



INSTITUTE FOR TRADE AND TRANSPORTATION STUDIES

PROMOTING REGIONAL AWARENESS FOR IMPROVING FREIGHT TRANSPORTATION

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NEWS UPDATE



Well, the ITTS Conference has come and gone, with the remainder of the month working on post conference items, such as billing and reimbursements.

ITTS is also working on updating the Freight Analysis Framework and State Trade profiles. (AAR has agreed for ITTS to develop a rail freight powerpoint based on their Freight Railroad Industry Snapshots.) These will be posted online in the next few weeks, but were not finished in time for this newsletter. While I do a fair amount of public speaking, I find having a slide bank for various topics a great help. All State files are posted at <http://www.ittsresearch.org/Latts2-State-Summaries.html>. Any additional comments or suggestions regarding standard slide material or freight links would be appreciated.

Finally, after an extremely heavy travel schedule last fall, as well as the work on the Conference, I am looking forward to staying home for a month to finish up a lot of lingering pieces. Stay tuned!

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

ITTS "Freight in the Southeast" Conference—Another Success

Well, the ITTS Conference was another smashing success with almost 130 registered attendees, which included the North Carolina Logistics Task Force Logistics Taskforce. (The North Carolina Logistics Task Force was created by the Governor to assist in understanding how transportation and logistics support the North Carolina economy.)

The meeting started off with an optional tour of the Lowe's distribution facility at nearby Statesville, North Carolina. The the tour of the Lowe's facility was a great chance to kick off the meeting, as everyone enjoyed learning about Lowe's distribution networks.

Because of scheduling conflicts at the Marriott, the Wednesday events were held at the nearby Ritz Carlton. North Carolina DOT Secretary Gene Conti welcomed the attendees as well as discussed some of the related freight work happening in North Carolina.

The first panel discussed thoughts on State Freight Planning Activities, which not only included some thoughts about various research needs, but how to understand what information is actually required in planning for freight projects. This theme was echoed in the second session, which discussed how to form State Freight advisory groups. The ITTS conference focuses on more active dialogue, with limited presentations and more questions and answers between the panelists and the audience.

The next morning, we started with a discussion on the future of MultiState Corridors, which included a lively debate about the future of the Highway Reauthorization, the

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The Group on the Lowe's tour.



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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 Alabama Department of Transportation, the Arkansas State Highway and Transportation Department, the Florida Department of Transportation, the Georgia Department of Transportation, the Kentucky Transportation Cabinet, the Louisiana Department of Transportation and Development, the Mississippi Department of Transportation, the North Carolina Department of Transportation, the South Carolina Department of Transportation, the Tennessee Department of Transportation, the Virginia Department of Transportation, and the 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 was in High School and College, I would often DJ parties. "Back in the day", you had to lug around stacks of albums, and have at least two turntables hooked up to some basic stereo equipment. Today, with the advent of mp3's, streaming music stations and other devices, we can enjoy music in ways that I could not have imaged 25 years ago. Clearly, the task of hearing that one song is some much easier than in the past.

However, like so many things, we tend to keep the relics of our misspent youth. I finally gave my sister my 400+ albums. Mind you, I have not had a working turntable for ten years, but it was hard letting go as I moved these albums from Louisiana, Tennessee, Louisiana (again), California, Virginia and back to Louisiana. It is funny how we did not hold on to cassette tapes or 8-tracks, but the albums themselves. Going through the boxes as I loaded them in the car, I enjoyed a torrent of memories – of dreams, of friends, and youth. (There were a few I really wanted to keep just for old times' sake, that I probably will go back and steal a few to decorate my man cave. Don't tell my Sister.)

In this melancholy state, I started thinking about what music had taught me. For those who do not know, I also play the mandolin

and guitar, and have a fairly decent voice (and at one time I had some basic blues harmonica down pat). Music taught me how to listen to parts, and how to learn the underpinning themes and melodies. But when I was spinning tunes, you had to learn to not only listen to the song you were playing, but the next two or three songs, so that you could develop a flow. (I'm no Daft Punk!) However, when my daughter makes a mix CD, it really is just a collection of songs. She never had to listen to a song and think about what song would go next on a cassette or when you were spinning tunes for party.

Well, going forward, today listening to music seems to be only a commodity, as the technology let us personalize and experience music to our individual tastes. It seems a shame that the labor involved in listening to music in the past (loading the turntable, scratches, leaving an album in the sun, rewinding the cassette, or pulling ribbons of cassette tape out of a car stereo) are "joys" my daughters will never experience.

On second thought, I hope my sister enjoys staring at a slew of albums she will probably never play and I got a lot of storage space!! ■

ITTS Conference – Another Success

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question of supporting freight railroads, and other funding issues. This lead into the second session, where the panelists discussed the need to improve transportation safety and security, but two panelists argued for the need to change existing truck size and weight limits.

After lunch, the next panel discussed how waterways and railroads should be considered as part of the freight system, and the importance of including these projects in statewide planning efforts to better coordinate regional investment. The final session discussed local and urban freight issues, which included not only the role of the MPO, but also drayage and other local delivery materials.

The Thursday reception was at the NASCAR Hall of Fame, where after a fairly long tour of autos and memorabilia, everyone gathered in the Great Hall for hor'dourves.

On Friday morning, the first session of the day focused on the Military in the Southeast. This included discussions on emergency response, munitions movements and working with local bases to mitigate traffic congestion. The final session served both as a wrap up session, but also a chance to discuss the future of the Southern Economy, as changes in demographics, international trade, and business patterns will share future infrastructure demand.

ITTS wishes to thank North Carolina Department of Transportation and the University of North Carolina, Charlotte, for serving as the co-hosts. ITTS would like to recognize the following sponsors:

AECOM (Gold)

Cambridge Systematics (Gold)

Wilbur Smith (Silver)

And the partnering organizations:

I-95 Corridor Coalition

American Association of State Highway and Transportation Officials (AASHTO)

American Transportation Research Institute (ATRI)

Appalachian Regional Commission (ARC)

Southern Associations of State Highway Transportation Officials (SASHTO)

Federal Highway Administration (FHWA)

Inland River, Ports and Terminals (IRPT)

Southern Growth Policy Board

Mississippi World Trade Center

University of Southern Mississippi

Tennessee-Tombigbee Waterway

World Trade Center of New Orleans

Trucking Industry Mobility and Technology Coalition (TIMTC)

The presentations are posted on the website. You can also browse the photos from both the sessions and the reception. Hopefully, we caught everyone in a good light.

Most people reported they found the conference unique, engaging, and enjoyable, with quality presentations, great networking opportunities and a wonderful tour of the NASCAR Hall of Fame. As with any conference, you begin planning the next conference the moment you pack up your stuff and head home. Already, I have received several suggestions on the conference, including session ideas and name tags. I would appreciate you filling out the online survey form to make sure that next year's conference is just as successful!

I hope to see everyone next year at the next ITTS "Freight in the Southeast Conference".

All information about the conference is available at http://www.ittsresearch.org/ITTS_2011_conference.html ■

Exports from Southeastern States Recovered from 2009 levels

Total U.S. exports grow in 1.277 billion in 2010, an almost 21% jump from 2009 levels, and returned close to the record high of 1.287 billion in exports in 2008. The net increase in the Southeast followed a similar pattern, as total exports increased by 268 billion, a 20 percent increase from 2009. Unlike the rest of the U.S., the export increase in the Southeast actually exceeded the 265 billion in exports reported for 2008. (These figures are based on the Origin of Shipment Database, and do not necessarily reflect the trade volumes reported at the regional gateways.)

Florida remained the nation's fourth largest exporting state, while Louisiana remained in tenth place. Of the ITTS member States, only Arkansas did not see volumes increase over last year, largely due to reduced shipments of civilian aviation parts. (See the attached table.)

The top five export destinations for shipments that originated in the Southeast were Canada (42 billion), China (21 billion), Mexico (18 billion), Japan (12 billion) and Brazil (12 billion). Together, these five markets accounted 39% of all export shipments from the Southeast in 2010. Of these top destinations, China had the largest net increase, as volumes in 2010 were 36% higher than in 2009. (Of the top ten destinations, only shipments to Germany, the United Kingdom and the Netherlands did not return to 2008 levels.)

The top commodities shipped from the Southeast in 2010 were Civilian Aircraft, engines and parts (16 billion), motor vehicles (14 billion), oil (11 billion), soybeans (10 billion), and coal (6 billion). Together these accounted for 22% of the commodities exported from the Southeast in 2010. Most of the top exports saw rapid growth in 2010, but export values did not fully recover to 2008 levels. For example, exports of motor cars and parts increased by 22%, but still remained \$4 billion short of 2008 levels. Only soybean and metal scraps experienced steady growth over the past two years. ■

Total Exports Based on State of Origin, 2008-2010, in Billions of U.S. Dollars

(Source: Wisertrade)

	2008	2009	2010	2008 – 2009	2009 – 2010
TOTAL U.S.	1,287	1,056	1,278	-18%	21%
TOTAL ITTS STATES	265	223	268	-16%	20%
Florida	54	47	55	-14%	18%
Louisiana	42	33	41	-22%	27%
Georgia	28	24	29	-14%	21%
Tennessee	23	20	26	-12%	27%
North Carolina	25	22	25	-13%	14%
South Carolina	20	16	20	-17%	23%
Kentucky	19	18	19	-8%	9%
Virginia	19	15	17	-21%	14%
Alabama	16	12	16	-22%	25%
Mississippi	7	6	8	-14%	31%
West Virginia	6	5	6	-14%	33%
Arkansas	6	5	5	-9%	-2%

▶ 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 speaking engagements

March 9-11, 2011

4th Annual Transportation and Infrastructure Convention

National Multi-Modal Transportation Steering Committee

March 10-12, 2011

Transportation Research Forum

Long Beach, California

March 14, 2011

AASHTO Standing Committee on Railroads

Washington, DC

March 21-23, 2011

JAXPORT 2011 Logistics & Intermodal Conference

Ponte Vedra Beach, Florida

March 28-29, 2011

2011 Washington Freight Transportation Policy Forum, "Mapping America's Vision For Freight Transportation"

Arlington, Virginia

April 5, 2011

Kentucky 2011 Regional Freight Conference

Florence Government Center, Florence, KY

April 5-6, 2011

8th Annual North American Marine Highways & Logistics Conference

Baltimore, Maryland

April 6-9, 2011

Transportation Intermediaries Association 33rd Annual Convention and Trade Show

Orlando Florida

April 26-28, 2011

3rd Annual Critical Commodity Conference

New Orleans, Louisiana

April 30-May 3, 2011

American Short Line and Regional Railroad Association

San Antonio, Texas

May 02-06, 2011

AASHTO Spring Meeting

Las Vegas, NV

🌐 **May 1-4, 2011**

International Transportation Economic Development

Conference: Economic Impact of Connecting People, Goods, Markets, Employment, Services and Production

Charleston, WV

May 4-6, 2011

2011 IRPT Annual Conference

Pittsburg, PA

May 8-12, 2011

13th TRB National Transportation Planning Applications Conference

Reno, Nevada

May 9-10, 2011

Georgia Logistics Summit 2011

Atlanta, Georgia

May 18-20, 2011

Transportation Research Board, Fourth International Transportation Systems Performance Measurement Conference

Irvine, California

June 6-7, 2011

Using National Household Travel Survey Data for Transportation Decision Making: A Workshop

Washington, D.C.

June 13-14, 2011

Southern Growth Policy Board

Roanoke, Virginia

🌐 **June 21-23, 2011**

American Association of Port Authorities - Communicating the Importance of Infrastructure Investment (Seminar for Public and Government Relations Professionals)

Savannah, Georgia

July 10-13, 2011

2011 TRB Joint Summer Meeting

Boston, Massachusetts

July 11-12, 2011

Port Maritime Economic Development Seminar

Portland, Oregon

July 20-22, 2011

American Association of Port Authorities - Port Security Seminar and Exposition

New Orleans, LA

August 10-12, 2011

Gulf Intercoastal Canal Association 106th Annual Convention

New Orleans, LA

🌐 **August 20-24, 2011**

SASHTO Annual Meeting

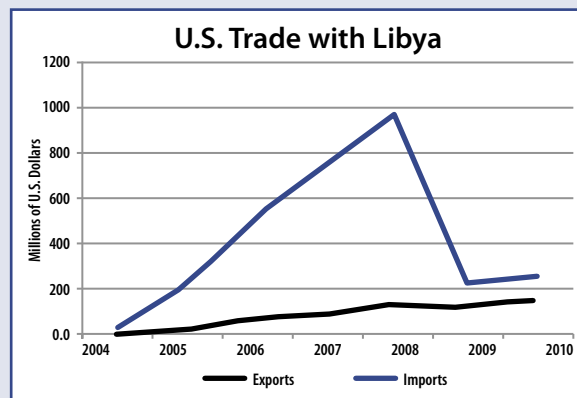
Louisville, KY

▶ TRADE PROFILE ... Libya

Libya's economy remains very dependent upon oil production. (According to the CIA World Fact Book, oil revenues accounted for 95% of the export earnings, 25% of Gross Domestic Product and 80% of Government Revenue.) Over the past few years, Libya has worked to normalize relations with the Europe and the United States, while also seeking to attract foreign direct investment in its energy sector. (President Bush signed an Executive Order which ended economic sanctions against Libya in 2004.) When oil prices fell in 2009, the Libyan economy suffered, as well as many large scale infrastructure projects. At the same time, Libya's lack of industry and other sectors, has contributed to the nation's high structural unemployment, despite many efforts by the Libya Government to diversify the economy.

Despite the current political upheavals, Libya largely trades

with Europe (its larger trading partner is Italy which accounts for almost 40% of Libya's trade, which is not surprising given its historic ties). In comparison, the U.S. receives roughly 5% of the country's exports.



For the U.S., trade with Libya equaled roughly 2.8 billion dollars of trade in 2010. Imports from Libya amounted to \$2.1 billion dollars, but 97% of the import value was crude petroleum and other petroleum products. In 2010, the U.S. exported 665 million dollars, most of which was vehicles and parts for industrial equipment.

For the Southeast, total trade with Libya equaled 418 million, a sharp decline from the large import shipments of petroleum. Exports to Libya reached a record 154 million, a 16% increase from 2010, mostly from increased shipments of cereals. (Libya imports roughly half of their foodstuffs.) ■