin Raffington at C.O. that this legislation is permissive in nature, meaning that state agencies can use it as a prioritization tool for local governments that have identified FLZ's and met the requirements of the legislation (including the definition of an ILC)
- Advantages of designating an ILC by FDOT standards include several potential funding opportunities

▪ **Workforce data**

- Polk EDC has recently procured Chmura data. Hillsborough has only EMSI data at zip code or county level. ACS has employment by occupation and employment status at block group level. Given broader geographical scope of data relevance, ACS seems to be the best source.

FLZ DATA GATHERING

▪ **Development Incentive data**

- Have coordinated with Polk, Winter Haven, Lakeland, Hillsborough, Tampa, Plant City and have collected good data/information on both official programs and insight as to political, public support and inter-jurisdictional coordination
- Still need historical data on incentive programs

▪ **Truck Data**

- ATRI data has been analyzed, but represents 2010, so does not include ILC
- Transearch another data source available from FDOT, but also represents 2010
- FAF4 another federal data source but represents 2012
- Truck survey at ILC would be ideal. City of Winter Haven planning staff has discussed a potential survey

▪ **Other collected data include**

- Future land use designations
- DOR warehousing data
- FDOT Freight Mobility and Trade Plan
- LRTPs
- D1 and D7 freight network and activity center designations
- Foreign Trade Zone sites

WHAT IS A FLZ?

ILC Infrastructure Support Program legislation (s. 311.101)

...a facility or group of facilities serving as a **point of intermodal transfer of freight** in a specific area physically separated from a seaport where activities relating to transport, logistics, goods distribution, consolidation, or value-added activities are carried out and whose activities and services are **designed to support or be supported by conveyance or shipping through one or more seaports** listed in s. 311.09.

Freight Logistics Zone legislation (s. 311.103)

...a grouping of activities and infrastructure associated with freight transportation and related services within a defined area around an **intermodal logistics center** as defined in s. 311.101(2).

WHAT IS A FLZ?

Strategic Intermodal System legislation (s. 339.63(5a) Florida Statutes)

- Must satisfy definition of Intermodal Logistics Center in s. 311.101(2)
- Must be designated in local comprehensive plan OR local development order as an ILC
- SIS definition adds that the **ILC can support a seaport OR airport**

FDOT Criteria for SIS Designation

- Meets the FDOT definition of an ILC;
- Supports domestic and international trade moving to or from a SIS seaport or airport;
- Is identified in a local comprehensive plan or local government development order as an ILC or equivalent; and
- Meets minimum size thresholds for cargo throughput (>0.25% of U.S. total for transfer type)

FUNDING AVAILABILITY

State/Federal Transportation Revenue s	FY 19-40	%
Other Arterials & ROW	\$1,272	18%
State Transit Allocation	\$610	8%
FTA Formula Grants	\$288	4%
Transportation Management Area (TMA)	\$355	5%
Transportation Alternatives Program (TAL)	\$69	0.9%
Transportation Regional Incentives Program (TRIP)	\$12	0.1%
Strategic Intermodal System (SIS)	\$4,535	63%
Total	\$7,141	100%



RENAISSANCE
PLANNING

**Sam
Schwartz
Engineering
D.P.C.**



FLZ CRITERIA

- **Potential Criteria – apply to FACs**

- Direct access to regional mobility corridors / limited access roadways
- Direct access to rail
- Access to unemployed workforce (by travel time contours)
- Access to freight related workforce (by travel time contours)
- Access to training capabilities (by travel time contours)
- Serviced by facilities with priority planned improvements
- FAC growth potential

- **Future Refinements**

- FAC growth capacity/attractiveness (based on USF study)
- Modification based on ILC interactions in the region (as data become available)

WHY ADOPT FLZ STRATEGIC PLAN?

▪ **Pros**

- First out of the box to define FLZ(s) enables interpretation of vague legislation
- Provides framework to facilitate potential funding for freight related infrastructure
- Broad brush approach maximizes opportunities/flexibility (can be refined as data become available)
- Other ongoing studies can inform FLZ process, including
 - USF study on Logistics Activity Center development analysis
 - D7 warehousing geodatabase
 - D1 freight plan

▪ **Cons**

- At present time, the only ILC in the area is in Polk County, which is currently oriented eastward, regarding freight markets – minimal interaction between ILC and PTB
- Data on detailed ILC interactions in the region not readily available

REQUIREMENTS vs CONSIDERATIONS

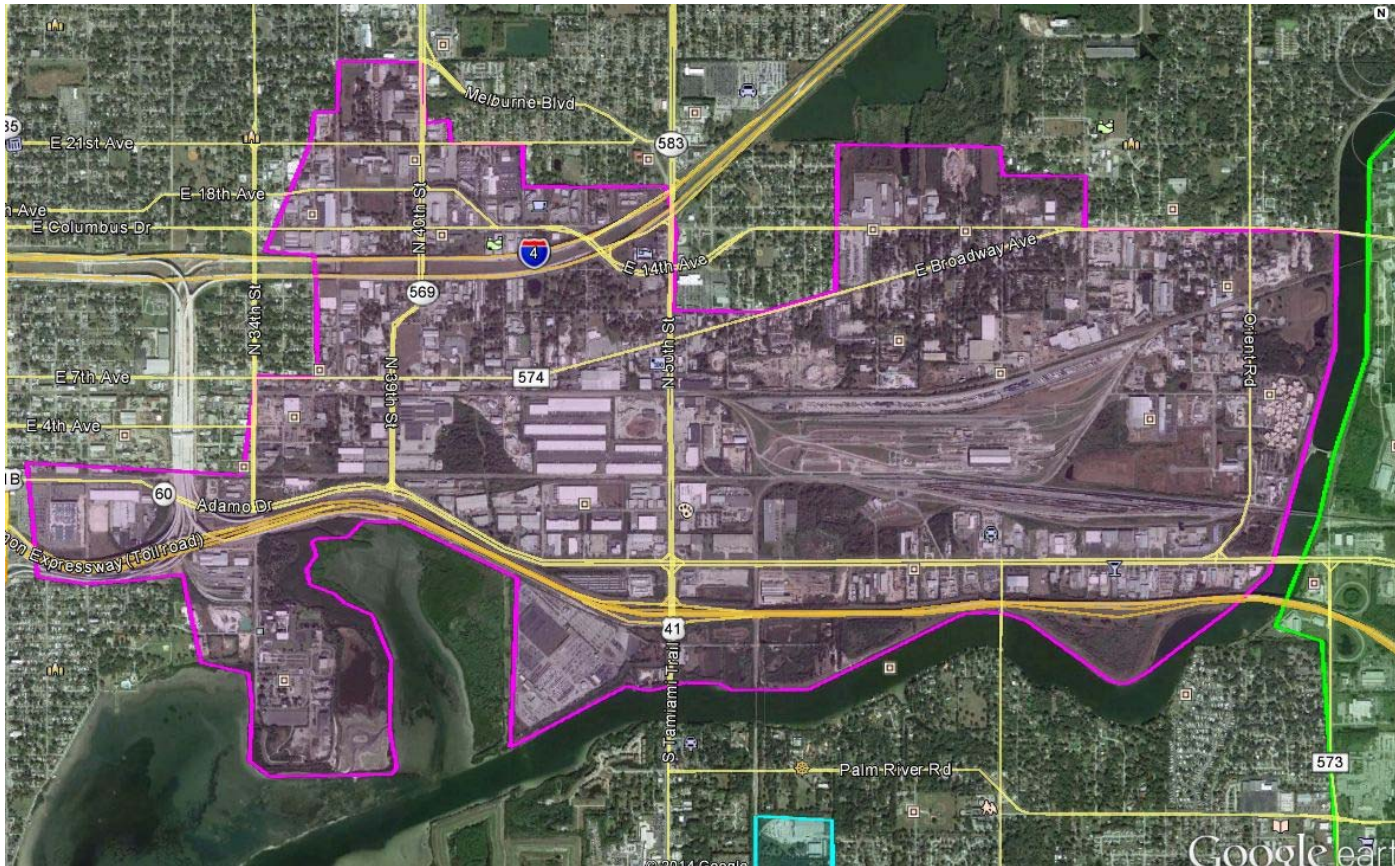
▪ Requirements

- Map of geographic area
- ID of existing/planned freight facilities
- ID of existing infrastructure within or close to FLZ
- ID of existing workforce availability within or close
- ID of existing/planned workforce training capabilities
- ID of local/state/federal plans concerning movement of freight

▪ Criteria

- Presence of ILC within FLZ
- Project serves a strategic state interest
- Project facilitates cost-effective and efficient goods movement
- Project contributes to economic activity
- Project supports existing and planned transportation network
- Investment or commitment made by owner or developer
- Local government commitment to private sector
- Demonstrated local financial support and commitment to project

SOUTHEAST TAMPA INDUSTRIAL FREIGHT ACTIVITY CENTER



- 300 acre railyard
- 85,000 containers transferred annually
- More than a dozen distribution centers surrounding railyard
- 5.5 million sq.ft. freight related floor area
- 5,700 total truck trips in/out of FAC