The Delaware Valley Freight Center Inventory

Presented To

Lehigh Valley
Freight Advisory Committee
Freight Center Inventory: Overview

• Inventory of Clusters of Freight-Related Land Use
  – Based primarily on existing uses

• Goals are consistent with DVRPC Long-Range Plan:
  – Focus new development into existing towns and centers to create stronger local communities and reduce suburban sprawl.
  – Form partnerships to bring employers and residents to targeted growth areas.
  – Reduce energy needs by locating jobs, housing, and services closer together.
  – Create employment opportunities for underemployed residents
Jobs

- Freight Related Jobs have higher than average annual salaries:
  - Finance and Insurance: $44,006
  - **Transportation and Warehousing:** $39,277
  - **Manufacturing:** $39,259
  - Real Estate: $33,943
  - Total for all sectors: $32,044 (100%)
  - Healthcare and Social Assistance: $30,620
  - Retail Trade: $21,321
Major Users of Freight-Related Land

• Manufacturing
  – Grew 25% from 2000-2008
  – Largest Sectors are:
    • Chemicals
    • Petroleum and Coal
    • Food
    • Computer and Electronics
  – Great asset is its diversity

• Distribution
  – Grew 35% from 2000-2008
  – Already eclipsed pre-recession levels
  – Over 100 Million people live within 500 miles of Philadelphia
Freight Center Methodology

- Initial designations were made using the 2005 DVRPC manufacturing land-use layer during County Freight Scan Study
- Outreach to counties and economic development officials
- Research to populate specific polygons of freight related land within Centers
- Field views to verify all Freight Centers and the land use within them
- Distribution of draft report to county planning departments and freight stakeholders
Freight Related Land Use Types

- Light Manufacturing
- Heavy Manufacturing
- Distribution
- Transportation
- Utility
- Quarry / Mining
Land Use Approach

Logan / Pureland Freight Center with 2005 DVRPC Land-Use Data

Logan / Pureland Freight Center with Freight-Related Land Uses as Defined
Freight Center Designations

- **Mega Freight Centers**
  - 1500+ Acres, or
  - 700+ acres and over 3,000 Manufacturing Jobs

- **Major Freight Centers**
  - 700 – 1,499 Acres, or
  - 250+ acres and over 3,000 Manufacturing Jobs

- **Intermediate Freight Centers**
  - 250-699 Acres, or
  - under 250 acres and over 3,000 Manufacturing Jobs
Mega Freight Centers

- 8 Mega Freight Centers
- 5 of the 9 counties have at least one Mega Freight Center
- 19,360 Total Freight Related Acreage
- 81,884 Total Jobs
Mega Freight Center Example:
Falls / KIPC

- **Land Use and Business Summary**
  - Heavy Manufacturing
    - Kinder Morgan
    - Gamesa Wind Corporation
  - Utility
    - Waste Management
  - Light Manufacturing
    - New Ford Mill Industrial Park
- **Adjacent Land Use and Buffer Zones**
  - Surrounded by water on three sides, and large buffer zone on the other.
- **Interstates and Freeways**
  - US 1 provides access. US 1 connects to I-95.
- **Local / Connector Roadways**
  - Pennsylvania Avenue
  - Tyburn Road to US 13
- **Rail Access**
  - Kinder Morgan operates the rail line within this center
  - Conrail switches the rail cars with Norfolk Southern in the Morrisville Rail Yard
Mega Freight Center Example:
Schuylkill River West / Philadelphia International Airport

- **Land Use and Business Summary**
  - Distribution
    - UPS
    - USPS
    - Regional Produce Market
  - Heavy Manufacturing
    - Sunoco Tank Farm
  - Transportation
    - Philadelphia International Airport
    - PHL Cargo City
  - Light Manufacturing
    - Pennsylvania Liquor Control Board
  - Utility

- **Adjacent Land Use and Buffer Zones**
  - Nearby urban residential land use
  - Buffered provided by hotels, airport parking, and an auto mall

- **Interstates and Freeways**
  - I-95

- **Local / Connector Roadways**
  - Hog Island Road, Island Avenue, Bartram Avenue, US 291, and Essington Avenue

- **Rail Access**
  - Chester Secondary and the 60th Street Industrial Track
Mega Freight Center Example: Schuylkill River East / Girard Point

**Land Use and Business Summary**
- Heavy Manufacturing
  - Girard Point Refinery
  - Aker Philadelphia Shipyard
- Light Manufacturing
  - Tasty Baking
- Transportation
  - CSX East Side Yard
  - CSX Transflo
  - CPR Transload
- Utility
- Distribution

**Adjacent Land Use and Buffer Zones**
- Northern section is adjacent to dense urban residential
- Southern section is adjacent to FDR Park

**Interstates and Freeways**
- I-95
- I-76

**Local / Connector Roadways**
- 26th Street, Passyunk Ave, PA 291

**Rail Access**
- Three Class 1 Railroads run through and service this Freight Center
Major Freight Centers

- 13 Major Freight Centers
- 7 of the 9 counties have at least one Major Freight Center
- 6 Located along Delaware River
- 11,365 Total Freight Related Acreage
- 21,000 Manufacturing Jobs
- 106,504 Total Jobs
Major Freight Center Example: South Philadelphia / Packer Avenue

- **Land Use and Business Summary**
  - Transportation
    - Packer Avenue Marine Terminal
    - Piers 78-80, 82, 84, 96, 98 Annex
    - Greenwich Intermodal Yard
    - Savage Transload
  - Heavy Manufacturing
    - Hyundai Rotum
  - Distribution
    - Food Distribution Center
    - UPS

- **Adjacent Land Use and Buffer Zones**
  - Stadium Complex
  - Navy Yard
  - Big Box Stores

- **Highway Access**
  - I-76 and I-95

- **Local / Connector Roadways**
  - Mantua Grove Road (County Road 656)
  - Grove Road (County Road 643)

- **Rail Access:**
  - Access Interstate system at Front Street, 7th Street, and Broad Street
  - Old Delaware Avenue vital for major facilities
Major Freight Center Example: Robbinsville / New Jersey Turnpike Interchange 7A

- **Land Use and Business Summary**
  - Two Distribution Center areas both owned and managed by Matric Development Group
    - Lifetime Brands
    - Grainger Industrial Supply
    - Mercedes Auto

- **Adjacent Land Use and Buffer Zones**
  - Well buffered from residential development by interstate highways and open space / farm land

- **Interstates and Freeways**
  - I-95 and I-195 directly adjacent. I-95 is only accessible via I-195.

- **Local / Connector Roadways**
  - Robbinsville – Allentown Road and Old York Road provide access to the Interstates
  - West Manor Way and New Canton Way provide circulation

- **Rail Access:**
  - No direct rail access
Major Freight Center Example:
Upper Gwynedd / West Point

- **Land Use and Business Summary**
  - Heavy Manufacturing
    - Merck
  - Light Manufacturing
    - Lehigh Valley Dairy Farms
    - Precision Tube Company

- **Adjacent Land Use and Buffer Zones**
  - Suburban residential development surrounds the center.

- **Interstates and Freeways**
  - I-476 (PA Turnpike) is located on 3.5 miles to the west of the center

- **Local / Connector Roadways**
  - Sumneytown Pike connects to I-476
  - West Point Pike, Allentown Road, and Church Road provide additional access and circulation

- **Rail Access:**
  - Stoney Creek Branch and Jenkintown / Lansdale Main Line (both owned by SEPTA with freight trackage rights) run through the center, but there is little direct rail business in the center.
Intermediate Freight Centers

• 23 Major Freight Centers
• Center land use tends to be more spread out and suburban in nature
• Spread out through the Region: at least one in every county
• 11,934 Total Freight Related Acreage
• 30,652 Manufacturing Jobs
• 149,642 Total Jobs
Intermediate Freight Center: Quakertown / Milford

- **Land Use and Business Summary**
  - Light Manufacturing
    - Millennium Manufacturing
    - Avery Dennison
    - Wilsey Tool Company
    - Shelly’s Lumber
    - Milford Enterprises
  - Transportation
    - Quakertown Airport

- **Adjacent Land Use and Buffer Zones**
  - Open Space
  - Some suburban residential development
  - Commercial Corridor along PA 309

- **Interstates and Freeways**
  - I-476 (3 miles west)

- **Local / Connector Roadways**
  - PA 309
  - PA 663
  - Pumping Station Road

- **Rail Access**
  - Bethlehem Branch (owned by SEPTA, operated by East Penn, LLC)
Intermediate Freight Center
New Garden / Baltimore Pike

- **Land Use and Business Summary**
  - Light Manufacturing
    - Primarily Serves the Food Industry (Specifically Mushrooms)
      - Modern Mushroom Farms
      - Manfredi Cold Storage
      - Basciani Foods
  - Transportation
    - New Garden Airport
    - East Penn Avondale Transload Facility
  - Quarry / Mining
    - Avondale Quarry

- **Adjacent Land Use and Buffer Zones**
  - Open Space
  - Farming

- **Interstates and Freeways**
  - US 1

- **Local / Connector Roadways**
  - Baltimore Pike
  - PA 41

- **Rail Access**
  - Octoraro Branch
## Freight Centers: County Summary

<table>
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<tr>
<th>County</th>
<th>Number of Mega Freight Centers</th>
<th>Number of Major Freight Centers</th>
<th>Number of Intermediate Freight Centers</th>
<th>Total Freight Related Acreage in Centers</th>
<th>2009 Manufacturing Jobs</th>
<th>2009 Total Jobs</th>
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Freight Centers: Summary

- The Delaware Valley has a large amount of clustered freight-related land
  - 42,658 acres of freight-related land
- Freight Centers are important job centers
  - 66,090 manufacturing jobs
- The majority of Freight Centers are rail served
  - 39 of the 44 Freight Centers have the possibility of freight rail service
- The spread and location of existing Freight Centers conform to desirable regional land use patterns and support anti-sprawl strategies
  - 11 Freight Centers are located in a Core City
  - 27 Freight Centers are located in a Developed Community / Mature Suburb
  - 6 Freight Centers are located in a Growing Suburb
  - 0 Freight Centers are located in a Rural Area

Source: DVRPC
Freight Centers: Summary

- Freight Centers are multifaceted and may offer inherent efficiencies and economies of scale.
  - 2 Freight Centers have five different land use types
  - 9 Freight Centers have four different land use types
  - 13 Freight Centers have three different land use types
  - 13 Freight Centers have two different land use types
  - 7 Freight Centers have only one land use type

- Freight Centers are well located to use the Interstate Highway System
  - 21 Freight Centers are located within a ½ mile of an Interstate Highway

- Freight Centers may have a distinct international flavor
  - 17 Freight Centers have either an airport or port facility within their boundary

Source: PRPA

An International Shipment of Cocoa Beans is Unloaded at Pier 84 in the South Philadelphia / Packer Avenue Freight Center
Action Steps for Planning Community

• Integrate the Concept of Freight Centers into Regional and County Plans
• Create and Track Freight Center Activity Indicators
  – Employment
  – Traffic Counts on Access Roads
• Study Access into Freight Centers
• Advance Freight Center Designation Methodology
  – Further Sophistication beyond strictly acreage
  – Different Approach to Designations
    • Growing Freight Centers
    • Transitional Freight Centers
    • At-Risk Freight Centers
    • Stable Freight Centers
  – More detailed analysis using a parcel by parcel approach
Action Steps for Local Government

• Protect Freight Centers Through Zoning and Comprehensive Planning
  – Freight Centers are desirable for local communities due to:
    • High Tax Rateables
    • Diverse Local Job Market
  – Consider use of Industrial Protection Areas
  – Consider Freight Centers when accessing plans for adjacent parcels

• Encourage re-use of Brownfields
  – Often have utilities needed for freight development
  – Properties were often have rich industrial histories
Action Steps for Private Businesses

• Participate in Freight as a Good Neighbor Strategies
  – Develop Truck Access Routes
  – Identify Truck Parking Locations and Encourage Use
  – Create Incident Management Programs
  – Expand Sustainability Measures
  – Hire Locally

• Share Services and Amenities
  – Marketing
  – Snow Removal
  – Lawn Care
  – Security
  – Day Care
  – Cafeteria
  – Gym
  – Lounge
  – Park
  – Transit / Shuttle Bus Service
Action Steps for All Stakeholders

• Create Branding Efforts focused around Freight Centers
• Identify and Implement Projects needed to Improve Freight Centers
  – Possible Funding Sources:
    • Congestion Mitigation and Air Quality (CMAQ)
    • Pennsylvania Rail Freight Assistance Program (RFAP)
    • Pennsylvania Rail Transportation Assistance Program (Rail TAP)
    • New Jersey Rail Freight Assistance Program
    • Innovative Financing and Public Private Partnerships
2017 Update Topics

• Boundaries and modifications of existing centers (including the related “detail card”)
• Existing centers which should be deleted
• New centers which should be added (note: the current freight center criterion is a minimum of 250 contiguous acres in size)
• Needed highway improvements
• Needed rail freight improvements
• any other items
Rebranding?

- Logistics Centers
- Freight Villages
- Supply Chain Hubs
New Ways to Organize

- Establishments (by built square footage)
- Jobs (by employment type)
- Number of Modes
- Types of Commodities
- Activity Levels
Thank You!

• DVRPC Freight Team
  – Barry Seymour, Executive Director
  – Mike Boyer, Associate Director
  – Ted Dahlburg, Manager
  – Mike Ruane, Senior Planner