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What Does it Look Like – Anything!

What is moving – Everything!

Where is it going – Everywhere!
WHAT IS DOMESTIC GOODS MOVEMENT?
U.S. is Largest Freight Transportation User in World
“Within” Freight Movements as Share of Tonnage, 2007

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total - all states</td>
<td>50%</td>
</tr>
<tr>
<td>Alabama</td>
<td>0%</td>
</tr>
<tr>
<td>Arkansas</td>
<td>25%</td>
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<tr>
<td>Florida</td>
<td>50%</td>
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<tr>
<td>Georgia</td>
<td>0%</td>
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<tr>
<td>Kentucky</td>
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<tr>
<td>Louisiana</td>
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<tr>
<td>Mississippi</td>
<td>50%</td>
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<tr>
<td>North Carolina</td>
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<tr>
<td>South Carolina</td>
<td>25%</td>
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<tr>
<td>Tennessee</td>
<td>50%</td>
</tr>
<tr>
<td>Virginia</td>
<td>0%</td>
</tr>
<tr>
<td>West Virginia</td>
<td>25%</td>
</tr>
</tbody>
</table>
Does Modes/Markets Matter? (Southeastern Average, 2007 tonnage)
Freight Planning Must Answer...

What lies outside that may change my world?

Can I work, fund, operate, etc., as these influences reshape my business?
What Is Changing?

- Demographics
- Fuel Prices
- Regulations
- Congestion
- Economic Development Pressures
- Budgets
- Expectations
- Land Use
Bottlenecks and Through Movements

Through Ton-Miles as Share of Regional Truck Traffic
“The Job Creation /Logistics Message”
Needs in Southeast from Latin American Trade (LATTTS)

**TOTAL 20-YR NEEDS ESTIMATE**
- $92 Billion
  - Latin America: Red
  - Other: Yellow

**20-YR HIGHWAY NEEDS ESTIMATE**
- $67 Billion
  - Latin America: Red
  - Other: Yellow

**20-YR PORT NEEDS ESTIMATE**
- $22 Billion
  - Latin America: Red
  - Other: Yellow

**20-YR AIR CARGO NEEDS ESTIMATE**
- $3.3 Billion
  - Latin America: Red
  - Other: Yellow
What Can/Will Change Modal/Business Relationships

- Timeliness
- Size of Shipment
- Per Unit Costs
- Inland Water
- Pipeline
- Railroads
- Trucking
- Air Service

- Modal Shifts?
- Geography Shifts?
- Delivery Options?
- Expectations?
Domestic Freight Remains Critical

- **Traffic Planning**
  - Not going away
  - Changing Operations
  - Corridors and Modal Interchanges becoming more important
  - Legacy system demands

- **Economic Development Issues**
  - Leverage domestic flows to build densities
  - Economic growth poles/clusters
  - Complex networks not easily understood
A Second Summary

- Already a lot done for domestic freight – Just Don’t Know It
- Domestic Freight will always remain a timely issue
- Need to better understand external flows for system needs
FREIGHT IN THE SOUTHEAST
Moving Our Region’s Business

March 14-16, 2012 – Norfolk, VA
For Registration or Exhibit & Sponsorship info contact,
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