



northern california mega-region goods movement economic cluster analysis

WHO: Caltrans and four regions including the San Francisco Bay Area, the Sacramento area, San Joaquin County and the Monterey Bay area will lead the project, with active participation of key stakeholders – employers and businesses in key industries, local economic development and transportation agencies, workforce investment boards, and community groups, among others.

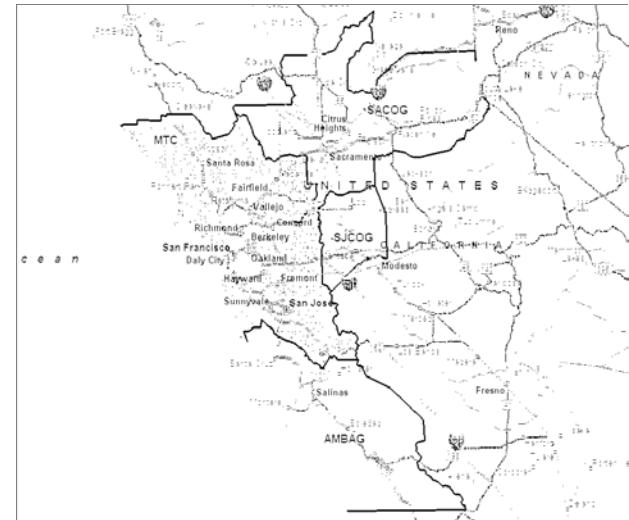
WHY: The regions are coming together to develop strategies that can support the mega-region's vast goods movement economic cluster, which already employs more than 1.7 million workers. The project will address a range of topic areas including, land use, transportation, economic development and workforce training.

WHAT: Strategies will be informed by an analysis of the mega-regional economic cluster as well as a deeper assessment of land use, transportation, economic development and workforce training plans and policies in up to five "focus areas."

WHEN: MTC and its regional partners launched the study in November 2016 and the final report is anticipated to be completed by June 2018.

Partner agencies include: the Association of Monterey Bay Area Governments, the Metropolitan Transportation Commission, the Sacramento Area County of Governments and the San Joaquin Council of Governments

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SIZE: 19 counties and 150 cities

POPULATION: 12.2 million people or 31.5% of the state's population in 2015

ECONOMY: \$875 in Gross Regional Product, the highest in per capita terms of any U.S. mega-region in 2014

JOBS: Over 1.7 million jobs in the goods movement related sector



KEY STAKEHOLDERS: Regional agencies will engage a diverse range of stakeholders and interest groups in the study. These include but are not restricted to: businesses and industry groups; workforce training institutions; community advocates; ports; trucking and railway operators; congestion management agencies; and local economic development agencies; among others.

STUDY OUTCOMES: Regional agencies will define the vast goods movement economic cluster; identify key challenges and opportunities related to land use conflicts, system bottlenecks, job growth and workforce training; identify up to five focus areas that are critical to the mega-region's goods movement system; develop strategies for the focus areas; and adopt an implementation action plan.

STUDY OVERSIGHT: The Mega-Region Working Group composed of policymakers from MTC, SACOG and SJCOG will oversee the development of this study. In addition, the respective boards for each regional agency will provide additional oversight and direction over the course of the project.

PROCESS: Regional agencies launched the project in November 2016 and anticipate completion by June 2018.

Winter 2016 to Spring 2017

Data Collection and Assessment:

Economic Cluster
Global Trends
Assets/Strengths
Threats/Weaknesses

Summer to Winter 2017

Challenges and Opportunities:

Transportation
Land Development
Middle-Wage Jobs
Worker Training

Spring to Summer 2018

Strategies and Recommendations:

Focus Areas Action Plan

DESIRED OUTCOMES:

- Expanded opportunities for low-wage workers;
- Improved system efficiency and safety;
- Lower congestion and fewer delays;
- Reduced emissions and community impacts; and
- More competitive projects for federal funding.

GOODS MOVEMENT SECTOR:

An estimated **\$1 trillion** worth of goods originated or passed through the mega-region's ports, warehouses, industrial districts and rail yards in 2012. This number is projected to grow to more than **\$2.6 trillion** by 2040.

GOODS MOVEMENT NETWORK:

The mega-region is connected through a network of highways, railroads and marine terminals. Transport of high-value agriculture goods also rely on aviation.

