WELCOME MESSAGE FROM SECRETARY RICHARDS

The Pennsylvania Department of Transportation welcomes you to the Eastern Pennsylvania Freight Summit. PennDOT convened this event with the support of several of our Planning Partners at the regional level, including the Lehigh Valley Planning Commission, the Delaware Valley Regional Planning Commission and the Tri-County Regional Planning Commission.

Freight transportation is a major public policy issue and one that is becoming more visible to the general public. Goods movement is becoming more complex—e-commerce consumers are increasingly demanding goods and services that require shorter supply chains and global reach. Just-in-time manufacturing and delivery practices have turned motor carrier fleets into rolling warehouses, with drivers who are faced with a limited supply of truck parking for required safety breaks. Major capital improvements beyond our borders, such as the raising of the Bayonne Bridge at Staten Island to accommodate larger vessels, and major investments at both the Panama and Suez canals, have direct impacts here in Eastern Pennsylvania. Our large consumer base and keystone position within the major Northeast U.S. market puts Eastern Pennsylvania at a vital intersection of warehousing and distribution activity.

These developments have been powered in part by increases in online shopping, a trend that will continue to have enormous implications in the years ahead. Retailing accounts for one in seven jobs (14%) in Eastern Pennsylvania, and changes in the retail industry will have significant overall effects on business, our society and our transportation system. Consumers are benefitting, but our aging freight infrastructure is struggling to keep up.

The Eastern Pennsylvania Freight Summit is intended to serve as a forum for sharing ideas and information concerning the transportation problems we collectively face. We trust that the thoughts and ideas that are generated and shared at this event will inspire you, and spur the actions and partnerships that are needed to address the challenging issues surrounding goods movement.

Leslie S. Richards
Secretary, Pennsylvania Department of Transportation
WELCOME MESSAGE FROM CO-HOSTS

On behalf of the Lehigh Valley Planning Commission and my fellow co-hosts, welcome to Bethlehem! We have been looking forward to this event and trust you will avail yourself of the outstanding array of speakers we have assembled, as well as the unique opportunities for you to network with freight transportation professionals. The Eastern PA Freight Summit offers the prospect for us to think critically about our transportation policy, planning, and programming practices, as well as economic trends and emerging topics in the world of freight.

The forces affecting our freight transportation are enormous, and the complex interaction of our demographics, socio-economics, trade policies and land use means that new approaches will be needed. Addressing our freight challenges will require a multi-faceted approach that includes public-private partnerships, strategic investments in infrastructure and improved coordination between our land use and transportation planning.

It is our hope that the summit will serve as a catalyst for future action to further sustain our region’s prosperity and livability.

Becky Bradley, AICP
Executive Director
Lehigh Valley Planning Commission

Steve Deck, AICP
Executive Director
Tri-County Regional Planning Commission

Barry Seymour
Executive Director
Delaware Valley Regional Planning Commission
## PROGRAM SCHEDULE

### DAY 1 - THURSDAY, JUNE 21, 2018

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>8:00 – 8:30</td>
<td>Registration</td>
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<tr>
<td></td>
<td>Coffee and pastries available</td>
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<tr>
<td>8:30 – 9:30</td>
<td><strong>Welcome and Keynote Address</strong></td>
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<tr>
<td></td>
<td>- Call to Order – <a href="#">James Ritzman</a>, Deputy Secretary for Planning,</td>
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<td>Pennsylvania Department of Transportation</td>
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<td>- Welcome – The Honorable <a href="#">Phil Armstrong</a>, Lehigh County Executive;</td>
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<td>and The Honorable <a href="#">Lamont McClure, Jr.</a>, Northampton County</td>
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<td>Executive</td>
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<td>- Opening Remarks – <a href="#">Leslie S. Richards</a>, Secretary, Pennsylvania</td>
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<td>Department of Transportation</td>
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<td>- Keynote Speaker – <a href="#">Bill Wolf</a>, Executive Vice President, CBRE</td>
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<tr>
<td>9:30 – 10:45</td>
<td><strong>Morning Session I</strong></td>
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<td><strong>Regional Perspectives: Freight trends and issues within the 25-county</strong></td>
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<td></td>
<td>- <a href="#">Becky Bradley</a>, Executive Director, Lehigh Valley Planning</td>
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<td>Commission</td>
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<td>- <a href="#">Steve Deck</a>, Executive Director, Tri-County Regional Planning</td>
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<td>Commission</td>
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<td>- <a href="#">Barry Seymour</a>, Executive Director, Delaware Valley Regional</td>
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<td>Planning Commission</td>
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<td>- <a href="#">Nancy Dischinat</a>, Executive Director, Lehigh Valley Workforce</td>
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<td>Development Board</td>
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<td>- Moderator: <a href="#">Erich Zimmermann</a>, National Association of Regional</td>
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<td>10:45 – 11:00</td>
<td><strong>Break</strong></td>
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<tr>
<td>11:00 – 12:15</td>
<td><strong>Morning Session II</strong></td>
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<td><strong>Beyond the Border: What forces beyond our region should we be</strong></td>
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<td>watching closely?</td>
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<td>- <a href="#">Andy Alden</a>, Executive Director, Interstate 81 Corridor Coalition</td>
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<td>- <a href="#">Mary Ameen</a>, Deputy Executive Director, North Jersey Transportation</td>
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<td>Planning Authority</td>
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<td>- <a href="#">Marygrace Parker</a>, Director, Freight and Innovation in Transportation Program Manager, Interstate 95 Corridor Coalition</td>
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<tr>
<td></td>
<td>- Moderator: <a href="#">Joseph Bryan</a>, Vice President, Freight &amp; Logistics Advisory</td>
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<td>Services, WSP</td>
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</table>

#PAFreight
PROGRAM SCHEDULE

12:30 – 1:30  Lunch and Featured Speaker
   ▪ Ed Konjoyan, Majestic Realty (introduced by Darlene Heller, City of Bethlehem Director of Planning)

1:30 – 2:45  Afternoon Session I
   Multimodal: How are ports and railroads addressing changes in supply chains and growing freight volume?
   ▪ Paul Kent, Senior Vice President for Ports & Infrastructure, Nathan Associates, Inc.
   ▪ Rudy Husband, Vice President of Government Relations, Norfolk Southern
   ▪ Jim Walsh, Senior Director of Operations, PhilaPort
   ▪ Moderator: Joseph Fitzpatrick, Esq., Fitzpatrick Lentz & Bubba, P.C.

2:45 – 3:00  Break

3:00 – 4:15  Afternoon Session II
   Truck Parking P3: What is the extent of the truck parking problem in Pennsylvania, and how can the public and private sectors work together to address it?
   ▪ Jeff Purdy, Transportation Specialist, FHWA Office of Freight Management & Operations
   ▪ Kevin Stewart, President and CEO, Pennsylvania Motor Truck Association
   ▪ Joe Gurinko, Deputy Director, PennDOT P3 Office
   ▪ Moderator: Alan Williamson, Senior Project Manager, HNTB

5:00 – 8:00  Reception at Fegley’s Brew Works
   ▪ 559 Main Street #101, Bethlehem, PA 18018
   ▪ Sponsored by the Traffic Club of the Lehigh Valley

DAY 2 - FRIDAY, JUNE 22, 2018

8:00 – 4:00  Guided tours of manufacturing and distribution facilities in the region
FEATURED SPEAKERS

**Leslie S. Richards**
Secretary, Pennsylvania Department of Transportation

Leslie S. Richards has extensive leadership experience in the management of transportation projects, both in her private sector work in the planning and engineering fields over the past two decades, as well as in her work in local government. Her private and public sector experience gives her a unique perspective on stakeholder issues, and on the importance of bringing projects to completion on time and on budget. Secretary Richards is recognized in the public and private sectors for her ability to build consensus in order to solve problems.

Secretary Richards is a graduate of Brown University, where she concentrated in economics and urban studies. She earned a Master’s of Regional Planning from the University of Pennsylvania. Secretary Richards is a lifelong Pennsylvania resident. She lives with her husband and three children in Montgomery County. Follow Secretary Richards on Twitter @SecRichards, and find her on Facebook at www.facebook.com/lesliesternrichards.

**Bill Wolf**
Executive Vice President, CBRE Global Supply Chain Practice Group

Bill Wolf has specialized in the Lehigh Valley, Central and Northeast Pennsylvania market since 1981 when he began his commercial real estate career. Bill has represented both landlords and tenants in major leases and sales in Pennsylvania and throughout North America.

Bill is a member of the CBRE Global Supply Chain Practice Group, which specializes in meeting the needs of the distribution industry on a multi-market basis. He is also a member of CBRE Special Properties Group, whose members provide specialized acquisition, disposition and consulting services for major industrial facilities located outside of metropolitan areas, with the unique understanding of the tremendous impact that large facilities have on the local economy of a small community.

**Ed Konjoyan**
Senior Vice President, Majestic Realty Co.

Ed Konjoyan joined Majestic in 2004 and currently serves as Senior Vice President. He is responsible for identifying and overseeing the development of master-planned business parks, and commercial and mixed-use projects, as well as the development of ground-leased land and public-private partnerships with governmental organizations.

A past President and Chairman of Legislative Affairs for NAIOP Inland Empire, Ed is a licensed Real Estate Broker and a member of the State Bar of California. He holds a law degree from Georgetown University and a Bachelor of Science degree in Business Administration with an emphasis in Real Estate Development and Finance from the University of Southern California.
The planning region encompasses:

- 4 PennDOT Engineering Districts
- 13 Planning Partner regions
- 25 counties, comprising approximately one-third of the state’s land area
- 64 percent of the state’s total population

Since 2010, the region’s population has grown by an estimated 140,000, or the equivalent of Lebanon County.

It is located within a day’s drive of 40 percent of the U.S. population, which represents 60 percent of the nation’s buying power.
The planning region encompasses a majority of the state’s share of the National Multimodal Freight Network (NMFN), including major freight corridors—Interstates 78, 80, 81, 83, 84, 95, 176, 380 and the Pennsylvania Turnpike. US 30 between York and Lancaster is also an important non-interstate element of the NMFN. In all, the region has nearly 53,000 linear miles of state and local roadways, accommodating overall travel demand of 166 million miles—daily.

Philadelphia International Airport is by far the region’s largest air cargo facility, with 439,000 tons of cargo landed in 2017. Other major air cargo facilities are in Harrisburg, Wilkes-Barre/Scranton and the Lehigh Valley. Rail freight service is led by Class I carriers Norfolk Southern and CSX. Conrail operates approximately 250 miles of rail in a shared asset area in greater Philadelphia. Numerous short-line railroads throughout the region connect shippers to the national rail network. The Port of Philadelphia (PhilaPort) is one of the state’s primary gateways to the global economy. In 2017, the port handled a record half-million containers.
Change in population is an indicator of a region’s economic health, and also drives the demand for freight. The region’s population has steadily grown, increasing by 140,000 people between 2010 and 2016 to a total of 8.2 million—nearly two-thirds of the state’s population.

Pennsylvania’s fastest-growing counties are in areas exhibiting significant freight growth, including Cumberland (5.6%), Lebanon (4.0%) and Lehigh (4.0%). The suburban counties surrounding Philadelphia also continue to grow, with Chester County’s population now exceeding 500,000. The City of Philadelphia has bucked national trends since 2000 to register gains in total population and is the sixth-largest city in the nation. The entire region is positioned squarely within the “megalopolis” urban complex, which stretches from Boston to suburban Washington, D.C., and is one of the largest agglomerations of population in the world. More people translates to more consumption of goods, commodities and services, which increase freight activity.
FHWA’s Freight Analysis Framework (FAF) incorporates data from the agriculture, extraction, utility, construction, service and other sectors to provide tonnage estimates by regions of origin and destination for 2012 (the most recent data available from the Commodity Flow Survey). The data can be used to project truck flows and forecasts; the accompanying figure projects freight volume by roadway in 2045.

According to the FAF, freight volumes are expected to increase on many of the region’s interstates, particularly on I-78 and I-81.
The severity of truck delay varies greatly throughout the 25-county region, but is most readily apparent on several of the region’s interstates and US routes. Significant corridors experiencing the most delay include Interstate 95, the Schuylkill Expressway and the Mid-County Expressway (the “Blue Route”) in Philadelphia. US 30 near Lancaster and York, as well as US 22 in Allentown are notoriously congested, as is Interstate 83 on Harrisburg’s Capital Beltway. Network capacity and congestion on these freight corridors have a significant impact on ease of distribution through the Northeast and along the Eastern Seaboard. Moreover, Pennsylvania’s roadways are important to the global supply chain. In light of trucking’s dominance as a share of moving the state’s freight (76 percent of all freight moved), addressing safety and bottlenecks on the highway network is a critical planning issue, and one that will only grow in importance as freight volumes increase.
“PREP” regions (Partnerships for Regional Economic Performance) designated by the PA Department of Economic and Community Development (DCED) encourage regional coordination of economic development efforts as part of a statewide economic delivery strategy.

In developing Pennsylvania’s first-ever statewide freight plan, PennDOT developed freight profiles for each of the state’s PREP regions. Summary information for the value and tonnages of freight moving across all PREP regions within Eastern Pennsylvania, and how they are expected to increase, is depicted in the accompanying table.

### Freight Value and Tonnages by PREP Region (2011, 2040)

<table>
<thead>
<tr>
<th>Region</th>
<th>Inbound to PREP Region</th>
<th>Internal to PREP Region</th>
<th>Outbound from PREP Region</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tons (millions)</td>
<td>Value (billions)</td>
<td>Tons (millions)</td>
<td>Value (billions)</td>
</tr>
<tr>
<td>2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Northeast</td>
<td>19.5</td>
<td>$22.7</td>
<td>2.5</td>
<td>$0.5</td>
</tr>
<tr>
<td>2. Lehigh Valley</td>
<td>23.4</td>
<td>$25.3</td>
<td>0.9</td>
<td>$2.6</td>
</tr>
<tr>
<td>3. South Central</td>
<td>50.5</td>
<td>$70.4</td>
<td>19.4</td>
<td>$22.8</td>
</tr>
<tr>
<td>4. Southeast</td>
<td>95.2</td>
<td>$129.0</td>
<td>24.9</td>
<td>$23.3</td>
</tr>
<tr>
<td>2040</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Northeast</td>
<td>36.2</td>
<td>$51.1</td>
<td>4.6</td>
<td>$1.5</td>
</tr>
<tr>
<td>2. Lehigh Valley</td>
<td>38.3</td>
<td>$53.1</td>
<td>2.5</td>
<td>$7.6</td>
</tr>
<tr>
<td>3. South Central</td>
<td>84.4</td>
<td>$158.1</td>
<td>40.5</td>
<td>$38.5</td>
</tr>
<tr>
<td>4. Southeast</td>
<td>154.9</td>
<td>$280.1</td>
<td>45.0</td>
<td>$48.9</td>
</tr>
</tbody>
</table>

Source: Pennsylvania Comprehensive Freight Movement Plan

Note: Susquehanna and Wyoming counties are part of a different PREP region; their freight data is not included in the table.
EASTERN PA FREIGHT PROFILE

1. NORTHEAST PREP REGION

- Distribution centers and quarries are the region’s largest freight generators.
- The largest commodity by value moving through the region is pharmaceutical products.
- The region is part of the growing New York metropolitan area. Two of the region’s counties (Pike and Monroe) experienced the strongest population growth rates in the state through the decade ending in 2010.

2. LEHIGH VALLEY PREP REGION

- Since 2010, the two-county region’s population has grown by nearly 18,200.
- Sections of US 22 and I-78 are among the top truck bottlenecks in the state.
- Industrial development in recent years has been dominated by distribution centers and logistics projects, exerting more pressure on agricultural land and open space.

3. SOUTH CENTRAL PREP REGION

- Three of the region’s counties (Cumberland, Franklin and York) experienced some of the highest population growth rates in the state between 2000 and 2016.
- The region’s diverse economy includes logistics firms, government, agriculture, and food processing, business and financial services, and advanced manufacturing.
- Many of the state’s top 100 freight generators are located within this region, including Amazon, which has six fulfillment centers.

4. SOUTHEAST PREP REGION

- The region is home to an estimated 4.4 million people—an increase of 90,000 since 2010.
- Southeastern PA’s "International Gateway" provides indispensable services to manufacturers and consumers throughout Pennsylvania.
- 41 "Freight Centers" are vital generators of 104,000 family-sustaining jobs.
- State investments are expected to double cargo business by deepening berths to 45 feet and installing “post-Panamax” container cranes, the largest in the world.

MSC Schuba B container ship
1,083 feet long
Comcast Center
Philadelphia
975 feet high

In February 2018, the Delaware River welcomed its largest-ever container ship, at 6,750 twenty-foot equivalent units (TEUs). The vessel was longer than the Comcast Center is tall.
Freight-related employment, as shown in the accompanying graphic, includes jobs in the Agriculture/Forestry/Fishing, Construction, Manufacturing, Mining/Quarrying/Oil & Gas Extraction, Transportation/Warehousing, Wholesale Trade, and Retail Trade industries. The region contains several major urban manufacturing hubs, including Allentown, Reading and Wilkes-Barre. High concentrations of freight-related employment also exist in more rural areas of the region, such as Wyoming County, underscoring the importance of rural connecting roadways.

The region is also home to several defense facilities. Installations such as the DLA Defense Distribution Center (Harrisburg), Letterkenny Army Depot (Chambersburg) and Tobyhanna Army Depot (Monroe County) all contribute to the region’s freight traffic. The Port of Philadelphia is one of only 14 ports in the U.S. designated as a Strategic Military Port, handling military cargo destined for various points around the world.
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Vice President/Senior Area Manager, Pennsylvania Statewide Operations
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