The Trucking Industry Today

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Without Trucks, Florida Stops!
U.S. Population Growth

Source: Census Bureau
U.S. and China Population History & Forecast

China

India

U.S.

Source: U.S. Census Bureau
America’s Top Trading Partners-2005

Billions of Dollars

Source: U.S. Census Bureau
Growth in Foreign Trade: 1960 to 2005

Billions of Dollars

Includes Imports and Exports

Source: Census Bureau
Growth in Truck Tonnage: 1960 to 2017

Billions of Tons

Source: ATA
Projected Growth in Freight Transportation Tonnage: 2005 to 2017

Total Percent Increase 2005 to 2017

- Truck: +31%
- Rail: +24%
- Pipeline: +20%
- Water: +30%
- Rail Intermodal: +75%
- Air: +72%

Source: U.S. Freight Transportation Forecast to...2017
Commercial Truck Population Growth

Total Increase from 2005 to 2017; Millions of Trucks

- **Light Trucks**
  - 2005: 3.8
  - 2017: 5.5 (47% increase)

- **Heavy Trucks**
  - 2005: 2.9
  - 2017: 3.8 (32% increase)

Source: *U.S. Freight Transportation Forecast to...2017 & ATA*
More traffic on already overcrowded roads ....
## What Does Congestion Cost?

<table>
<thead>
<tr>
<th>Category</th>
<th>Billions of dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>TTI estimates of delay and fuel waste</td>
<td>63.1</td>
</tr>
<tr>
<td>Cities not included in TTI estimates</td>
<td>12.8</td>
</tr>
<tr>
<td>Productivity losses</td>
<td>38.0</td>
</tr>
<tr>
<td>Unreliability losses</td>
<td>38.0</td>
</tr>
<tr>
<td>Truck cargo delays</td>
<td>3.8</td>
</tr>
<tr>
<td>Safety and environmental costs</td>
<td>12.6</td>
</tr>
<tr>
<td><strong>Total highway congestion costs</strong></td>
<td><strong>168.3</strong></td>
</tr>
</tbody>
</table>

*Texas Transportation Institute*
Congestion Costs Growing Faster than GDP

- Since 1982, the cost of congestion has grown at 8% per year, more than double the rate of growth of the economy.

- In 20 years, continued growth at this rate would bring the cost of congestion to $890.5 billion.

- Equal to 4.3% of GDP.
Freight Bottlenecks

- 2004 FHWA study identified top 200 highway freight bottlenecks
- Cost trucking industry more than 243 million hours annually
- Direct financial cost of approximately $7.8 billion
- Highway bottlenecks account for 40% of congestion
Worst Freight Bottlenecks in Florida (FHWA)

- I-95@I-595 (Miami)
  - 1,011,400 annual truck hours of delay
  - $3.3 million in annual economic costs
- I-10@U.S. 17A (Jacksonville)
  - 595,200 annual truck hours of delay
  - $1.9 million in annual economic costs
- I-275@I-4 (Tampa)
  - 540,500 annual truck hours of delay
  - $1.7 million in annual economic costs
- I-95@Golden Glades (Miami)
  - 508,800 annual truck hours of delay
  - $1.6 million in annual economic costs
Total Florida Freight Bottleneck Costs

Eight worst highway bottlenecks in Florida cause 3.6 million annual hours of delay for trucks at an economic cost of $116 million. *

*According to a study by the FHWA
Longer Combination Vehicles (LCVs)
Intermodal Specific Concerns

- TWIC ($150) vs. FUPAC ($130) incompatibility
- Inconsistent security/access standards state to state, port to port, even terminal to terminal
- Roadability concerns for equipment chassis
- Delays, delays, delays
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