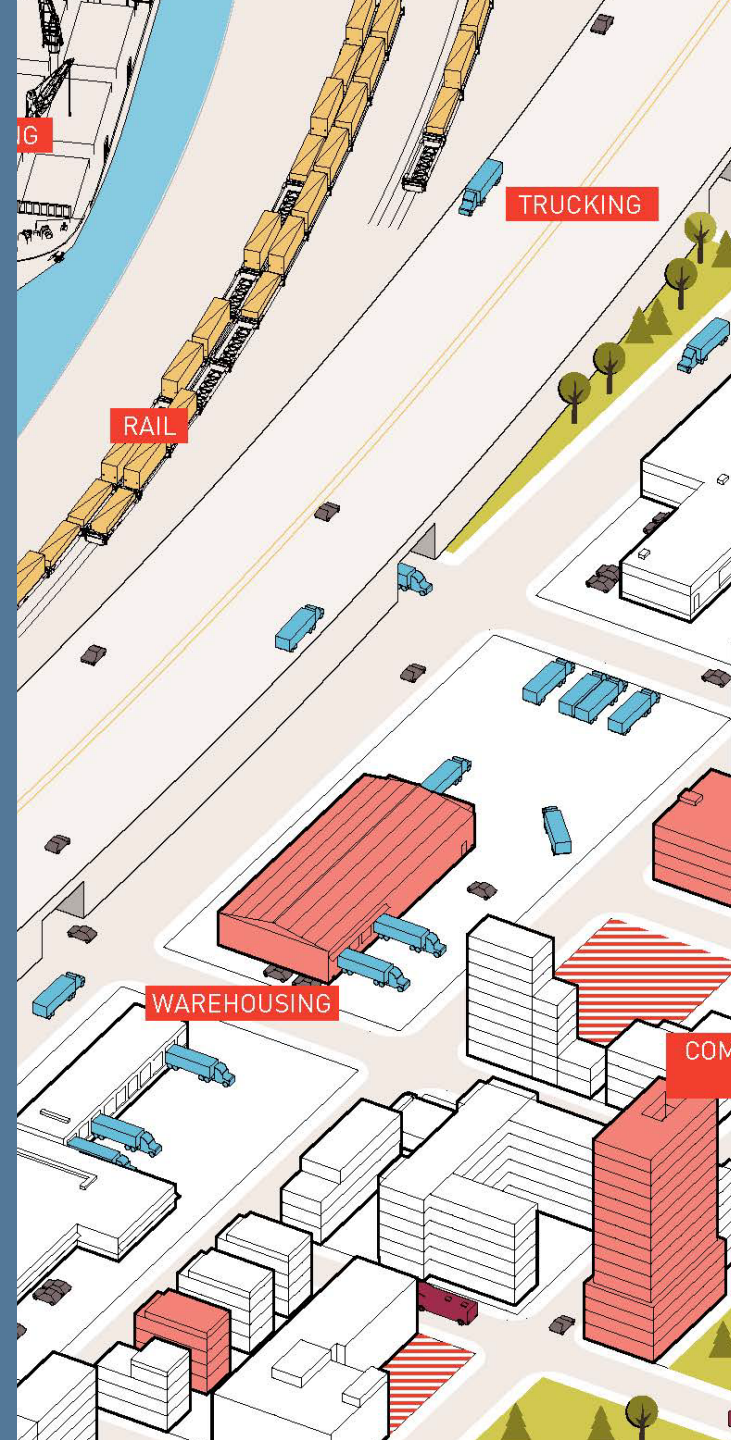


Capitol Region Council of Governments

Regional Warehousing Land Use and Traffic Study

February 26, 2025

Project Advisory Committee Meeting #1



Introductions

Study Overview

Goals & Objectives

Scope of Work

Study Outcomes

Next Steps

PROJECT TEAM

CRCOOG

PRINCIPAL PLANNER

Kyle Shiel



Project Management

Stakeholder Engagement

Economic Analysis

Traffic Assessment

PROJECT MANAGER

Stephanie Finch, AICP

INTERIM PROJECT MANAGER

Stephen Chiaramonte, AICP

DEPUTY PROJECT MANAGER

Charles Romanow, AICP

STAKEHOLDER ENGAGEMENT

Megan Savage

Best Practices Guide

Michael Meola, J.D.



Traffic Assessment

Kevin Johnson, AICP



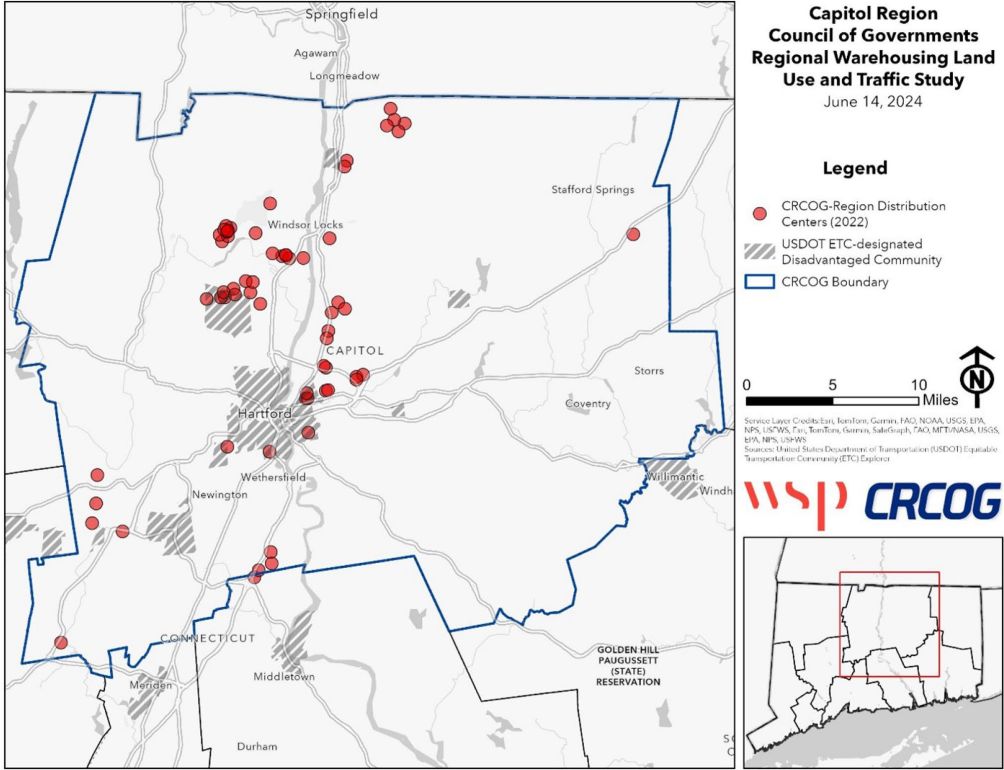
STUDY OVERVIEW

Visible regional growth in warehousing/distribution centers

Need to understand how and where traffic impacts are most visible

Market trends will define how municipalities can proactively plan for future developments

Traffic analysis will model regional freight travel demand, consider the impact of last-mile deliveries, and review truck parking needs



GOALS & OBJECTIVES

Comprehensively study the regional warehousing landscape and its associated impacts on transportation, land use, and economic development

State, regional, and local policymakers will better understand the challenges and opportunities presented by e-commerce and warehousing

Municipal staff will have a resource to assess development applications for warehousing and logistics sites

SCOPE OF WORK

Task 1 – Project Management

Task 2 – Stakeholder Engagement

Task 3 – Economic Analysis of Warehousing, Logistics & E-Commerce Sector

Task 4 – Traffic Assessments

Task 5 – Best Practices Guide: Warehousing Site Design & Proposal Review

Task 6 – Final Report and Executive Summary

Project Advisory Committee

- Identify major challenges
- Three meetings

Study Website

- Share progress and materials

Municipal Meetings

- Meet with local planning and zoning commissions

Task 3

Regional Economic Share Analysis

Identifies sectors and industries that are growing and concentrating, and pace of growth

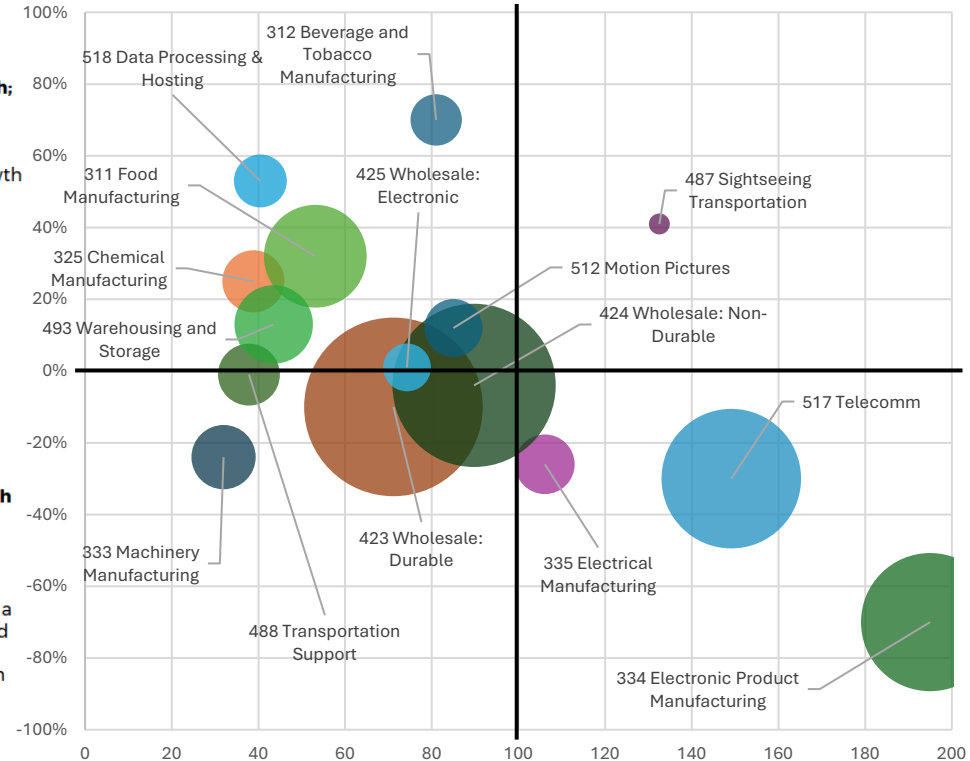
Understand place of distribution, logistics, warehousing, and manufacturing within the broader regional economy

UP & COMING
Above average growth; below average concentration
Industries in this quadrant are in a growth phase, building on a critical mass of talent before reaching saturation.

OFF-RADAR
Below average growth and concentration
Industries in this quadrant are generating much activity. There is often a tiny pool of specialized talent but companies can be protected from competition.

ACTIVE
Above average growth and concentration
These industries often represent the market's specialization(s), with the deepest talent pools and brightest growth forecasts. Competition is often fierce, placing growth pressure on wages.

MATURE
Below average growth; above average concentration
Industries are either very large and experiencing slow growth on a percentage basis, or simply decreasing in competitiveness to other, "hotter" markets.



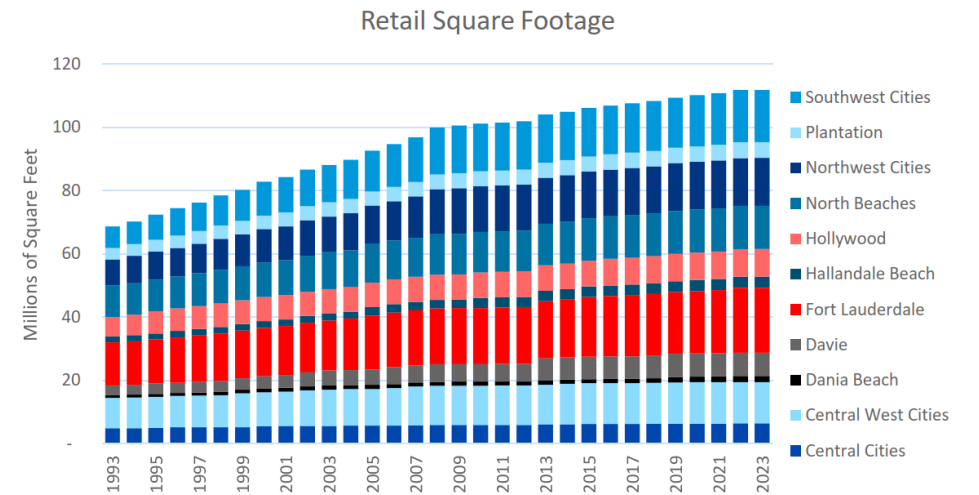
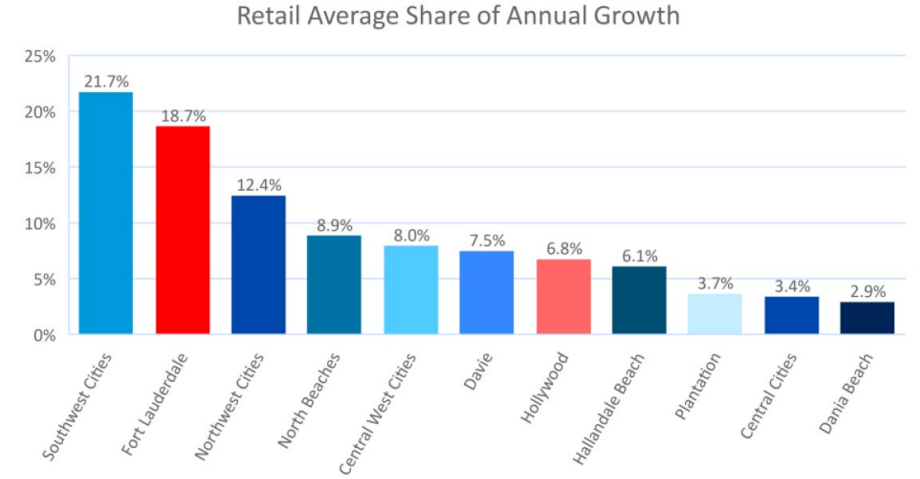
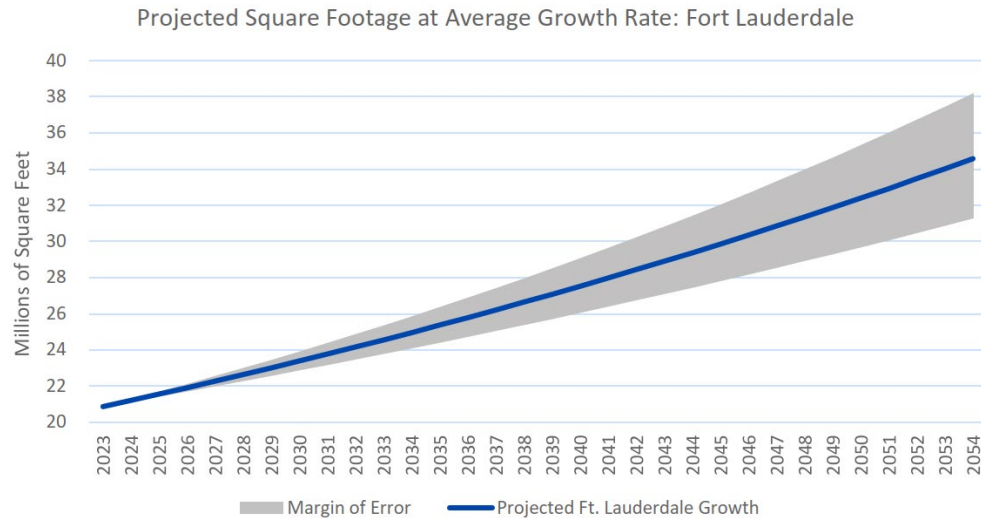
Location Quotient

Task 3

Market Supply and Demand Forecast

Assess amount of new real estate space we can reasonably expect the market to build

Understand the expected pace of development



Synthesize literature on trip generation (particularly from warehouses)

Traffic count plan

- Consider: previous tasks, warehouse developments, literature
- Identify traffic count firm and conduct counts

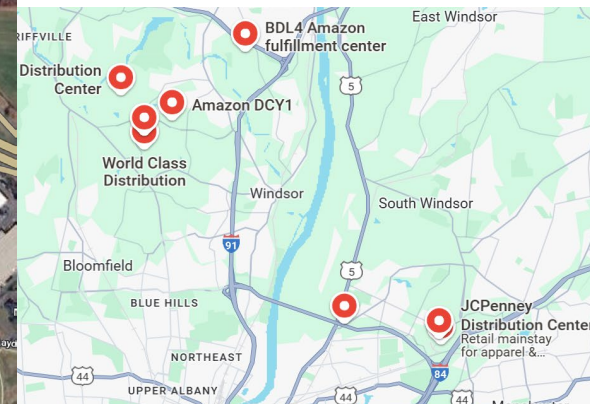
Estimate trip generation rates (trucks, vans, employees, etc.)

Task 4

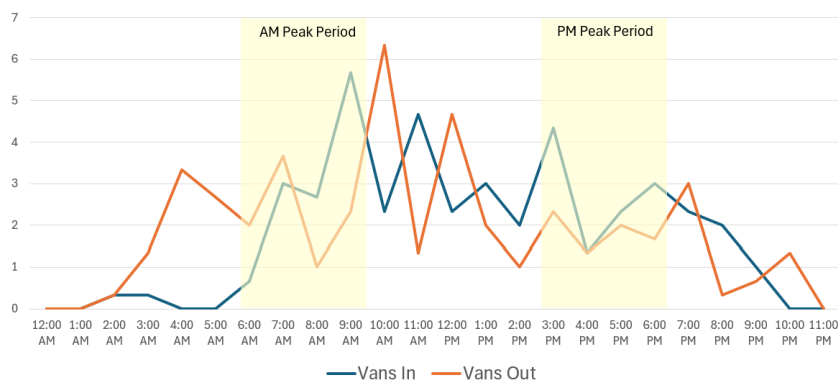
Special Considerations for Delivery Vehicles

Team will analyze online vehicle delivery patterns and volumes

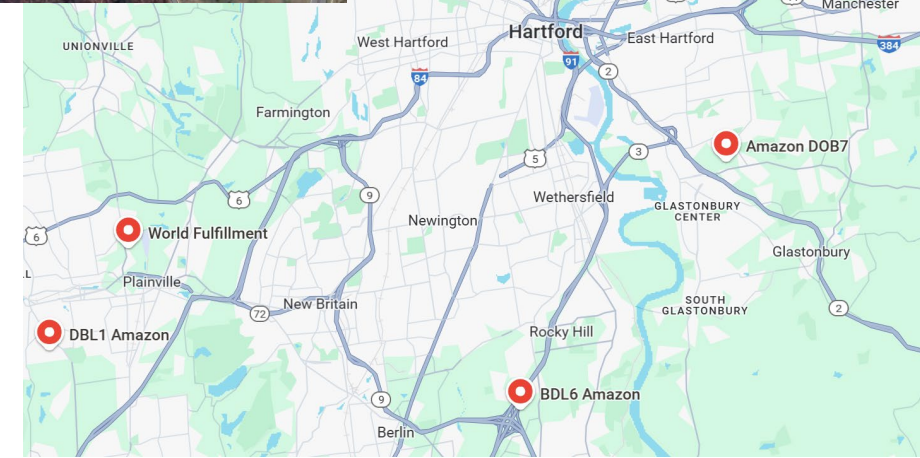
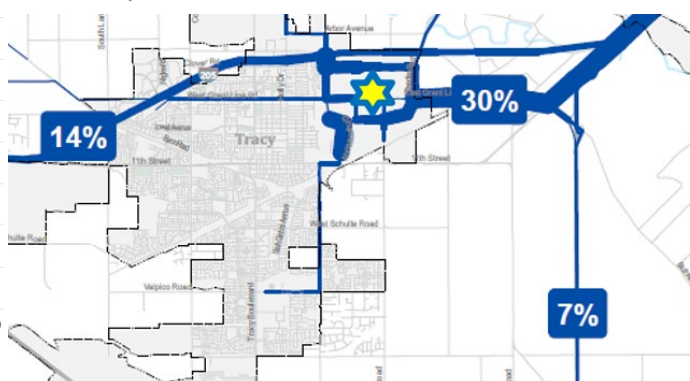
- Work with CRCOG staff and the PAC to identify study facilities
- Utilize Replica to identify the routes used by delivery vehicles
- Identify last-mile impacts of e-commerce delivery



Example Fulfillment Center Delivery Van Temporal Profile



Example Fulfillment Center Distribution Pattern



This task will result in the production of a best practices guide for review of new warehouse development proposals based on findings from:

- analysis of existing sites
- interviews with sector participants
- review of regulations and processes
- benchmark research



STUDY OUTCOMES

Market analysis focused on the increased demand for warehousing & distribution in the CRCOG region

Projected future demand and potential sites for warehousing & distribution

Traffic impact analysis

Best practices guide for warehousing & logistics center proposals and site plan review

Final report compiling all interim deliverables and summarizing data

SCHEDULE

Task	Winter 2025	Spring 2025	Summer 2025	Fall 2025	Winter 2025-2026	Spring 2026
Stakeholder Engagement						
<i>PAC Meeting</i>						
Economic Analysis						
<i>Market Analysis</i>						
<i>Trends & Market Demand</i>						
Traffic Assessment						
<i>Traffic Impact Analysis Guidance</i>						
<i>Traffic Counts</i>						
<i>Delivery Vehicle</i>						
<i>Regional Truck Parking</i>						
Best Practices Guide						
Final Report						

NEXT STEPS

Develop project website

Coordinate stakeholder meetings

Begin traffic analysis

Conduct traffic counts

Begin market analysis

Initiate Best Practices Guide

Project Team Contacts

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Please share any
questions/comments