SCAG hosted the fourth steering committee meeting on September 21, 2010. The agenda items included 1) Review of key items from the April meeting, 2) Warehouse Space Forecast, 3) East-West Corridor Analysis Status Update, and 4) Evaluation of Truck Bottlenecks.

Summary of the meeting

Review of Key Items from the April Meeting

Regional Rail Strategies

- Updating the rail elements, including updates on rail traffic simulations to assess improvements needs
- Assessing passenger train volume growth in coordination with Metrolink.
- Working with County Transportation Commissions and ACE to update grade separation project inventory

Port and Modal Elasticity Study Phase II

- Study findings highlighted the need to be cautious in imposing container fees to raise revenue for supporting our goods movement infrastructure, as the elasticity of imports through our ports to potential fees may be much more sensitive than previously estimated.

Warehouse Space Forecast

- In 2008, 15% of warehousing was port related, but by 2035, 25% of all occupied space will be used for port related warehousing. Most current and future warehouse use is for domestic rather than international goods; however demand for warehousing of port related goods grows faster than for non-port related.
- 75% warehouse capacity utilization is the average based on the survey work conducted. The analysis assumes an average height of 27ft, 23% cubic space utilization, and 75% capacity utilization. Newer warehouses in the Inland Empire have higher ceiling, roughly 30 ft.
- The forecast for Task 5 analysis is driven by containerized cargo and did not focus on non-containerized cargo such as fruit and vegetables that also require warehousing.
- The study task (Task 16) related to analyzing SB 375 and various land use scenarios will tie in with findings of this warehouse work (Task 5).
- The cargo forecast came from Tioga group and IHS Global Insight work for the San Pedro Bay Ports and included potential volume changes due to Panama Canal and improvements completed at other West Coast ports.

Next steps:

- How this warehouse forecast correlate to employment forecast may need to be analyzed.

Task 5 Final Findings: Needs Assessment of Industrial/Warehouse Facilities - Spatial allocation of warehousing space over time

- This analysis evaluated the likely allocation of warehousing demand to 25 submarkets in the region based on geography. Goods will be stored in different locations depending on economic criteria and availability. It shows the likely sequence of how the allocation takes place in the region.
- Port related and non-port related goods will have different geographic distributions. Port related distribution is more related to prices and proximity to the ports and most of it is predicted to remain in the basin. Non-port related has a greater relationship to population centers and is more likely to remain on the outskirts.
- By 2025 available land suitable for industrial use need to be rezoned to accommodate the growing demand. By 2027 the region will be built out.
- Industry favors brand new facilities, however, pricing will eventually force old facilities to be rebuilt/redeveloped.
- Non-port related growth forecast was calculated using IHS Global Insight's TRANSEARCH data. International growth forecast was separated to derive domestic growth rates.
- The analysis concerns both import and export growth rates, but only 30% of export is assumed to require warehouse space.
- The findings are based on calculation using an average building height, not accounting for the 20% increase in height in new facilities.
- Product storage requirement has a great variation. Not all products can be stacked due to weight requirements so height is not always desired.

Next steps:

- We will be refining the assumptions related to the non-port (domestic) forecast by comparing population, employment, and other growth factors against the TRANSEARCH domestic growth rates.

EW Corridor Analysis Status Update

Proximity of Warehousing to Alternative EW Freight Corridors

- The analysis identified several candidate corridors and evaluation criteria, including the corridor proximity to warehouses to evaluate how well these corridors will serve existing warehouses
- The warehouse square footage within a 2.5 mile and 5 mile radius along several potential alignments was considered and classified as undeveloped, occupied and available. Alignments included SR- 60, I-10, I-605, I-15, SR-91, I-105, I-710, Southern California Edison and Union Pacific Railroad.
- SR-60, I-10 and UP alignments had the greatest advantage in terms of proximity to warehousing.
- Analysis on next steps will be conducted in the next several weeks. Also, a fall-back plan to relieve congestion needs to be explored in the event there is no consensus on the alignment.
- Any EW facility could only serve a portion of the market. Other strategies such as addressing individual freeway hotspots are needed to alleviate issues in areas where the truck lanes will not serve.
- SCAG's heavy duty truck (HDT) model is being updated. Prior to running any analyses with the HDT model on specific corridors, initial set of screening has to be conducted to narrow down the alignments to identify the most promising candidates.

- The purpose of the EW corridor is to serve maximum demand. Suggestions were made to expand the scope of analysis east of I-15 to accommodate future warehousing growth..

- Additional analyses will be considered beyond the initial proximity to warehouse screening, including ROW constraints, physical/engineering challenges, and community impacts, etc.

Evaluation of Truck Bottlenecks

Truck Congestion Hot Spot Analysis

- Analysis of truck congestion hot spots aims at identifying short to medium term solutions prior to the EW corridor: first phase of highway oriented goods movement strategy development.
- Identified delays where speed was less than 45mph using PeMS (13 weekday period data), GPS, ATRI (mostly focused on interchanges) data.
- There are a number of locations without detectors, impacting current result
- Gateway Cities COG is willing to share tdata capturing I-5/I-605 interchange, SR-91/I-605 interchange, and I-105 bottlenecks.
- GPS data from Trimble, Calmar, and ATRI show additional bottlenecks that were not captured with PeMS data. For a more detailed analysis of bottlenecks, steering committee inputs and directions are requested.
- ATRI data seems to have discrepancies on bottleneck locations, specifically at I-710/I-105 and I-405/I-605 in terms of truck congestion.

Next Steps:

- Additional analyses of data will need to be conducted including further identification of specific hotspots not captured by current data evaluation—verify with Caltrans, CTCs, COGs
- Analyze future conditions with model results
- Begin investigation of causes and potential mitigation projects
- Some of these hotspots may be addressed with projects currently in the pipeline or planned
- Other projects may need to be identified through this planning effort