



Freight Trends

August 15, 2018 – Join Meeting of California, Oregon and Washington Transportation Commissions



71%

of All Freight by Weight

81.5%

of All Freight by Value

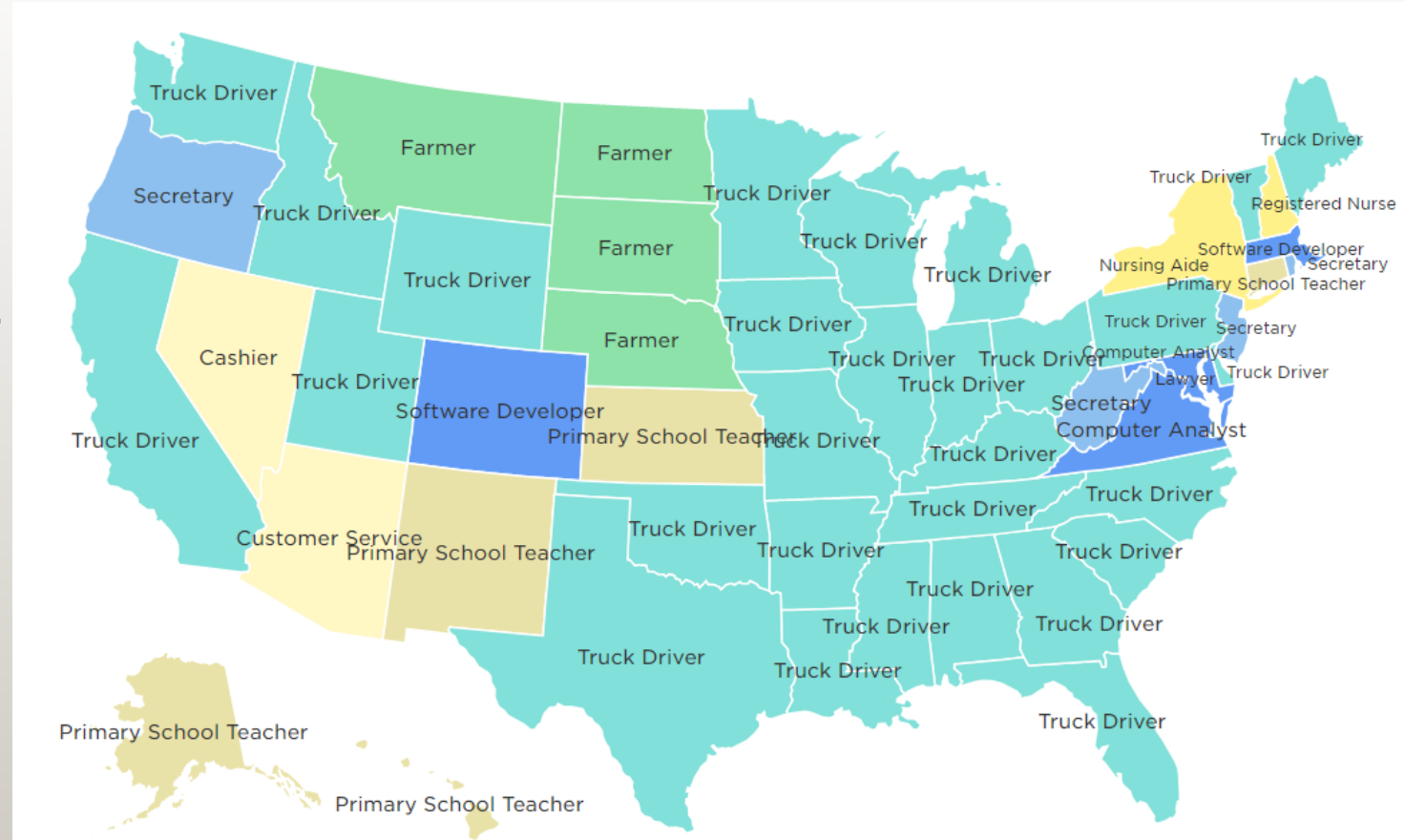
\$41.3 Billion

State/Federal Highway Taxes
in 2015

Trucks Are
Essential
to the
Economy

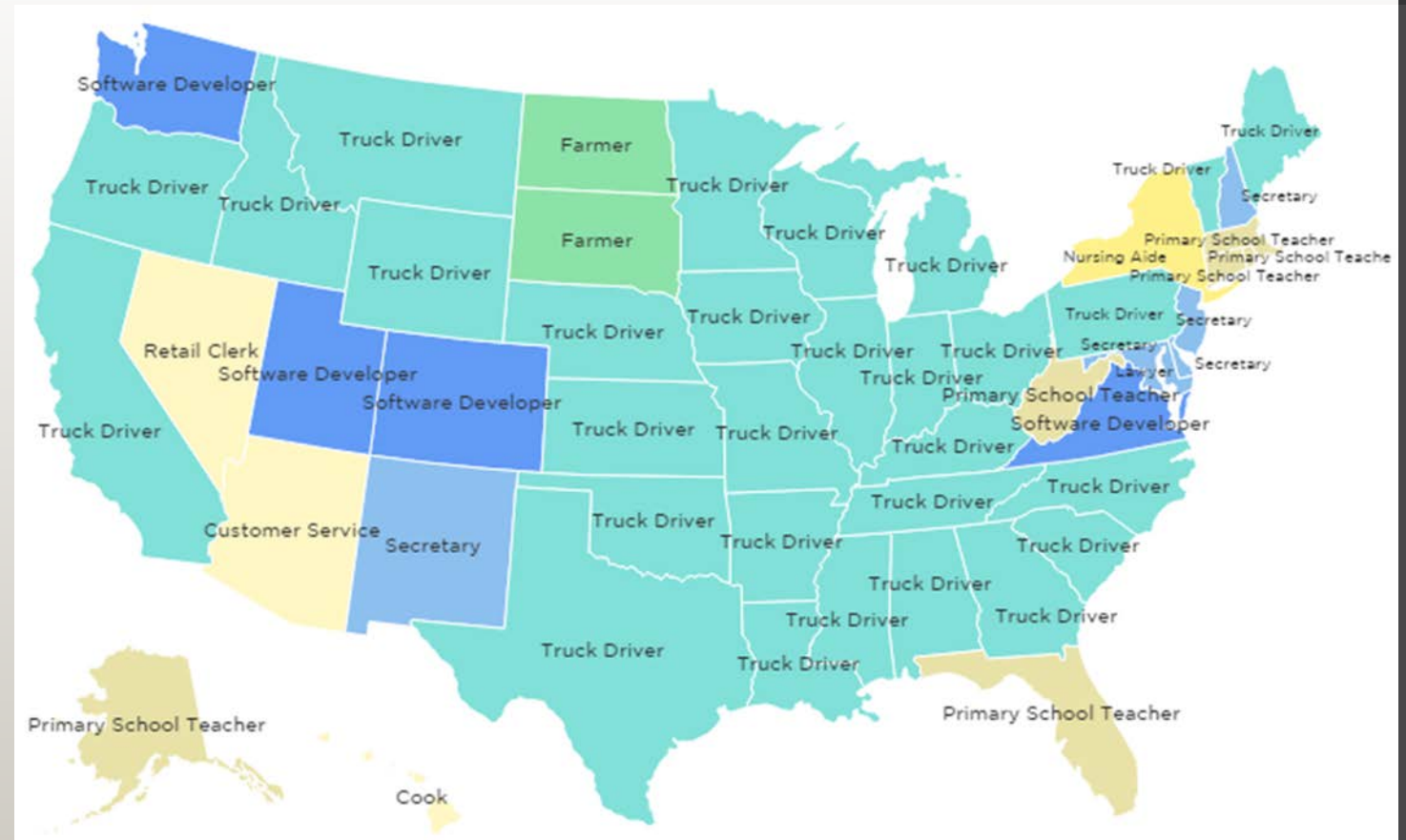
Trucks Are Essential to the Economy

- Driven by Small Biz:
 - 97.3% of trucking companies operate fewer than 20 trucks.
- Truck Driver most common job in 29 states (Source: NPR Planet Money)



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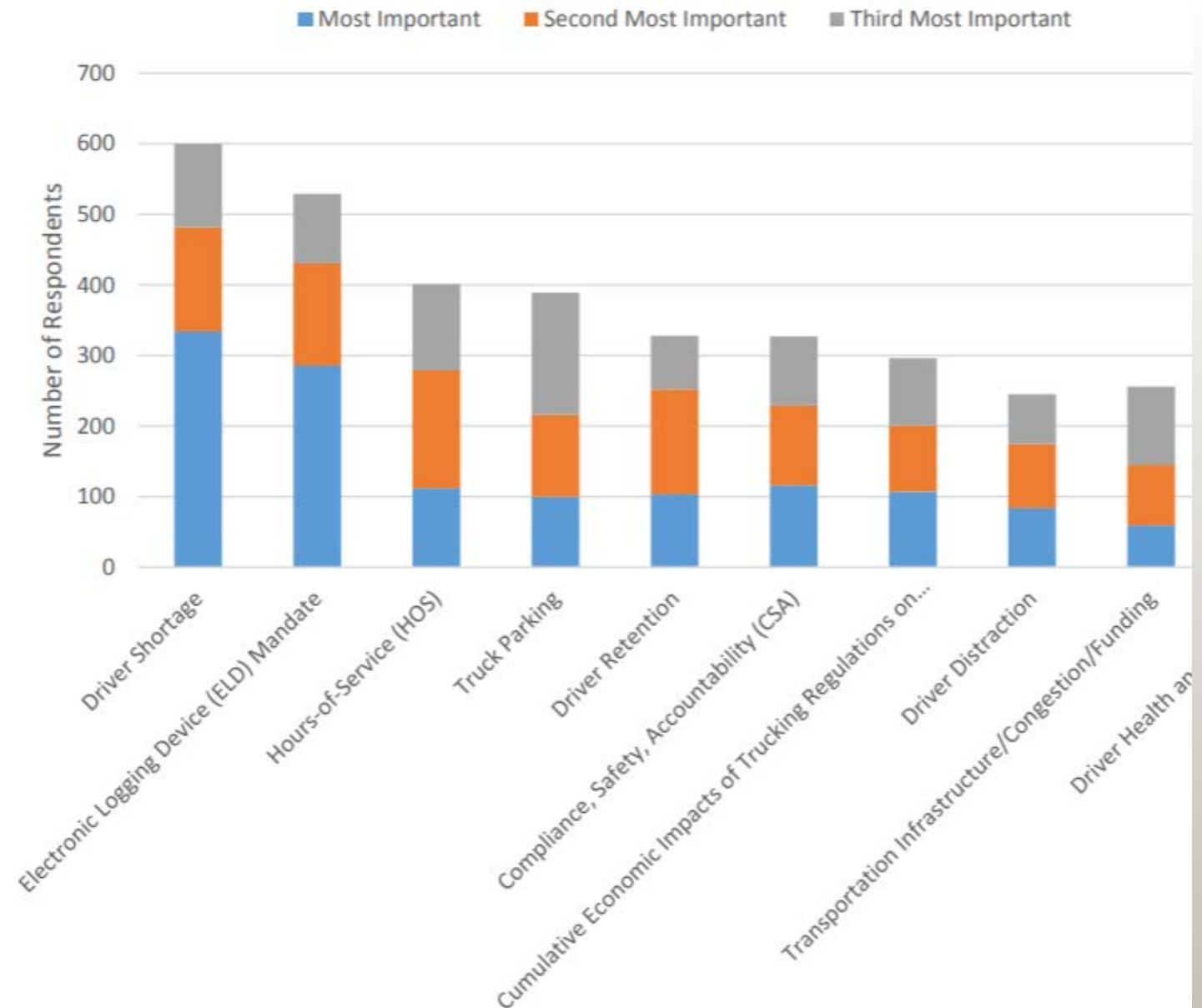
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Industry Issues

- Driver Shortage
- Transition to Electronic Logs/Hours of Service
- Truck Parking
- Infrastructure Investment/Congestion

Figure 1: Distribution of Industry Issue Prioritization Scores



The U.S. doesn't have enough truckers, and it's starting to cause prices of about everything to rise



A student practices hooking an 18-wheeler up to a trailer during a commercial driver's license class at Lake Cumberland CDL Training School in Mount

'What Does a Trucker Look Like?' *It's Changing, Amid a Big Shortage*



Kristina Jackson, a 22-year-old driver based in Raleigh, N.C., is constantly reminded that she's an outlier in an industry that is 94 percent male and two-thirds white. *Travis Dove for The New York Times*

Hours of Service/ELDs

- Federal safety rules mandate breaks
 - No more than 11hrs driving during total of 14hr on-duty cycle. Must take 10hrs off-duty to re-start.
 - No more than 8hrs between 30 min breaks
- State labor and employment laws mandate meal and rest breaks
 - In California, must provide 10-min paid break every 4hrs, at least 30-min unpaid off-duty meal break for every 5hrs worked.
- **Drivers must take breaks!**
- Transition to electronic logging devices (ELDs) from paper logs
 - 3-7% impact on capacity (Source: ACT Research)



Truck Parking

Rank	State	Total Spaces	Ratio of Private to Public Spaces	All Spaces per 100K Daily Truck VMT
1	Montana	3,568	4.9	171.4
2	Missouri	10,718	8.7	166.4
3	Wyoming	5,181	5	159.1
4	Nevada	3,971	16.6	157.4
5	Louisiana	12,111	35.8	151.7
35	Oregon	4,521	7.2	81.3
44	Washington	3,596	2.9	68.5
48	California	13,144	9.5	53.7

- CA has second worst ratio of truck traffic to available parking in nation

- Caltrans Truck Parking Advisory Committee

- Source: Bureau of Transportation Statistics



Infrastructure Investment/Congestion

- ATRI Top 100 Freight Bottlenecks
 - CA – 7 including 5 in Top 50 worst
 - WA – 6 including 1 in Top 50 worst
 - OR - 1
- Freight demand forecasted to increase by 50% between 2012-2045 (Source: 2016 FHWA Freight Analysis Framework)
- **Congestion + Lack of Parking + Hours of Service + Driver Shortage**
- **Needed Investment in Infrastructure and Planning to Accommodate Forecasted Growth**