

APPENDIX I-1: FREIGHT TREND ANALYSIS INTRODUCTION

In preparation for an update of the California Goods Movement Action Plan (GMAP) which was adopted in two phases in 2005 and 2007, Caltrans contracted with the California State University, Long Beach (CSULB) Center for International Trade and Transportation (CITT) to provide project scoping assistance related to the California Freight Mobility Plan (CFMP). The purpose of the scoping study contract was for METTRANS, a collaboration of CITT and the University of Southern California, to assist the Caltrans Freight Planning Branch in conducting advance planning such as assembling up-to-date information on key goods movement related trends, gathering stakeholder input and mapping out recommended approaches for the CFMP.

This section provides an overview of key trends, both current and emerging, in goods movement and assesses how these trends may affect demand for freight mobility infrastructure in California as well as the freight planning process. The initial scope of work included a list of 18 potential broad areas for analysis which were then further refined; however, METTRANS completed 19. The topics were selected, in part, based on requests for briefings made to the Caltrans Freight Planning Branch by key agency stakeholders. In addition, the Freight Branch of the Office of Freight Planning (OFP) completed three additional trend analyses and is indicated in the list below.

Trend Analysis List

- Farm-to-Market
- California's Central Valley Profile
- Cross-border Issues
- Freight and Sustainability
- Public-Private Partnerships (P3s) in Freight
- Chicago Region Environmental and Transportation Efficiency Program (CREATE)
- Highway and Rail Intelligent Transportation Systems (ITS)
- Last-Mile Delivery/Pick-up Issues
- Postponement
- Air Cargo
- Panama Canal Expansion
- Nicaraguan Inter Ocean Canal (Caltrans)
- Inland Ports
- Niche Port and Bulk Commodities
- Vessel Size and Impact on Ports
- Chassis Management
- Private Railroads and Public Agency Challenges
- Rail Abandonment and Preservation – State Ownership Strategies
- Railroad Safety and Security
- Regional and Short Line Railroads
- Railroad Perspectives on Shared Use
- 3D Printing and Production (Caltrans)

Trend papers contain a trend statement, background on the issue, freight system implications, planning considerations, sources and resources for additional information. They are designed to:

1. Provide a concise overview of the key trends, emerging issues, and background context that Caltrans should consider as the agency prepares the California Freight Mobility Plan and determines the State's role in improving the economy through improvements in the California freight mobility infrastructure.
2. Be used as stand-alone briefing papers for key stakeholders that do not have technical or deep policy knowledge of goods movement and freight mobility at the national, state and regional level.
3. Focus on those areas where Caltrans has a clearly defined role, e.g., in rail and highway planning but not in port operations.

The trend sheets contained in this appendix and are also posted on the Caltrans Freight Mobility Plan website: <http://www.dot.ca.gov/hq/tpp/offices/ogm/>