Study of Goods Movement in Peel

Strategic Overview

November 2004

Prepared by Wilbur Smith Associates and IBI Group
# TABLE OF CONTENTS

1. **EXECUTIVE SUMMARY** .................................................................................................................. 1
   1.1 Introduction and Purpose .............................................................................................................. 1
   1.2 Principal Findings ................................................................................................................................. 1
       1.2.1 Congestion and Unreliability Loom as Major Transportation Network Problems ......................... 1
       1.2.2 Goods Movement Data are Lacking ...................................................................................... 2
       1.2.3 COORDINATION of Goods Movement Issues Across Governments and Stakeholders is Limited ... 2
   1.3 Recommendations ................................................................................................................................. 3
       1.3.1 Policy Area 1: Goods Movement Stakeholder Involvement ..................................................... 3
       1.3.2 Policy Area 2: Goods Movement Corridors ........................................................................ 3
       1.3.3 Policy Area 3: Goods Movement Policy and Funding Coordination ........................................ 4
   1.4 Next Steps .......................................................................................................................................... 4

2. **PURPOSE & BACKGROUND** ........................................................................................................... 5
   2.1 Introduction ........................................................................................................................................ 5
       2.1.1 Purpose and Goals of Study ................................................................................................. 5
       2.1.2 Regional official plan – Existing Elements Related to Freight ................................................. 6

3. **PEEL IN THE GTA CONTEXT** ....................................................................................................... 7
   3.1 Geographic Orientation ....................................................................................................................... 7
   3.2 Population, Demographics and Labour Force – Current and Trends .......................................... 7
   3.3 Economic Relationship of Peel, GTA, Canada, the US and NAFTA .............................................. 9

4. **PEEL REGION FREIGHT TRANSPORTATION** ........................................................................ 11
   4.1 Factors Affecting Goods Movement Volume and Character ......................................................... 11
   4.2 Existing Official Plan ....................................................................................................................... 12
   4.3 Transportation System by Mode ...................................................................................................... 13
       4.3.1 Air Transportation .............................................................................................................. 13
       4.3.2 Railway Transportation .................................................................................................... 13
       4.3.3 Marine Transportation ..................................................................................................... 13
       4.3.4 Road Transportation ......................................................................................................... 13
4.3.5 Major Activity Generators ........................................................................................................13
4.4 Goods Movement Activity Trends in Peel .........................................................................................15
4.5 Role of Trade by Mode in Peel Region ..............................................................................................16
  4.5.1 Trucking mode ........................................................................................................................16
  4.5.2 Railway Mode ..........................................................................................................................19
  4.5.3 Air Mode ..................................................................................................................................19
5. STAKEHOLDER CONSULTATION ....................................................................................................21
  5.1 Survey – Overview and Summary Results ......................................................................................21
    5.1.1 SURVEY SUMMARY ..............................................................................................................21
    5.1.2 SURVEY HIGHLIGHTS .........................................................................................................21
    5.1.3 REGIONAL ISSUES OF CONCERN IDENTIFIED THROUGH THE SURVEY .......................24
  5.2 Strategic Issues from Regional Councillor Workshop ....................................................................24
    5.2.1 Freight Corridors ..................................................................................................................24
    5.2.2 Freight Funding Policies ......................................................................................................24
    5.2.3 Coordination of Truck Policies .............................................................................................25
    5.2.4 Travel Demand Management ..............................................................................................25
    5.2.5 Land use Planning .................................................................................................................25
    5.2.6 Early Action Initiatives ........................................................................................................26
    5.2.7 Multimodal Planning .............................................................................................................26
    5.2.8 Truck/auto Separation ..........................................................................................................26
    5.2.9 Freight Stakeholder Involvement .........................................................................................26
  5.3 Strategic Issues - Goods Movement Community .............................................................................26
6. OTHER GOODS MOVEMENT STRATEGIC ISSUES AFFECTING PEEL ......................................28
  6.1 Assessment of Emerging Goods Movement Issues Affecting Peel ...............................................28
    6.1.1 Intermodal Trends .................................................................................................................28
    6.1.2 Hazardous Goods Movement ...............................................................................................29
  6.2 Assessment of Freight Data Needs and Gaps ..................................................................................29
7. STRATEGIC OPTIONS FOR PEEL ..................................................................................................31
  7.1 Internal Perspective (Freight Policy Options and Needs) ...............................................................31
  7.2 External Perspectives (Best Practices) ..........................................................................................31
    7.2.1 NORTH AMERICAN EXAMPLES .......................................................................................31
    7.2.2 OVERSEAS EXAMPLES .................................................................................................37
  7.3 Common “Best Practice” Themes ..................................................................................................39
8. KEY FINDINGS, RECOMMENDATIONS AND NEXT STEPS ..............................................40
8.1 Key Findings .................................................................................................................. 40
8.2 Recommendations ......................................................................................................... 40
8.3 Next Steps ..................................................................................................................... 42

APPENDIX A: PEEL GOODS MOVEMENT SURVEY SUMMARY ........................................44

APPENDIX B: INTERVIEW SURVEY ..................................................................................45

APPENDIX C: GOODS MOVEMENT FORUM ........................................................................51

EXHIBITS

EXHIBIT 1 GTA POPULATION PROJECTIONS TO 2031 ......................................................7
EXHIBIT 2 PEEL REGION POPULATION AND AREA MUNICIPALITIES .............................8
EXHIBIT 3 LABOUR FORCE IN THE TRANSPORTATION AND WAREHOUSING SECTOR ..8
EXHIBIT 4 EMPLOYMENT FORECAST 2001 TO 2031 ..........................................................9
EXHIBIT 5 POSITION OF MAJOR MARKETS RELATIVE TO THE REGION OF PEEL ..........10
EXHIBIT 6 PEEL REGION TRANSPORTATION NETWORK ..................................................14
EXHIBIT 7 TRUCK TRIPS CROSSING PEEL REGION BOUNDARY (MEDIUM AND HEAVY TRUCKS) ................................................................................................................... 15
EXHIBIT 8 COMMERCIAL VEHICLE TRIPS IN ONTARIO .......................................................17
EXHIBIT 9 HEAVY TRUCK RESTRICTIONS ........................................................................ 18
EXHIBIT 10 AIR CARGO TRAFFIC (TONNES) .....................................................................19
EXHIBIT 11 TRENDS IN AIR CARGO ACTIVITY AT PEARSON AIRPORT ............................20
EXHIBIT 12 CONGESTED INTERSECTIONS IDENTIFIED BY SURVEY .................................23
1. EXECUTIVE SUMMARY

1.1 Introduction and Purpose

Situated at the crossroads of Eastern Canada’s transportation system, the Region of Peel is a hub for some of North America’s most important east-west and north-south trade routes. Peel is served by a network of seven provincial expressways, many of which are focused around Lester B. Pearson International Airport, Canada’s largest air cargo hub. Canada’s two major railroads – the Canadian National (CN) and the Canadian Pacific Railway (CPR) – operate in and have major facilities in or adjacent to Peel.

Peel’s economic vitality depends greatly on this extensive transportation network. The Region contains 31% of the Greater Toronto Area’s (GTA) manufacturing and industrial activity. The transportation/warehousing economic sector accounts for about 8% of the Region’s employment activity, much higher than that in other parts of the GTA.

The Region of Peel commissioned this study to assess the state of the goods movement transportation system in the Region and strategic options for addressing long-term goods movement transportation needs in the Regional Official Plan Strategic Update (ROPSU). The study is intended to identify planning, policy, programmatic and infrastructure investment options available for enhancing the Region’s ability to accommodate goods movement as part of the overall Regional investment strategy. The recommendations lay the groundwork for Peel’s integration of goods movement into its continuous planning process.

1.2 Principal Findings

Peel Region continues to experience growth in its industrial, warehousing and distribution sectors of the economy. Paralleling this economic expansion is growing stress on, and risks to, the reliability and operational efficiency of the transportation network. It is difficult to precisely quantify or analyze the extent and character of these issues due to a historic lack of systematic data collection regarding goods movement in Peel and throughout the country. Collecting more and better data about goods movement activities, patterns and problems in Peel will significantly improve the Region’s ability to identify and implement cost-effective system improvements and policy initiatives. By forming partnerships with goods movement stakeholders in the private and public sectors and involving them in the planning process, the Region can proactively work toward addressing these issues, many of which will require partnerships across the public and private sectors and across governments to resolve.

1.2.1 CONGESTION AND UNRELIABILITY LOOM AS MAJOR TRANSPORTATION NETWORK PROBLEMS

A survey of local industries and transportation companies conducted for this study found that while the Peel Region’s transportation system generally accommodates goods movement adequately, stakeholders perceive looming major problems. For example, all respondents noted congestion on highways and at certain major intersections as a problem; the degree to which congestion is a problem, however, varied depending on each company’s routing requirements. Since many firms today employ “just-in-time” (JIT) logistics techniques, the need for a reliable transportation system is critical. In addition, haulers of heavy aggregates, particularly those in the north-western sector of
the Region, noted that various road restrictions affect routing of their vehicles and hence their efficiency.

The major planning and investment challenge facing Peel will be continued goods movement industry growth across all transportation modes. Some components of the goods movement sector are experiencing sustained annual goods movement traffic volume growth rates near or above 10%. Truck traffic volume as a share of total traffic on the roads has grown from being a secondary consideration into a significant factor; with continued growth, goods movement issues will increase in importance and visibility for the Region. Current facilities at their present locations are either at or approaching capacity much faster than anticipated; how and where they are replaced will depend on crucial funding decisions that are yet to be made collaboratively by government and industry.

Reliable predictions about where, when and how any major problems will appear are difficult to make in the absence of substantial data. Many of the determining factors are beyond the influence of municipal and regional governments. It is also unclear whether the global trend will be toward the concentration of goods handling facilities into large super-terminals or “freight villages” (either centrally located in urban areas, or in so-called “greenfield” areas) or whether the activity will be dispersed into smaller satellite facilities being served by trunk line feeders.

### 1.2.2 GOODS MOVEMENT DATA ARE LACKING

Urban goods movement data on vehicle movements, shipment flows, and origin and destination information are not typically available on a system-wide basis. This is a global problem. Although some jurisdictions have carried out special studies to obtain snapshot information of urban goods flows from time to time, this has not yet occurred in Peel.

The main sources of data for the Peel Region include intersection counts and cordon counts. Traffic counts are undertaken throughout the Region every two years. In most locations these are basic traffic counts, with buses, trucks and service vehicles (all with three axles or more) counted as one group. Full classification counts are undertaken in some locations, but not enough to generalize across the Region. Analyzing this data to capture commercial vehicle flows for main arteries is a major undertaking. During the course of this study, the consultant conducted a sample exercise for a section of Dixie Road, near Pearson Airport, primarily to gauge the level of effort required to analyze freight vehicle flows and to demonstrate the types of results that can be achieved. Additional resources would be required to undertake this type of analysis on a Region-wide basis.

### 1.2.3 COORDINATION OF GOODS MOVEMENT ISSUES ACROSS GOVERNMENTS AND STAKEHOLDERS IS LIMITED

A major theme emerging from this study is the need for communication, collaboration and partnerships:

- among governments - Peel Region and its area municipalities, the province and the federal government working together; and
- between the public and private sectors (to coordinate and advance goods movement system improvements).

There is little mention of goods movement in the Official Plan documentation to date affecting Peel Region. Leadership and funding are needed to make partnerships effective. Peel can take a limited leadership role, but the scope and scale of the issues will require active participation across governmental jurisdictions and levels. There is also a need to understand how the plans prepared by different levels of government can be coordinated so that decisions and actions are complementary.

Peel Region staff have worked closely with the Provincial and Federal governments on goods movement initiatives. For example, recent work by the Province of Ontario has included goods movement studies for Ontario, surveys of commercial vehicle movements on the highway system,
the establishment of a Central Ontario Freight Advisory Forum and the release of a recent discussion paper (summer 2004) "Places to Grow" with a section on strategies for moving goods.

Experiences with planning for goods movement in other jurisdictions may be instructive for Peel. In most cases, the experience is fairly recent; awareness and documentation of goods movement are emerging trends. Themes common to most of the practices elsewhere include:

- Congestion Relief and Safety Improvement — discussions on these topics could generate short term small-scale projects and meaningful input concerning the long-range priorities;

- Linking Economic Vitality with Goods Movement Efficiency — discussions on these topics deal with economic competitiveness, trade, land use, access and egress to major transportation facilities such as intermodal terminals, airports and ports; and

- Operations and Policy Harmonization — discussions include harmonization of regulations among institutions, harmonization of transportation operations with different users of existing infrastructure, or simply integrating goods movement into transportation plans and policies.

Virtually all of the examples considered here involve establishment of ongoing industry-government liaison groups (under a variety of names or labels). The Peel Goods Movement Forum of November 5, 2003 is a first step in such a process. Participants in the Forum responded positively to the suggestion of organized ongoing consultations.

In Europe, there have been further developments to generate and share data on urban goods movement activities. Montréal appears to be in the very early stages of adopting such a systematic approach to data collection. In the United States, the approach to building a successful track record appears to hinge on starting with small, manageable projects that produce observable improvements in safety or reductions in congestion.

1.3 Recommendations

Recommendations for addressing the issues and opportunities discussed in the Principal Findings above have been developed and fall into three major policy areas: goods movement corridors; goods movement policy and funding coordination; and goods movement stakeholder involvement.

1.3.1 POLICY AREA 1: GOODS MOVEMENT STAKEHOLDER INVOLVEMENT

Peel Region should pursue and forge partnerships with the various agencies that have active roles in improving the goods movement transportation system. This includes partnerships among governments – municipal, regional, provincial and federal – and between the government and private sector groups. Efficient and effective goods movement requires the public and private sectors to work together.

1.3.2 POLICY AREA 2: GOODS MOVEMENT CORRIDORS

Peel Region should work with the area municipalities to expeditiously develop a goods movement network across the Region. Peel’s critical goods movement corridors and activity centres should be assessed and prioritized for preservation and improvement. This effort should include compiling and organizing existing data, identifying data gaps and collecting new data to address gaps. Specific objectives for the Regional goods movement network include: minimize congestion on the road network and transportation corridors; minimize the impact of truck traffic on residential communities including noise, safety and accessibility; and provide an appropriate goods movement network that meets the needs for moving goods within and through Peel Region.
**Recommendation - Data Needs:** The Peel Region should pursue acquisition of additional needed freight data, which are a critical aspect of the goods movement corridor analysis and assessment process. Options for joint data initiatives with the provincial and federal governments and private sector need to be explored.

**Recommendation - Multimodal Planning:** Peel, in collaboration with other GTA jurisdictions and provincial and federal agencies, should seek to more fully and effectively integrate multimodal goods movement planning into the Region’s overall transportation planning and prioritization process. Critical goods movement corridors and nodes, once identified through this collaborative process, should be included in the Long Range Transportation Plan as part of the regional transportation network. By pursuing transportation improvement strategies that take advantage of the best attributes of each mode, network reliability and performance are enhanced to mitigate problems caused by congestion and disruptions.

### 1.3.3 POLICY AREA 3: GOODS MOVEMENT POLICY AND FUNDING COORDINATION

**Peel Region needs to address goods movement problems and improve facilities in coordination with other jurisdictions.** Just as goods movement transportation activities transcend municipal, regional, provincial, and even national borders, efforts to improve the efficiency and effectiveness of goods movement need to be conducted by various stakeholders through collaboration and coordination.

**Recommendation - Funding Coordination:** Peel should coordinate goods movement improvement funding policies with the provincial and federal governments. The Region should develop a clear, accurate and concise message on this subject and clearly communicate it to the public, community leaders and policy and funding decision makers at all government levels.

**Recommendation - Coordinated Truck Policies:** Peel should develop a plan for enhancing coordination of municipal truck restrictions by working with the Region’s municipalities and consulting with industry. This plan should build upon goods movement corridor information and contain an industry consultation element.

**Recommendation - Planning for Sustainable Goods Transportation:** Area Municipalities are encouraged to include consideration of sustainable goods transportation in their planning processes. With the rapid growth of goods movement and terminal activity within Peel, it is important for the area municipalities and the Region to continue to plan for these activities and to involve private sector stakeholders in the goods movement planning process. Furthermore, planning should ensure a balance between the movement of people and the movement of goods across the regional network.

### 1.4 Next Steps

1. Develop goods movement policies for the Peel Transportation Plan Consolidation and the Regional Official Plan Strategic Update.

2. Establish and strengthen ongoing partnerships and stakeholder involvement with the public and private sectors, e.g. establish a goods movement liaison working group.

3. Coordinate between Peel and area municipal staff to define a Strategic Goods Movement Network in Peel for review, assessment and prioritization.

4. Initiate discussions with other regional, provincial and federal jurisdictions and agencies regarding funding and policy coordination.
2. PURPOSE & BACKGROUND

2.1 Introduction

Situated at the crossroads of Eastern Canada’s transportation system, the Region of Peel is a hub for some of North America’s most important east-west and north-south trade routes. For example, over half of Quebec’s exports to the United States pass through Peel. Peel is served by a network of seven provincial expressways. The expressway system is well-connected to Lester B. Pearson International Airport, Canada’s largest air cargo hub. Canada’s two major railroads – the Canadian National (CN) and the Canadian Pacific Railway (CPR) – operate in and have major facilities in or adjacent to Peel, and most goods moving by rail between South-western Ontario, Eastern Ontario/Eastern Canada and Western Canada also pass through the Region.

Peel’s economic vitality depends greatly on this extensive transportation network. The Region contains 31% of the Greater Toronto Area’s (GTA) manufacturing and industrial activity, primarily in Mississauga and Brampton1. During the last 20 years, however, growing roadway congestion and the ever-increasing emphasis on time-sensitive delivery have created increasing pressure on the goods movement system. Peel as a principal industrial node in the GTA, is undertaking this study to better understand the nature and role of goods movement and the strategies available to the Region to more effectively address goods movement problems and issues.

2.1.1 PURPOSE AND GOALS OF STUDY

The Region of Peel commissioned this study to assess the state of the goods movement transportation system in the Region and strategic options for addressing long-term goods movement transportation needs in the Regional Official Plan Strategic Update (ROPSU). The study is intended to identify planning, policy, programmatic and infrastructure investment options available for enhancing the Region’s ability to accommodate goods movement as part of the overall Regional investment strategy. The study is of a strategic nature and constitutes the first phase of a multi-year Peel Goods Movement Program, and includes participation by Mississauga, Brampton, Caledon and the involvement of the Ontario Ministry of Transportation (MTO) and Transport Canada. The recommendations lay the groundwork for Peel’s integration of goods movement into its continuous planning process.

Peel’s specific goals for this study include:

- Develop a current perspective on goods movement and its role in and impact on the Peel Region’s economy and transportation system;

- Develop a future context for goods movement in Peel Region, including global goods movement trends and consultation with the goods movement industry on issues, perspectives, future challenges, solutions and actions;

- Develop relationships with industry and goods movement companies in Peel;

- Develop strategic policy options, including long range planning, goods movements policies, and partnerships between the public and private sectors; and

- Identify on-going goods movement planning needs, including data needs and performance indicators and monitoring.

---

2.1.2 REGIONAL OFFICIAL PLAN – EXISTING ELEMENTS RELATED TO FREIGHT

The Regional Official Plan (ROP) is a public document, prepared at the direction of Regional Council to provide a long-term policy framework for decision making. The ROP sets the Regional context for protecting the environment, managing resources, directing growth and setting the basis for providing Regional services in an efficient and effective manner.

Peel Region is embarking on a strategic update of the ROP. This report documents opportunities for incorporating policies that are supportive of economic development and goods movement efficiency within the Region.

The 1996 Peel ROP focuses on growth management and policy-oriented strategies for achieving regional goals. Goods movement is not addressed in an explicit or substantive manner. However, as currently structured, the Official Plan provides multiple opportunities for more effectively highlighting and integrating goods movement-supportive strategies with overall Regional policies.
3. PEEL IN THE GTA CONTEXT

3.1 Geographic Orientation

Peel Region is one of the five Regional Municipalities that are part of the GTA. The Region is centrally located in Ontario between the burgeoning GTA and the well-populated South-western Ontario. It has easy access to major highways that serve the two main cross-border points at Windsor and Buffalo and is located within a one-day drive of most major North American markets including Chicago, New York, Boston and Montreal. In the last 10 years there has been a move to relocate manufacturing/distribution industries to more suburban locations such as Peel, as land requirements for these industries increase and the cost of land in urban areas goes up. This has resulted in a rapid growth of freight centres in suburban areas to service this industrial growth.

3.2 Population, Demographics and Labour Force – Current and Trends

Peel Region’s population is expected to increase by over 40% by year 2031 (535,000 persons by Peel’s most recent official forecast); however, other regions are expected to experience the largest growth in the same period of time (See Exhibit 1). Among Peel Region’s Municipalities, Mississauga is the city with the largest population, and Brampton is growing fastest in recent years (See Exhibit 2).

Exhibit 1 GTA Population Projections to 2031

<table>
<thead>
<tr>
<th>Region</th>
<th>1996</th>
<th>2001</th>
<th>Population Forecast and Population Growth (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTA</td>
<td>4,629,000</td>
<td>5,082,000</td>
<td>5,983,000</td>
</tr>
<tr>
<td>Toronto</td>
<td>2,385,000</td>
<td>2,482,000</td>
<td>2,659,000</td>
</tr>
<tr>
<td>Peel*</td>
<td>853,000</td>
<td>989,000</td>
<td>1,217,000</td>
</tr>
<tr>
<td>York</td>
<td>592,000</td>
<td>729,000</td>
<td>1,009,000</td>
</tr>
<tr>
<td>Durham</td>
<td>459,000</td>
<td>507,000</td>
<td>629,000</td>
</tr>
<tr>
<td>Halton</td>
<td>340,000</td>
<td>375,000</td>
<td>501,000</td>
</tr>
</tbody>
</table>

Source: Preliminary Population Projections to 2031, December 2003, GTAH Forecasting Project, Hemson. (Peel Projections based on Peel Regional Council Approval, March 6, 2003.)
Exhibit 2  Peel Region Population and Area Municipalities

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Peel Region</td>
<td>732,798</td>
<td>852,526</td>
<td>988,948</td>
<td>35.0</td>
</tr>
<tr>
<td>Brampton</td>
<td>234,445</td>
<td>268,251</td>
<td>325,428</td>
<td>38.8</td>
</tr>
<tr>
<td>Caledon</td>
<td>34,965</td>
<td>39,893</td>
<td>50,595</td>
<td>44.7</td>
</tr>
<tr>
<td>Mississauga</td>
<td>463,388</td>
<td>544,382</td>
<td>612,925</td>
<td>32.3</td>
</tr>
</tbody>
</table>

Source: Region of Peel Website, Peel Statistics Section

In 2001, Peel Region’s total labour force was 564,190 according to 2001 Canada census data. From this labour force, approximately 9.6% work in “manufacturing”, 20.6% in “sales and services” and 0.9% in “primary industry”. All of the industries in the Peel Region depend one way or another on the transportation industry, which, along with trade, equipment operators and related occupations, represents 14.6% of the Region’s total labour force.

A more specific fact suggesting that employment in the Region of Peel is very dependent on the transportation industry is proportion of labour force employed in “Transportation and Warehousing”. As it is shown in Exhibit 4, in comparison to other regions of the GTA and the country of Canada, Peel Region reports the highest proportion of workers (7.95% in year 2001) related to the transportation and warehousing industry.

Exhibit 3  Labour Force in the Transportation and Warehousing Sector

<table>
<thead>
<tr>
<th>Region</th>
<th>1996 Total Workers</th>
<th>Transportation / Warehousing</th>
<th>%</th>
<th>2001 Total Workers</th>
<th>Transportation / Warehousing</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Durham</td>
<td>243,955</td>
<td>8,735</td>
<td>3.6%</td>
<td>279,585</td>
<td>12,020</td>
<td>4.3%</td>
</tr>
<tr>
<td>Halton</td>
<td>191,750</td>
<td>7,590</td>
<td>4.0%</td>
<td>213,020</td>
<td>10,730</td>
<td>5.0%</td>
</tr>
<tr>
<td>Peel</td>
<td>476,445</td>
<td>27,395</td>
<td>5.8%</td>
<td>564,195</td>
<td>44,875</td>
<td>7.9%</td>
</tr>
<tr>
<td>Toronto</td>
<td>1,231,300</td>
<td>32,390</td>
<td>2.6%</td>
<td>1,320,380</td>
<td>50,335</td>
<td>3.8%</td>
</tr>
<tr>
<td>York</td>
<td>319,335</td>
<td>8,850</td>
<td>2.8%</td>
<td>569,580</td>
<td>13,635</td>
<td>2.4%</td>
</tr>
<tr>
<td>Ontario</td>
<td>5,586,975</td>
<td>198,555</td>
<td>3.6%</td>
<td>6,086,815</td>
<td>280,150</td>
<td>4.6%</td>
</tr>
<tr>
<td>Canada</td>
<td>14,812,700</td>
<td>598,925</td>
<td>4.0%</td>
<td>15,872,075</td>
<td>774,220</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

Source: Statistics Canada Census Data

Finally, the employment forecast for the Region of Peel suggests that labour force will grow some 47.47% from year 2001 to 2031. (See Exhibit 4).
### 3.3 Economic Relationship of Peel, GTA, Canada, the US and NAFTA

In recent years, the volume and economic value of international trade has grown significantly. Goods are now also being transported over longer distances than was the case 20 years ago. Canada’s Gross Domestic Product (GDP) is increasingly derived from exports of goods and services (43.1 percent in 2001, compared to 25.7 percent in 1990\(^2\)). While the automotive sector remains dominant in terms of trade volumes, new agreements such as the North American Free Trade Agreement (NAFTA), has opened new markets for goods and services on throughout North America.

Currently, the US accounts for 81.8 percent of total Canadian exports and 71 percent of total imports\(^3\). Trade flows are much more strongly oriented north-south than previously. This, in turn has caused more dependence on trucks because rail intermodal services across the US border are not as highly developed as they are East-West across Canada.

The Greater Toronto Area (GTA) plays a key role as a point of distribution and redistribution for goods on a national and continental scale. The GTA generates about one-quarter of Canada’s GDP. Associated with this high level of economic activity is a corresponding intensity in the movement of goods and services in the Region. Indeed, the volume of Ontario’s international trade is more than all other Provinces combined. The value of intra-provincial trade in Ontario is almost seven times that of inter-provincial trade, and almost twice that of international trade. The US accounts for 84% of Ontario’s international trade by value – 95% of exports and 73% of imports.\(^4\) About $92 billion or one-quarter of Ontario – US trade is with the state of Michigan, while $53.8 billion or 48% of Ontario’s trade with the rest of Canada is with Quebec\(^5\). Trade with the US has increased significantly as a result of NAFTA, and the Ontario economy has become increasingly north-south in orientation, leading to considerable growth of trucking, container traffic and air cargo with the US.

A large portion of North American markets is within two days driving distance from Peel/GTA (see Exhibit 5). Industrial-commercial investment brokers note that, for almost a decade, the quest for investment grade property has been led by firms requiring warehousing with high ceilings, broad spaces and plenty of dock capacity (i.e. “high cube”). This has required the development of new facilities, many of which have located in Peel. The GTA represents the third largest concentration of industrial floor space in North America (only Chicago and Los Angeles have more), and the Region of Peel plays an especially critical role in the overall GTA context. Almost half of this industry inventory is in Mississauga, which is served by a network of seven provincial freeways in the vicinity of Lester B. Pearson International Airport. It is estimated that at least 60 percent of this space is devoted to warehousing and logistics uses\(^6\). Results of the Ontario Commercial Vehicle Survey

---

\(^2\) Government of Canada, Department of Foreign Affairs and International Trade.
\(^3\) Government of Canada, Department of Foreign Affairs and International Trade.
\(^4\) Ontario Ministry of Transportation “Freight Supportive Land Use Planning Guidelines”
\(^5\) Transport Canada 2001 Annual Report.
\(^6\) The Canadian Urban Institute “Moving Goods in the New Economy”, 2001
suggest that more than $2.5 billion worth of goods move daily on provincial highways. The majority of these movements occur in the province’s south-western and central regions, with the highest-volume link being Highway 401 between Lester B. Pearson International Airport and Highway 427, which carries around $560 million in goods per day.\(^7\)

Exhibit 5  Position of Major Markets Relative to the Region of Peel

Note: One day of driving is assumed to correspond to a travel time of 9 hours.

\(^7\) Greater Toronto Service Board “GTSB Goods & Services Movement Strategy: Phase 1”
4. PEEL REGION FREIGHT TRANSPORTATION

4.1 Factors Affecting Goods Movement Volume and Character

The shift from an inventory-based focus to one in which the necessity of safe and timely delivery is of key significance for the consideration of goods movement concerns in the Peel Region’s transportation planning. Recognizing the important role freight transport plays in preserving the economic vitality and quality of life for Peel will help in maintaining and enhancing the Region’s important role in the GTA and Central Ontario.

Freight transportation has needed to respond to a number of changes within the economy in recent years. The shift over the past few decades from a heavy industrial and manufacturing based economy to one based on providing services within the urban environment is characterized by five major economic trends:

- Importance of trade and globalization of the economy;
- Growth of service industries;
- Restructuring of traditional manufacturing to increase competitiveness and emergence of high technology and knowledge-based industries;
- Industrial location and demographic trends, including increased flexibility for businesses in their location decisions and an aging population; and
- Reduced government roles and increased privatization.

The result of such changing trends is a shift in the focus of freight logistics. The "push" economy of the past has been replaced by a "pull" economy, from inventory-based logistics to replenishment-based logistics. In the push economy, suppliers pushed materials to a manufacturer, who pushed the completed product to a distributor, who supplied the retailer, who filled the customer’s order. Each business entity maintained an inventory of parts and products as a buffer against fluctuations in supply and demand. A pull system relies less on maintaining expensive inventory and more on timely transportation to match supply and demand. This new pull economy is creating a larger volume of commercial truck travel in the United States.

In response, freight transportation has recently undergone a number of changes that have increased transport efficiency. Inter-modality has created a system in which containers can be moved from one mode to another without being dismantled and repacked. Business practices have been adjusted due to deregulation of motor carriers and railroads, and freight rates revised, leading to greater competition across modes and lower shipping costs. The introduction of integrated logistics and supply-chain management has led to just-in-time delivery of goods and the need for transportation networks that enable quick and reliable delivery of freight.

With such improvements in efficiency, total logistics costs as a percentage of the gross domestic product have decreased. These cost savings have been passed on to consumers throughout the economy, providing a direct economic impact. Operating costs have been further lowered with the movement of firms to regions with a strong transportation network. Continued improvement of metropolitan transportation networks will result in additional cost savings and ultimately further increase economic competitiveness.

Recent trends though, if not properly addressed, can negatively impact the great strides made by improvements in freight transport efficiencies. The ability of manufacturers to serve global markets places a greater burden on metropolitan transportation networks to provide for the efficient, seamless delivery of goods. The advent of internet commerce as a means to market and sell products online, in a global setting, has created further demands that impact transportation network

---

operations. Due to the need for greater delivery capacity to meet the increased demand of a global market, freight volumes are increasing vis-à-vis greater truck lengths and weights.

These recent trends in freight transport, in metropolitan regions where freight transportation planning has been inadequate, have led to significant increases in traffic congestion. The fastest growth in travel is expected in South-western Ontario and the GTA area, where it is projected to increase by 113%. As with truck, high growth is also expected in the air cargo sector. A 1996 GTSB survey of carriers found that 97% of carriers surveyed indicated congestion was a problem on highway 401 and 100% indicated that congestion was a problem on the QEW / highway 403.

Such impacts, if not properly addressed, could ultimately hurt the Peel Region’s economic vitality by reducing the Region’s attractiveness as a location for freight-transport related business. Increased levels of freight-related congestion increase travel delays and accident rates, which contribute to a lower quality of life for the citizens of Peel and even the entire GTA.

These issues pose challenges for the Peel Region as it plans for the future. In an urbanized setting such as Peel, where opportunities for modifications to the existing built environment and transportation infrastructure are limited when compared with designing new communities, strategies to maximize the efficiencies of the inter-relationship between shippers, transport carriers and planners must be a central concern. Although the controlling factors will be driven by global trade requirements, many of the effects will be realized locally. It is becoming increasingly important to monitor these trends, and to establish a capability to respond quickly to changes while engaging in collective efforts with industry within Peel and with outside jurisdictions.

4.2 Existing Official Plan

The policies in the Region that affect goods movement include: the Planning Act and the Provincial Policy Statement that accompanies it; the Regional Official Plan; the individual Municipal Official Plans; and, the Zoning bylaws that implement the Official Plans. The overriding provincial plans and areas of Provincial interest that affect Peel Region include:

- Niagara Escarpment Plan
- Parkway Belt West Plan
- Oak Ridges Moraine Conservation Plan
- Lake Ontario Waterfront

In all of the Official and Provincial plans that affect Peel Region there is very little specific mention of goods movement. It focuses on growth management and policy-oriented strategies for achieving broad regional goals.

In the regional structure chapter of the Official Plan it is stated, that to provide a diversity of healthy communities, they will be served and connected by a multi-modal transportation system and provide an efficient use of land, public services, finances and infrastructure, while respecting the natural environment. In the Transportation System section, the Official Plan states that one of its goals is to provide an integrated, safe and efficient system for transportation of people and goods; and one of the policies is to locate, where possible, activities generating substantial truck traffic near major roads or expressways. (Policy 5.6.4.2.3)

Goods movement is not addressed in an explicit or substantive manner. However, as currently structured, the Official Plan provides multiple opportunities for more effectively highlighting and integrating goods movement-supportive strategies with overall Regional policies.

\(^9\) GTSB Goods & Services Movement Strategy: Phase 1, January 2001
4.3 Transportation System by Mode

Peel Region is a major transportation hub in Ontario that is linked to an excellent transportation network, the key links of which are depicted in Exhibit 6. The following provides a brief description of the main network components:

4.3.1 AIR TRANSPORTATION

Lester B. Pearson International Airport (LBPIA) is located in the City of Mississauga. This airport is in the top tier of North American Airports. It is the most important air cargo centre in Canada, handling 344,000 tonnes in 2000. Its main strengths include its international and transborder connections along with air freight. A majority of air cargo is carried as belly cargo on passenger flights. LBPIA also acts as a hub for a limited number of air freighter flights.

4.3.2 RAILWAY TRANSPORTATION

Class 1 Railways CPR, CN and Short Line OBRY (Orangeville Brampton Railway) pass through the Region of Peel. CN has two east-west main lines, the “Lakeshore” route through Mississauga, and the “bypass” route through Brampton, both linking to the US across the St. Clair/Detroit and Niagara rivers. CPR has connections in both the east-west (to Windsor, Chicago and Western United States as well as Buffalo/Niagara and the Eastern United States) and north-south (to Sudbury and Western Canada) directions; the OBRY serves the Region from Streetsville to Orangeville. There are three Rail -Truck Intermodal terminals serving the Region including CN (Brampton), and neighbouring CPR terminals: CPR Milton (in Halton) and CPR Vaughan (in York).

4.3.3 MARINE TRANSPORTATION

In the marine sector, the Peel Region has three private port facilities, at the refinery and at the cement plant in Clarkson and the Lakeview power generating station, for petrochemicals, limestone and coal respectively.

4.3.4 ROAD TRANSPORTATION

The network of major highways and arterial roads in the Region of Peel promotes easy access for trucks within the Region and beyond.

- Provincial Highways:
  - QEW (Toronto to Buffalo);
  - Highway 401 (Toronto to London);
  - Highways 403, 407, 409, 410, 427
- Arterial Roads: including both Peel roads as well as municipal roads.

4.3.5 MAJOR ACTIVITY GENERATORS

Some of the major generators of goods movement in Peel include:

- The Brampton Industrial Area, one of the most rapidly expanding industrial areas;
- The Lester B. Pearson International Airport area;
- The Meadowvale industrial area; and
- The older industrial area located at the intersection of Queensway with Highway 427.
Exhibit 6  Peel Region Transportation Network
4.4 Goods Movement Activity Trends in Peel

Freight transportation systems are now challenged by higher levels of service and lower costs being demanded by shippers, with carriers having to operate in increasingly congested road conditions. At the same time, economic, environmental and demographic changes along with new business practices impose increasing restrictions on freight transportation. In addition to this, the transportation industry will soon face skills shortages since it is expected that 40% of existing workers could retire in the next 5 to 10 years.

Changes in the business environment have altered production, distribution and logistics requirements. The merger of modern communication technologies and physical distribution systems has transformed the shipping industry, including inventory control and physical locations where goods are staged. New practices like just-in-time production and, more recently, demand-side inventory management where customer orders placed on the web are contributing to a new business model in which storage plays a lesser role and mobile inventories are the norm. All of these factors have given rise to new types of transhipment points better known as distribution centres, which are larger than traditional warehouses, built on extensive suburban areas. High volume and precise inventory management require more frequent movements of smaller loads, thus increasing truck, parcel van, and airplane traffic.

The Region of Peel has not escaped this reality. Truck traffic in Peel is growing faster than either auto trips or population (7% per annum for trips by all truck types, 5% per annum for medium and heavy trucks crossing the Peel boundary). The Cordon Count Program also showed that the percentage of trucks on Peel’s roads represents 7% of Vehicles in the AM Peak and 5.5% in the PM Peak. Goods movement is becoming more predominant in Peel’s transportation system. The share of trucks, among all daily vehicle trips increased, from 16% in 1991 to 19% in 2001. Exhibit 7 shows the number of total truck trips crossing the Peel Region Cordon in a 12-hour period. The chart shows significant increments in truck movement since 1991.

![Exhibit 7 Truck Trips Crossing Peel Region Boundary (Medium and Heavy Trucks)](image)

In recent years, there has been an increase in industrial and commercial related development along the entire Highway 401 corridor in Peel. Two areas in particular that may influence goods movement patterns are the Airport Corporate Centre Area and the Meadowvale Area. Both of these areas are popular for locating motor carrier terminals and warehouse centres because of the good access and they are expected to generate a large amount of truck trips in the area.

10 Peel Region Cordon Count Program, 2003
11 Peel Region Cordon Count Program, 2003
Metropolitan regions, naturally, are important places for distribution, reflecting the volume of urban markets and the advantage of fast and flexible response to requirements at the point of sale (80% of Canadians now live in urban areas). Just-in-time deliveries and lower inventories have led to more frequent deliveries of goods and services, markedly increasing congestion in urban markets. Local delivery inside urbanized areas is much more costly than long-distance shipments, in part because it must use small vehicles with their low productivity (with increasing presence of parcel deliveries and less-than-truck load shipments), and in part because it must operate on congested streets.

With the population of the GTA expecting to grow rapidly, the automobile dependent nature of most suburban development and the increase in truck traffic on Peel roads indicates that congestion in Peel and the surrounding regions will be a major issue in the years to come. Also, with all of this activity and growth there is competition in the Region for land to accommodate all of these pursuits.

4.5 Role of Trade by Mode in Peel Region

As it was stated previously Ontario is by far the largest intra-provincial, inter-provincial, and international trader among Canadian provinces in terms of value and volume, and the volume of Ontario’s trade is more than all other provinces combined. In 1994, trucks transported 61% of Ontario’s export value and 83% of the province’s import value.

In terms of tonnes of intercity goods serving the GTA, trucking dominates with 70% of the total tonnes, which translates into more than 250 million truck movements annually in the region. The next most common mode is marine with 15%, rail with 14% and air with 1%. Additional detailed information on each mode, as available, is presented below.

4.5.1 TRUCKING MODE

The 1999/2000 Commercial Vehicle Survey done by the Ministry of Transportation recorded that more than $2.5 billion worth of goods are moved on provincial highways and the majority of those movements occur in the province’s South-western and Central regions. In 1999, 16% of all longer distance truck trips that use Ontario highways originate in Peel Region, and 17% terminate in Peel Region (See Exhibit 8).
The current major road network serving goods movements consists of freeways and expressways. Highway 401 and the QEW handle 63% of the Canada’s commercial vehicle trips to and from the US. In certain sections, both highways carry in excess of 30,000 trucks per day. Truck volumes on selected points of the 400 series highways, municipal expressways and other streets exceed 10,000 per day.

The Region of Peel uses a restrictive approach concerning truck movements; rather than define truck routes, truck restrictions are published (e.g. time periods, weight limits, permanent restrictions, seasonal restrictions, etc.) The present situation is illustrated in Exhibit 9; truck routes vary by municipality depending on their needs. Some routes such as Hwy 10 / Hurontario Street are not continuous heavy truck routes throughout the region. Another example of discontinuity is Dixie Road, which is a truck route through the northern part of Caledon then is not a truck route through Brampton but then resumes heavy truck route status through Mississauga.
Exhibit 9   Heavy Truck Restrictions
4.5.2 RAILWAY MODE

The main cross-Canada freight routes for CPR and CN pass through the Central Ontario Region (See Exhibit 6). Both CPR and CN have connections in all directions including links to New York, Windsor/Detroit and Chicago, Western Canada, Montreal and Halifax.

Limited statistics on the rail industry’s activity and throughput are publicly available given the competitive nature of the industry. While a large portion of Central Ontario rail movements simply pass through the region, the automotive industry in Ontario depends heavily on rail and has major facilities in the province, including a large Daimler Chrysler plant in Brampton.

CPR and CN have many terminal facilities serving the Peel area. CP Rail operates the main Vaughan Intermodal Terminal located near Highway 50, north of Highway 7, in York Region, on the border with Peel. This rail terminal handles domestic and international containers. CPR also operates the Expressway terminal on Trafalgar Road immediately south of Highway 401 in Milton (in Halton Region, near the border with Peel), which handles Expressway intermodal services to Montreal and Detroit.

CN owns the substantial Brampton Intermodal Terminal, off Airport Road immediately south of Highway 7 in Brampton. CN also operates a terminal located in Brampton on Torbram Road, south of Steele which is used for CN’s RoadRailer services (RoadRailers have trailer bodies which can be given railway bogies and run as train behind a dedicated locomotive).

Intermodal rail traffic is expected to continue to increase at annual rates of 8% to 12%. Consequently the two intermodal facilities in Peel Region (the Brampton Intermodal Terminal and the Torbram Yard) will in turn increase their prominence as goods movement generators.

4.5.3 AIR MODE

Air freight is increasing in significance given the shift to a more globally integrated economy. Lester B. Pearson is the busiest airport in Canada and is the centre of air cargo traffic in the GTA. Pearson is the largest air cargo gateway in Canada, handling 344,474 tonnes in year 2000, 44% and 93% of all air cargo in Canada and Ontario respectively12 (See Exhibit 10).

Exhibit 10  Air Cargo Traffic (Tonnes)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Toronto (LB Pearson Intl)</td>
<td>Loaded</td>
<td>165,841.10</td>
<td>177,169.30</td>
<td>169,909.70</td>
<td>173,545.90</td>
</tr>
<tr>
<td></td>
<td>Unloaded</td>
<td>170,812.90</td>
<td>191,132.70</td>
<td>188,802.10</td>
<td>201,548.00</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>336,654.00</td>
<td>368,302.00</td>
<td>358,711.80</td>
<td>375,093.90</td>
</tr>
</tbody>
</table>

Exhibit 11 provides a summary of the trends in air cargo traffic at Pearson Airport until the year 2000. Overall, air cargo volumes increased by an average of 4.5% per year between 1990 and 2000. The fastest growing air cargo sector is transborder traffic. Between 1994 and 1999, transborder traffic grew by 16% per year on average. This trend is primarily a result of NAFTA, but also a reflection of trends towards just-in-time delivery and the production of higher value but smaller and lighter goods13.

All indications are that air cargo traffic will continue to grow at a much faster rate than the general economy. For Pearson Airport the Greater Toronto Airports Authority (GTAA) estimates that total air

---

13 Greater Toronto Service Board “GTSB Goods & Service Movement Strategy; Phase 1”
cargo tonnage will increase by approximately 5% per year over the next 20 years. Total air cargo activity is forecast to exceed 900,000 metric tonnes by 2018.

The Airport area is by far the most dominant goods movement generator in Peel Region. The GTAA has estimated that businesses in the airport area generate $14.7 billion in business revenue. Many truck and rail facilities are located in the industrial area around the airport. With the expansion of the airport, this area will continue to be a key generator. Pearson itself generates more than 2,000 truck trips per day, principally in smaller trucks. Cargo activity is dictated by contractual arrangements, restrictions on night operations, goods custom clearance, cost / space /flight frequencies to selected locations and connections with other airlines.

Exhibit 11  Trends in Air Cargo Activity at Pearson Airport

Source: GTAA Regional Summary
5. STAKEHOLDER CONSULTATION

5.1 Survey – Overview and Summary Results

Surveys of shippers and carriers were carried out in the Peel Region for this study. About 75 companies were contacted representing diverse activities including resource movements, courier companies, auto manufacturing companies, communication products, etc. A full list of the companies surveyed can be found in Appendix A. Companies were mainly surveyed by telephone; a few received and responded with a faxed survey form. The following shows the response rate for the survey:

<table>
<thead>
<tr>
<th>Completed</th>
<th>29</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacted but did not Respond or Refused</td>
<td>36</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>10</td>
</tr>
<tr>
<td>Total Contacted</td>
<td>75</td>
</tr>
</tbody>
</table>

Appendix B includes the survey questions, and summary statements on stakeholder responses.

5.1.1 SURVEY SUMMARY

The general response from the survey was that the agencies in Peel Region are doing a relatively good job accommodating goods movement in the area with some exceptions. Congestion on highways and at major intersections was a problem described by all companies but in different degrees depending on their area of operation. This is important because for most operations just-in-time logistics techniques have created increasing pressure on the goods movement system. The exceptions were mainly companies that, due to their specific location and the location of their customers, had particular difficulties with road restrictions affecting their routing. The other major issue for most companies is a shortage of good drivers in the area.

5.1.2 SURVEY HIGHLIGHTS

Highlights of responses to the survey include:

- Half of the respondents were located in Mississauga;
- Most respondents have been in their present location more than 10 years;
- 79% of respondents owned or operated a private fleet of truck vans;
- All respondents shipped outbound and inbound;
- Most of the outbound shipments stay in the GTA and a lot of the inbound shipments were from Ontario and specifically the GTA with some from Quebec and the United States;
- “On-time/just-in-time delivery “ was the most crucial factor influencing the outbound and inbound transportation arrangements;
The primary commodity group hauled by over half of those surveyed, was general freight;

Over half of the respondents are able to use the shortest distance between the pick up and delivery. Some issues that surfaced with those who cannot use the shortest routes include:

- Having to avoid roads restricted at times when they had customer demands;
- North south route restrictions between Hwy 10 and Trafalgar Road require quarry companies to add “thousands of kilometres per day”;
- The companies want to use the most efficient routes to avoid congestion.

Specific intersections are identified to be avoided due to congestion, accidents and restrictions. The nature of the difficulty was not always indicated in the survey. The map (Exhibit 12) shows intersections mentioned by at least two respondents. Although based on a small sample, it is provided as a source of information. These intersections are:

- Airport Road and Derry Road
- Airport Road and Bovaird Drive
- Goreway Road and Derry Road
- Dixie Road and Derry Road
- Highway 10 and Highway 24
- Airport Road and Steeles Avenue
- Mavis Road and Britannia Road
- Matheson Blvd. and Dixie Road
- Highway 401 across Peel (particular problems at Dixie)
- QEW across Peel
- Intermodal Drive gets backed up due to the CN Intermodal yard.

The stakeholders’ comments on congested areas has provided useful feedback for the appropriate jurisdictions to consider remedial action for those roads.

Just under half of the respondents felt that the heavy vehicle restrictions currently in place were “Important or Very Important” with respect to their business. Their responses included:

- Heart Lake Road should not be restricted to trucks;
- Access to plant on Torbram Road is restricted, company must use an indirect route to access plant;
- Restricted routes impede route efficiency;
- Restrictions on Mississauga Road, McLaughlan Road, Heart Lake Road and Sandlewood make the company feel like Peel is “trying to force us out”;
- Coleraine Drive is restricted;
- Would like to be able to use the route from Winston Churchill via Olde Baseline to Mississauga Road but there is an 18km gap in this route due to road restrictions;
- The most important challenges facing these companies were traffic congestion, driver shortages, the cost of fuel, maintaining cost-effectiveness and making on-time deliveries.

Respondents were unable to identify any consistent weak link in the transportation services in Peel. Some commented that Peel Region did very well compared to other GTA Regions.
Exhibit 12  Congested Areas as Identified by Stakeholders
5.1.3 REGIONAL ISSUES OF CONCERN IDENTIFIED THROUGH THE SURVEY

While there is a high degree of satisfaction with the goods movement network in Peel Region, as the demand for goods movement in the region increases and population increases at the expected rate there will be increasing competition for land to accommodate the needs of residential and commercial development. As urban residential areas grow there will be pressure on the Region to restrict more roads in order to protect the quality of life in the new neighbourhoods. At the same time, with congestion already a problem in the region (see Exhibit 13) trucking companies will be demanding new and bigger roadways to move their goods. Planning for these competing demands needs to be done as soon as possible to ensure that both land use types are accommodated. While the municipalities tend to protect their residential areas, few appear to be championing the goods movement cause, a very important component of the Peel Region economy.

5.2 Strategic Issues from Regional Councillor Workshop

In June 2003, Peel Region Council and staff convened a workshop to discuss key issues related to goods movement in the Region of Peel. Following are highlights of the major issues discussed in that Workshop. This section of the report highlights the issues raised. Synthesis of issues and formulation of recommendations follows in Section 8.

5.2.1 FREIGHT CORRIDORS

Peel Region has a network of strong goods movement corridors with highways, roads and major and minor freight terminals. Rapid growth of freight and auto traffic is a major challenge which makes the identification, planning and implementation of future Peel's freight corridors even more important.

During the Stakeholder consultations there was consensus that Peel needs to identify and take actions to preserve and enhance key strategic goods movement corridors throughout the Region. As most corridors cross into other jurisdictions and involve both regional and provincial roadways, partnerships among governments and stakeholders will be key to making this process successful.

5.2.2 FREIGHT FUNDING POLICIES

Except for major highways through their jurisdictions, municipalities and regions are responsible for the funding of road improvements within their respective jurisdictions. The bulk of the revenue stream for funding transportation improvement is essentially generated by local residents and businesses. However, while it can be argued that the greater share of passenger trips are indeed local, therefore supporting a rationale that solutions dealing with passenger transportation should be planned, implemented and funded locally, this does not stand true for goods movement.

Goods movement is multi-jurisdictional. Some regions of the country, such as Peel, are important freight hubs where goods are staged for shipment elsewhere in the GTA, the Province, nationally and internationally. While a share of goods movement to, from, within and through the Region of Peel does support local business and jobs, a large share of the goods movement activity supports business and jobs elsewhere. In spite of the national and provincial significance of goods movement, funding for freight related improvements is almost entirely provided by local community residents and businesses.

The policy implication is that localities will likely start to prioritize diminishing resources toward projects that are truly local. This will impact the level of investment in projects that are viewed as regional, provincial or national. The area that will likely be impacted first is goods movement. The economic implication from such a “shift in the pendulum” will be damaging, both locally and nationally.
5.2.3 COORDINATION OF TRUCK POLICIES

There are policies at the local and regional level that adversely affect truck movement and productivity, including two identified by this study. The first is related to local truck restrictions on regionally significant routes that are also key truck corridors. The issue is not actually the restrictions themselves (often times these restrictions serve a specific public good), but rather that they are not coordinated among municipalities, and that they do not take into consideration the broader economic benefits of goods movement and the operational and market driven imperatives faced by companies.

The second relates to tolls exacted on trucks using Highway 407. Research from this study, along with studies conducted at the provincial level, shows that truck tolls on the 407 and revenue collection system limitations deter usage by motor carriers. The issue for Peel Region is that trucks that would otherwise be using the 407 travel on regional and municipal roads. However, there is no mechanism for recognizing inter-jurisdictional cost responsibility, and the consequences of diverted traffic need to be accommodated by the Region and the Municipalities.

5.2.4 TRAVEL DEMAND MANAGEMENT

Truck travel demand remains heavy throughout the business day, but drops off significantly during non-business hours. Moreover, this travel behaviour conflicts directly with passenger travel demand, specifically when the latter peaks during the morning and afternoon rush hours. In other words, the peaking of commuter traffic during specific periods of the day overlaps with the demand for freight delivery during business hours, placing an undue burden on the providers of public transport delivery systems to allocate public resources toward facilities that are underutilized for a large part of a 24-hour period. A key issue here is that to get better peak spreading there must be improved cooperation of the industries themselves. They control the timing of truck travel not the trucking companies themselves.

Also, Travel Demand Management is a comprehensive challenge, including both passenger and freight movement in the problem definition and formation of solutions. Until now, these have been treated as separate matters with most of the emphasis on automobile and transit usage.

5.2.5 LAND USE PLANNING

As the Region of Peel continues to attract individuals and businesses, the demand for different land uses intensifies. At the same time, the Region serves as an important staging area for warehousing and logistics businesses. For freight system users and operators to reach suppliers and consumer market, efficient access to transportation options and freight facilities (e.g., warehouses, distribution centers, rail terminals, intermodal yards, air cargo ramps, and other facilities) is most important, and frequently dictates where and how they seek to locate. The key issues to address here are conflicts between freight facilities and other competing land uses, and how they can be best managed. For example, although there are a number of clusters of warehousing and logistics activity in Peel (mostly in the vicinity of the Pearson International Airport), “sprawl” of this type of goods movement related activity into the outer fringe of the Region could become a problem down the road.

Stakeholder consultation attendees concurred that efforts to plan land use with regard to goods movement needs to be better coordinated, particularly with respect to access to and from freight and intermodal facilities. As Peel continues to attract additional distribution and logistics-oriented business, and its population continues to grow, the potential for land use conflicts between commercial and community uses intensifies. There is therefore a need for land use and site planning codes for freight and “community-friendly” freight development.
5.2.6 EARLY ACTION INITIATIVES

There is a natural tendency for freight projects to be large mega projects. In other words, freight projects get attention if they are big-ticket projects, which can take decades to fund and implement. Conversely, the private sector are driven by shorter planning horizons measured in months and years and are seldom more than five years. Freight projects can represent small initiatives or projects that are more likely to be funded as part of the traditional transportation planning and funding cycles. Actually this type of quick win project can be very cost-effective.

Stakeholder consultation attendees concurred that, in addition to long-range strategic and policy planning, taking near-term focused action on specific goods movement “hot spots” in Peel could yield significant benefits. Several specific intersections, roadway segments and interchanges were noted across the different groups as candidates for relatively low-cost / high-impact improvements projects. Such projects could also be valuable in terms of demonstrating the value of public-private partnership and facilitating their continuation.

5.2.7 MULTIMODAL PLANNING

Data show that there exists a demand for intermodal and multimodal transportation – intermodal traffic in the region is growing. Each freight mode has its unique strengths but when combined modes bring choice and efficiency. The issue is that the investments to accommodate this growth are typically made by the private sector. Past tendencies have been toward large integrated intermodal terminals, like Brampton (CN) and Vaughan (CPR). These require coordinated planning because of land use and traffic issues. Future planning should also make provision for specialized smaller scale terminals like Expressway at Milton and bulk plastics transfer in Streetsville.

5.2.8 TRUCK/AUTO SEPARATION

The region is a key trucking hub for provincial, national and international trade and transportation, currently and for the foreseeable future. Notwithstanding the need to grow intermodal traffic (so as to divert truck traffic), the growth in truck traffic in the region is expected to exceed the growth in automotive traffic, especially along the key freight corridors identified by this study. These key freight traffic corridors are also important for safe and efficient automotive and transit transportation. Consideration may be given to traffic management policies that would encourage separation of truck and auto traffic streams. Such strategies may have limited application in Peel Region; nevertheless, they are mentioned in the interest of being comprehensive.

5.2.9 FREIGHT STAKEHOLDER INVOLVEMENT

Efficient and effective goods movement requires public and private sectors to work together to ensure that the strategies that are ultimately deployed are based upon well-informed decisions. Currently, a mechanism for ensuring a sustained level of dialogue with the private sector is lacking.

Freight stakeholder involvement was identified as the overall top priority. There was consensus that efficient and effective goods movement requires the public and private sectors to work together. Recent actions such as Peel’s Goods Movement Study and Ministry of Transportation studies and meetings evidence some progress in this regard. It was also noted that leadership is key to creation of successful partnerships and that addressing funding needs for goods movement improvements must be part of partnership functions.

5.3 Strategic Issues - Goods Movement Community

In November 2003, the Peel Region invited representatives of the goods movement community to a public forum to address the future of goods movement and help Peel better understand and respond to transportation planning issues. Approximately 50 representatives of transportation
companies, manufacturing and distribution companies and government transportation planners and elected representatives participated.

The issues raised in the Forum echoed those identified in the Councillors’ workshop. The Forum’s major theme was the need for partnerships among governments, at the same level and between levels, and between the public and private sectors to coordinate and advance goods movement system improvements. In addition, forum participants believed that leadership and funding are needed to make partnerships effective. Additional themes that emerged from the forum included the need for improving goods movement information and data; the need for “early action” initiatives to address goods movement problem “hot spots” in the Region; identification, protection and enhancement of key goods movement corridors; and more coordinated land use planning.

Appendix C contains the full Forum Report, which Peel distributed to all attendees and other interested parties.
6. OTHER GOODS MOVEMENT STRATEGIC ISSUES AFFECTING PEEL

This report has thus far discussed issues and concerns identified through consultation with various public and private stakeholders across the Region. There are, however, additional issues relevant to goods movement planning that the Region may need to address.

6.1 Assessment of Emerging Goods Movement Issues Affecting Peel

6.1.1 INTERMODAL TRENDS

CN’s Brampton Intermodal Terminal (BIT) and CPR's Vaughan Terminal (just inside York) have seen explosive growth in recent years. Over the period from 1990 to present North American railways have sustained annual growth in intermodal freight over 8% per year. BIT and Vaughan have grown from scratch to their current formidable scale over the same period. Other "Intermodal" facilities in the Region are also doing well, but they do not operate at the same scale as these two facilities. CN’s RoadRailer terminal and CPR's Milton Expressway terminal (just inside Halton) are two examples of important developments. This growth is presenting issues and challenges regarding the capacity of local roads feeding the terminals. For example, recent media coverage of CN's threat to embargo import containers at BIT unless shippers agree to accept their shipments on weekends is an indication of urgent need for expansion in such facilities. CN officials say that Brampton Intermodal Terminal has a nominal capacity to handle about 1000 containers a day, but it is now operating at a much higher level.

The industry survey carried out in the course of this study also reflected issues of congestion on the access roads to the terminal, with trucks queuing up for the gate actually blocking access to industries along the service road. Some of the solutions to these congestion problems rest within the industry itself. Reservations systems for trucks, improved deployment of human and equipment resources, and other institutional changes that could facilitate seven-day operations are among the strategies under consideration. Facilitation of access arrangements is one area in which the Region of Peel and the three municipalities can play a supporting role.

General prospects for inter-modal freight transportation are positive, and could possibly be sustained at annual rates of increase in excess of 10%. However, such a future would require significant investments in mainline rail infrastructure to accommodate the additional trains, and additional terminals. This is where the uncertainty lies. New investments in rail infrastructure will require a significant injection of public capital because the rate levels that would have to be charged in order to attract truckers to use the rail instead of the road are not high enough to generate private sector market returns on capital.

Social and environmental benefits would have to be internalized to justify major infrastructure investment decisions. Proposals have been put forward by the railways (CN, CPR and VIA) for significant investment between Quebec City and Windsor; coordinated improvements for both freight and passenger train services were at the heart of these proposals. It is uncertain at the time of this writing whether the federal government will approve such proposals, or if the three railways are prepared to work closely enough with each other and governments to make this happen. There appears to be little movement in the direction of such cooperation at this time.

The long-term effects of such developments could help offset the growth of congestion on freeways and highways, but it is not likely to have a significant impact on the growth in truck traffic, even under the most optimistic rail scenarios.

With respect to the form that this might take, given that mainline track investments would have been made, the jury is out whether the trend would be towards consolidation of intermodal terminals into
unique major facilities - such as is currently under development in Detroit; or whether the railways would tend to move their terminals even farther from Central Business Districts - such as appears to be happening in the Chicago area. If the CPR Expressway model dominates, then the prospect of freight villages including rail access and motor carrier consolidation facilities would entail a large number of smaller terminals located along the mainline corridors close to the industrial parks, retail distribution and commercial centers i.e. freight corridors connecting freight villages.

At this time, the most prudent approach in respect of regional transportation planning would be to keep options open by adopting a flexible and resilient approach that could eventually accommodate either the concentrated model, or the distributed model, or some combination of both. Current facilities at their present locations are either at or approaching capacity much faster than anticipated; how and where they are replaced will depend on crucial funding decisions that are yet to be made by government and industry working together.

6.1.2 HAZARDOUS GOODS MOVEMENT

One of the freight related issues is the movement of hazardous goods. Regulations regarding the transport of hazardous goods are the responsibility of the federal and provincial governments. Transport Canada is the focal point for the national program to promote public safety during the transportation of dangerous goods. The department's Transport of Dangerous Goods Directorate serves as the major source of regulatory development, information and guidance on dangerous goods transport for the public, industry and government employees. Through its various components, the Directorate works closely with other federal and provincial agencies to implement the safety program.

The onus is on the shippers to ensure that their carriers have the appropriate documentation and markings on their vehicles/equipment to assist the emergency response team to take the appropriate course of action. The municipality/Region’s concerns for dangerous goods is in the area of emergency response because it is the local jurisdiction that will respond first to a local emergency that may involve dangerous goods.

Peel Region, therefore, has a relatively small role in the area of hazardous goods. The Region can use the Official Plan and its policies to reduce the likelihood of dangerous goods incidents in sensitive areas – e.g. near residential neighbourhoods, in tunnels etc. An evaluation of the amount of hazardous goods moving through Peel Region would require further study as there is no information available at this time.

6.2 Assessment of Freight Data Needs and Gaps

This study has identified the need to build on the current level of data available to understand freight volumes, demand, behaviours and growth trends. While there are existing sources of high level data that provide a general overview and understanding that is useful for broad strategic analyses, the data are not sufficiently complete or detailed for planning at the regional or municipal level. Freight data concerning the rail, air and marine modes are under the jurisdiction of the federal government, and these are primarily concerned with long-distance movements; there is virtually no systemic reporting of local freight connections to and from intermodal terminals. These sources do not provide a comprehensive picture of goods movement in Peel.

Origin-destination freight data at the regional or municipal level depends upon special-purpose surveys, and this is a serious issue at the national level for the transportation planning of urban goods movements. Examples of initiatives that have been taken recently to collect urban survey data are available in Vancouver, Calgary and Montréal.

In Vancouver, The Lower Mainland Truck Freight Study was carried out in 1999 to provide a valuable source of information on truck movements in the Greater Vancouver area, including connections to the US border; specific counting stations were set up at key locations, including
intermodal air, rail and marine terminals. This was an expensive undertaking, for which data collection alone accounted for about $300,000. The primary focus was vehicle movements, as opposed to shipments.

Calgary and Edmonton have recently conducted surveys to gather urban goods movement data. The University of Calgary is involved in this project, with the primary emphasis being on working with industry sectors to identify lower-cost approaches for gathering data.

A number of jurisdictional interests in the Montréal area have gathered together to form an interregional committee for goods movement. It includes Montréal and the five "administrative regions" surrounding it. A current initiative of this group is to establish a goods movement observatory that consists of a collaborative sharing of information among key stakeholders.

Closer to home, the Commercial Vehicle Survey carried out in Ontario during 1999 and 2000 represents the most significant source of vehicle movement data. Unfortunately, the focus of this survey, and other trucking roadside surveys, is on vehicle trips greater than 200 km. This is a useful source to capture sample trips originating and terminating in Peel Region, but it is not comprehensive enough for planning within the Region.

Statistics Canada maintains an ongoing sample of shipment waybills that is periodically summarized in public reports. This survey is focused only on large for-hire carriers who are predominantly engaged in long-distance transportation. All private trucking and most local cartage companies are excluded. The quantitative significance of this exclusion remains a problem, the extent of which is difficult to ascertain, rendering this source as inappropriate for regional planning.

The main sources of data for Peel Region include intersection counts and cordon counts. Traffic counts are undertaken throughout the region every two years. In most locations these are basic traffic counts, with buses, trucks and service vehicles (all with three axles or more) counted as one group. Full classification counts are undertaken in some locations, but not enough to generalize across the region. Analyzing this data to capture commercial vehicles flows on main arteries is a major undertaking. During the course of this study a sample exercise was undertaken for a section of Dixie Road, near Pearson Airport, which showed that a higher level of effort was required to extract the data for planning analysis. This work could be extended with additional resources being made available.
7. STRATEGIC OPTIONS FOR PEEL

7.1 Internal Perspective (Freight Policy Options and Needs)

The policies that affect goods movement include the Ontario Planning Act and the Provincial Policy Statement that accompanies it, the Regional Official Plan, the individual Municipal Official Plans and the Zoning bylaws that implement the Official Plans.

There is little mention of goods movement in the Official Plans and Provincial policy statements that affect the Peel Region. There is also a need to understand how the plans prepared by different levels of government can be coordinated so that decisions and action are complementary.

The consultant reviewed the existing Regional Official Plan (ROP) to find areas of the plan that should be revised so that goods movement considerations are either included or strengthened.

There is an opportunity to raise awareness regarding goods movement issues such as having an efficient distribution system in support of regional industry and commerce. The ROP should recognize the importance of the goods movement network to a vital and diverse economy and it should support growth and development.

7.2 External Perspectives (Best Practices)

This section provides a set of examples of noteworthy practices in regional and metropolitan goods movement planning and practices from around the world. Section 7.2.1 is devoted to a set of North American (Canada and U.S.) examples. Section 7.2.2 focuses on examples from overseas.

7.2.1 NORTH AMERICAN EXAMPLES

Metropolitan and urban regions in Canada and the U.S. share many characteristics related to freight and goods movement planning, problems and opportunities. In Canada, at least one major metropolitan area has begun to aggressively develop an overall freight movement strategy. In the U.S., agencies known as “Metropolitan Planning Organizations,” or MPOs, are responsible for system-level transportation planning and decision-making at the metropolitan level. There are currently about 375 MPOs across the USA. During the last decade, many of these MPOs have embarked on freight planning initiatives that go well beyond the letter of federal law and rule.

7.2.1.1 MONTRÉAL, QUEBEC

Example: Montréal par Quatre Chemins (“Montreal by Four Paths”) – Comité Interrégional pour le Transport des Marchandises (CITM) (Inter-regional Committee for Goods Transportation)

Description: Literally translated, "Montréal by four paths" is the by-line of a strategic action plan for goods movement 2001 – 2006, developed by the Comité Interrégional pour le Transport des Marchandises -CITM (Inter-regional Committee for Goods Transportation). The committee was formed in 1999 and completed its strategic plan at the end of 2000; it comprises 70 representatives from all sectors: business; economic development agencies; labour unions; and, Federal, provincial, regional and municipal governments. The driving force comes from le Conseil regional de développement de L’Île de Montréal (CRDÎM) (i.e. the Regional Development Council of the Island of Montréal) and the CRDs of its surrounding Administrative Régions: Lanaudière to the Northeast; Laurentides to the North and Northwest; Laval to the North; and Montérégie to the South.

The Interregional Committee for Goods Transportation stemmed from a Forum on goods movement that was held in June 1998 under the aegis of CRDIM that was considered by all to be a great success. It brought together over 200 persons from all sectors of industry and permitted initiation of...
actions that led to the strategic plan. These same groups continue to this day in implementing the recommendations of that strategic plan.

The 1998 Forum identified four main issues as the focus for common interest. These were:

- highway congestion;
- conditions that would support development of the goods transportation industry;
- harmonization of goods transportation with the urban milieu; and,
- strengths and advantages of the region.

Special diagnostic studies were carried out for each of these issues along with recommendations consistent with active and continuing involvement of the members of the CITM.

The strategic action plan emerged from a concerted effort of industry and public leaders. A common vision was developed to consolidate and enhance the position of the Regions surrounding Montréal as an important hub for goods transportation on the basis of a strong, prosperous, innovative and flexible transportation industry. Guided by a common strategy the industry chose to focus resolutely on competitive requirements taken at a continental scale in its development choices. Through the mission and its related objectives, seven major projects are now underway with continuing oversight by the CITM.

- **Goods Transportation Observatory**
  - This initiative is focused on gathering, producing and sharing information on goods movement to improve decision-making; it is getting underway in the current year.

- **International Promotion Campaign**
  - This campaign is primarily focused on the European market, highlighting Montréal's expertise in transportation, logistics and distribution centers for North America.

- **Goods Distribution and Logistics Centers in the Montréal Region**
  - The concept being promoted here is similar to Freight Facility Villages that also include value-added activities such as final assembly, inspection, labelling and packing.

- **Mirabel Perishable Foods Centre**
  - Mirabel Airport has a distribution centre for perishable goods and has potential to expanded services for airlines, exporters/importers and shippers. Aéroports de Montréal (ADM), the agency responsible for Dorval and Mirabel airports, is spearheading this initiative.

- **Distribution Centre for Electronic Commerce**
  - ADM is promoting Mirabel for this initiative as well. The intention is to facilitate creation of logistics data centers.

- **Distribution Centre for Fishery Food Products in Montérégie**
  - Proximity to the border crossing at Lacolle, which is one of the important Border Gateway’s for perishable foods in Eastern Canada is an advantage for Montérégie to focus on processed foods, primarily fishery products (les denrées bio-alimentaires). The region hopes to bring together the producers, those responsible for marketing and merchandising and providers of logistics services. The scope of services intended includes inspection, customs, transportation, brokering, warehousing, order handling etc. in bond (i.e. duty-free).
Québec/New York Corridor
  - The Chamber Of Commerce of Metropolitan Montréal hopes to bring together partners in the region to promote development of a trade corridor between Québec and New York.

In all cases, the CITM identified precise actions, primary responsibility for implementation, partnership dependencies to complete implementation, and a schedule for completion.

7.2.1.2 ORLANDO METROPOLITAN AREA, FLORIDA, USA

Description: Orlando is a large, and fast growing metropolitan region with a central industry: tourism, built around the Disney and Universal theme parks. As in many other areas, growing congestion is hurting freight mobility. The key issue here is that excess congestion, especially involving freight vehicles, threatens the key industry – tourism, and the key strategy is to try to separate truck intensive uses from tourist, residential, and retail auto-intensive uses. To do this, potential future distribution demand areas, such as the theme parks and major malls, were identified based on demand forecasts. Ideal warehouse logistics areas based upon available land that could serve the future demand areas were then also identified. With this information, existing tools, such as zoning the identified areas to specific uses, and designating tourist routes, through routes, and arterial spines, could be brought to bear. The lesson learned in this setting is that we often already have all the tools we need – we just require some new information to allow us to use those tools in a different way.

Metroplan Orlando also established the Freight Mobility Working Group (FMWG) to facilitate effective planning for freight in the region. The FMWG is comprised of about 65 stakeholders from both the public sector and private industry who meet quarterly. The FMWG’s purpose is to (1) identify freight and transportation problems and solutions; (2) improve both short-term and long-term freight planning to make all modes more cost-effective; and (3) provide awareness of the critical social and economic impact of freight, goods and services movement on Central Florida’s communities. During the Strategy Plan development process, a subgroup of the FMWG met monthly to monitor study progress. The FMWG provided valuable guidance and made recommendations throughout the study.

7.2.1.3 PHILADELPHIA METROPOLITAN REGION, PENNSYLVANIA, USA

Description: Recognizing that a region’s vitality and businesses, jobs, and consumers all rely on a transportation system that can handle goods efficiently and safely, the Delaware Valley Regional Planning Commission (DVRPC), the Metropolitan Planning Organization (MPO) for the Philadelphia region, has committed significant resources and technical capabilities to examining freight issues on an ongoing and comprehensive basis. DVRPC’s overarching planning objective is to devise goods movement strategies that will facilitate the flow of freight, accommodate projected growth, and, at the same time, minimize adverse impacts on local communities and the environment. At the forefront of DVRPC’s freight planning initiative is a freight advisory committee, the Delaware Valley Goods Movement Task Force. The committee is open to all freight practitioners and experts including trucking, railroad, port, airport, shipper, freight forwarder, economic development, and member government representatives. By involving the Task Force and its three subcommittees (Data, Planning, and Shippers) in DVRPC’s activities, including the Long Range Plan, Transportation Improvement Program (TIP), and Work Program, the committee serves as a national model of a regional, multi-sector freight partnership. As a manifestation of the commitment to treat goods movement through technical studies and capital programming and in response to the federal mandate (i.e., TEA-21) that metropolitan planning organizations embrace freight as an important planning area, DVRPC has undertaken the practice of highlighting freight-related projects and
studies contained in its transportation plans and programs. The most current examples are the 2025 Long Range Plan and the New Jersey and Pennsylvania Transportation Improvement Programs.

In addition, DVRPC has created a program called “Freight Forward,” that seeks to advance small-scale, freight-friendly improvements in a timely fashion. Maintenance and minor improvements to highways, bridges, and railroads can be very helpful in making freight operations more efficient and safer. For this reason, the Freight Forward program was instituted by transportation agencies to benefit freight carriers and shippers in the Delaware Valley. The program centers on "small cap" projects which can be easily and quickly implemented. Freight Forward is a results-oriented program with a proven track record that responds to the special needs of the local freight community by implementing quick-fix solutions. Examples of projects that can potentially be advanced under the Freight Forward Program include fixing a pothole; resurfacing a highway/railroad grade crossing; installing a directional sign; increasing turning radii; retiming traffic signals; striping pavement; and improving a railroad siding.

7.2.1.4 HOUSTON METROPOLITAN REGION, TEXAS, USA
Example: Strategic Freight Project Quick Response Team (QRT)

Description: The Houston-Galveston Area Council (H-GAC), the Metropolitan Planning Organization (MPO) for the region, completed a Strategic Freight Corridor and Needs Assessment Study in year 2000. This project included an Intermodal Facility Inventory, which identified the location, general information and operational characteristics of major intermodal freight facilities serving the region, including 68 access needs/improvement projects at 27 intermodal facilities in the Houston-Galveston region, with each being categorized as either short-term, long-range (Metropolitan Transportation Plan projects), or issues requiring further study.

To address identified freight congestion problems that could be solved in a relatively short time frame, the H-GAC established a “Quick Response Team (QRT)” Advisory Committee. The QRT Advisory Committee was responsible for selecting appropriate locations with access improvement needs; assisting the selected consultant with the identification and evaluation of potential low-cost short-range improvements; and implementing the recommended solutions. This QRT project, which is considered the first of its kind in the country, was a demonstration project by special permission of the Federal Highway Administration (FHWA) since MPO’s are not normally involved with project-level planning and engineering. It was sponsored by H-GAC through federal funds obtained under the Congestion Mitigation and Air Quality (CMAQ) program of the Transportation Equity Act for the 21st Century (TEA-21). Additionally, local matching and interlocal agreements between involved governmental agencies assisted with the evaluation and implementation of projects.

Through the QRT initiative’s fast-tracking approach, six projects have been initiated, with one already completed. The reported benefits of the relative low-cost QRT projects include improved intermodal freight facility access, reduced overall traffic delays, improved air quality and safer transportation conditions for passenger and goods movement.

7.2.1.5 COLUMBUS METROPOLITAN REGION, OHIO, USA
Example: Mid-Ohio Regional Planning Commission (MORPC) Freight Planning Program

Description: In the Columbus, Ohio, region, a dynamic and growing distribution and logistics center for the north central U.S., the Mid-Ohio Regional Planning Commission (MORPC) is expanding what was once strictly freight data collection and dissemination into a comprehensive freight planning program geared towards the "Just-In-Time" nature of the community we serve. MORPC is pursuing special freight provisions and incentives to be incorporated into its planning process and program development to ensure that key freight stakeholders, who are vital to the region’s economic success, benefit from regional improvements and funding allocations. Since 2000, MORPC has provided the opportunity for the planning and policy community to have behind the scenes glimpses of several of central Ohio’s major warehousing, distribution and intermodal facilities. These activities have allowed a two-way dialog, and improved appreciation of the
challenges faced, between the people who plan transportation improvements and the private sector that relies on those improvements. Additionally, biannually, MORPC publishes a Central Ohio Freight Fact Book documenting freight flows through the region, existing infrastructure and planned improvements, as well as a prediction of the future freight picture.

In addition, MORPC is pursuing establishment of a “Freight Transportation Improvement Program (TIP),” or “F-TIP,” a process and document that will lay the groundwork for special freight allocations to central Ohio. Currently MORPC’s TIP process does not give special consideration to the freight community and their dynamic needs. However, MORPC recognizes the "Just In Time” nature of the freight community and is pursuing freight provisions and incentives to be incorporated into our planning process and program development to ensure that these stakeholders, that are vital to our regions economic success, benefit from regional improvements and funding allocations. MORPC anticipates that the F-TIP will be incorporated into MPO planning process for the years 2004 to 2007.

7.2.1.6 LOS ANGELES REGION, CALIFORNIA, USA
Example: Freight-supportive Design Strategies in Regional Transportation Plan and Goods Movement Advisory Committee (GMAC)

Description: The Southern California Association of Governments (SCAG), the metropolitan planning organization (MPO) for the Los Angeles region incorporated specific freight-related design strategies into its year 2000 regional transportation plan. These strategies emphasize the importance of goods movement as part of the overall transportation system:

- Improve road geometrics in areas used by trucks, to permit large-radius vehicles to manoeuvre safely.
- Develop standards for road construction that will be less susceptible to damage by heavy vehicles.
- Replace inadequately low overpasses and provide sufficient horizontal clearance for truck manoeuvres.

The plan also includes freight-friendly standards for signalization, signage, incident management support teams, and delivery hours.

SCAG has also established a public-private Goods Movement Advisory Committee (GMAC) to help guide identification of regional freight priorities and facilitate effective planning for addressing those priorities. The GMAC is comprised of city, county, state, port, private sector and community officials representing diverse but critical viewpoints for ensuring a vibrant and relevant freight planning program in this large region.

7.2.1.7 SEATTLE-PUGET SOUND REGION, WASHINGTON, USA
Example: Regional Freight Mobility Roundtable and FAST Corridor Initiative

Description: The Regional Freight Mobility Roundtable, an initiative of the Puget Sound Regional Council (PSRC), the MPO for the Seattle region, is a nationally recognized public-private forum to define and recommend actions serving freight mobility needs in and through central Puget Sound. Private sector participants include rail, marine, air cargo and trucking carriers, and shippers such as Boeing and Weyerhaeuser. Public sector participants include local governments, the ports of Seattle, Tacoma and Everett, state agencies, and federal agencies within the U.S. Department of Transportation (including rail, highway, maritime) and the Department of Defence.

The “Freight Action Strategy for Everett-Tacoma-Seattle” (FAST) is an innovative partnership composed of transportation agencies, ports, cities, economic development organizations, trucking, rail and business interests. FAST is working to streamline the movement of freight through the
central Puget Sound region of Washington State. Since 1996, the FAST partnership has studied freight movement via rails, roads and shipping ports to develop projects that move freight more efficiently and increase safety for cars, trucks and trains. Of particular importance is enhancing efficient and safe access for trucks between the regional expressway system and the major intermodal port facilities in the region, thereby mitigating negative impacts on residential and mixed-use area from noise, traffic and emissions. Since its inception, FAST has identified 15 top priority projects from Everett to Tacoma: three projects are complete, and six projects are under construction. More FAST projects are in the pipeline for 2003 - 2005. The FAST Corridor Project is co-sponsored by the Washington State Department of Transportation and the Puget Sound Regional Council, and consults with the Roundtable on project priority decisions.

7.2.1.8 PORTLAND METROPOLITAN AREA, OREGON, USA

Example: Year 2000 Regional Transportation Plan

Description: The Year 2000 long-range Regional Transportation Plan (RTP) for the Portland metropolitan region, developed by METRO (the region’s elected metropolitan government), incorporates explicit freight-oriented land use considerations into its long-range transportation planning process. Policy 15.0 states:

- Provide high-quality access between freight transportation corridors and the region’s freight intermodal facilities and industrial sanctuaries.

- Maintain a reasonable and reliable travel time for moving freight through the region in freight transportation corridors that enhances the region’s economic competitive advantage.

  - Freight operation (such as weigh-in-motion, automated truck counts, enhanced signal timing on freight connectors).
  - Where appropriate, consider improvements that are dedicated to freight travel only.

- Consider the movement of freight when conducting multi-modal transportation studies.

- Work with the private sector, local jurisdictions, ODOT and other public agencies to:

  - develop the regional Intermodal Management System and Congestion Management System (CMS)
  - monitor the efficiency of freight movements on the regional transportation network
  - identify existing and future freight mobility problems and opportunities
  - reduce inefficiencies or conflicts on the freight network
  - maximize use of ship, rail, air and truck for a multi-modal freight system
  - address safety concerns related to freight.

  - Coordinate public policies to reduce or eliminate conflicts between current and future land uses, transportation uses and freight mobility needs, including those relating to:

    - land use changes/encroachments on industrial lands; and
    - transportation and/or land use actions or policies that reduce accessibility to terminal facilities or reduce the efficiency of the freight system.

  - Ensure that jurisdictions develop local strategies that provide adequate freight loading and parking strategies in the central city, regional centers, town centers and main streets.
• Develop improved measures of freight movement as defined in the 2040 Growth Concept.

• Correct existing safety deficiencies on the freight network relating to: roadway geometry and traffic controls; bridges and overpasses; at-grade railroad crossings; truck infiltration in neighbourhoods; and congestion on interchanges and hill climbs.

7.2.2 OVERSEAS EXAMPLES

Urban and regional freight and goods movement problems are not exclusive to North America. Indeed, the compact and dense nature of older urban areas in Europe and elsewhere creates special problems for the efficient and safe movement of freight and goods. As a result, a variety of innovative plans and practices have been pursued in many of these regions to address these problems. The following examples put forth a sampling of noteworthy practices from overseas.

7.2.2.1 HAUTE NORMANDIE, FRANCE

Example: Regional Center for the Exchange of Electronic Transport Data ("CREDIT")

In the Haute Normandie region of France, CREDIT (Centre Regional pour l'Exchange de Données Informatisé du Transport or Regional Center for the Exchange of Electronic Transport Data) was officially instituted during the summer of 1997. Haute Normandie encompasses the region of the lower Seine River which includes the ports of Le Havre and Rouen. The objective of CREDIT is to bring together the main economic, political, and administrative parties in the Haute Normandie region. The project provides the opportunity and mechanism for the project partners and other parties to decide and carry out studies, surveys, and actions covering goods vehicle movements in Rouen urban area.

Initially, CREDIT was to be an experiment, but it has since been decided to retain the center as a focus for sustainable urban and regional freight flows in Haute Normandie. Long-term acceptance of CREDIT came about because various parties decided to support and become directly involved in the operations of Haute Normandie freight projects. These parties include the City of Rouen, the Urban District of Rouen, the Maritime Department of the Seine, local political and administrative transportation authorities, Chambers of Commerce, Industry of Rouen and EURE (the Regional Transport Administration), the Regional Council of Haute Normandie (a regional political authority), logistics clubs of users, and the regional and national energy saving agency ADEME.

7.2.2.2 LIVERPOOL, ENGLAND

Example: Mersey Strategy

The "Mersey Strategy" is a public, private and voluntary sector partnership working to implement the Mersey Estuary Management Plan, which is a management framework designed to safeguard the Mersey Estuary and the adjacent land and marine environments, while providing policies to encourage sustainable development. The Port of Liverpool is an active port, with docks at various places along the length of the estuary up to Eastham where the Manchester Ship Canal begins. With over 30 million tons of freight passing through the docks each year, the Port is a major trade route for shipping, particularly as a gateway for Europe. The banks of the Mersey Estuary are home to some of the region's largest and most lucrative petrochemical and chemical industries, including Britain's second largest oil refinery. The estuary also receives up to 60 percent of the industrial and domestic water-borne pollution produced by the Mersey Basin's inhabitants. In addition, a large part of the estuary is protected under British, European, and international law for its importance to bird life.

The Mersey Strategy is based around a vision statement: "The Mersey Estuary Management Plan will provide a framework for co-ordinated action. The plan will be a key instrument in addressing critical management issues so as to secure the sustainable development of the Mersey Estuary and
to maintain and develop its position as one of the region's most valued environmental assets. The Management Plan is based on a vision of the future of the Mersey Estuary as one of the cleanest developed estuaries in Europe, where the quality and dynamics of the natural environment are recognised and respected and are matched by a high quality built environment, a vibrant maritime economy, and an impressive portfolio of estuary-related tourism and recreation facilities."

The estuary management framework looks at four main policy areas, each broken down into strategic policy areas with their own strategic objectives and management measures. One of the main policy areas is Economic Development, one of whose subdivisions is Commercial Navigation and Port Development with the strategic objective “to support the continued commercial and economic development of the estuary's ports and port-related employment areas compatible with the Management Plan's environmental policies.”

7.2.2.3 BREMEN, GERMANY
Example: Truck Route System

In Bremen, Germany, truck routes were established as a result of congestion diverting through truck traffic from major thoroughfares to smaller roads in residential areas. A Truck Route System was developed that includes different categories of streets. The system includes regulations that consider weight and emissions of the vehicles. The truck route system was developed with the participation of seven working groups. These groups consisted of representatives of local authorities (the city and its surrounding municipalities) and other affected parties representing the environment, the harbour, and commercial interests.

The truck route system was implemented in two phases. The first phase was voluntary and included provisions of maps showing the truck route system and improvement of the way-finding system for truck drivers. The second phase included both enforcement and new construction to improve the truck routes.

7.2.2.4 LONDON, ENGLAND
Example: Heathrow Airport Retail Consolidation Centre

At London’s Heathrow International Airport, congestion, both on airport roads and at loading bays, had become a significant problem with 439 supplier movements being made to 240 retail outlets within the airport each day. With the development of Heathrow’s Terminal Five, there was concern that congestion would only increase. In response, the airport initiated a project to develop a new warehousing and distribution service for retailers at Heathrow. Operations carried out this Heathrow consolidation centre as part of the project include:

- Receipt of all supplier deliveries at the consolidation centre;
- Consolidation by outlet and terminal and time delivery slot;
- Onward timed delivery to individual outlet;
- Collection of returns/branch transfers; and
- Removal of packing waste for recycling.

Airport authorities acquired a 25,000 square foot warehouse close to the airport and established the Heathrow Consolidation Centre. The Centre currently serves 36 retailers who account for 35 percent of Heathrow's retailing population. Authorities hope to have all airport retailers using the Centre in 2004. It is estimated that use of the Consolidation Centre has reduced vehicle movements for retailers and suppliers to the four current Heathrow terminals by 61 percent.
7.3 Common “Best Practice” Themes

From the various “best practices” examples described above, one can extract some common themes that may be pertinent to the formulation of new policies in Peel. For example, nearly all of the examples involved establishment of standing industry-government advisory groups. An initial step towards this process was taken by Peel Region when it convened a successful Goods Movement Forum on November 5, 2003. Participants in the forum responded positively to the suggestion of organized ongoing consultations.

Beyond the overarching theme of ongoing industry-government consultation, there are several key topics that seem to have greatest mutual interest and bias for action:

- Congestion and Safety -- discussions on these topics appear to generate short term small-scale projects, in addition to meaningful input concerning the long-range priorities;

- Conditions to Support Economic Development and creation of jobs through more efficient goods movement -- discussions on these topics deal with land use, access and egress to major transportation facilities such as intermodal terminals, airports and ports;

- Harmonization -- discussions indicated in the above examples suggest multifaceted pursuits that could include harmonization of regulations among institutions, harmonization of transportation operations with different users are existing infrastructure, or simply including goods movement in the context of transportation plans and policies.

In overseas examples, there have been further developments to generate and share data on urban goods movement activities. Montréal appears to be in the very early stages of adopting such a systematic approach to data collection. Any initiatives in these areas with appear to be breaking new ground.

The approach to building a successful track record in the United States appears to hinge on starting with small, manageable projects that produce observable improvements in safety or reduction in congestion.
8. KEY FINDINGS, RECOMMENDATIONS AND NEXT STEPS

8.1 Key Findings

Goods movement has needed to respond to a number of changes in the economy over the past few decades, with the major change being a shift away from a “push” oriented, heavy industrial and manufacturing-based economy, to a “pull” oriented, consumer and service-based economy. This recent shift in economic focus has been characterized by five trends:

- Economic globalization;
- Service industry growth;
- Emergence of high technology and knowledge-based industries;
- Changing demographics and increased flexibility in industrial location; and
- Reduced government and increased privatization.

Such an economic shift has resulted in a number of changes in goods movement and logistics strategies. The most significant of these changes has been the focus on just-in-time (JIT) delivery, as opposed to the inventory-based logistical strategies of the past.

A further issue with respect to the high growth in goods movement activity is that the needs of goods movement and passenger travel are sometimes in conflict. This is particularly true in many of the Go Rail corridors in the GTA where there is limited capacity for both passengers and freight.

Recognizing the importance of maintaining its economic advantage while addressing current and future freight transport needs, Peel Region appreciates the significance freight planning must play in overall regional long-term planning initiatives.

The major Peel-specific theme emerging from this study is the need for communication, collaboration and partnerships:

1. among governments - Peel Region and its area municipalities, the province and the federal government working together; and
2. between the public and private sectors (to coordinate and advance goods movement system improvements).

Leadership and funding are needed to make partnerships effective. Peel can take a limited leadership role, but the scope and scale of the issues will require tangible involvement by senior governments. Additional themes that emerge from the study include:

1. the need for improving goods movement information and data;
2. the need for “early action” initiatives to address goods movement problem “hot spots” in the Region;
3. identification, protection and enhancement of key goods movement corridors; and
4. more coordination between land use and transportation planning.

8.2 Recommendations

Recommendations for addressing the issues and opportunities identified through this study have been developed based primarily on stakeholders feedback on issues and options and best practices. The recommendations fall into three major policy areas: goods movement corridors; goods movement policy and funding coordination; and goods movement stakeholder involvement.
Policy Area 1: Goods Movement Stakeholder Involvement

The Peel Region should pursue and forge partnerships with the various agencies that have active roles in improving the goods movement transportation system. These corridors include roads, railways, air, and sea ports as well as pipelines and electricity transmission routes. This includes partnerships among governments – municipal, regional, provincial and federal – and between the government and private sector groups. Efficient and effective goods movement requires the public and private sectors to work together. In order to pursue this, Peel should design, implement and sustain a dialogue with the private sector and its public sector partners on the movement of goods and freight. Among the options available are for Peel to develop a top-level goods movement advisory group or liaison team consisting of a broad range of stakeholders. This group could develop a plan based on best practices from elsewhere in North America with applicability to Peel. Another option is to identify a team of private sector staff level employees to form an “expert panel” as a resource for transportation agency staff to address goods movement issues.

Policy Area 2: Goods Movement Corridors

Peel should provide an appropriate goods movement network that meets the needs for moving goods within and through Peel Region. The critical goods movement corridors and activity centres should be assessed and prioritized for preservation and improvement. This effort should include compiling and organizing existing data, identifying data gaps and collecting new data to address gaps. Both quantitative (e.g., traffic volumes, commodity flows, etc.) and qualitative (e.g., interviews with freight operators, planning policies, etc.) data needs should be addressed through this effort. This information will provide Peel with a basis for identifying and/or designating a Regional Goods Movement Network for incorporating into and addressing through the Long Range Transportation Plan element of the ROPSU. An overview of the Peel goods movement corridors should also be communicated to other agencies and government levels to achieve greater consistency in priority setting and policy development at all levels.

Recommendation - Data Needs: The Peel Region should pursue acquisition of additional needed freight data, which are a critical aspect of the goods movement corridor analysis and assessment process. More robust and current data will allow Peel to analyze system performance and needs in more detail and evaluate the feasibility of various implementation strategies.

The Region should initiate investigations to expand traffic classification counts at intersections and cordons where there is high density of commercial traffic, and start to build trend information so that such traffic can be correlated with other growth indicators in the Region.

In addition, there is a critical need for information on shipments and vehicle trip types and purposes that would require extensive investment in survey instruments. This is an issue that cannot adequately be addressed by any one municipality or Region in the GTA; rather, it needs to be addressed at a larger systemic level. Options for joint data initiatives with the provincial and federal governments need to be explored. For its part, the Peel Region could take an active role in advancing priority of this area and promoting inter-governmental collaboration through promotion of its initiatives and communicating data needs in local, GTA, provincial and federal settings.

Recommendation - Multimodal Planning: Peel, in collaboration with other GTA jurisdictions and provincial and federal agencies, should seek to more fully and effectively integrate multimodal goods movement planning into the Region’s overall transportation planning and prioritization process. Critical goods movement corridors and nodes, once identified, should be included in the Long Range Transportation Plan as part of the regional transportation network. By pursuing transportation improvement strategies that take advantage of the best attributes of each mode, network reliability and performance are enhanced to mitigate problems caused by congestion and disruptions. In fact, the bulk of local freight and goods distribution is actually on the local roadway system, which is shared with passenger/commuter traffic. In addition, a significant portion of long-distance freight and goods transport is by rail, which is also experiencing congestion.
due to freight/passenger train interaction, which occurs in the Peel Region and across the GTA. Therefore, efforts to identify goods movement-specific projects should actually result in projects that would improve both passenger and freight transportation and reliability. Peel’s efforts in this regard should build on the multimodal transportation system already in place in the Region and focus on corridors and terminal areas.

**Policy Area 3: Goods Movement Policy and Funding Coordination**

The Peel Region needs to address goods movement problems and improve facilities in coordination with other jurisdictions. Peel should minimize the impact of truck traffic on our residential communities, including noise, safety and accessibility. Also, just as goods movement transportation activities transcend municipal, regional, provincial, and even national borders, efforts to improve the efficiency and effectiveness of goods movement need to be conducted by various stakeholders through collaboration and coordination. Areas in which coordination needs to take place include funding, truck policies and planning policies.

**Recommendation - Funding Coordination:** Peel should coordinate goods movement improvement funding policies with the provincial and federal governments. The Region should develop a clear, accurate and concise message on this subject and clearly communicate it to the public, community leaders and policy and funding decision makers at all government levels. In addition, a series of potential funding policy alternatives needs to be outlined to provide a basis for starting a dialogue among key players. Funding priorities should favour collaborative projects with other levels of government and with industry.

**Recommendation - Coordinated Truck Policies:** Peel should develop a plan for enhancing coordination of municipal truck restrictions by working with the Region’s municipalities and consulting with industry. This plan should build upon goods movement corridor information and contain an industry consultation element. The plan should also identify any areas of conflict between community needs and industry and offer options for mediating/resolving such conflicts. This recommendation speaks to the need for action to follow the consultations and stakeholder involvement from the first set recommendations. Having sought views of industry and other related public agencies as stakeholders, it would naturally follow that leadership in some key issues would be expected. Coordination of by-laws and regulations that impact goods movement in the Region appears both manageable in principle and potentially welcome, judging from feedback received in the course of this project. Both coordination within the Region among municipal jurisdictions, and with adjacent Regions and municipalities should be investigated to establish acceptable processes that both respect local authority and promote economic efficiency and growth in general.

**Recommendation - Planning for Sustainable Goods Transportation:** Area Municipalities are encouraged to include consideration of sustainable goods transportation in their planning processes. With the rapid growth of goods movement and terminal activity within Peel, it is important for the area municipalities and the Region to continue to plan for these activities and to involve private sector stakeholders in the goods movement planning process. Furthermore, planning should ensure a balance between the movement of people and the movement of goods across the regional network.

### 8.3 Next Steps

Over the next six to 12 months, the Peel Region, in coordination with its area municipalities, can take a series of steps to begin addressing the above recommendations:

1. **Develop goods movement policies for the Peel Transportation Plan Consolidation Report and for the Regional Official Plan Strategic Update.**

2. **Establish and strengthen partnerships and stakeholder involvement:**
• Convene a stakeholder liaison group at the conclusion of this study as a follow-on to the November 2003 forum and explore ways to work together on an ongoing basis.
• Use the liaison group as a vehicle to discuss priority directions for the Region to pursue in a goods movement planning program.

3. Coordinate between Peel and area municipal staff to define a Strategic Goods Movement Network in Peel for review, assessment and prioritization:
• Work with the stakeholder liaison group to identify the key elements of the Peel goods movement network.
• Launch a data collection effort focused on the strategic goods movement network, possibly including surveys (e.g., freight terminal gates and shippers) and expanded traffic and classification counts.
• Assess the goods movement corridors to identify and prioritize potential enhancements to the network.

4. Initiate discussions with other jurisdictions regarding funding and policy coordination:
• Take advantage of recent Ontario Ministry of Transportation (MTO) freight planning initiatives by seeking opportunities to build upon them and collaborate with the MTO.
• Work with Transport Canada on initiatives of mutual interest including sustainable goods movement, enhanced intermodal integration and border crossings.
• Meet with neighbouring GTA regions and municipalities to share goods movement planning concerns and issues and begin discussions of collaborative inter-regional goods movement data collection, analysis and planning.
## APPENDIX A: PEEL GOODS MOVEMENT SURVEY SUMMARY

### Mississauga

<table>
<thead>
<tr>
<th>Completed</th>
<th>Mississauga</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td>Astra Zeneca Canada Inc.</td>
</tr>
<tr>
<td>Completed</td>
<td>Bax Global Canada Ltd.</td>
</tr>
<tr>
<td>Completed</td>
<td>Buckley Cartage Ltd.</td>
</tr>
<tr>
<td>Completed</td>
<td>Canada Post - Gateway Postal Facility</td>
</tr>
<tr>
<td>Completed</td>
<td>Canadian Pacific Railway</td>
</tr>
<tr>
<td>Completed</td>
<td>Canpar Transport Ltd.</td>
</tr>
<tr>
<td>Completed</td>
<td>D Armstrong</td>
</tr>
<tr>
<td>Completed</td>
<td>ErbTransport Limited</td>
</tr>
<tr>
<td>Completed</td>
<td>Exel Global Logistics</td>
</tr>
<tr>
<td>Completed</td>
<td>FedEx Canada Ltd.</td>
</tr>
<tr>
<td>Completed</td>
<td>Motor Express Toronto, Motor Express Terminals</td>
</tr>
<tr>
<td>Completed</td>
<td>PPG Canada Inc</td>
</tr>
<tr>
<td>Completed</td>
<td>Purolator Courier Ltd.</td>
</tr>
<tr>
<td>Completed</td>
<td>Ambro Transport Inc.</td>
</tr>
<tr>
<td>Completed</td>
<td>Bell Mobility</td>
</tr>
<tr>
<td>Completed</td>
<td>C F M Vermont Castings Majestic Products</td>
</tr>
<tr>
<td>Completed</td>
<td>Globe Ground North America Inc.</td>
</tr>
<tr>
<td>Completed</td>
<td>Intra Items Inc.</td>
</tr>
<tr>
<td>Completed</td>
<td>Livingston International Inc.</td>
</tr>
<tr>
<td>Completed</td>
<td>T N T Logistics</td>
</tr>
<tr>
<td>Completed</td>
<td>United Van Lines (Canada) Ltd.</td>
</tr>
<tr>
<td>Completed</td>
<td>Action Airport Express Inc.</td>
</tr>
<tr>
<td>Contacted</td>
<td>Greater Toronto Airports Authority</td>
</tr>
<tr>
<td>Contacted</td>
<td>C W Henderson Cartage</td>
</tr>
<tr>
<td>Contacted</td>
<td>Canpar Transport Ltd.</td>
</tr>
<tr>
<td>Contacted</td>
<td>D G N Marketing Services Ltd.</td>
</tr>
<tr>
<td>Contacted</td>
<td>Eagle Global Logistics Inc.</td>
</tr>
<tr>
<td>Contacted</td>
<td>First Team Transport Group Ltd.</td>
</tr>
<tr>
<td>Contacted</td>
<td>Hewlett-Packard (Canada) Ltd.</td>
</tr>
<tr>
<td>Contacted</td>
<td>J S Crawford &amp; Son Transport Inc.</td>
</tr>
<tr>
<td>Contacted</td>
<td>Melburn Trucking Lines Corp.</td>
</tr>
<tr>
<td>Contacted</td>
<td>Nadiscorp Logistics</td>
</tr>
<tr>
<td>Contacted</td>
<td>Panalpina Inc.</td>
</tr>
<tr>
<td>Contacted</td>
<td>Quik X Group of Companies</td>
</tr>
<tr>
<td>Contacted</td>
<td>Reimer Express Lines Ltd. / Roadway Express</td>
</tr>
<tr>
<td>Contacted</td>
<td>S C M Supply Chain Management</td>
</tr>
<tr>
<td>Contacted</td>
<td>Sameday Right-O-Way</td>
</tr>
</tbody>
</table>

### Brampton

<table>
<thead>
<tr>
<th>Completed</th>
<th>Brampton</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td>Coca-Cola Bottling Company, The</td>
</tr>
<tr>
<td>Completed</td>
<td>Daimler Chrysler Brampton Assembly Plant</td>
</tr>
<tr>
<td>Completed</td>
<td>Day &amp; Ross Inc.</td>
</tr>
<tr>
<td>Completed</td>
<td>Ford Motor Company of Canada Limited</td>
</tr>
<tr>
<td>Completed</td>
<td>Gamma-Dynacare Medical Laboratories</td>
</tr>
<tr>
<td>Completed</td>
<td>Nortel Networks</td>
</tr>
<tr>
<td>Completed</td>
<td>T N T Logistics</td>
</tr>
<tr>
<td>Completed</td>
<td>LTV Copperweld</td>
</tr>
<tr>
<td>Completed</td>
<td>Canadian Tire Corp (AJ Billes Distribution Centre)</td>
</tr>
<tr>
<td>Completed</td>
<td>Loomis Courier Services</td>
</tr>
<tr>
<td>Completed</td>
<td>Maple Lodge Farms</td>
</tr>
<tr>
<td>Completed</td>
<td>Maritime-Ontario Freight Lines Ltd</td>
</tr>
<tr>
<td>Completed</td>
<td>O-I Canada Corp was Consumers Glass</td>
</tr>
<tr>
<td>Completed</td>
<td>Zellers Inc.</td>
</tr>
<tr>
<td>Completed</td>
<td>Midland Transport</td>
</tr>
<tr>
<td>Completed</td>
<td>Winners Apparel Ltd</td>
</tr>
</tbody>
</table>

### Caledon

<table>
<thead>
<tr>
<th>Completed</th>
<th>Caledon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td>Effem Foods</td>
</tr>
<tr>
<td>Completed</td>
<td>James Dick Construction</td>
</tr>
<tr>
<td>Completed</td>
<td>Topac Express</td>
</tr>
<tr>
<td>Contacted</td>
<td>Laidlaw Transit Limited</td>
</tr>
<tr>
<td>Contacted</td>
<td>Husky Injection Molding Systems</td>
</tr>
<tr>
<td>Contacted</td>
<td>Nesel Fast Freight Inc.</td>
</tr>
<tr>
<td>Contacted</td>
<td>Town of Caledon</td>
</tr>
<tr>
<td>Completed</td>
<td>SEWS</td>
</tr>
<tr>
<td>Completed</td>
<td>AFA Forest Products</td>
</tr>
<tr>
<td>Contacted</td>
<td>Peel Federation of Agriculture</td>
</tr>
<tr>
<td>Contacted</td>
<td>McGillion Transport</td>
</tr>
<tr>
<td>Contacted</td>
<td>Brite Millwork</td>
</tr>
<tr>
<td>Contacted</td>
<td>Bel Air lumber</td>
</tr>
<tr>
<td>Contacted</td>
<td>Wanderosa Wood Products</td>
</tr>
<tr>
<td>Contacted</td>
<td>MSM Transportation</td>
</tr>
<tr>
<td>Contacted</td>
<td>Cavalier Transportation</td>
</tr>
</tbody>
</table>
APPENDIX B: INTERVIEW SURVEY

1. **What is your title?** Most of the respondents were Logistics or traffic managers although we have also spoken to several dispatchers, operations managers and CEOs. Though we were fortunate to have spoken to traffic / Logistics / Distribution managers because they privy to see the big picture as well as enough in the loop where they are knowledgeable of routing decisions and challenges their drivers face.

**Background**

1. **Where is your company located in the Peel Region?**

Most of the respondent companies stated their general location as at Dixie and somewhere else (Derry, Britannia, Shawson, Courtney Park etc.) About half of the respondents were located in Mississauga.

2. **Are you in one location only, or several in the Region?**

Also about half had other locations in the Peel Region

3. **How many full-time employees does your company employ at this location?**

About half of the respondents have under 300 employees

4. **How long has this operation been at its current location?**

The range of responses to this question went from 1 to more than 100 though most of the respondents had been in the present location for more than 10 years

5. **Does your firm own and/or operate any of the following transportation equipment?**

79% of respondents claimed to own and or operate a private fleet of truck vans. Response rates were negligible for the other options given. 6% of respondents claimed to own or operate truck special equipment such as flatbeds or refrigerated trucks. It should be noted however that at present aviation specific companies have not yet been contacted, and that though only one respondent claimed to operate private rail rolling stock that one respondent represents a huge volume of goods moving in – out and through Peel.

6. **What are typical hours of operation for your facility?**

Most companies surveyed operate 24/7

7. **Do your business transportation needs experience daily, weekly or season peaks?**

Most respondents said that they do indeed experience peaks though no two seemed to have the same peaks. Though the end of the business quarter seems to be busier for the carriers. One point of interest, business seems to have become less predictable since September 11th 2001.

Outbound Transportation
8. Does your company ship outbound from your location?

100% answered yes.

9. What are the primary products you ship from your location?

In the case of the carriers they would claim to carry everything from “a needle to an anchor” and in the case of the manufacturers they (obviously) reported shipping their product

10. What are the primary markets/final destinations for these products? Are they local? If not please list the top states or countries

Typical answer would be “all of North America, most is in Canada, well Ontario in fact a lot of our outbound shipments stay in the GTA”

11. Who exercises primary control over out-bound transportation decisions in selection of carriers and routes?

80% of respondents said that their company exercises primary control with regard to outbound goods movement. 20% said that they exercise control but do so in responding to their customer’s needs and therefore ultimately customers exert control and only 12% said that a 3rd party handles their logistics. It should be noted that respondents were able to choose more than one or all three.

12. Approximately how many outbound shipments does your company make weekly?

From the data collected it is estimated there are 29,462 outbound shipments a week, that breaks down to – 5271 truckload, 9220 Less Than Truckload, 14627 express package, 344 rail cars. It should be noted that in several cases the information was not available and there may have been confusion between shipments and number of trucks. These numbers are VERY rough.

13. What would you consider to be the most crucial factors influencing your outbound transportation arrangements? Please rank order the top 3 with 1 = highest priority.

<table>
<thead>
<tr>
<th>Rank</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>3</td>
<td>1</td>
<td>On-time/just-in-time delivery</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>12</td>
<td>3</td>
<td>Cost (rates)</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>2</td>
<td>4</td>
<td>Loss and damage</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>2</td>
<td>7</td>
<td>Equipment availability</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>2</td>
<td>3</td>
<td>A full range of integrated services</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Others: ranked 1 &amp; 2 were customer requirements, ranked 3rd was availability of routes.</td>
<td></td>
</tr>
</tbody>
</table>

Inbound Transportation

14. Does your company receive inbound transportation at you location?
100% answered yes

15. **What are the primary products you receive at your location?**

In the case of the carriers they would claim to carry everything from "a needle to an anchor" and in the case of the manufacturers they (obviously) reported shipping their raw materials.

16. **What are the primary origins of these products? Are they local? If not please list the top cities or countries; if the market is within Peel Region.**

As with the answer to this question in reference to outbound shipping the answers were very sporadically distributed though a lot of inbound goods come from the GTA or Ontario, then Quebec and North America as a whole.

17. **Who exercises primary control over inbound transportation decisions?**

79% of respondents said that their company exercises primary control with regard to inbound goods movement. 16% said that they exercise control but do so in responding to their customer’s needs and therefore ultimately customers exert control and only 12% said that a 3rd party handles their logistics. It should be noted that respondents were able to choose more than one or all three.

18. **Approximately how many inbound shipments does your company receive weekly?**

From the data collected it is estimated there are 12 790 inbound shipments a week, that breaks down to – 5078 truckload, 6846 less Than Truckload, 310 express package, 556 rail cars. It should be noted that in several cases the information was not available and there may have been confusion between shipments and number of trucks. These numbers are VERY rough.

19. **What would you consider to be the most crucial factors influencing your inbound transportation arrangements?** Please rank order the top 3 with 1 = highest priority.

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>2</td>
<td>1</td>
<td>On-time/just-in-time delivery</td>
</tr>
<tr>
<td>3</td>
<td>11</td>
<td>4</td>
<td>Cost (rates)</td>
</tr>
<tr>
<td>2</td>
<td>6</td>
<td></td>
<td>Loss and damage</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td></td>
<td>Equipment availability</td>
</tr>
<tr>
<td>2</td>
<td>3</td>
<td></td>
<td>A full range of integrated services</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td></td>
<td>Others: for number one the concerns were the customer (2) and traffic (1) for the third choice it was available routes.</td>
</tr>
</tbody>
</table>

**Carrier and Logistics specific questions**

20. **Are you a Carrier or Logistics company:** 16 of the 24 responded yes

21. **How many power units operate out of your terminal location? Please check the one applicable to your firm.**
22. Are you a private or “for-hire carrier”?

<table>
<thead>
<tr>
<th>Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Hire</td>
<td>10</td>
</tr>
<tr>
<td>Private</td>
<td>6</td>
</tr>
</tbody>
</table>

23. How would you describe your services (check all that apply)

<table>
<thead>
<tr>
<th>Service</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>LTL</td>
<td>11</td>
</tr>
<tr>
<td>Intermodal</td>
<td>3</td>
</tr>
<tr>
<td>Truckloads</td>
<td>8</td>
</tr>
<tr>
<td>Specialized</td>
<td>5</td>
</tr>
<tr>
<td>Express</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
</tr>
</tbody>
</table>

Responses for Other: warehousing, aggregate, and refrigerated.

24. What are the primary commodities being hauled by your operation?

<table>
<thead>
<tr>
<th>Commodity</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freight</td>
<td>14</td>
</tr>
<tr>
<td>Bulk</td>
<td>2</td>
</tr>
<tr>
<td>Garbage</td>
<td>1</td>
</tr>
<tr>
<td>Construction</td>
<td>2</td>
</tr>
<tr>
<td>Liquids</td>
<td>1</td>
</tr>
<tr>
<td>Specialized</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
</tr>
</tbody>
</table>

Responses for other: mail, Lumber, Steel, Hazardous goods, Food

25. What type of geographic area does your operation cover?

<table>
<thead>
<tr>
<th>Area</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peel</td>
<td>12</td>
</tr>
<tr>
<td>GTA</td>
<td>13</td>
</tr>
<tr>
<td>South Western Ontario</td>
<td>10</td>
</tr>
<tr>
<td>Long Haul Domestic</td>
<td>11</td>
</tr>
<tr>
<td>Long Haul International</td>
<td>10</td>
</tr>
</tbody>
</table>

26. What are the primary origins and destinations for the commodities you haul? In serving these locations, what are the primary regional routes that your drivers use? (to access 400 series highways, or to exit Peel Region).

The vast majority of responses to this question consisted of either one of three possibilities 1) Road X ↔ Dixie ↔ 401 or, 2) “we service all roads within X number of postal codes. 3) Road X ↔ Bovaird ↔ 410 ↔ 401.

Overall Transportation/Logistics Management – Summary for All Locations
27. Do your drivers generally use the route that is the shortest distance between the pick up and delivery?

11 of the respondents said yes to this Question. The following is a list of common or poignant responses of those who said no.

“Avoid restricted roads / could make more direct deliveries without road restrictions. Summerlea (in Brampton) is restricted in the evening, customer demands delivery when road is restricted.”

“Truck restrictions - North - South between 10 & Trafalgar - most [quarries] do not have efficient routes. Desired route 24>Winston Churchill > Olde baseline road > Mississauga south into town would save Thousands of Kilometers a day!”, and

“We use the most efficient routes except for avoiding traffic, construction or when we use the 407, in other words we use the most practical route”

28. In using these routes are you aware of any specific challenges your drivers face on these routes, for instance intersections where there are frequent accidents or near misses, routes through congested areas or places where it is difficult for a truck to maintain the flow of traffic, truck restrictions?

Airport & Derry
Airport & Bovaird
401 and Dixie
Goreway & Derry
Dixie & Derry
Highway 10 & 24
Intermodal drive gets terribly backed up due to the CN Intermodal yard

29. As you are probably very aware – there are many heavy vehicle restrictions on local and regional roads. How important are these restrictions to your business.

<table>
<thead>
<tr>
<th>Importance</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essential/very important</td>
<td>5</td>
</tr>
<tr>
<td>Important</td>
<td>5</td>
</tr>
<tr>
<td>Somewhat Important</td>
<td>2</td>
</tr>
<tr>
<td>Not very important</td>
<td>13</td>
</tr>
</tbody>
</table>

“Because I am a trucker they are of the utmost importance - Heart Lake road should not be restricted.”

“Access to the plant on Torbram is restricted, so instead of using the most direct route we must go around the block to access the plant. Also Williams PKWY is restricted so they we not use it except with small vans”

“They impede route efficiency - region has lots of major roads but they are restricted!”, and…

“Colleran is restricted and ought not be”

“Mississauga Rd, McLauchlan rd, Heart Lake Road, Sandlewood - its almost like the Region of Peel is trying to force us out!”

For more information on road restrictions see Question 27.

30. Would please you identify specific problem areas? (Intersections)
31. **What is the greatest challenge you currently face in meeting your company’s transportation/logistics needs?**

Major responses were traffic congestions, a shortage of good drivers, cost of fuel, being cost effective, and making deliveries on time. Some interesting responses include…

We face the same challenges as any other trucking firms and we make it work. Peel region has done a great job dealing with infrastructure considering the incredible pounding the roads get!

The trucking is its own worst enemy, with the demands it allows its own customers to make of them.

To access one [quarry] costs an addition 17KMs due to road restrictions - multiplied by the 250 trips in and out a day!

32. **From a business perspective, what do you feel is the weakest link in the transportation services currently available in the Region of Peel?**

For the most part respondents were unable to really identify any weak link per se, the common answer of fuel cost, traffic congestion etc. did come up but there were also some interesting responses.

“There is an 18km gap in the north south routes that should not exist!!!! We would like to be able to use the following route, Winston Churchill > Olde Baseline > Mississauga !!!”

“ Compared to the rest of the GTA Peel Region is doing really well! Especially compared to Scarborough and York regions”

33. **Would you be interested in participating in or receiving information materials from a freight advisory committee for the Region of Peel?**

Those who were interested were certainly interested in knowing where all this is going, so follow-up is definitely expected. Those who agreed to participate where not necessarily willing to sign up right away, but may be interested in getting involved once they know more.

<table>
<thead>
<tr>
<th>Response</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Interested</td>
<td>3</td>
</tr>
<tr>
<td>Interested in Participation</td>
<td>7</td>
</tr>
<tr>
<td>Materials Only</td>
<td>10</td>
</tr>
</tbody>
</table>
APPENDIX C: GOODS MOVEMENT FORUM

Study of Goods Movement in Peel: Strategic Overview (Phase 1)

Peel Goods Movement Forum Summary
November 5, 2003

Prepared for
The Regional Municipality of Peel

By
Wilbur Smith Associates and IBI Group

November 27, 2003
Table of Contents

Introduction and Executive Summary................................................................. 53
Forum Overview.................................................................................................. 53
General Comments and Discussion................................................................. 54
Breakout Group Results................................................................................. 54
Next Steps ....................................................................................................... 55

Appendix A: Forum Attendees......................................................................... 57
Appendix B: Forum Agenda............................................................................. 58
Appendix C: Breakout Group Discussion Notes............................................. 59
Introduction and Executive Summary

In recent years, the Peel Region has experienced rapid growth in goods movement activity. For example, truck trips have increased more than 50% in the past 10 years, while CN and CP intermodal traffic and Pearson Airport air freight have, at times, grown even faster. A strong freight transportation system is critical to the continued economic wellbeing and growth of Peel’s industries, its employment levels and overall competitiveness. The Peel Region’s planning, policies and transportation systems, therefore, need to have an enhanced focus on goods movement issues.

To help Peel better understand and respond to these issues, the Region hosted a forum on November 5, 2003 to address the future of goods movement. Invitees included leaders in Peel’s goods movement industry from the public and private sectors. The Region hosted the Forum as part of its transportation planning process and Regional Official Plan Strategic Update (ROPSU). The purpose was to discuss emerging and potential problem areas, opportunities and possible actions to address them.

The major theme emerging from the Forum was the need for partnerships among governments, at the same level and between levels, and between the public and private sectors to coordinate and advance goods movement system improvements. In addition, forum participants believed that leadership and funding are needed to make partnerships effective. Additional themes that emerged from the forum included the need for improving goods movement information and data; the need for “early action” initiatives to address goods movement problem “hot spots” in the Region; identification, protection and enhancement of key goods movement corridors; and more coordinated land use planning.

Forum Overview

Fifty-one (51) participants attended the Forum (see Appendix A for list of attendees), which began with a welcome and introduction from Emil Kolb, Chair of the Region of Peel, Nick Tunnaccliffe, Peel Region’s Commissioner of Planning, and Murray McLeod, Transportation Planning Manager for Peel. The opening comments were followed by a presentation by Arno Hart, Wilbur Smith Associates and Michael Kieran, IBI Group, on the preliminary results of the Study of Goods Movement in Peel: Strategic Overview (Phase 1). The presentation included information on the findings of the study to date and put forth a variety of possible strategic actions the Peel Region could take to enhance goods movement planning. The presentation was followed by a question and answer period moderated by Peter Plumeau, Wilbur Smith Associates, who also facilitated the remainder of the Forum.

Following the presentation, the attendees were assigned to one of five breakout groups. The groups were asked to discuss the proposed strategic actions presented earlier, identify the three top priorities, summarize the rationale for them and discuss solutions and/or actions for addressing the top priorities. Each group reported on its discussion and results. Peter Plumeau, the Forum facilitator, then synthesized and summarized the breakout group results.

The Forum closed with wrap-up comments and a thank you to participants by Tom AppaRao, Peel Region Director of Transportation Planning.

The full Forum agenda is shown in Appendix B.
General Comments and Discussion

Overall, Forum attendees expressed support for the issues and ideas presented during the day. They strongly encouraged Peel to continue engaging the goods movement community in the regional planning process and to pursue partnerships between the public and private sectors to address existing and emerging goods movement needs. Most people believed that the preliminary goods movement study results emphasized the appropriate points and did a good job of highlighting the existing and emerging situation in Peel.

The consensus of Forum attendees was that specific follow-on actions should emerge from this Forum and the goods movement study and that progress on the actions should be monitored and disseminated. There was also support for convening additional Forums at appropriate points to maintain the lines of communication and relationship between the planning community and the industry stakeholders as an ongoing relationship.

Breakout Group Results

Five breakout groups were formed to discuss and prioritize strategies that Peel could pursue to address the Region’s freight mobility needs for the long term. Each group was asked to consider, discuss and prioritize its top three priorities from the following list, which were derived from issues identified in the preliminary study:

- Freight corridors
- Multimodal planning
- Coordination of truck planning
- Early action initiatives
- Travel demand management
- Land use planning
- Federal/Provincial/Municipal priorities for goods movement
- Truck/auto separation
- Goods movement information
- Freight stakeholder partnerships

Each group reported back on its priorities, the rationale for selecting those priorities and suggested action steps. Appendix C includes detailed notes of each of the breakout group discussions as recorded on the flipcharts. The consensus of the attendees was that five key areas are top priorities:

- **Partnerships** – All five breakout groups identified partnerships as the overall top priority. This includes partnerships among governments – municipal, regional, provincial and federal – and between the government and private sector groups. There was consensus that efficient and effective goods movement requires the public & private sectors to work together. Currently, there is little ongoing dialog or coordination among these entities, although recent actions such as Peel’s Goods Movement Study and Ministry of
Transportation studies and meetings evidence some progress in this regard. It was also noted that leadership is key to creation of successful partnerships and that addressing funding needs for goods movement improvements must be part of partnership functions.

- **Goods Movement Information and Data** – There was consensus that effective planning requires good information, but that goods movement information in Peel and the Greater Toronto Area (GTA) is extremely limited. Attendees concurred that there is a need to improve goods movement information bases and use them to facilitate effective tools for predicting future growth in goods movement. It was also noted that this is an area in which public-private partnerships could foster improved availability of and access to goods movement data for planning.

- **Early Action Initiatives** – Attendees concurred that, in addition to long-range strategic and policy planning, taking near-term focused action on specific goods movement “hot spots” in Peel could yield significant benefits. Several specific intersections, roadway segments and interchanges were noted across the different groups as candidates for relatively low-cost/high-impact improvement projects. Such projects could also be valuable in terms of demonstrating the value of public-private partnerships and facilitating their continuation.

- **Freight Corridors** – Attendees noted that Peel is well served by highways, roads & terminals, and has a strong network of goods movement corridors. However, rapid growth of freight and automobile traffic is a major challenge to the network’s continued viability. There was consensus that Peel needs to identify and take actions to preserve and enhance key strategic goods movement corridors throughout the Region. As most corridors cross into other jurisdictions and involve both regional and provincial roadways, partnerships among governments and stakeholders will be key to making this process successful.

- **Land Use Planning** – Attendees concurred that efforts to plan land use with regard to goods movement needs to be better coordinated, particularly with respect to access to and from freight and intermodal facilities. As Peel continues to attract additional distribution and logistics-oriented businesses, and its population continues to grow, the potential for land use conflicts between commercial and community uses intensifies. There is therefore a need for land use and site planning codes for freight and “community-friendly” freight development.

Forum participants also agreed that while these five areas are of high importance, the Region should not ignore any of the 10 areas, as they are all integral to the future of goods movement in Peel.

**Next Steps**

The next steps include incorporating the results of the Forum into the recommendations of the draft study report and presenting it to the Regional Council. Key recommendations and policy initiatives will also become part of the Regional Official Plan Strategic Update (ROPSU). The study will also form the basis for additional data collection, planning and stakeholder partnership initiatives, including possible follow-up forums or meetings between members of the freight community.
The Forum generated a lot of energy which was reflected in the dialogue and the views expressed. The key for the future will be to keep this enthusiasm alive by working together to make things happen in goods movement!
## Appendix A: Forum Attendees

### Peel Goods Movement Forum - November 5th, 2003

#### List of Participants

<table>
<thead>
<tr>
<th>Region of Peel</th>
<th>First Name</th>
<th>Last Name</th>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gena Ali</td>
<td>Re</td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Tom Apparao</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Jim Carrick</td>
<td></td>
<td>Region of Peel - Public Works</td>
<td></td>
</tr>
<tr>
<td>Eric Chan</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Wayne Chan</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Veronika Koran</td>
<td></td>
<td>Region of Peel - Communication *</td>
<td></td>
</tr>
<tr>
<td>Bryan Hill</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Emil Kohl</td>
<td></td>
<td>Region of Peel - Chair</td>
<td></td>
</tr>
<tr>
<td>Murray McLenn</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Harriet McLoughlin</td>
<td></td>
<td>Region of Peel - Communication *</td>
<td></td>
</tr>
<tr>
<td>Reena Sachdeva</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Salabir Saied</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Hadeem Siddiqui</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Nick Tunnicliffe</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
<tr>
<td>Edmond Wu</td>
<td></td>
<td>Region of Peel - Planning</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transportation Industry</th>
<th>First Name</th>
<th>Last Name</th>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ron Adam</td>
<td></td>
<td>Exel Global Logistics Canada Inc.</td>
<td></td>
</tr>
<tr>
<td>Rosheen Barrett</td>
<td></td>
<td>Bargo Transportation Service Inc.</td>
<td></td>
</tr>
<tr>
<td>Al Boughton</td>
<td></td>
<td>Talion Leasing</td>
<td></td>
</tr>
<tr>
<td>Bill Clark</td>
<td></td>
<td>Apex Motor / Western Canada Express Inc.</td>
<td></td>
</tr>
<tr>
<td>Kerry Faughnan</td>
<td></td>
<td>Trans West Logistics</td>
<td></td>
</tr>
<tr>
<td>Michele Kesar</td>
<td></td>
<td>Jured Service Network</td>
<td></td>
</tr>
<tr>
<td>Art Stallion Logistics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luigi Gandolfo</td>
<td></td>
<td>Les Enterprises Lucargo Enterprises</td>
<td></td>
</tr>
<tr>
<td>Colin Hamilton</td>
<td></td>
<td>Cavalier Transportation Service Inc.</td>
<td></td>
</tr>
<tr>
<td>Paul Jury</td>
<td></td>
<td>Canadian Pacific Railway</td>
<td></td>
</tr>
<tr>
<td>Wayne Langdon</td>
<td></td>
<td>Muns Carlage Ltd</td>
<td></td>
</tr>
<tr>
<td>George Ledson</td>
<td></td>
<td>Cavalier Transportation Service Inc.</td>
<td></td>
</tr>
<tr>
<td>Paul Merryweather</td>
<td></td>
<td>All-Ontario Transport Ltd.</td>
<td></td>
</tr>
<tr>
<td>Pierre Payette</td>
<td></td>
<td>Air Canada - Cargo Operations</td>
<td></td>
</tr>
<tr>
<td>Mike Roy</td>
<td></td>
<td>Air Canada - Cargo Operations</td>
<td></td>
</tr>
<tr>
<td>Geoff Woods</td>
<td></td>
<td>Canadian National</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goods Movement Consultants</th>
<th>First Name</th>
<th>Last Name</th>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arno Hart</td>
<td></td>
<td>Wilbur Smith Associates</td>
<td></td>
</tr>
<tr>
<td>Michael E. Kieran</td>
<td></td>
<td>Ill Group</td>
<td></td>
</tr>
<tr>
<td>Peter Plumeau</td>
<td></td>
<td>Wilbur Smith Associates</td>
<td></td>
</tr>
<tr>
<td>Matthew Williams</td>
<td></td>
<td>Effem Foods</td>
<td></td>
</tr>
<tr>
<td>Henrik Aboger</td>
<td></td>
<td>City of Brampton</td>
<td></td>
</tr>
<tr>
<td>Mike Marley</td>
<td></td>
<td>City of Brampton</td>
<td></td>
</tr>
<tr>
<td>Bill Mansley</td>
<td></td>
<td>Canada's National Safety Institute</td>
<td></td>
</tr>
<tr>
<td>Mike Parks</td>
<td></td>
<td>City of Brampton</td>
<td></td>
</tr>
<tr>
<td>Scott Rick</td>
<td></td>
<td>Canada's National Safety Institute</td>
<td></td>
</tr>
<tr>
<td>Matthew Williams</td>
<td></td>
<td>Canada's National Safety Institute</td>
<td></td>
</tr>
<tr>
<td>Henrik Aboger</td>
<td></td>
<td>City of Brampton</td>
<td></td>
</tr>
<tr>
<td>Arno Hart</td>
<td></td>
<td>Wilbur Smith Associates</td>
<td></td>
</tr>
<tr>
<td>Michael E. Kieran</td>
<td></td>
<td>Ill Group</td>
<td></td>
</tr>
<tr>
<td>Peter Plumeau</td>
<td></td>
<td>Wilbur Smith Associates</td>
<td></td>
</tr>
<tr>
<td>Greg Sweetnam</td>
<td></td>
<td>James Dick Construction</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area Municipalities</th>
<th>First Name</th>
<th>Last Name</th>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tim Marley</td>
<td></td>
<td>Town of Caledon</td>
<td></td>
</tr>
<tr>
<td>Mike Parks</td>
<td></td>
<td>City of Brampton</td>
<td></td>
</tr>
<tr>
<td>Robert Sasaki</td>
<td></td>
<td>City of Mississauga</td>
<td></td>
</tr>
<tr>
<td>Matthew Williams</td>
<td></td>
<td>City of Mississauga</td>
<td></td>
</tr>
<tr>
<td>Henrik Aboger</td>
<td></td>
<td>City of Brampton</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Federal / Provincial / Institutions</th>
<th>First Name</th>
<th>Last Name</th>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julius Soys</td>
<td></td>
<td>Ministry of Transportation Ontario</td>
<td></td>
</tr>
<tr>
<td>Bill Raney</td>
<td></td>
<td>Ministry of Transportation Ontario</td>
<td></td>
</tr>
<tr>
<td>Robert Bengevin</td>
<td></td>
<td>Transport Canada, Ontario Region</td>
<td></td>
</tr>
<tr>
<td>Beth Jones</td>
<td></td>
<td>Moving The Economy</td>
<td></td>
</tr>
<tr>
<td>Glenn Miller</td>
<td></td>
<td>Canadian Urban Institute</td>
<td></td>
</tr>
</tbody>
</table>

* Event organization
### Appendix B: Forum Agenda

**Region of Peel**  
**Goods Movement Stakeholders Forum**  
**November 5, 2003**  
**Holiday Inn Brampton**  
**AGENDA**

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Speaker/Presenter</th>
</tr>
</thead>
</table>
| 8:30-9:00 am | Registration - Continental Breakfast  
"Open House" focused on displays |                                          |
| 9:00-9:15 am | Welcoming Comments from Peel Region Officials                       | Nick Tunnacliffe, Planning Commissioner, Peel Region |
| 9:15-10:00 am| Preliminary Peel Goods Movement Study  
Findings and Recommendations | Amo Hart, WSA, Mike Kieran, IBI          |
| 10:00-10:15 am| Questions and Answers on Study Findings &  
Recommendations | Facilitated by Peter Plumeau, WSA        |
| 10:15 am     | Break/Refreshments                                                  | N/A                                      |
| 10:30-11:30 am| Facilitated Breakout Group Discussions –  
Prioritization of Future Directions for Peel | Individual tables and facilitators       |
| 11:30 am–12:00 pm | Lunch                                                            |                                          |
| 12:00-1:00 pm| Breakout Group Reports and Identification of  
Group Priorities for Future Directions for Peel | Reports from each table, Synthesis by Peter Plumeau with audience feedback |
| 1:00-1:15 pm | Next Steps and Closing Comments                                    | Tom Apparao, Region of Peel              |
| 1:15 pm      | Adjourn                                                            |                                          |
Appendix C: Breakout Group Discussion Notes – from Flipcharts

Table 1

– Facilitator & Presenter: Mr. Julius Gorys (MTO)

1. Land Use Planning
   - Better coordination to bring transportation on-line as development occurs or before rather than afterwards when there is congestion (OMB, lot levy acquisition / D.C.).
   - Political direction regarding development staging or accepting faulty studies.
   - Unawareness of development implications by planners of freight location decisions (Bolton).

2. Freight Corridors
   - Jurisdictional conflicts regarding road sizes (Kennedy and McLaughlin):
     - From 4-6 lanes → 2 lanes → 4 lanes.
   - Need for more “regional roads” & improvements in all jurisdictions – help off-load provincial system.
   - Where are the future ones to focus on? Each mode has to be in proximity to each other (LMP focus) → enhance if necessary.
   - Focus on the major problem area first, instead of scatter gun approach to improvements.

3. Goods Movement Information
   - Misrepresentation regarding impacts (trucks versus large residential developments).
   - Need it for partnership or greater public understanding:
     - “Getting people work” as opposed to “getting people to work”.
   - Why everything happens as:
     - Customer driven → Shopper decision → carriers (public flash point)

4. Federal / Provincial / Municipal Priorities for Goods Movement
   - No leadership / vision; only hindsight.
   - See action priorities

5. Early Action Initiatives
   - Torbram → railway crossings between 407 and Derry Rd.
   - Britannia → size of road regarding volume and signalling at Dixie Rd.
   - Hwy 7 / Bovaird → size of highway inadequate.
   - Hwy 7 / R.R. 50 → sheer quantity and left turn; full interchange needed.
   - Airport / Steeles → Traffic to CN intermodal; peak hour 407 car traffic.
   - Courtney Park → Partial interchange.
   - Dixie Road → Between Hwy 401 & Derry Rd, sheer volume and truck/car compatibility.
   - Airport / Derry → intersections.
   - Public transit need to reduce single occupant car volumes along Queen St.

6. For Region of Peel
   - “Special case” - all modes merging here → different than Ottawa.
   - Freight stakeholder partnerships.
   - Use of airport land for logistics translating into truck impacts on municipal roads (left ≠ right hands).
Table 2

– Facilitator: Mr. Bob Sasaki (City of Mississauga)
– Presenter: Mr. Greg Sweetnam (James Dick Construction)

1. Freight Corridors
   - Congestion, reliability, efficiency, cost, connectivity, accessibility.
   - North/South highway – Halton & Wellington / Peel boundary.
   - East/West highway – north of Brampton.
   - By-passes and existing roads.
   - Coordination with land use planning.
   - Need government to work with Carriers

2. Federal / Provincial / Municipal Priorities for Goods Movement
   - True Optimization, setting priorities, long term vision, coordination (using strengths of each), streamlining.
   - Coordinating agency / function.
   - Coordination between policy and implementation at local level
   - Coordinated networks and standards.
   - Leadership in coordination with other government policies and priorities.
   - Coordinate funding.

3. Goods Movement Information
   - Technical and objective solutions, proactive communication, back to industry and from government.
   - Spend more money on commercial truck goods surveys, locally and nationally.
   - Spend money on other modes e.g. rail companies.
   - Tap into new technology in use in industry e.g. speeds and real time congestion management.
   - Industrial sector studies – including OD survey).

4. Overall
   - Need to look at all 10 issues.
   - Public / private cooperation.
1. Federal / Provincial / Municipal Priorities for Goods Movement
   - Same rules everywhere:
     - Same weights.
     - Coordination of truck policy.
     - Leads to working at lowest standard.
   - Combine this with “coordination of Truck Policies”.
   - Coordination of funding by all levels of government.
   - Need for better coordination in GTA.
   - Funding.

2. Travel Demand Management
   - Night and weekend deliveries – local deliveries has more productivity.
   - Community friendly delivery and safety benefits; store staff can spend more time with customer, e.g. Home Depot.
   - Long haul has more difficulties
     - Regulation
     - Different customer needs
     - Border crossings.

3. Early Action Initiatives
   - Intersection improvements.
   - Regional Road 50 / Queen Street
   - Left turn off Hwy 427 NB
   - Erin Village (in Wellington County) – truck route restrictions.
   - Congestion on Regional Road 50 in Bolton.

4. Coordination of Truck Policies
   - Issues:
     - Fragmented nature of network.
     - Fragmented decision making.
     - Lack of information and communication.
   - Solutions:
     - Coordinate decisions around truck routes.
     - Identify freight corridors and truck routes.
     - Involve MTO and surrounding Regions.

5. Land Use Planning
   - Commercial areas off truck routes needed to have clear truck access:
     - Community Planning.
   - Design of docks – older ones not big enough; update zoning.

6. Goods Movement Information
   - Needed data regardless of what issues are considered important.
   - Data confidentiality is a problem – new privacy legislation on Jan 1, 2004.
   - Common thread: All issues needed DATA.
1. **Land Use Planning**
   - Site plan; funding; policies; regulations.
   - Political Implications in attracting major employers.
   - Traffic Impact Study (TIS) / data be included as part of the Region’s database.
   - Project approval is short-term and not consistent with Long Range Land Use.
   - TIS are narrow-focused.
   - Transportation Corridor is a land use policy.

2. **Coordination of Truck Policies**
   - Toll Issue
   - Freight stakeholder partnership
   - Policies that are not truck friendly e.g. truck restriction by-laws.
   - Coordinate with all levels of government – Peel could play a leading role.
   - Airport operating hours.

3. **Federal / Provincial / Municipal Priorities for Goods Movement**
   - By-laws restrict movements for efficient – slow.
   - Suggested Hwy 407 to be free for trucks – What value for trucks to use 407 when operation (and administration systems) is NOT trucker friendly?
   - Peel takes leadership role to change 407 operations.
   - Goods Movement Council; target to achieve; goods movement is not in the radar screen.