



INSTITUTE FOR TRADE AND TRANSPORTATION STUDIES

PROMOTING REGIONAL AWARENESS FOR IMPROVING FREIGHT TRANSPORTATION

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NEWS UPDATE

⊕ The ITTS member states have participated in several phone calls to discuss comments on the National Freight Primary Network. As with all such discussions, most benefited from hearing what other states were doing regarding their own evaluation of the network. The comment period has been extended to February 15.

⊕ The State Statistic files for Domestic Freight, International Trade and Exports by Metropolitan Statistical Areas have been updated on the ITTS website. They are available in PowerPoint slides for use in presentations or reports. I am always up for recommendations as I continue to update the State pages.

⊕ Other significant events involved attending an NHI course on Freight and Land Use Workshop hosted by Mississippi DOT, a user meeting on the future of the Freight Analysis Framework in Washington DC, and served as a discussant during a Panama Canal workshop at the annual Transportation Research Board meeting.

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VISIT THE ITTS BLOG AT
<http://www.ittsresearch.org/blog/>

ITTS Conference

I am happy to announce that the next ITTS "Freight in the Southeast" Conference will be held in Tampa, March 3-6. The Freight in the Southeast Conference is open to anyone interested in looking at issues related to transportation, including planners, local officials, economic developers, and firms involved in logistics and freight shipments. The conference focuses on a wide variety of topics that influence freight shipments in the Southeast, but are relevant throughout the nation. The meeting is panel-oriented, which has always generated engaging dialogues between the speakers and attendees. (You can also view information about previous conferences on the ITTS website!) The speaker roster and tour information will be posted as they become finalized and sponsorship opportunities are available.

The Conference fee is \$300 per person or a single day pass for \$150. The conference will be held at the DoubleTree by Hilton Hotel Tampa Airport Westshore 4500 West Cypress Street, Tampa, Florida. More information, including registration for the ITTS Conference, is available at <http://www.cvent.com/d/84qp59>.

~ TENTATIVE AGENDA ~

MONDAY, MARCH 3, 2014	
9:00 am - 5:00 pm ..	National Highway Institute Course, Fundamentals of Freight Data
7:00 pm.....	Working Dinner Meeting- Integrating Local and Statewide Freight Planning Efforts
TUESDAY, MARCH 4, 2014	
8:00 am	Tour of Publix Distribution Centers and CSX Intermodal Rail Terminal
12:00 pm	Boxed Lunch
1:00 pm.....	Opening Session
1:30 pm	State of the Economy
4:00 pm	Free Trade Zones, Foreign Direct Investments, Site Selection and Industrial Properties
6:30 pm - 9:00 pm ..	Peer Exchange for State DOT Employees (by invitation only)
WEDNESDAY, MARCH 5, 2014	
8:00 am	Update on Federal Transportation Policy
8:45 am	Role of the Private Sector in Freight Advisory Councils
10:30 am.....	Performance Metrics and Managing Transportation Systems
12:00 pm	Lunch
1:30 pm.....	Concurrent Sessions
	Track 1- The Autonomous Supply Chain, Part I: Trends in Warehousing Procurement
	Track 2- The Role of ports in the Region's Economy
3:30 pm.....	Concurrent Sessions
	Track 1- The Autonomous Supply Chain, Part II: Autonomous Vehicles
	Track 2- Connecting Ports to Hinterlands
6:00 pm - 8:00 pm ..	Reception and Waterside Tour of the Port of Tampa
THURSDAY, MARCH 6, 2014	
8:00 am - 10:00 am ..	Tour of the Tampa Airport
10:00 am.....	ITTS Working Meeting on Identifying State Freight Research Needs



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The Institute for Trade and Transportation Studies provides research data and expert opinions to its members concerning the effects of commercial freight movements on domestic and international activities, with reference to infrastructure and transportation needs, and safety implications.

The ITTS members include the:

Arkansas State Highway and Transportation Department

Florida Department of Transportation

Georgia Department of Transportation

Kentucky Transportation Cabinet

Louisiana Department of Transportation and Development

Mississippi Department of Transportation

Missouri Department of Transportation

Virginia Department of Transportation

West Virginia Department of Transportation

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▶ LAMBERT'S LAGNIAPPE

la-gniappe |lan'yap| : something given as a bonus or extra gift.

When I speak publicly about transportation to a non-transportation audience, I normally ask what people drank that morning. The typical response is water, milk, juice, or some caffeinated beverage. Most people do not think about that product's quality, price or availability while consuming their favorite beverage and starting their day. Since not many of us milk our own cows or grow our own fruit trees, beverage shipments represent an almost invisible element in our daily lives.

But other groups are starting to discuss the impacts of globalization and transportation on our daily lives. Throughout 2013, Planet Money (with National Public Radio) followed the supply chain of T-Shirts. Partially based on Rivoli's, "The Travels of a T-Shirt in the Global Economy," Planet Money followed harvested cotton on its course from Mississippi through Indonesia, Bangladesh and Columbia, before finally arriving back in the United States in the form of a T-Shirt. (Short videos about each step are posted on <http://apps.npr.org/tshirt> but the more detailed storylines are available through the podcast series).



I excitedly followed the podcasts, and with over 20,000 other people, I made a small contribution through Kickstarter to fund the project and receive my own shirt. I knew where my T-Shirt was at each step in the process. My gray T-Shirt arrived in early December.

On any day, my consumption patterns depend upon many similar supply chains. People are working behind the scenes to figure out what I will purchase or need over the next few days or weeks and making sure it is available when I am ready to make a purchase. (I know, it's all about me!) For 2007, USDOT estimated that,

on average, \$46 billion dollars of goods moved daily across America's transportation system. Even though I don't have too many fully-loaded tractor trailers backing up to my doorstep, transportation systems are responsible for getting me everything from my morning coffee to my new Planet Money T-Shirt. Who knows, maybe my next presentation will be about Mississippi cotton being shipped halfway around the world only to become a T-Shirt printed with a squirrel holding a martini glass. ■

What is ... The Commodity Flow Survey

The Freight Analysis Framework (FAF) represents the most comprehensive national database for multimodal commodity flows in the U.S. However, approximately three-fourths of the tonnage reported in the FAF is measured in the Commodity Flow Survey (CFS), a survey of outbound shipments that BTS conducts every five years in partnership with the U.S. Census Bureau as part of the Economic Census. As a shipper survey, the CFS surveys businesses based on their outbound shipments four times a year. Six national 2012 preliminary tables were released in December. Preliminary numbers indicate that over \$13 trillion of freight, weighing over 11 billion tons, were shipped in the United States in 2012.

Based on value and tonnage, trucking served as the dominant mode used to transport freight in the United States, handling roughly 70% of the nation's freight movements, followed by rail, intermodal, pipelines and waterways. From a transportation infrastructure framework, the average shipment moved 586 miles, resulting in over 3.3 trillion ton-miles of cargo. (A ton-mile represents shipping one ton of cargo one mile, which better represents



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NHI Course Fundamentals of Freight Data

The one-day workshop “Fundamentals of Freight Data” is intended for freight transportation professionals, such as planners, researchers, and policy and decision-makers, who need information on freight data for a variety of uses such as regional profiles, long-range transportation plans (LRPs), State Freight Plans, State Transportation Implementation Plans (STIP), transportation improvements programs (TIPs), freight performance measurement, freight forecasting, freight studies, facility planning, corridor planning, and strategic policy planning, among others. This workshop provides broad knowledge of freight data sources used in the primary freight activities needed for transportation studies and effective policy decision making. This workshop is not meant to be a comprehensive or in-depth examination of freight data and its applications. It will present

the characteristics and key limitations of existing freight data, methods for collecting state and local data on freight transportation, and uses for freight data.

The workshop is designed to cover the following topics:

- Types of freight data
- Sources of freight data
- Freight data tools
- Case studies of using freight data
- What to do when existing data does not exist or is inadequate.

As this is a pilot NHI course, you will not be able to register on the NHI website but can do so through the ITTS Conference registration process. ■

States Update

- The second Mississippi Freight Advisory Council meeting will be held at the Mississippi DOT Headquarters building on February 19 to further assist in the development of the Statewide Freight Plan and will include discussions on freight goals and performance measures.
- At the request of the Arkansas State Highway and Transportation Department, I will be speaking at the 2014 AED/ACCE Joint Winter Meeting. The morning sessions will focus on freight topics. I will be speaking on international trade and changing markets.

• ITTS is a partnering organization for the upcoming 2014 Logistics, Trade, and Transportation Symposium, which will be held on the University of Southern MS Gulf Park Campus in Long Beach, MS. I will be moderating a session on Trucking Challenges and Issues.

• On April 9-10, 2014, the Kentucky Transportation Cabinet’s Division of Planning and the FHWA-KY Division will be hosting “Nature’s Call to Action”, their sixth biennial Air Quality Conference. ■

What is ... The Commodity Flow Survey

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system usage when compared to tons or value.) On a ton-mile basis, trucking carried only 38% of the nation’s cargo, while railroads carried a larger share of the nation’s freight shipments.

But what does this mean for the average American? Using the latest U.S. population estimate of 317 million people, per capita consumption of the nation’s infrastructure, based on ton-miles, was 10,458 ton miles, the same as one ton of freight making 7.5 trips between Chicago and Miami. So the next time you are stuck in traffic or waiting at a train crossing, you may be watching your next purchase passing before your eyes!

As with most researchers, I am eagerly awaiting the more detailed state, mode and commodity flows that will be released in December 2014 and integrated into the next version of the Freight Analysis Framework. In the meantime, you can enjoy reviewing the freight information posted on the Bureau of Transportation Statistics website.

(In 2010, I assisted in organizing a workshop on improving the CFS. I am glad to see that several recommendations from the conference were incorporated in the 2012 survey! The conference report is available at <http://www.trb.org/Main/Blurbs/166010.aspx>) ■

Other Items of Note...

• AASHTO and FHWA have announced a Third Round of SHRP2 Implication Opportunities, which includes a section on Freight Demand Modeling and Data Improvement (C20). For more information, visit <http://www.fhwa.dot.gov/goshrp2>. Submissions are due February 14, 2014.

• There is a call for papers related to “Operational Constraints on Effective Governance of Intermodal Transport”. Please visit <http://www.journals.elsevier.com/research-in-transportation-business-and-management/call-for-papers/operational-constraints-on-effective-governance>. Abstracts are due on March 1.

News Update

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🌐 I contributed an article on the economic contribution of maritime trade to the U.S. economy for the American Association of Port Authorities Seaports Magazine, Winter 2013 edition. (<http://www.aapaseaports.com/>)

▶ ITTS CALENDAR

This list highlights upcoming conferences related to transportation that may be of interest to the ITTS member region. For any corrections or suggestions, please contact Bruce Lambert at bruce@ittsresearch.org.

🌐 ITTS participation or speaking engagements

February 3, 2014

New Orleans World Trade Center, Transportation Committee Meeting

New Orleans, LA

🌐 **February 10, 2014**

Arkansas Economic Developers and Arkansas Chamber of Commerce Executives Joint Winter Meeting

Little Rock, AR

February 19, 2014

2nd Freight Advisory Committee for Mississippi DOT

Jackson, MS

🌐 **Feb 26-27, 2014**

Logistics, Trade and Transportation (LTT) Symposium

Long Beach, Mississippi

March 3-6, 2014

ITTS Freight in the Southeast Conference

Tampa, FL

March 13-15, 2014

55th Annual Transportation Research Forum

San Jose, California

March 18-19, 2014

Sixth Annual Georgia Logistics Summit

Atlanta, GA

March 17-20, 2014

Supply Chain & Transportation USA

Atlanta, GA

April 9-10, 2014

Kentucky Transportation Cabinet's Division of Planning and FHWA-KY Division's 6th biennial Air Quality Conference "Nature's Call to Action"

Frankfort, KY

April 9-11, 2014

I-TED 2014 – International Transportation Economic Development Conference

Dallas, TX

April 15-17, 2014

6th Critical Commodity Conference
New Orleans, LA

>>> **SAVE THE DATE** <<<

FREIGHT IN THE SOUTHEAST

Moving Our Region's Business



Co-Sponsored by
Florida Department of Transportation

March 4-6, 2014 – Tampa, FL

For Registration or Exhibit & Sponsorship info contact,
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▶ TRADE PROFILE ... Cotton Exports

The Southeast has long had a reputation as the "Land of Cotton" although today, cotton production stretches from Southern Georgia to California. The United States ranks among the top cotton producing regions. Together with China, India, and Pakistan, the four nations produce roughly 75% of the world's cotton. (Most cotton grown in the Eastern U.S. is Upland Cotton, while Pima Cotton, which possesses a longer fiber, is grown out West.) The USDA estimated 7,664 thousand acres of cotton were harvested in 2013, of which 33% were grown throughout the ITTS states.

The majority of U.S. cotton production heads overseas, as highlighted by the NPR story. (While domestic mills still exist, today most apparel purchased in the U.S. was imported.) In 2012, the largest markets for U.S. cotton exports (based on HS Code 5201) by value were China (which received 55% of U.S. cotton exports), Turkey (9%), Mexico (6%), Vietnam (4%), and Indonesia (3%).

Cotton production is important to the ITTS member states. The region grew 38% of the nation's cotton production based on bales produced (the standard cotton bale weighs 480 pounds). At the same time, the region accounted for 20% of

the cotton exports based on shipment origination. Normally, cotton is transported to regional centers, of which Memphis is the largest, and so export shipments are likely to begin at one of the main distribution centers, leaving the country through an ocean container for overseas markets.

U.S. Department of Agriculture forecasts assume that 2014 cotton exports will continue to decline due to reduced demand in China and increased export competi-

tion from Indian and Brazilian producers. Unlike other crops, cotton is not produced for consumption but for textiles and manufacturing, thus demand is more sensitive to economic conditions. ■

Cotton Production and Exports from the ITTS member States

USDA Acreage, yield, and production estimates, 2013				Exports by Value (millions)	
State	Harvested Acres (in 1000s)	Average Yield per Acre	Production (1000s of Bales)	2011	2012
Arkansas	305	1,149	730	305	278
Florida	128	750	200	9	12
Georgia	1,355	850	2,400	598	760
Louisiana	125	1,248	325	48	42
Mississippi	285	1,229	730	551	705
Missouri	246	956	490	95	118
Virginia	77	960	154	89	33
Total ITTS States	2,521	7,142	5,029	1,695	1,947
Total all USA	7,664	826	13,187	8,387	6,229