

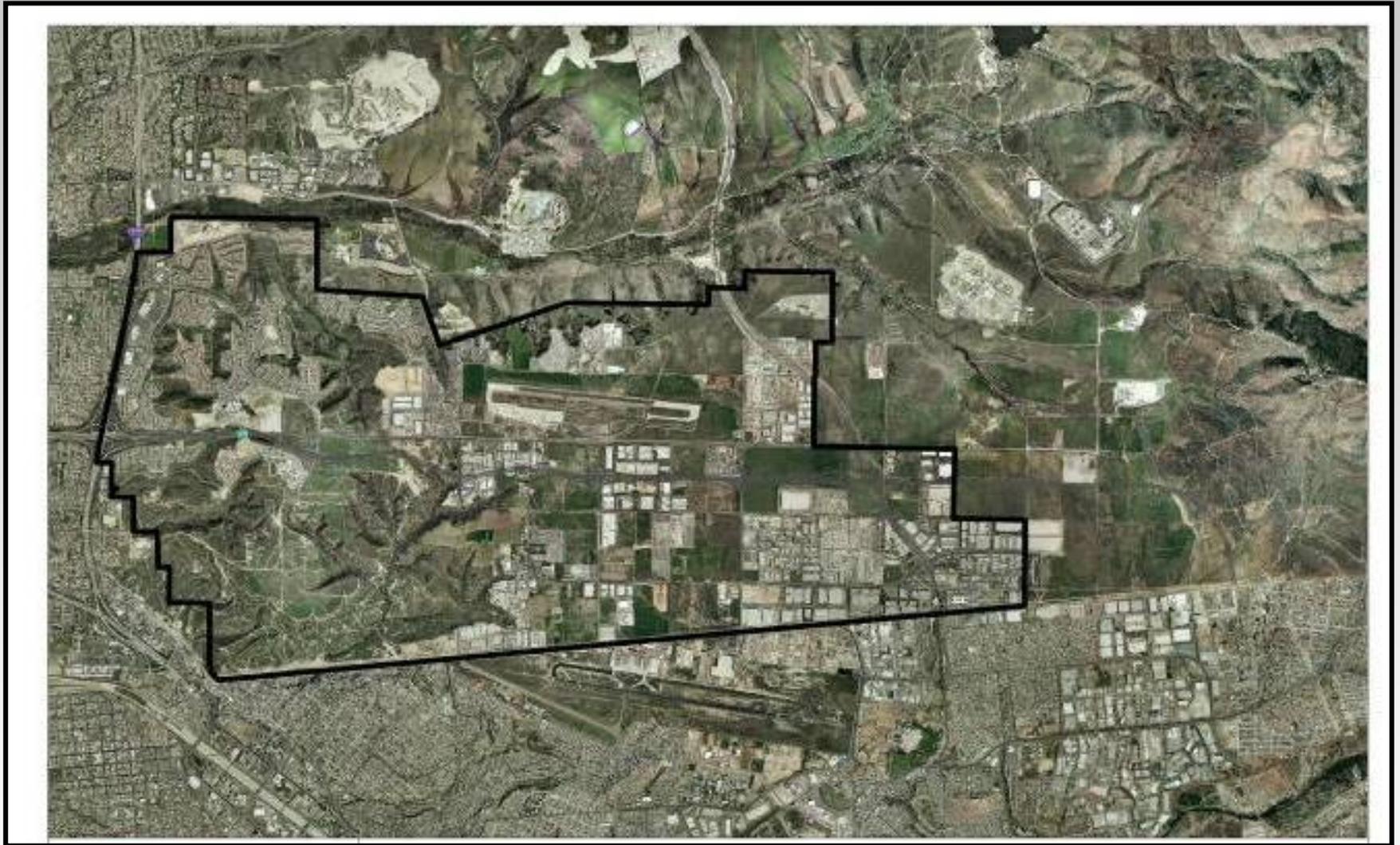
THE CITY OF SAN DIEGO

OTAY MESA COMMUNITY PLAN UPDATE

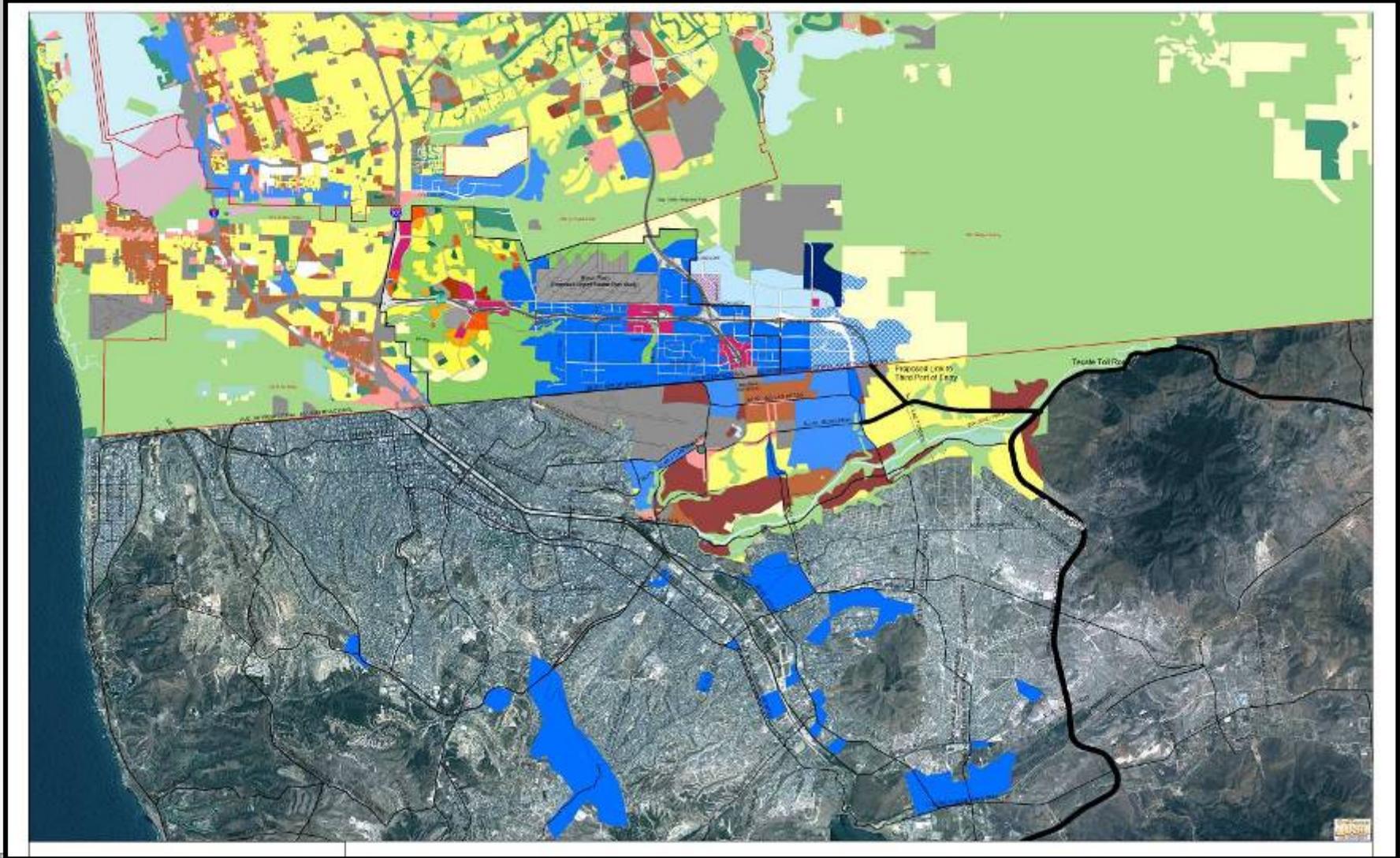
Planning Commission Workshop:
Transportation
17 May 2007



Otay Mesa Planning Area



Otay Mesa: Regional Perspective



Overview

1. Introduction
2. Regional Transportation Projects
3. Cross-border Goods Movement & Trends
4. General Plan Policies
5. Revised Plan Scenarios
6. Aviation
7. Roadway Network
8. Truck Circulation
9. Transit
10. Trails, Pedestrians & Bicycles
11. Planning Commission Discussion
12. Public Comment



Introductions

- **William Anderson, FAICP**, Director of City Planning and Community Investment
- **Mary Wright, AICP**, Program Manager
- **Bill Figge**, CALTRANS
- **Curtis Spencer**, IMS Worldwide, Inc.
- **Theresa Millette, AICP**, Senior Planner
- **Linda Marabian, P.E.**, Senior Traffic Engineer
- **Manjeet Ranu, AICP**, MW Steele Group, Inc.

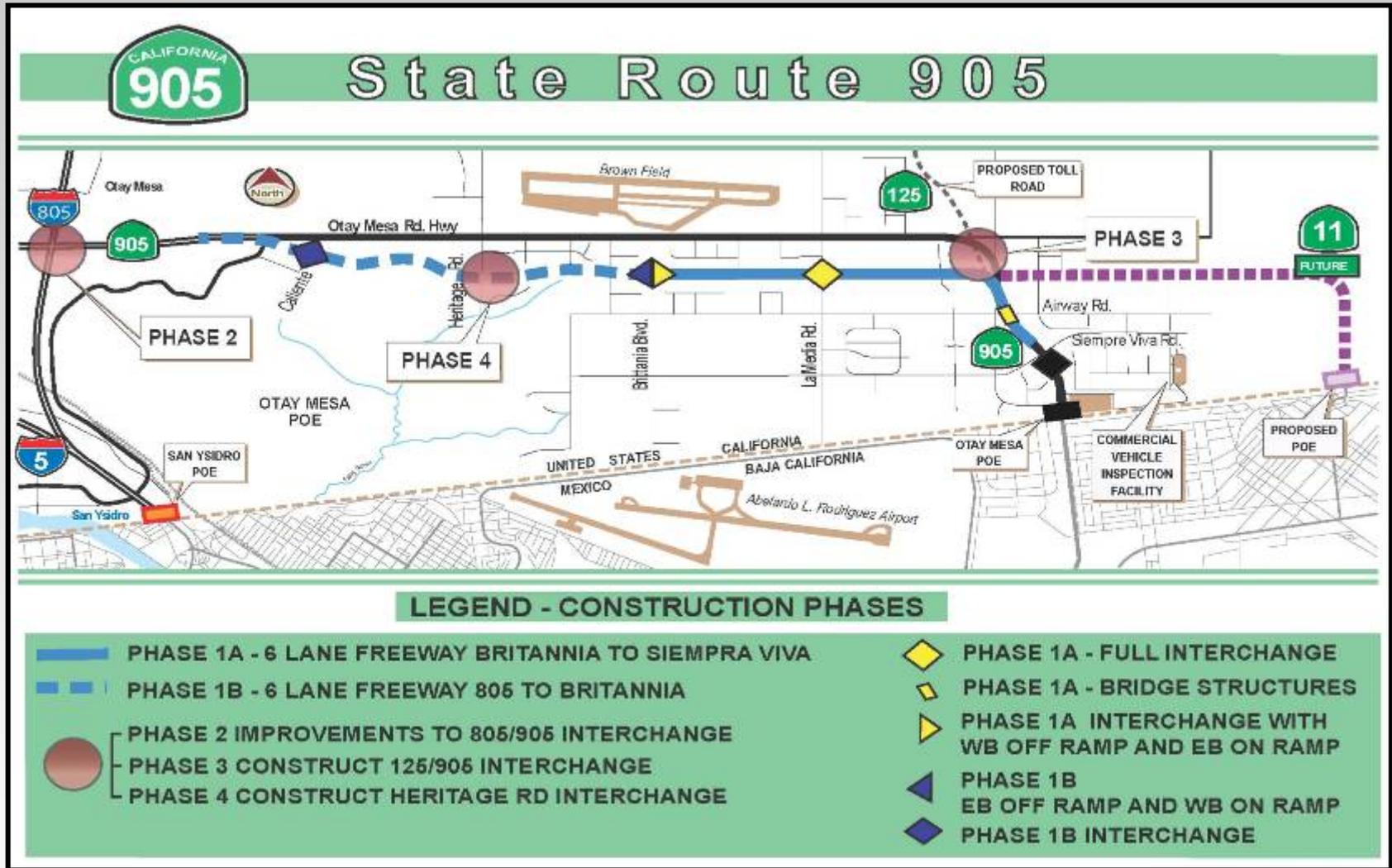


Bill Figge

CALTRANS



SR-905 Project



Curtis Spencer, President

IMS Worldwide, Inc.



The Otay Mesa Logistics Market

- The Global Logistics Trends affecting Otay Mesa are really more about China-Mexico-US trade
- Global Logistics Impact on Industrial Real Estate in Otay Mesa is a mixed picture: some re-deployment of manufacturing to Asia and a resurgence in certain sectors (auto, large-bulky electronics) in Tijuana
- Impact of the growing produce business on OM Produce Centers and OM traffic volumes
- Impact of Tecate on the volume of traffic in OM, the OMLC

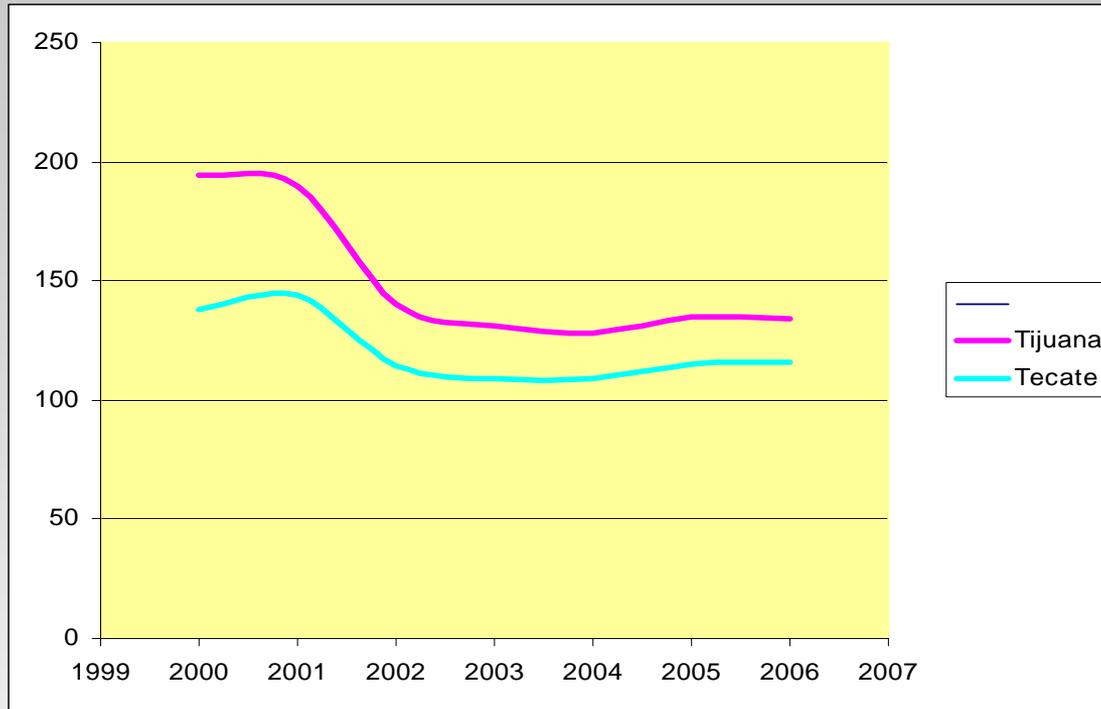


Future trends, needs for logistics and produce centers in OM

- Container and trailer loaded vehicles, southbound and northbound
- Container and trailer empty vehicles, southbound and northbound
- Mexico rules require a “preview” in OM which utilize the OMLC
- Produce centers support distribution of goods from farms in Mexico to markets and stores in CA



Maquila Growth – No. of Plants 2000-2006



No. of Maquila Plants (total) per year	Tijuana	% Change	Tecate	% Change
2000	194		138	
2001	190	-2%	144	4%
2002	140	-26%	114	-21%
2003	131	-6%	109	-4%
2004	128	-2%	109	0%
2005	135	5%	115	6%
2006	134	-1%	116	1%

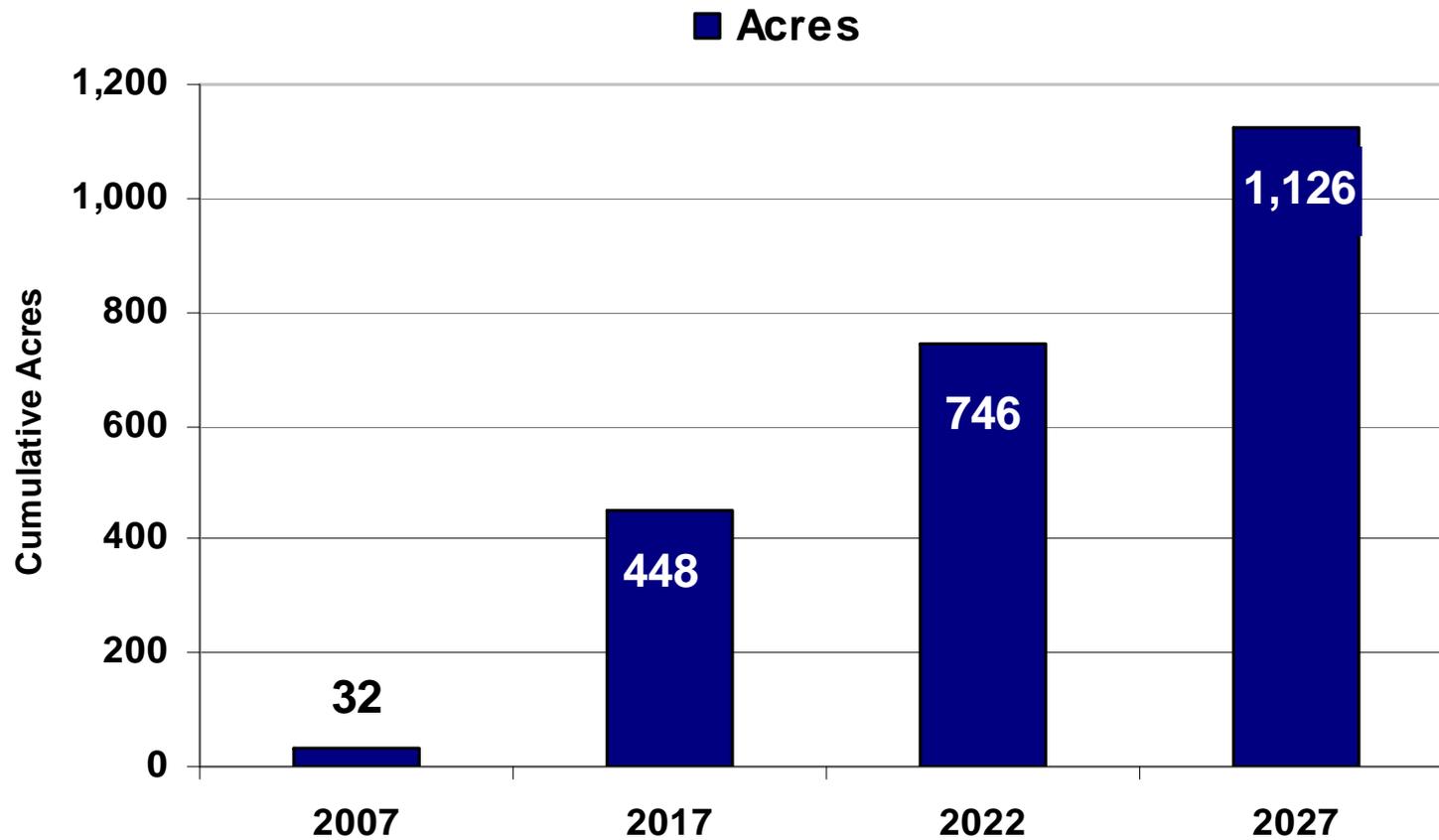


Demand for Warehousing, Logistics Centers in OM

- Absorption rate has historically been about 500,000 SF per year (CBRE, G&E)
- This is just under 30 acres per year
- Projected maquiladora growth is estimated to be 3-10 % per year (Over the last two years, a modest 4% growth rate has been reported by the National Statistics Institute)
- Using 5% per year as a conservative rate, (1/2 of the 10% Maquila growth turns into demand for Otay Mesa space), this is the demand chart for space over 20 years.....



Demand for Industrial Space in Acres



Assumptions for the Chart

- 500,000 annual absorption for the past 5 years
- Users of the space are 75% maquilas
- Maquila growth will be between 3-10%
- At the highest growth rate (10%) for Maquila growth which affects real estate by 5%, the demand from 2007 through 2027 is for a total of 1,126 cumulative acres (needed to be set aside now, to meet demand)
- This is generally consistent with the City-specific study conducted by ERA



- Issues that affect this implementation:
 - Length of service rules for US trucks, drivers not willing to wait in line in lieu of earning driving miles to destination
 - Drayage system is the most efficient system to manage empties and laden vehicles
 - TWIC program will preclude Mexico drivers from driving to LALB for imports, exports
 - Lawsuits by US-based trucking organizations



Likelihood of Customs Inspections in Mexico

- Security considerations
- Chain of custody considerations for vehicles in transit, in the waiting line
- In-transit inspections for vehicles coming from inland cities creates added security risks
- CBP not willing to deploy staff into Mexico



Future Trends in Truck Storage

- Sector specific growth predicted in automotive and electronics which are Asia-Pacific centric, driving demand for higher volumes of loaded, empty vehicle traffic in OM
- OM Logistics Center operators will “squeeze” more out of existing property, willing to work 24-7 to process trucks inbound, outbound, loaded and empty



Macro Economic Influences

- Manufacturing evolving into global processes, more sophisticated supply chains
- Sectors in Mexico will expand, others will decline (apparel, textile)
- Mexico will excel in JIT manufacturing which is tailored to electronics and automotive (emerging China)
- Tecate shifting volumes to OM, OMLC



Third POE on Operations in OM

- Still requires use of OMLC processing centers in transition, moving east to the new POE (In the County land, not studied) GSA study on feasibility in 2010, construction within 3 years thereafter (well within our 20 year planning horizon)
- Balanced infrastructure to support southbound and northbound traffic, both empties and laden
- Changes in FAST in order to accommodate reduces “waiting time”



Crossing Data - CBP

- Waiting time (in the queue prior to arrival at the POE)
- Processing time (time to move through the POE process, inspection, drug profile, dog inspection, RPM, VACIS and release)
- FAST processing infrastructure to reduce “waiting time” and increase this sector of traffic



Specific Recommendations

- Logistics trends continue to evolve and impact all aspects of OM, OMLC and maquiladora industry (and traffic volumes and traffic patterns)
- OM will continue to be a localized processing center for maquiladora and produce business, but not a magnet for SoCAL distribution
- Industrial land supply in the border area appears to be more than adequate to meet the demands of the 20-year time horizon, but should be reviewed every 5 years as the impact of global trade, new trade regions and processing trends evolve



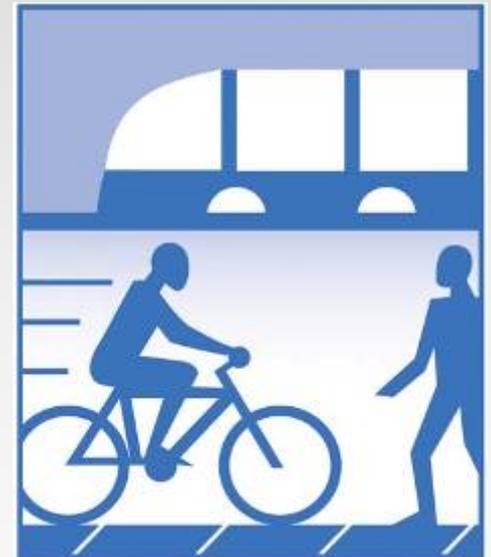
Theresa Millette, AICP

Senior Planner, City of San Diego

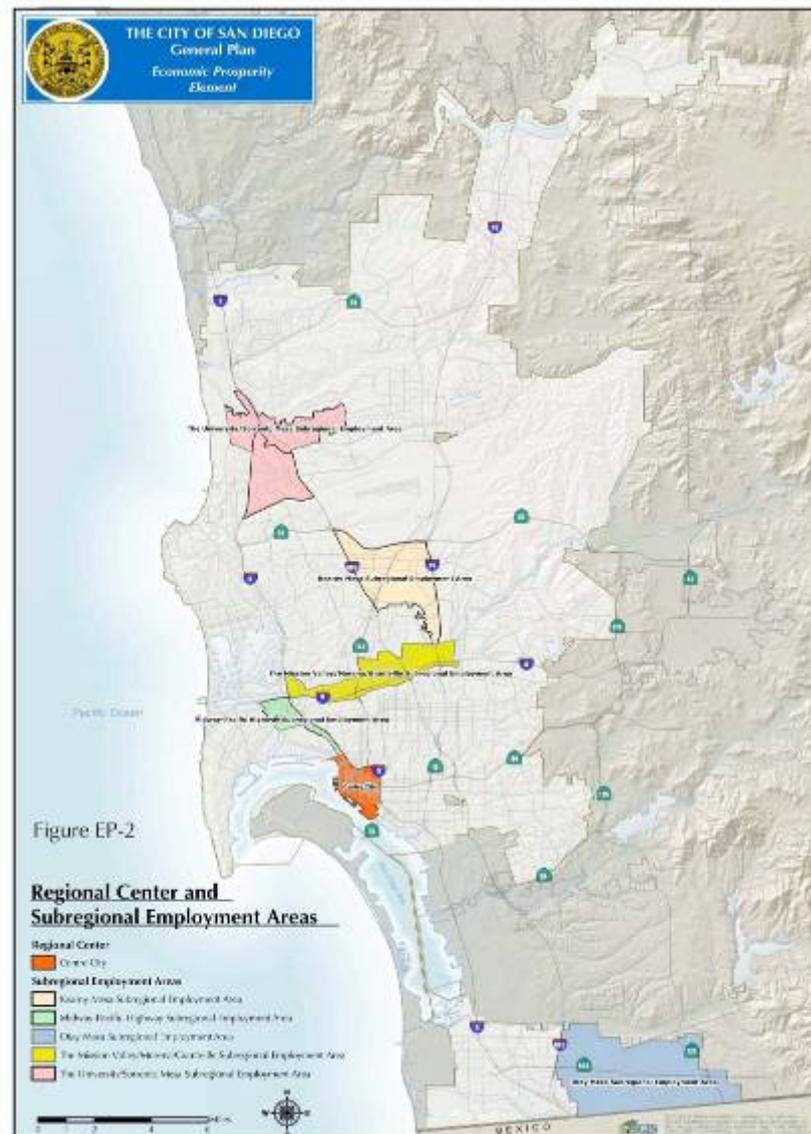


Draft General Plan Policies: Mobility

- Walkable communities
- Transit first
- Street and freeway system
- Bicycling
- Airports
- Goods movement/freight
- Regional coordination and financing



Draft Regional & Sub-regional Centers



Goals of the Plan Update

- **Regional Center:** enhance Otay Mesa's role in the region
- **Create Complete Places:** balanced, integrated mix of uses within and across Otay Mesa
- **Transit:** coordinate land use planning to support high frequency transit service
- **Build Needed Infrastructure:** include development that can finance infrastructure improvements

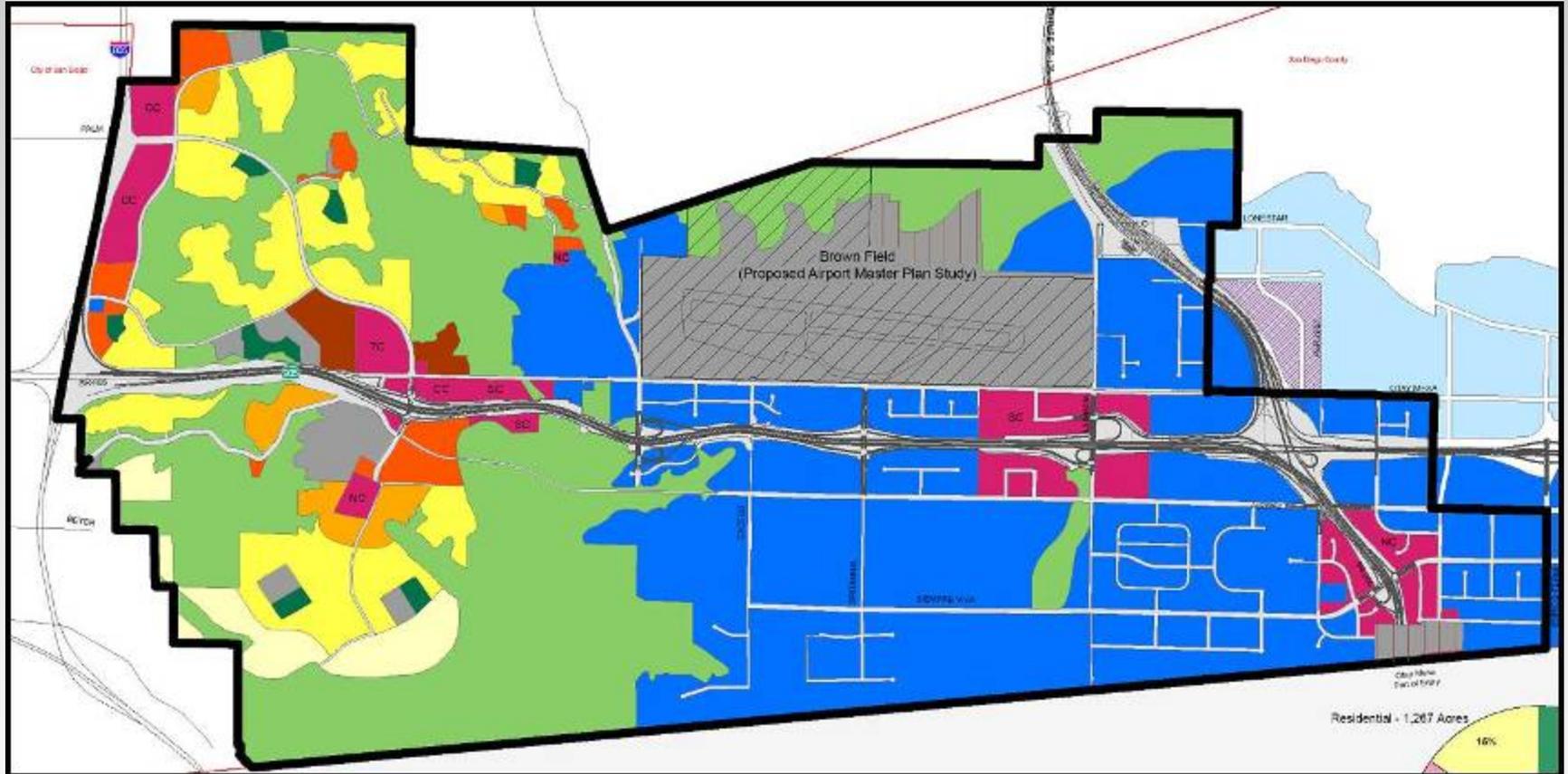


Goals of the Plan Update

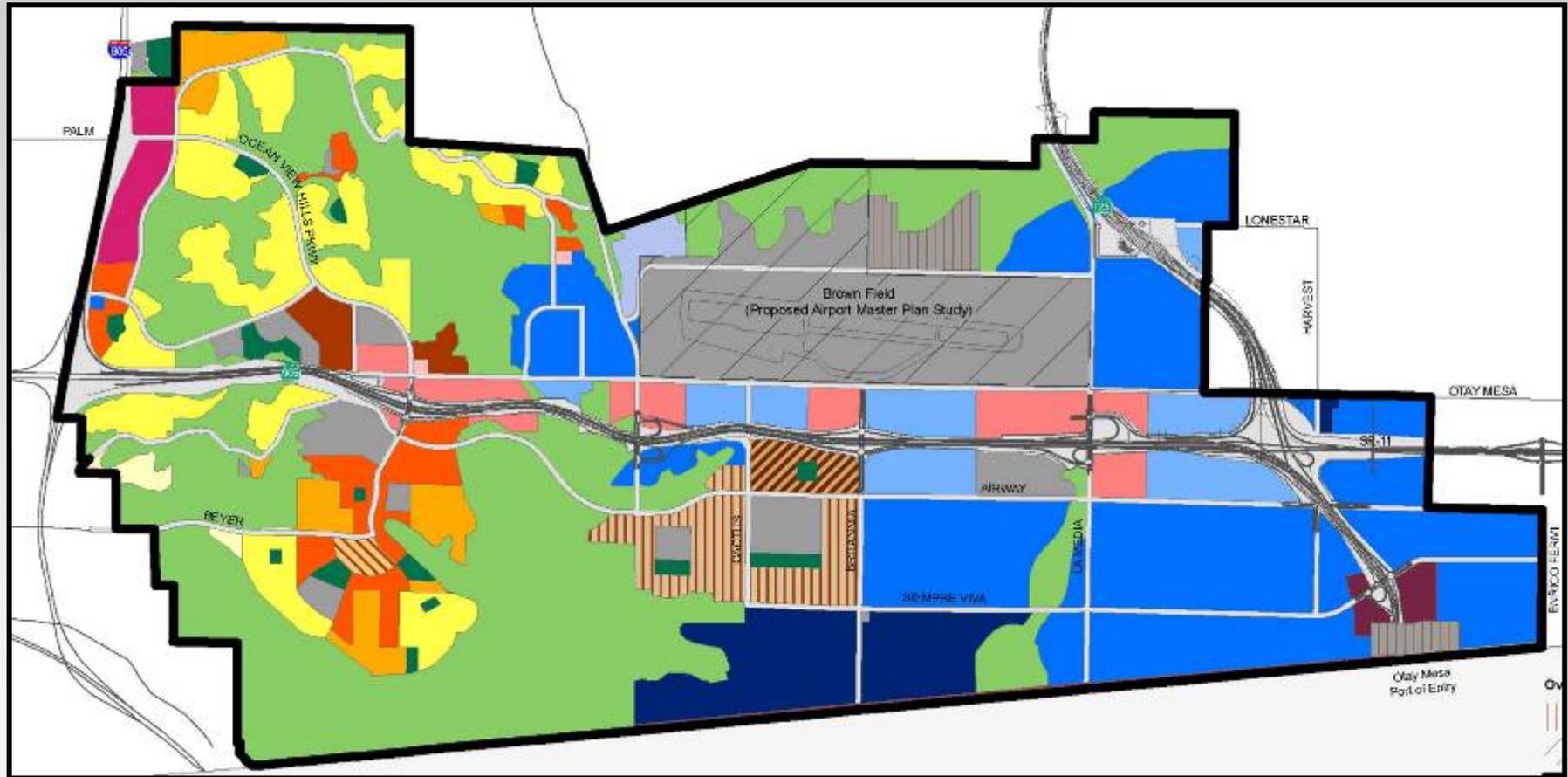
- **Diversify:** broaden the industry profile and increase employment
- **Industrial Capacity:** protect and enhance
- **International Trade:** support activities
- **Housing:** provide more housing and meet workforce needs
- **Brown Field:** improved utilization and integration within Otay Mesa



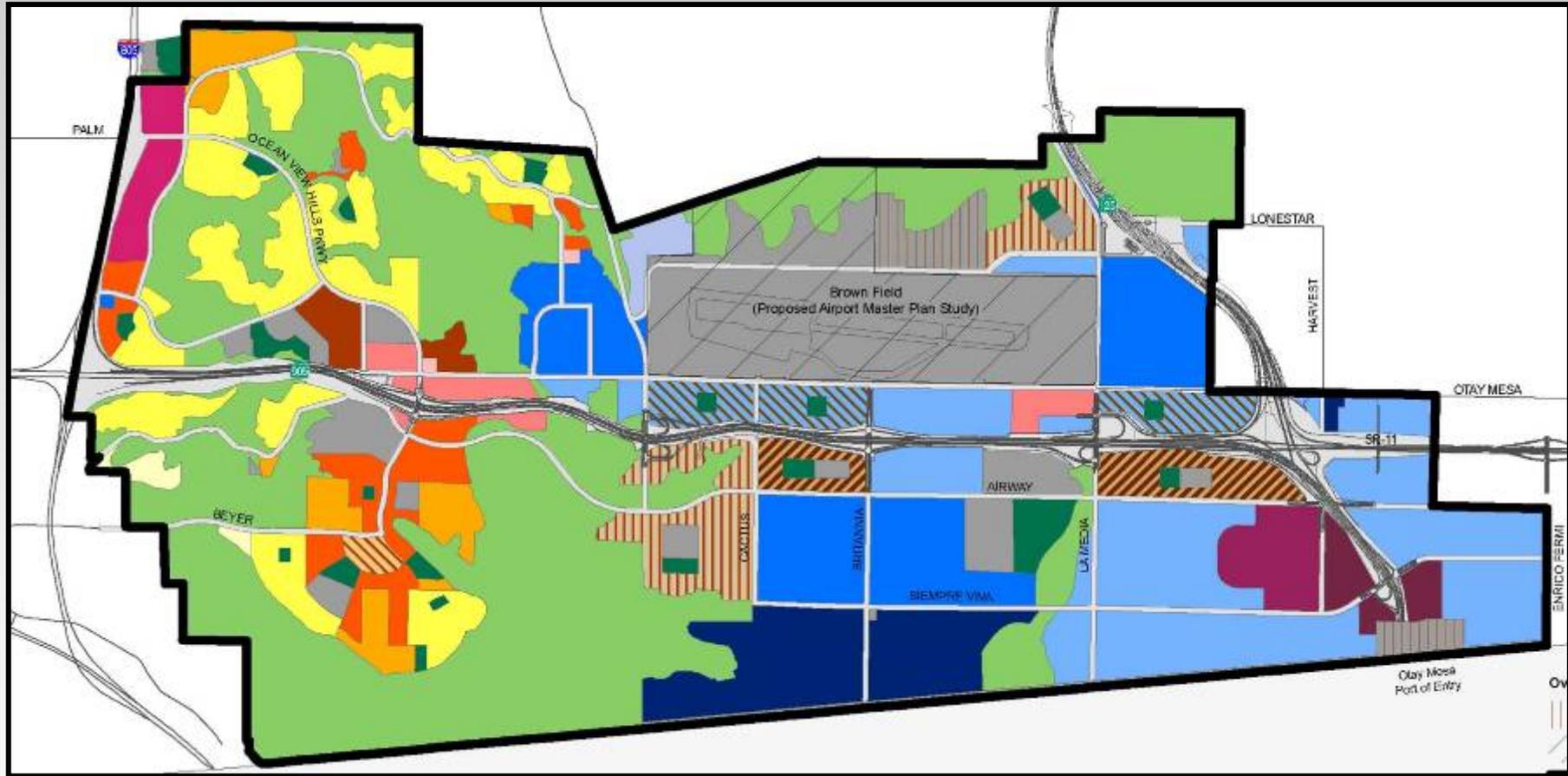
No Project Alternative



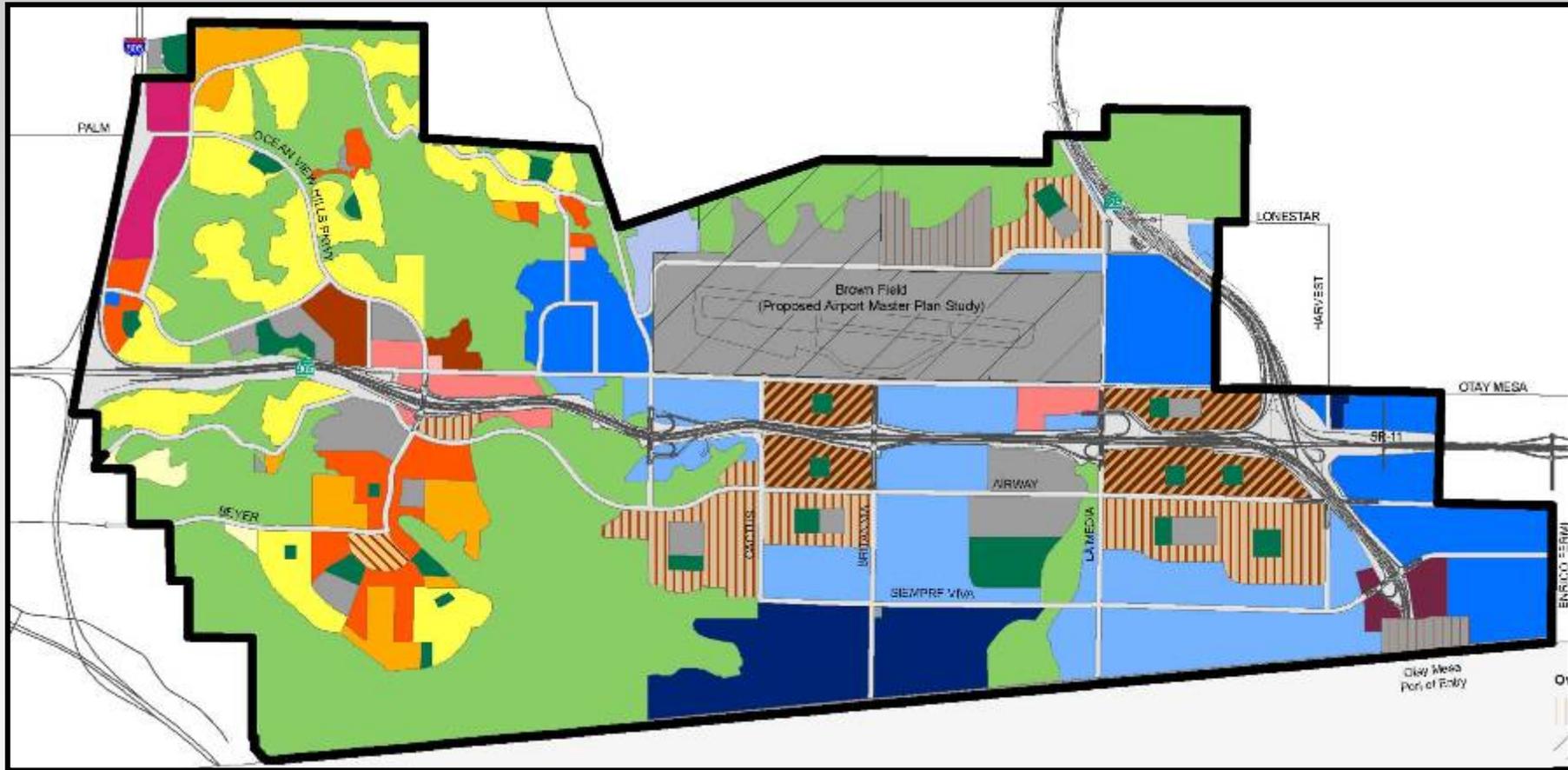
Scenario #3



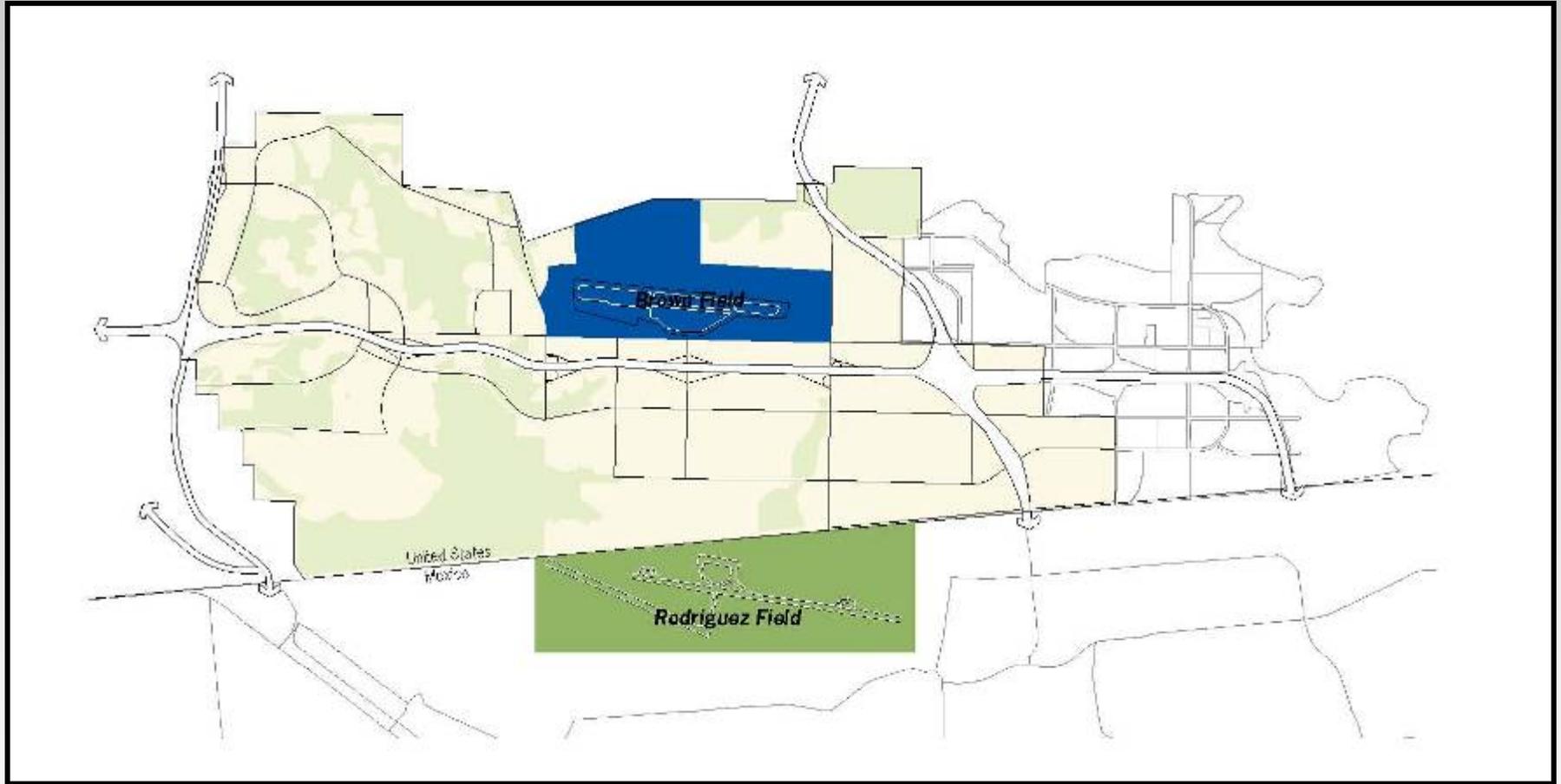
Scenario #1



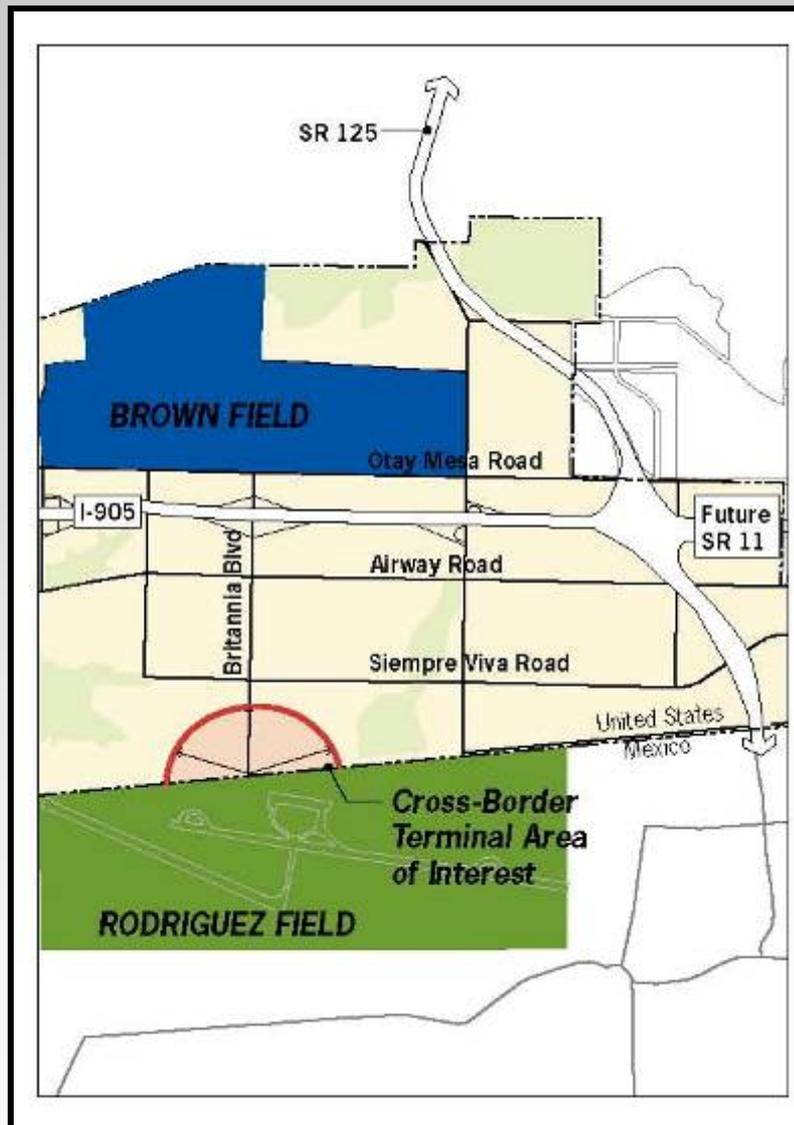
Scenario #2



Aviation—Brown Field



Aviation—Cross-border Terminal Concept



Linda Marabian, P.E.

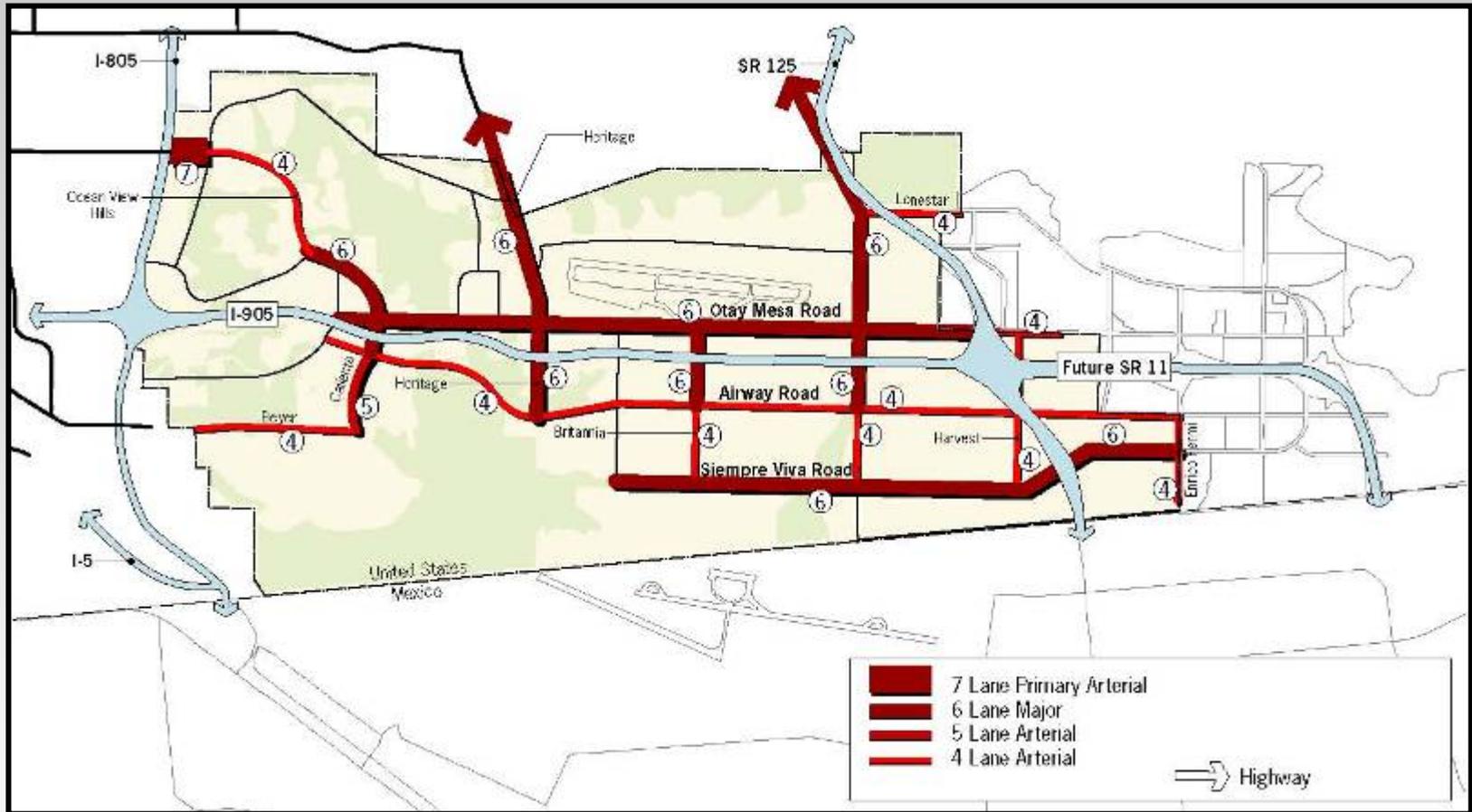
Senior Traffic Engineer, City of San Diego



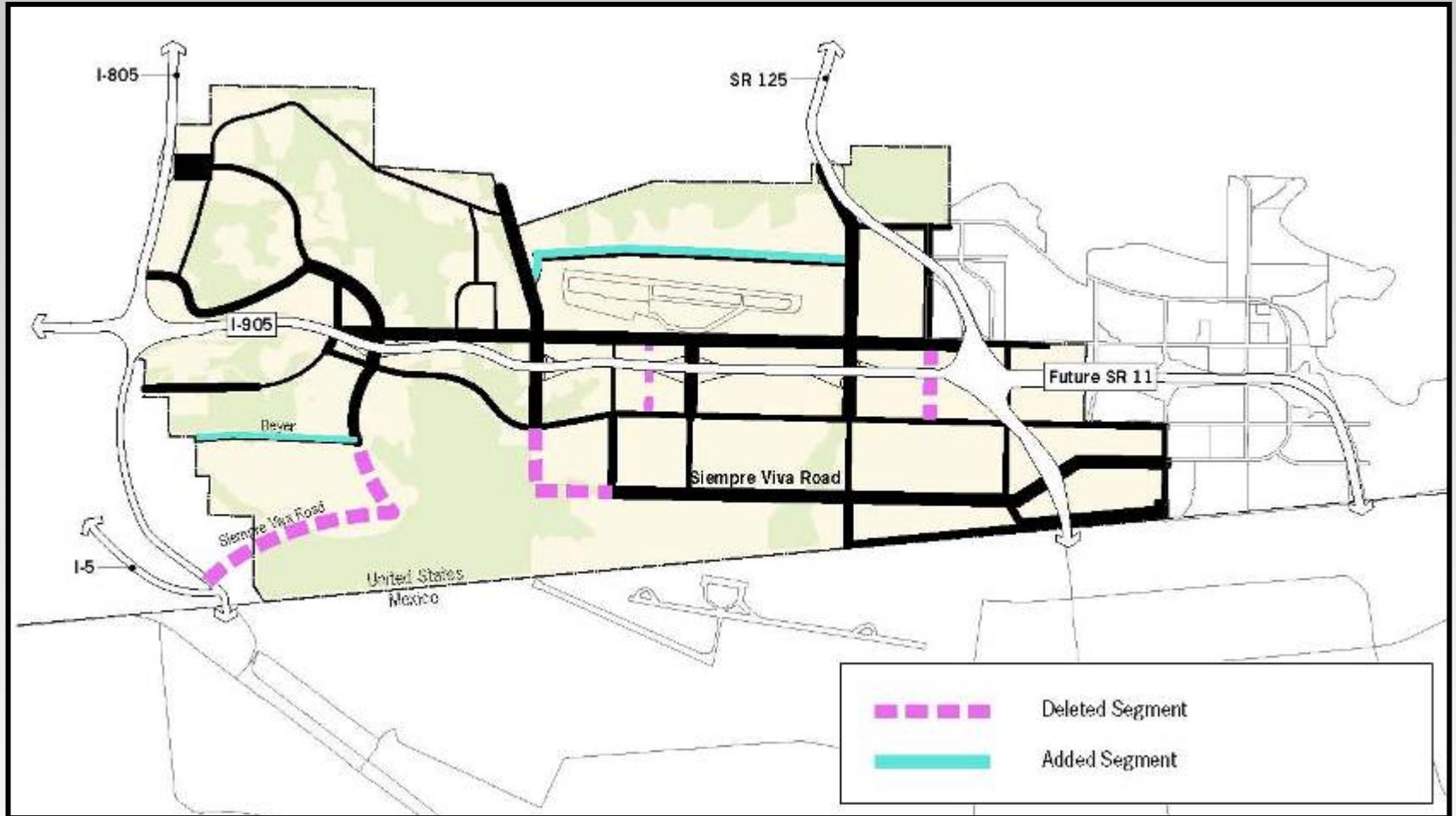
Roadway Network Today



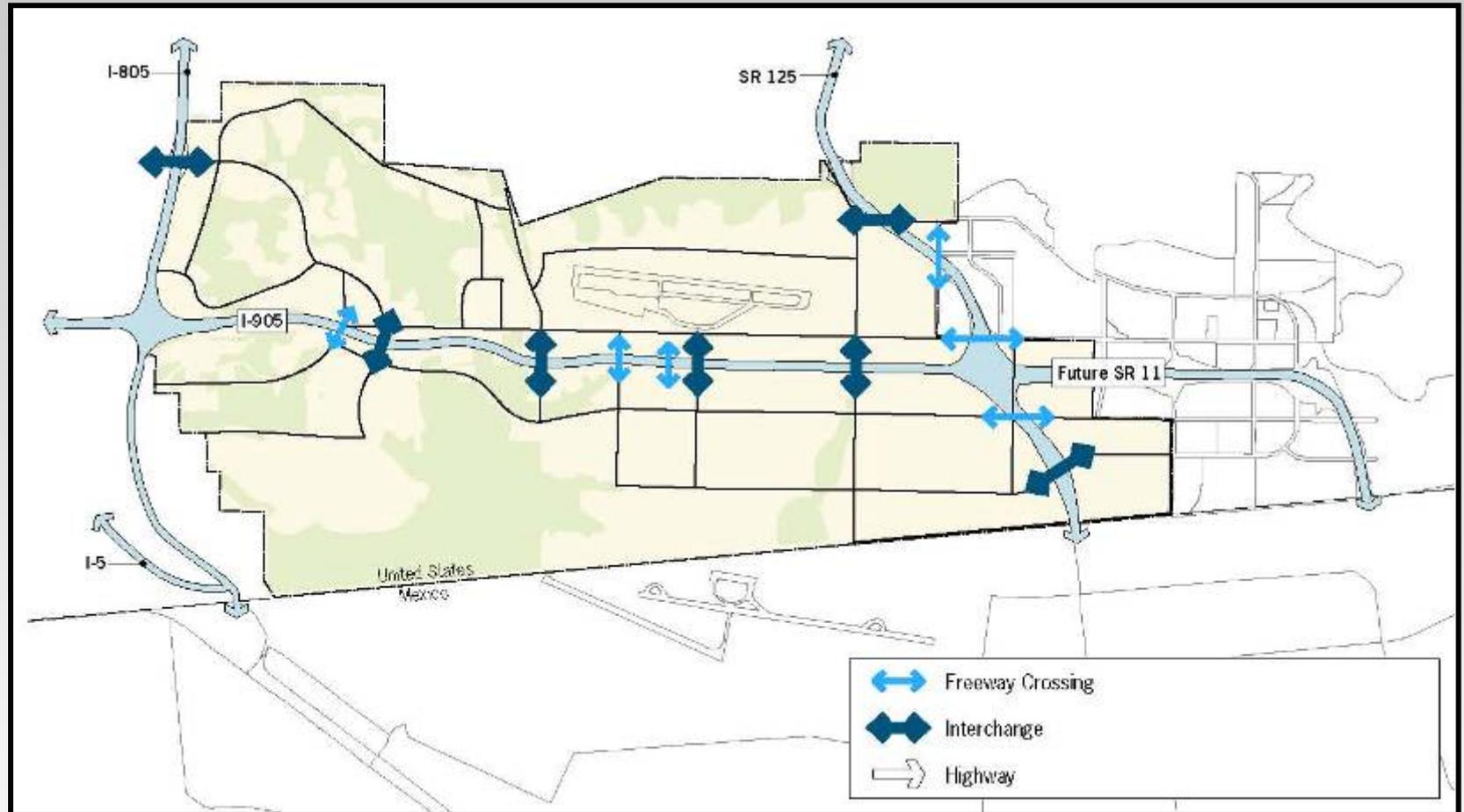
Proposed Roadway Network



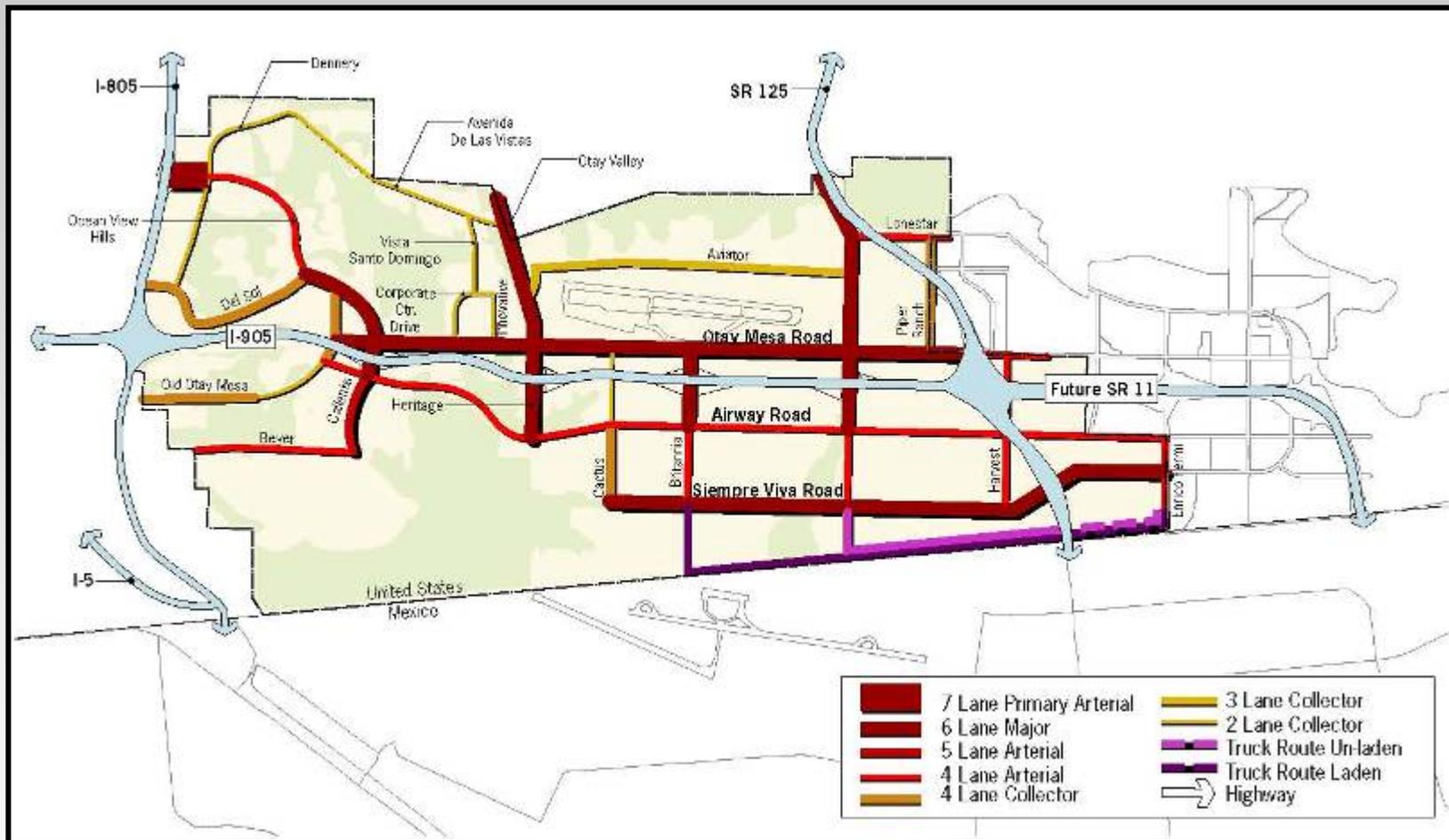
Potential Network Changes



Connectivity—Adopted Plan



Composite Proposed Roadway Network

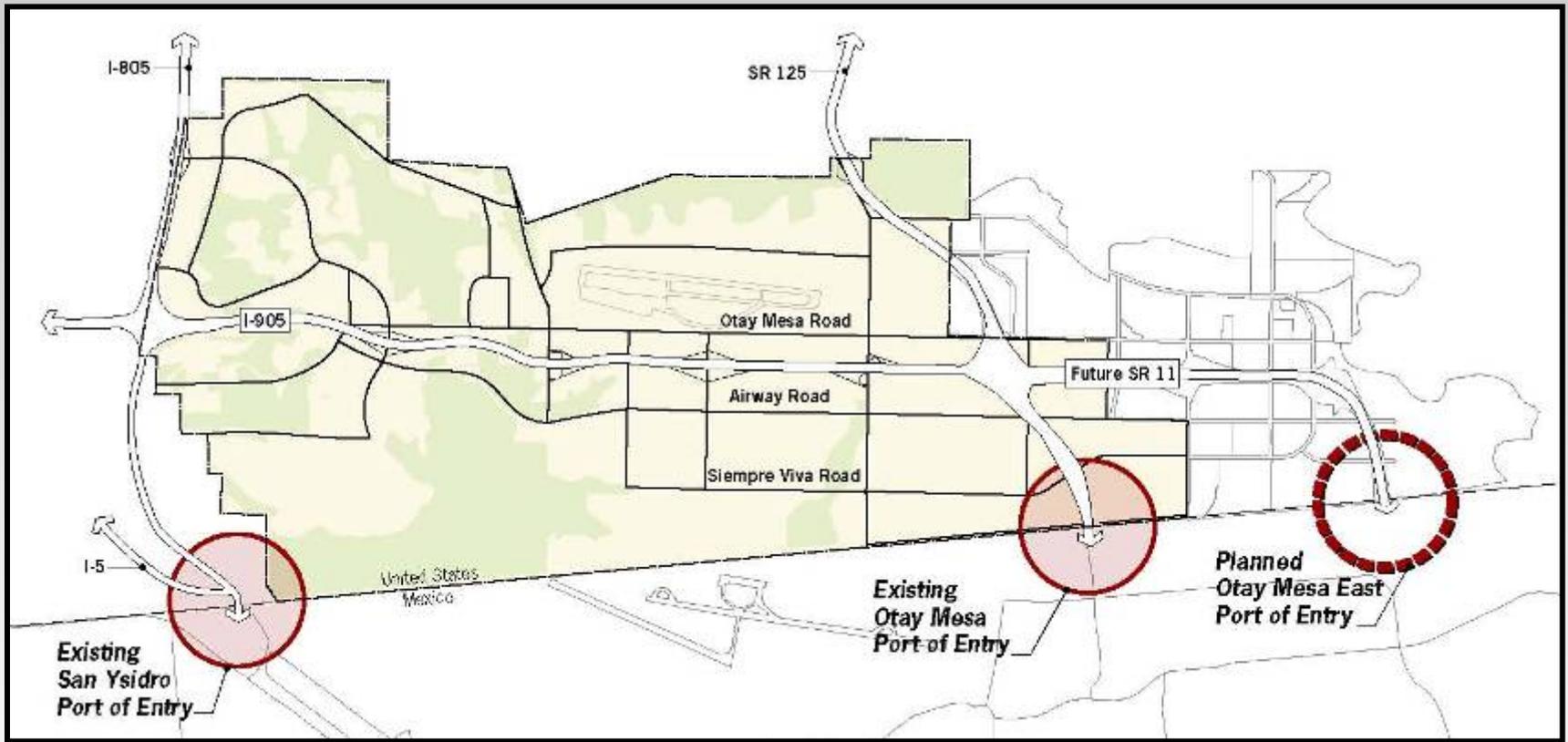


Manjeet Ranu, AICP

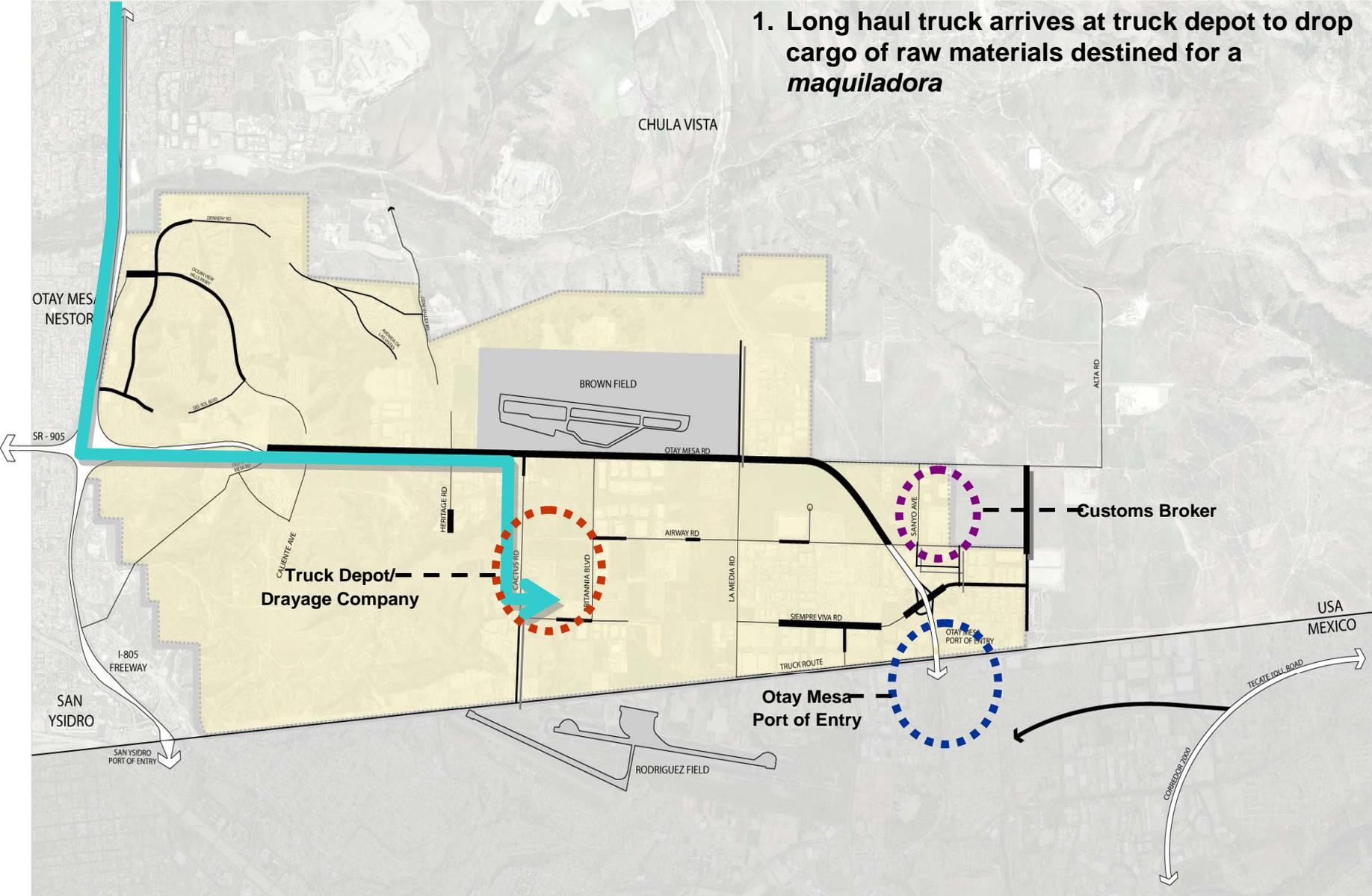
MW Steele Group, Inc.



Western San Diego County Ports of Entry



1. Long haul truck arrives at truck depot to drop cargo of raw materials destined for a *maquiladora*

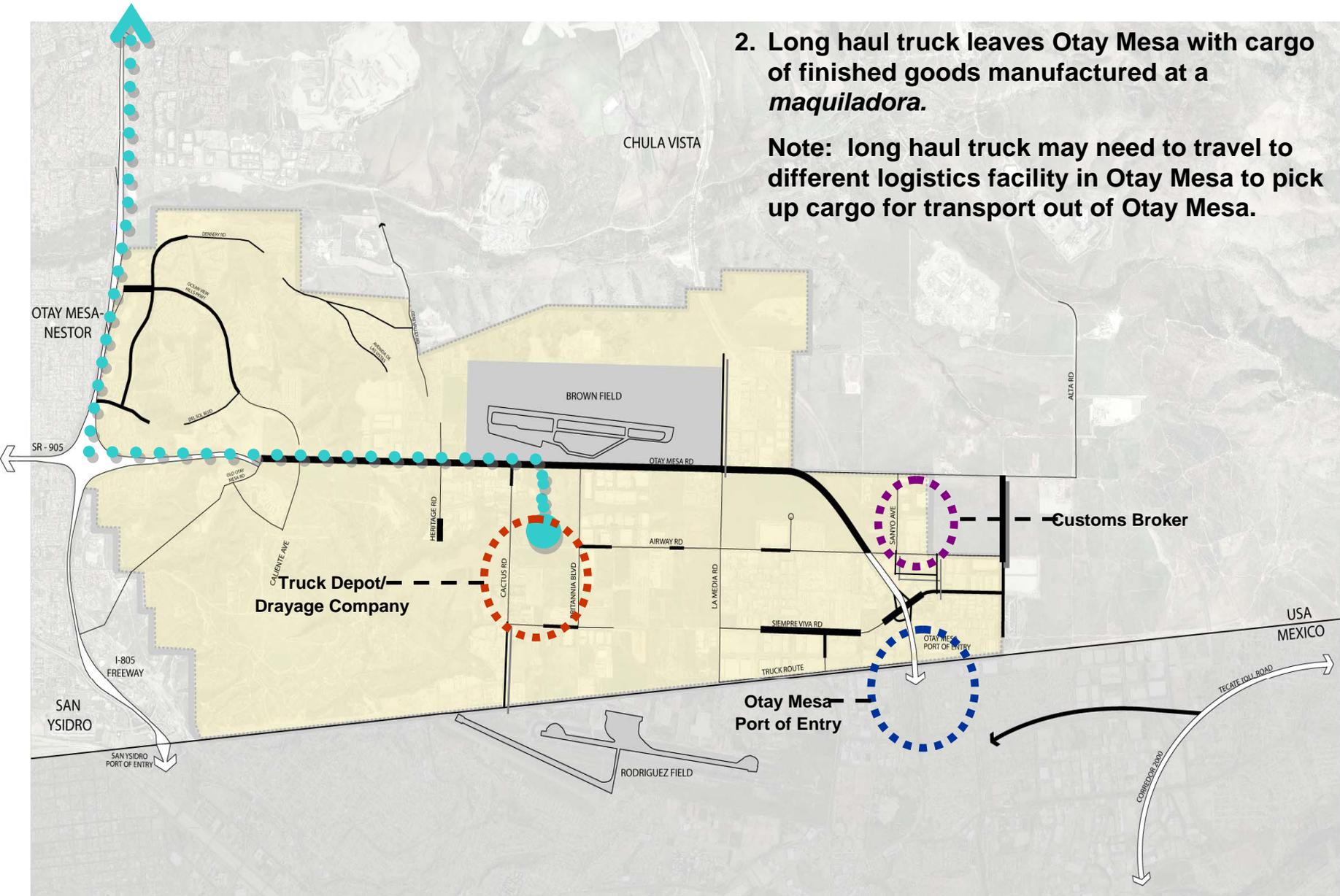


PHASE	TRUCK MOVEMENT	DESCRIPTION
A		Raw materials delivery by long haul truck
B		Drayage pick up and delivery to customs broker for Mexican customs papers
C		Drayage of cargo through Mexican customs to maquiladora or transfer point



2. Long haul truck leaves Otay Mesa with cargo of finished goods manufactured at a *maquiladora*.

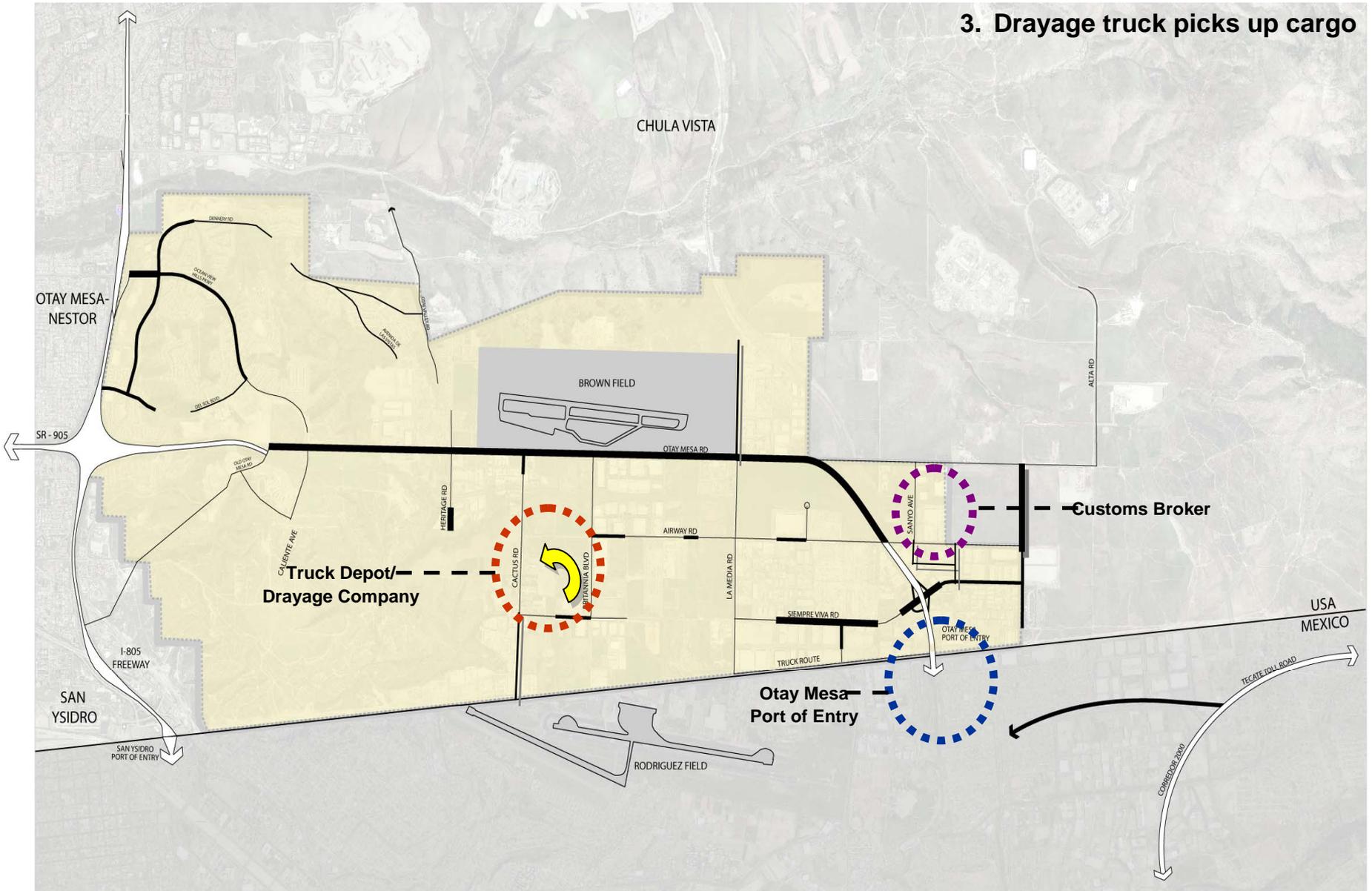
Note: long haul truck may need to travel to different logistics facility in Otay Mesa to pick up cargo for transport out of Otay Mesa.

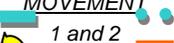
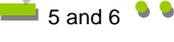


PHASE	TRUCK MOVEMENT	DESCRIPTION
A		Raw materials delivery by long haul truck
B		Drayage pick up and delivery to customs broker for Mexican customs papers
C		Drayage of cargo through Mexican customs to maquiladora or transfer point



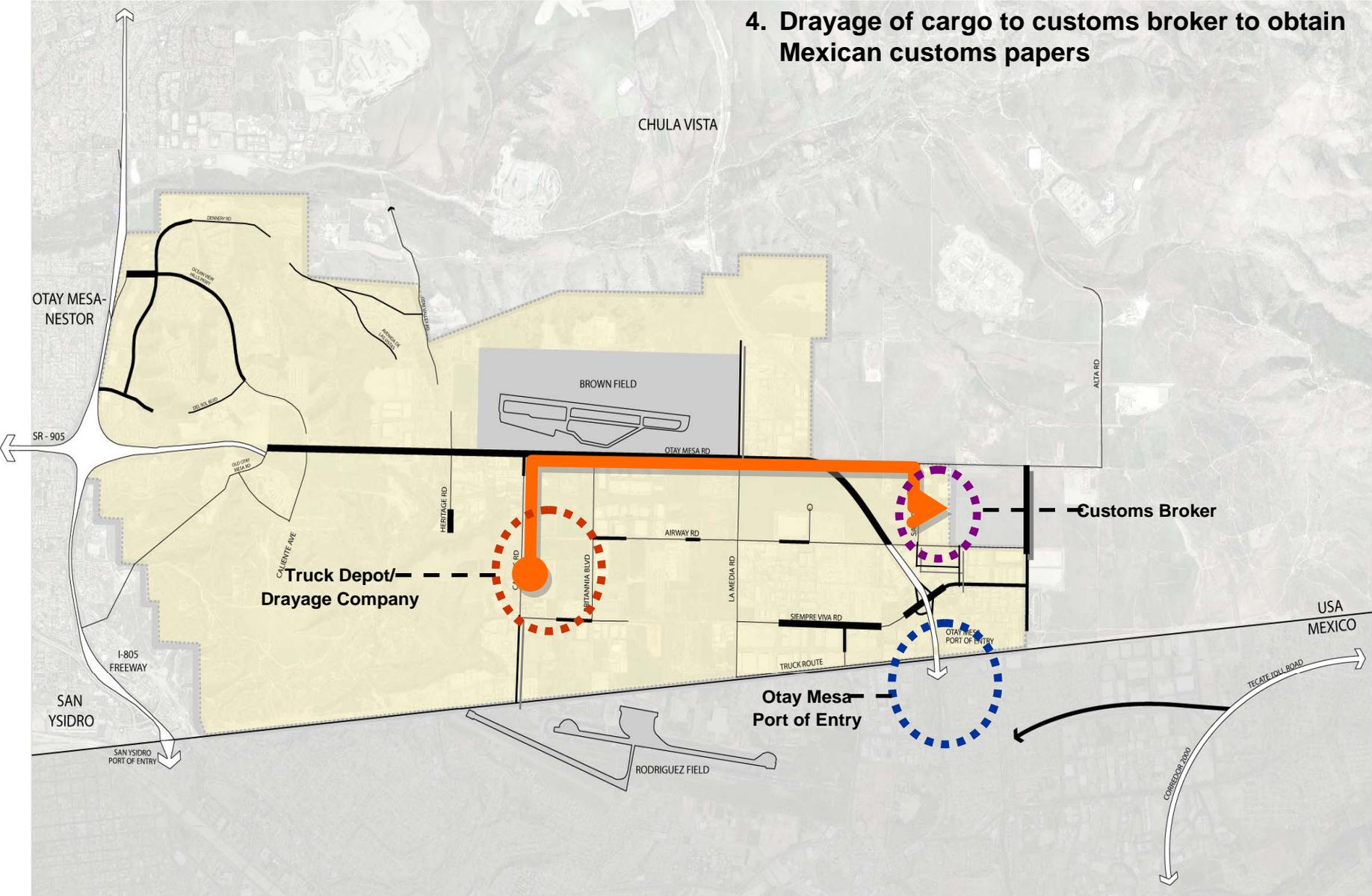
3. Drayage truck picks up cargo



PHASE	TRUCK MOVEMENT	DESCRIPTION
A		Raw materials delivery by long haul truck
B		Drayage pick up and delivery to customs broker for Mexican customs papers
C		Drayage of cargo through Mexican customs to maquiladora or transfer point



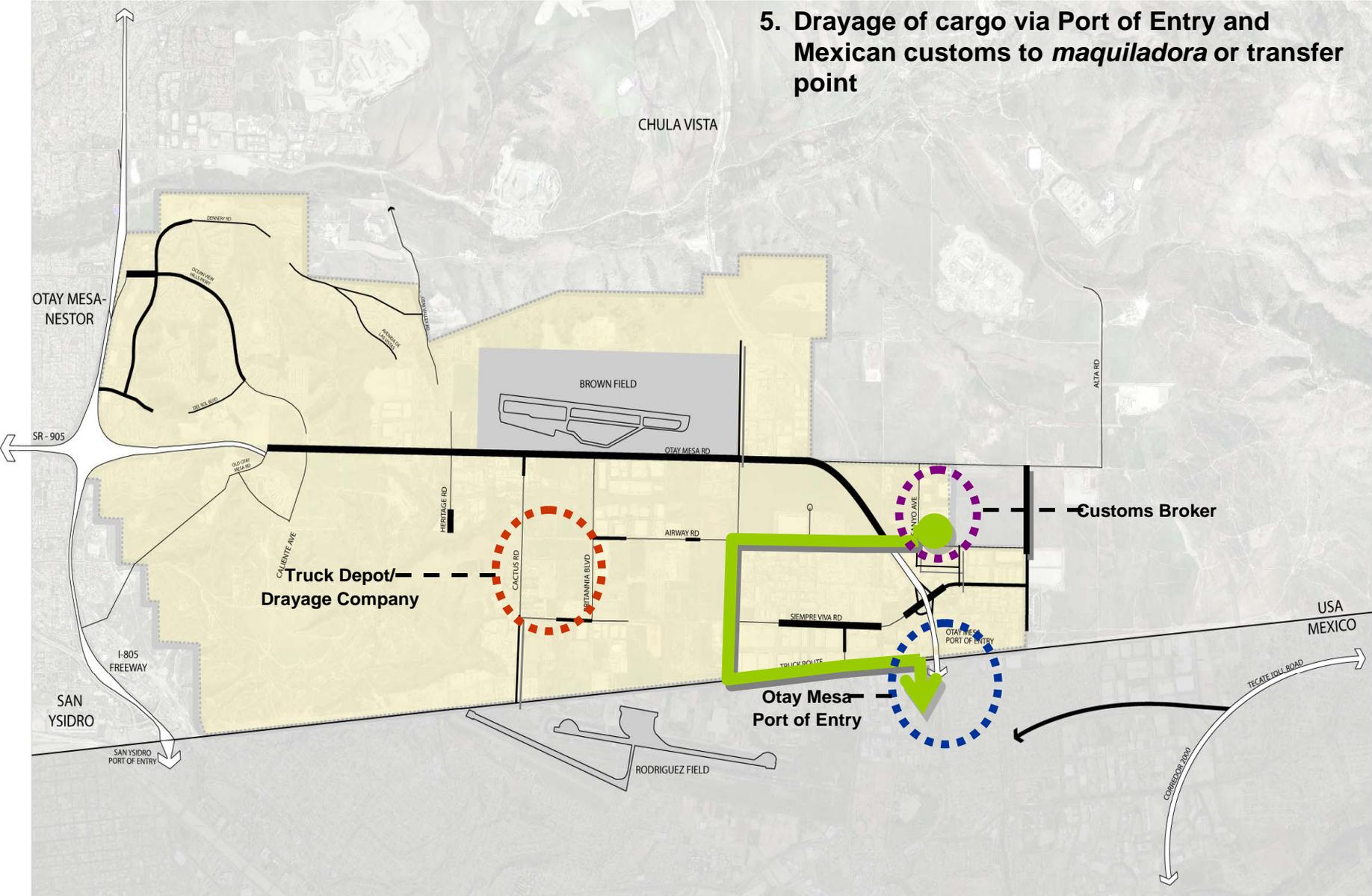
4. Drayage of cargo to customs broker to obtain Mexican customs papers



PHASE	TRUCK MOVEMENT	DESCRIPTION
A		Raw materials delivery by long haul truck
B		Drayage pick up and delivery to customs broker for Mexican customs papers
C		Drayage of cargo through Mexican customs to maquiladora or transfer point



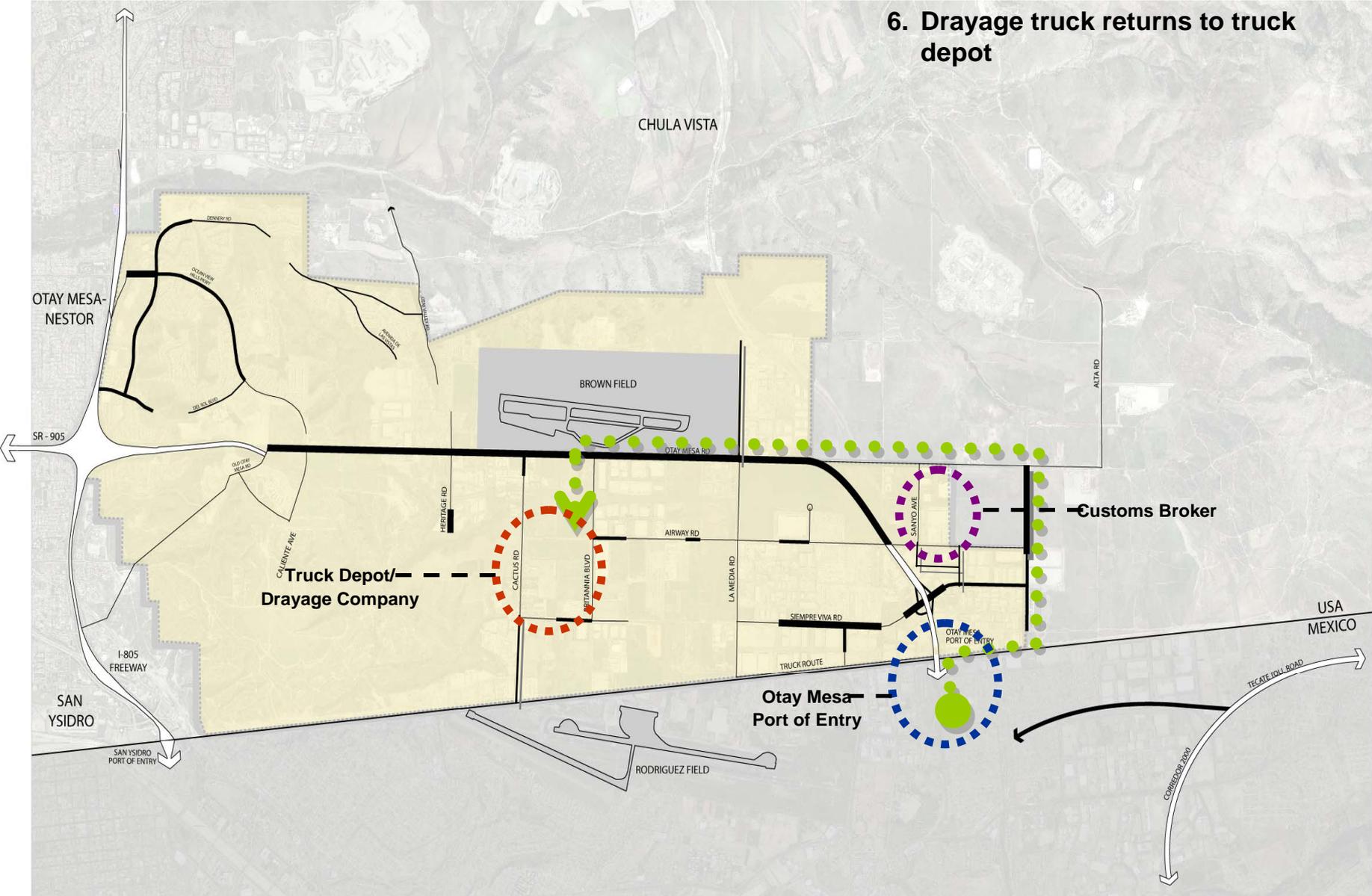
5. Drayage of cargo via Port of Entry and Mexican customs to *maquiladora* or transfer point



PHASE	TRUCK MOVEMENT	DESCRIPTION
A		Raw materials delivery by long haul truck
B		Drayage pick up and delivery to customs broker for Mexican customs papers
C		Drayage of cargo through Mexican customs to maquiladora or transfer point



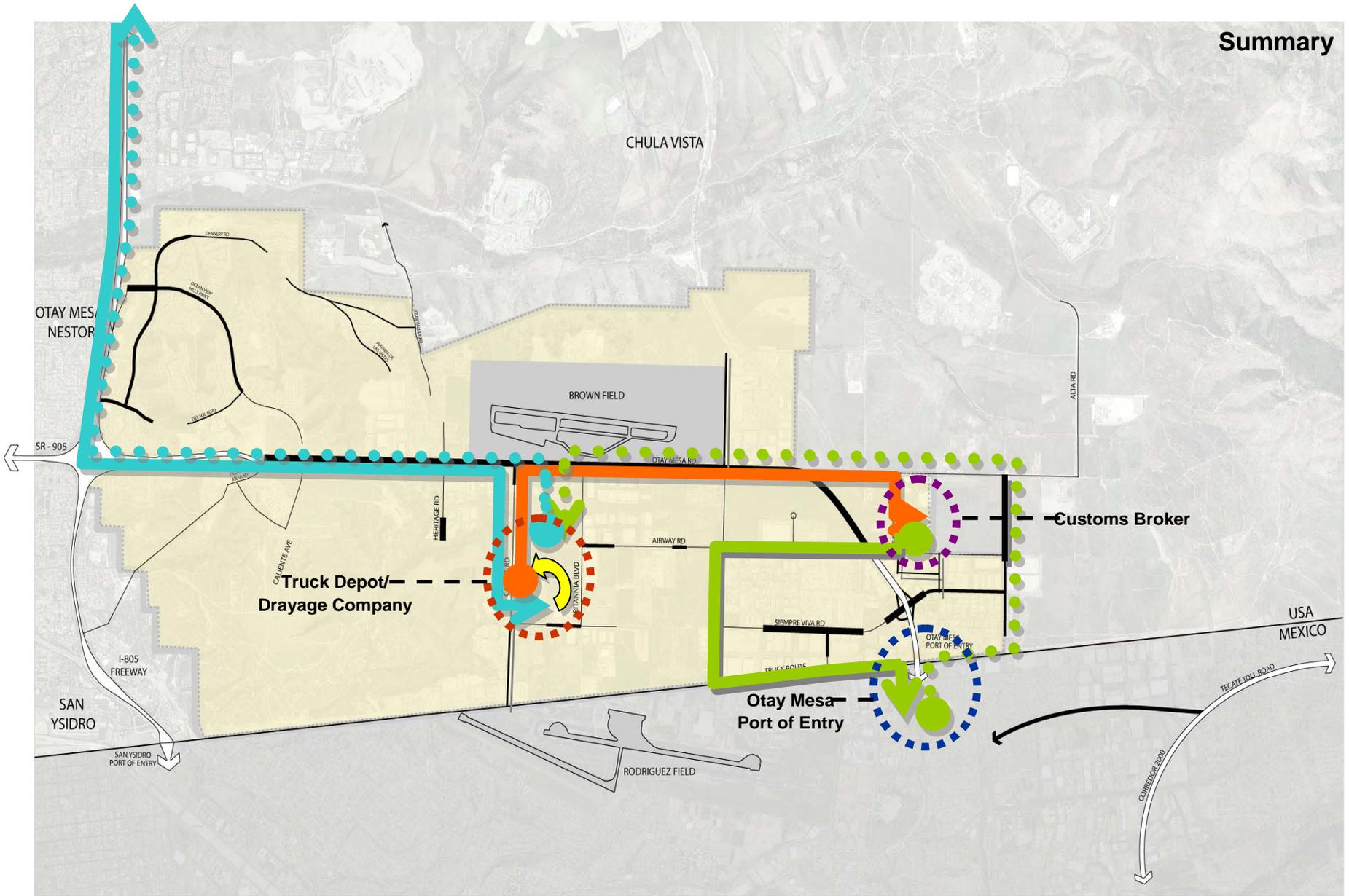
6. Drayage truck returns to truck depot



PHASE	TRUCK MOVEMENT	DESCRIPTION
A		Raw materials delivery by long haul truck
B		Drayage pick up and delivery to customs broker for Mexican customs papers
C		Drayage of cargo through Mexican customs to maquiladora or transfer point



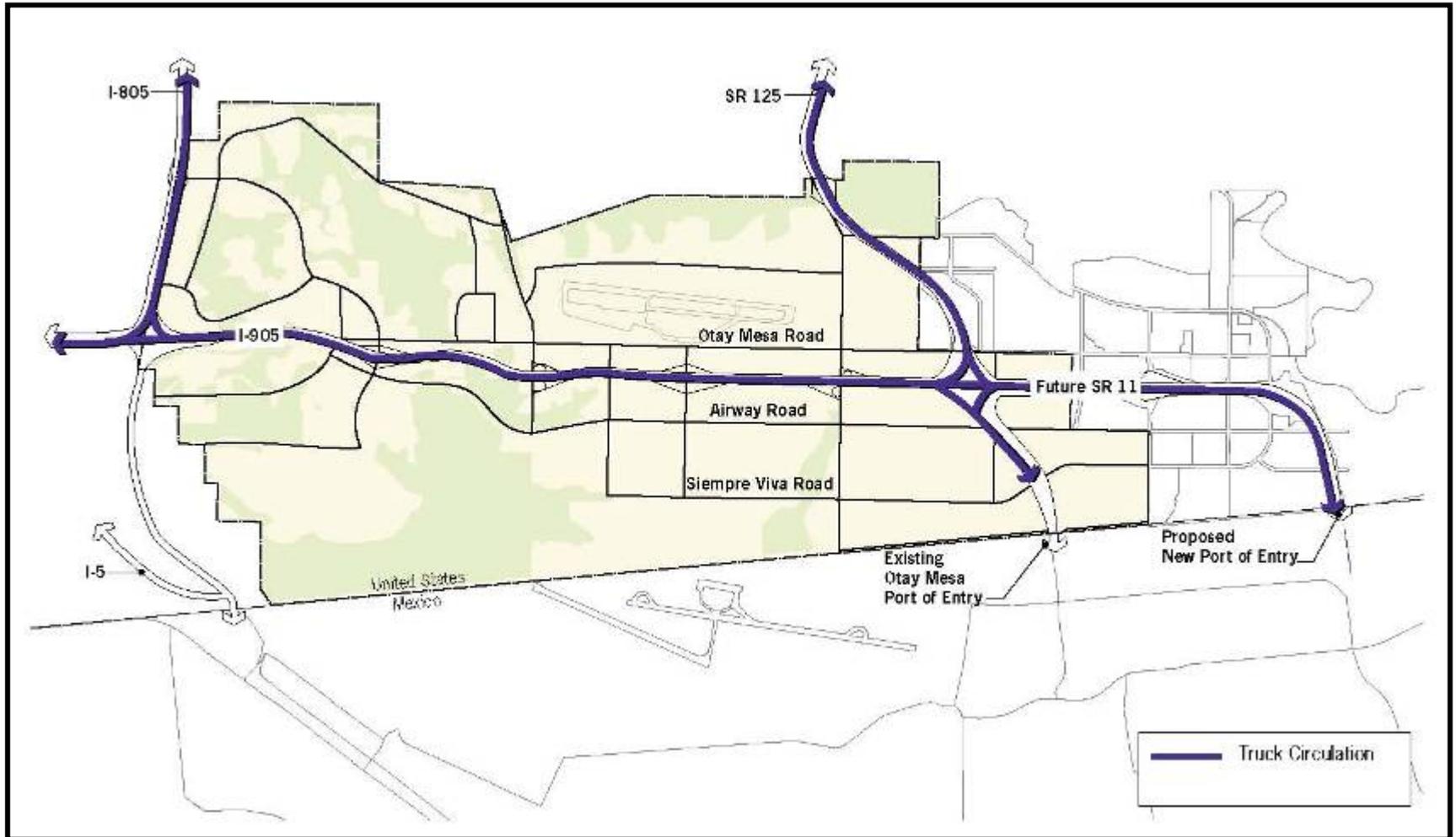
Summary



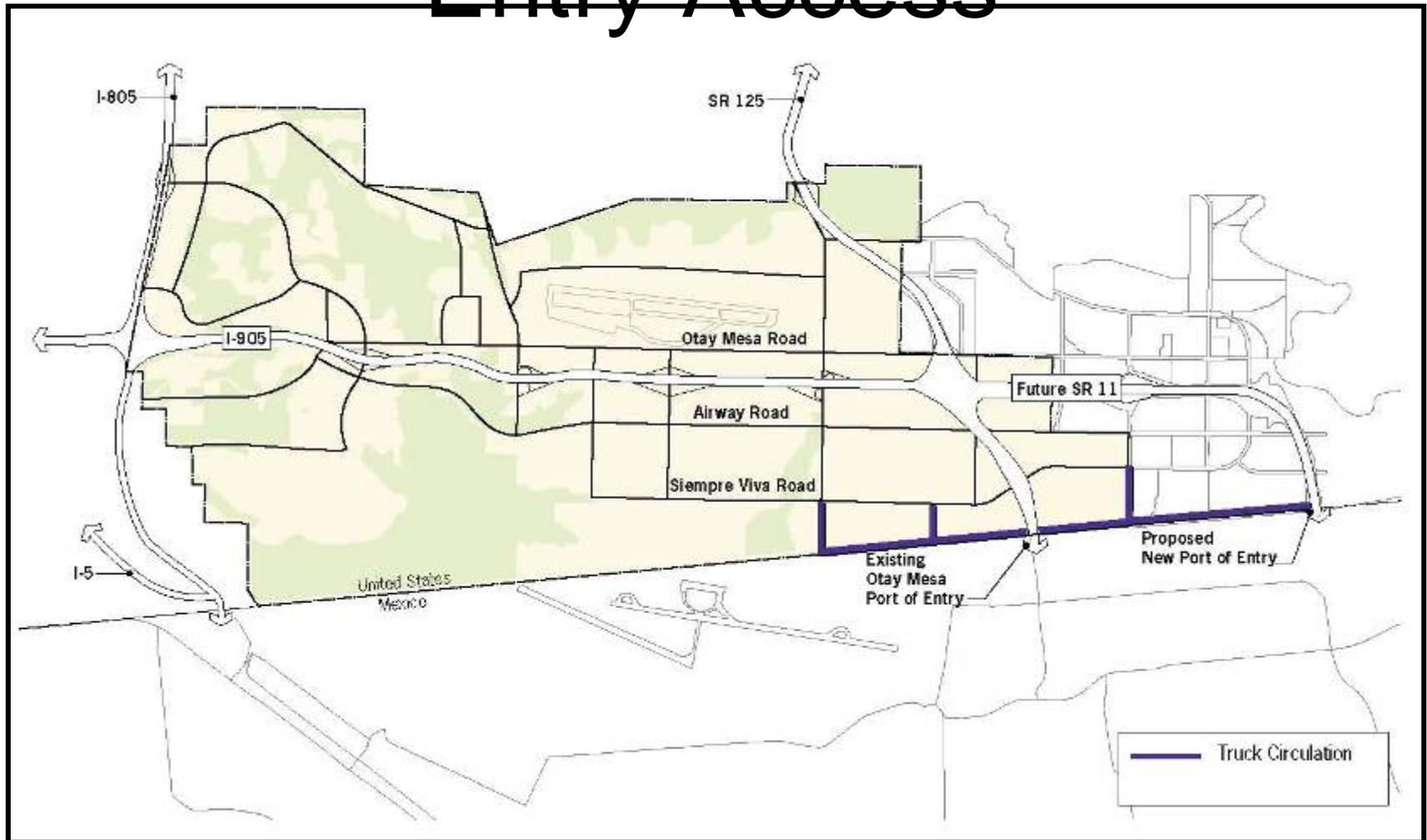
PHASE	TRUCK MOVEMENT	DESCRIPTION
E		Raw materials delivery by long haul truck
A		1 and 2
B		Drayage pick up and delivery to customs broker for Mexican customs papers
C		Drayage of cargo through Mexican customs to maquiladora or transfer point



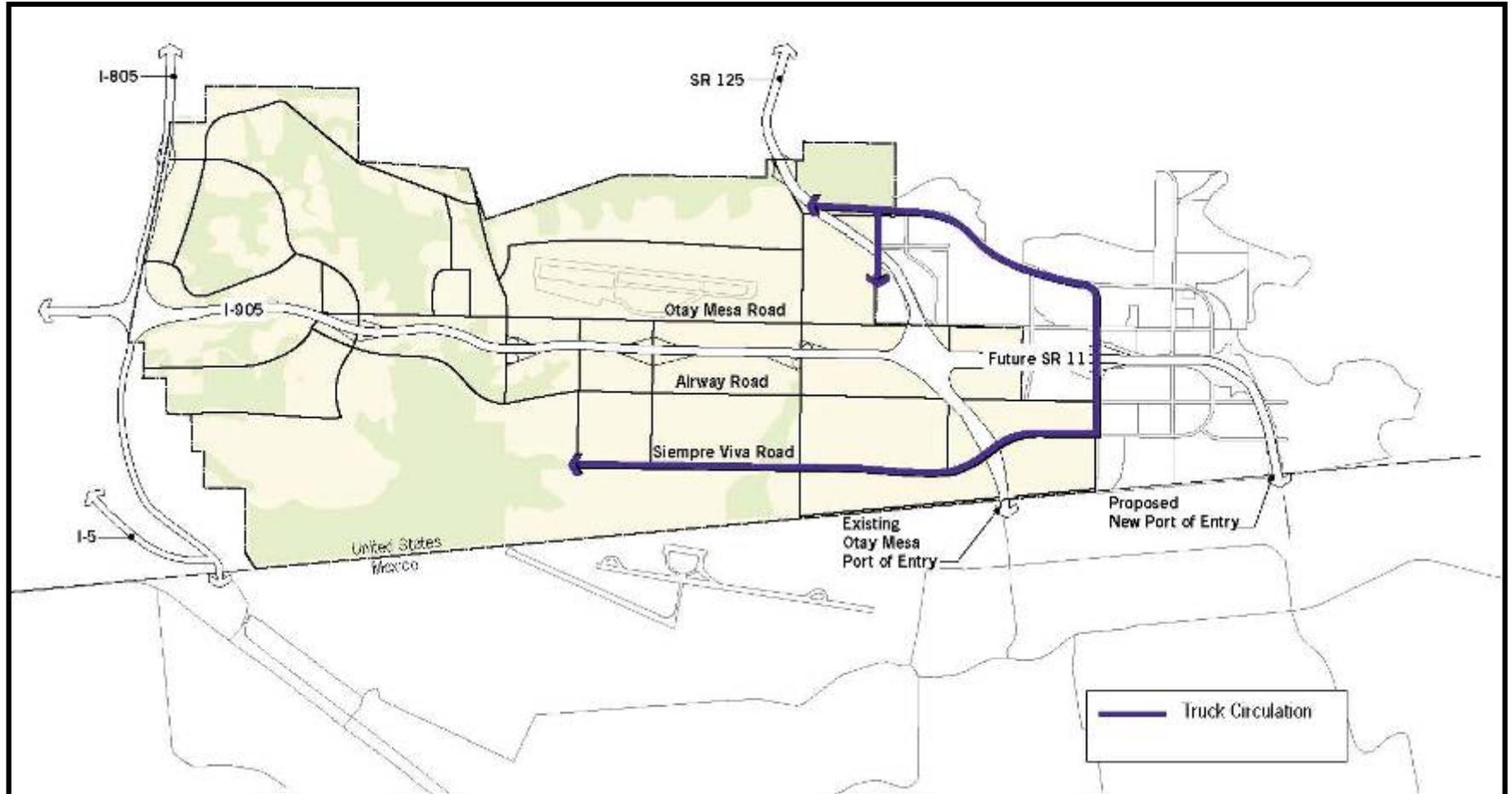
Truck Circulation Study: Freeways & Expressways



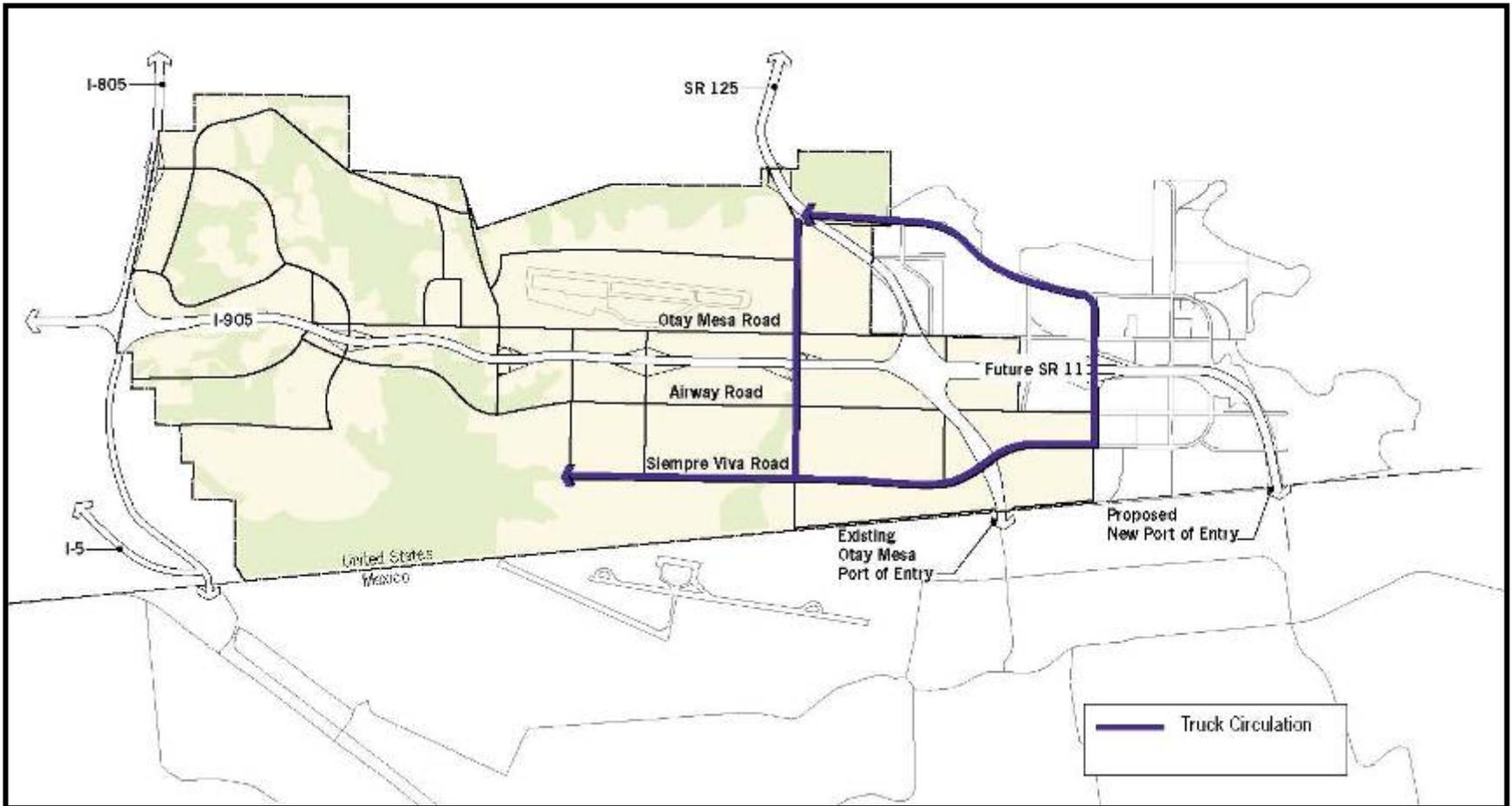
Truck Circulation Study: Port of Entry Access



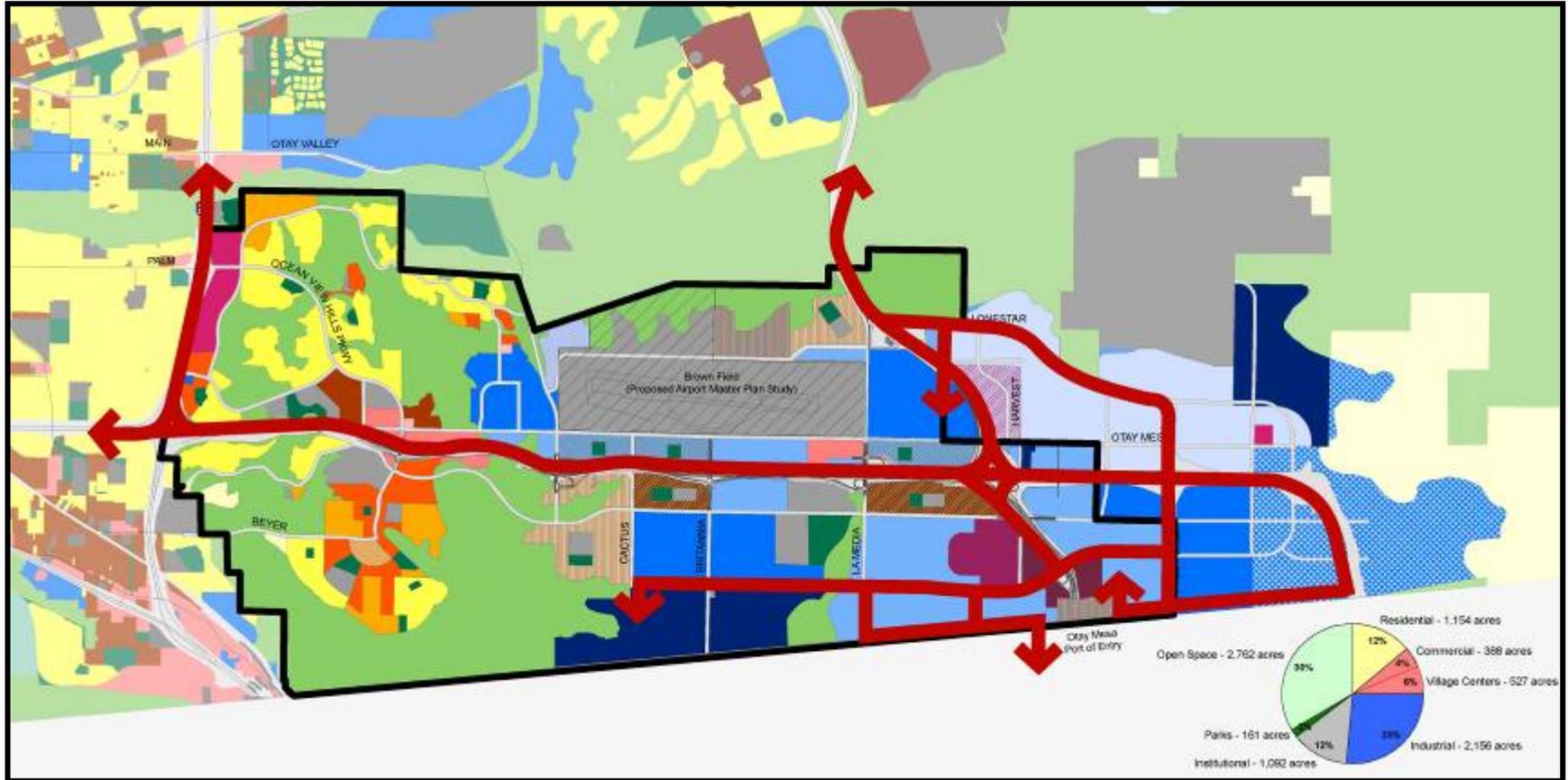
Truck Circulation: Perimeter Access System Scenarios #1 & #2



Truck Circulation: Perimeter Access System Scenario #3



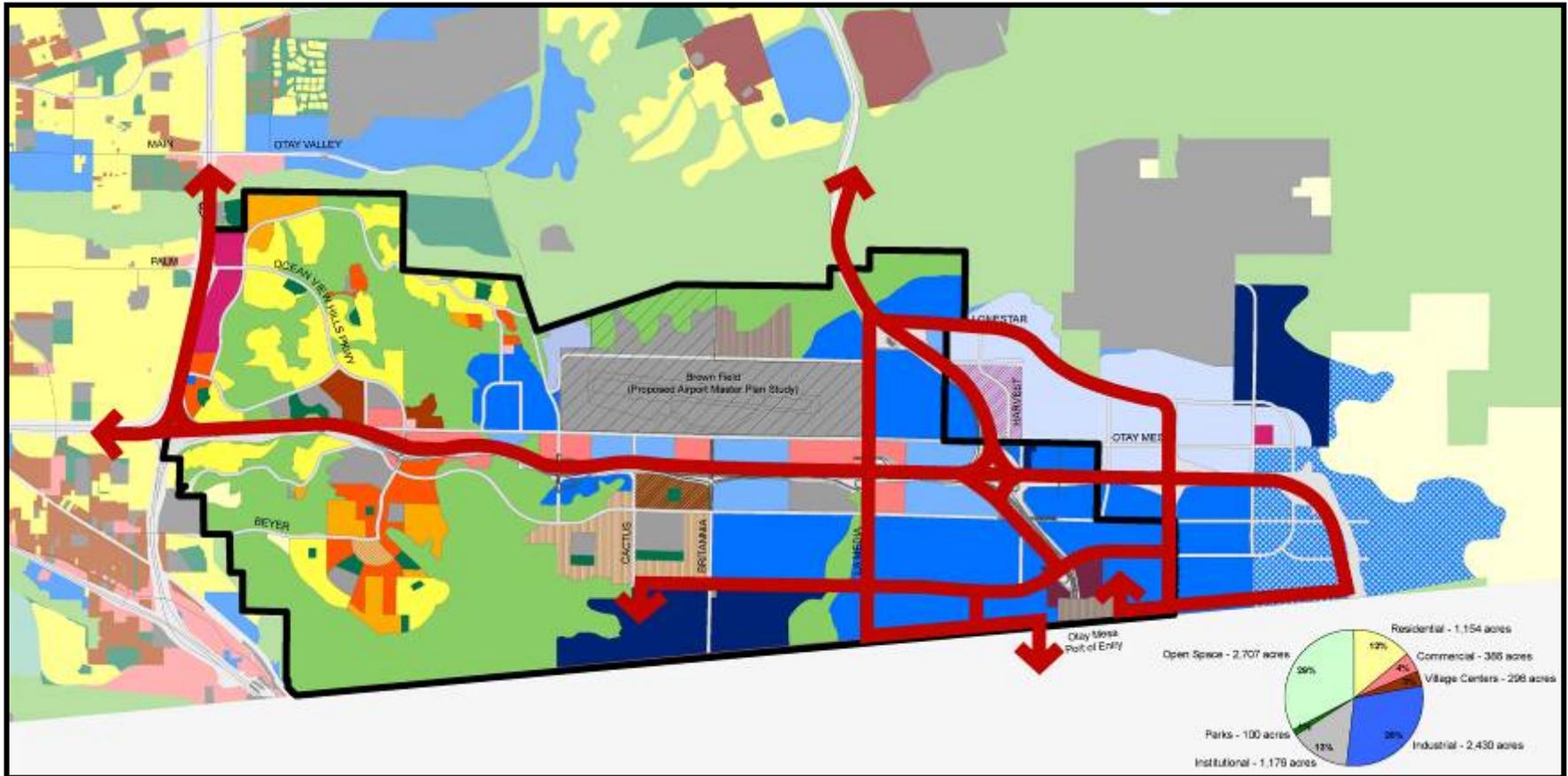
Truck Circulation Study Option: Scenario #1



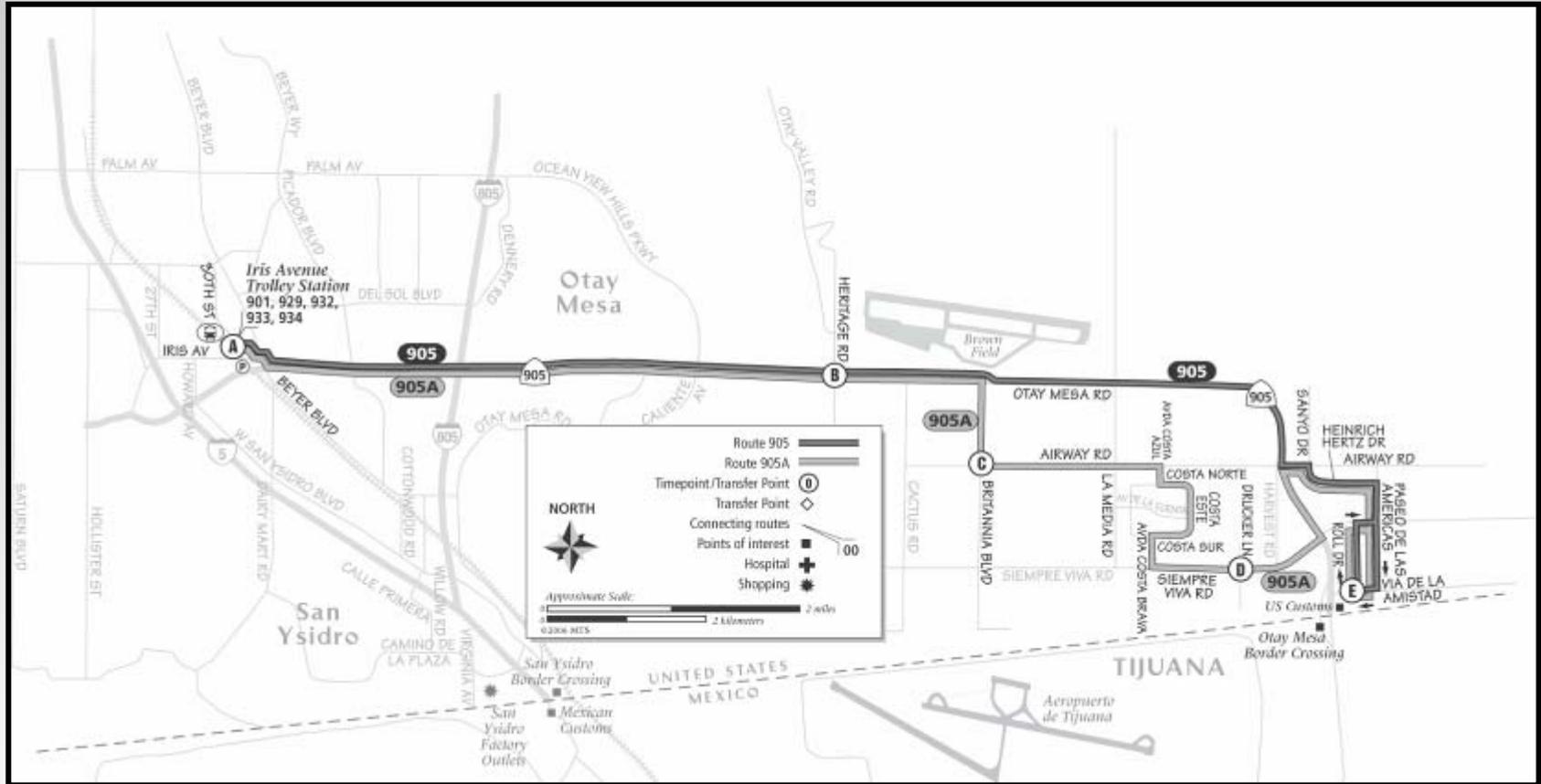
Truck Circulation Study Option: Scenario #2



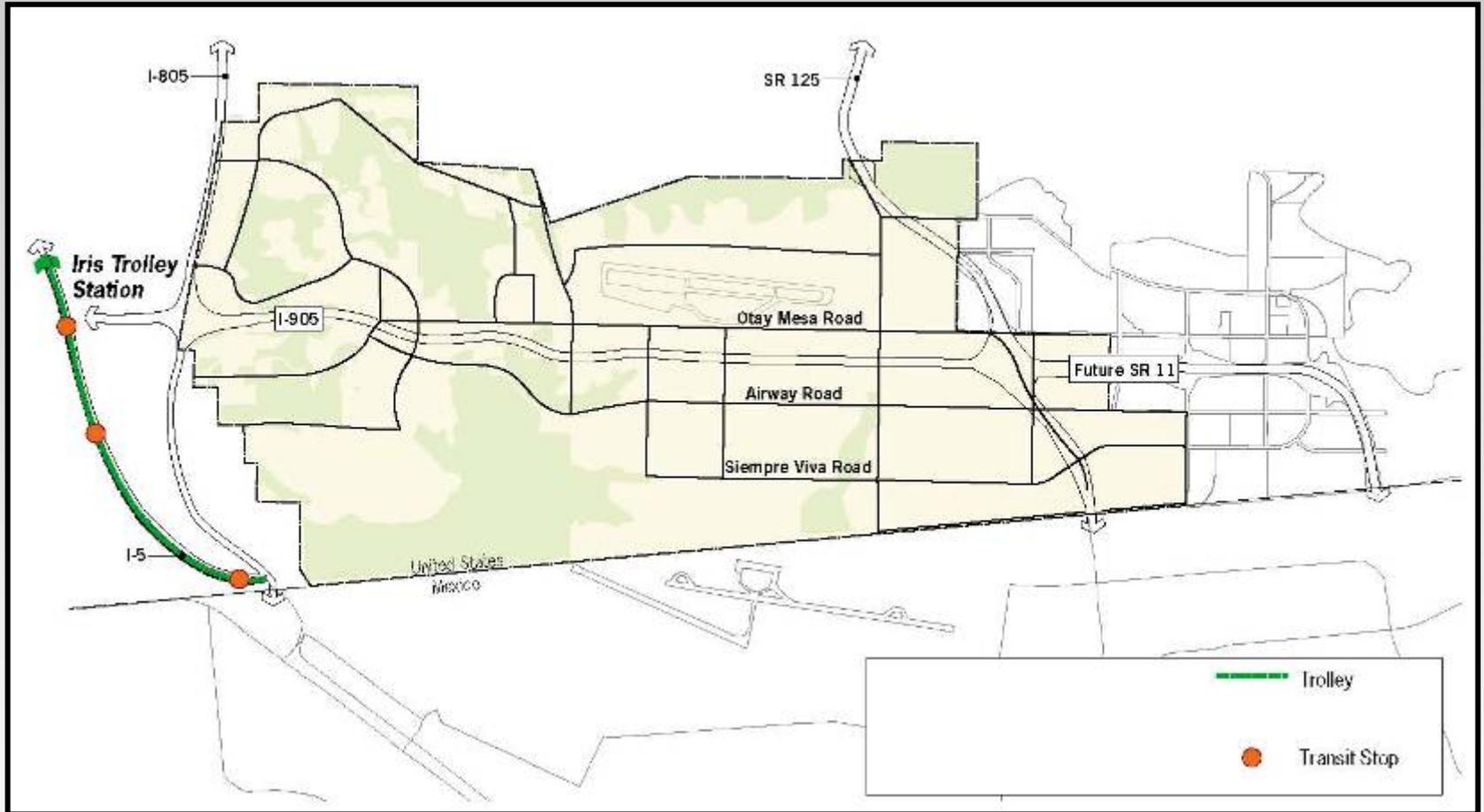
Truck Circulation Study Option: Scenario #3



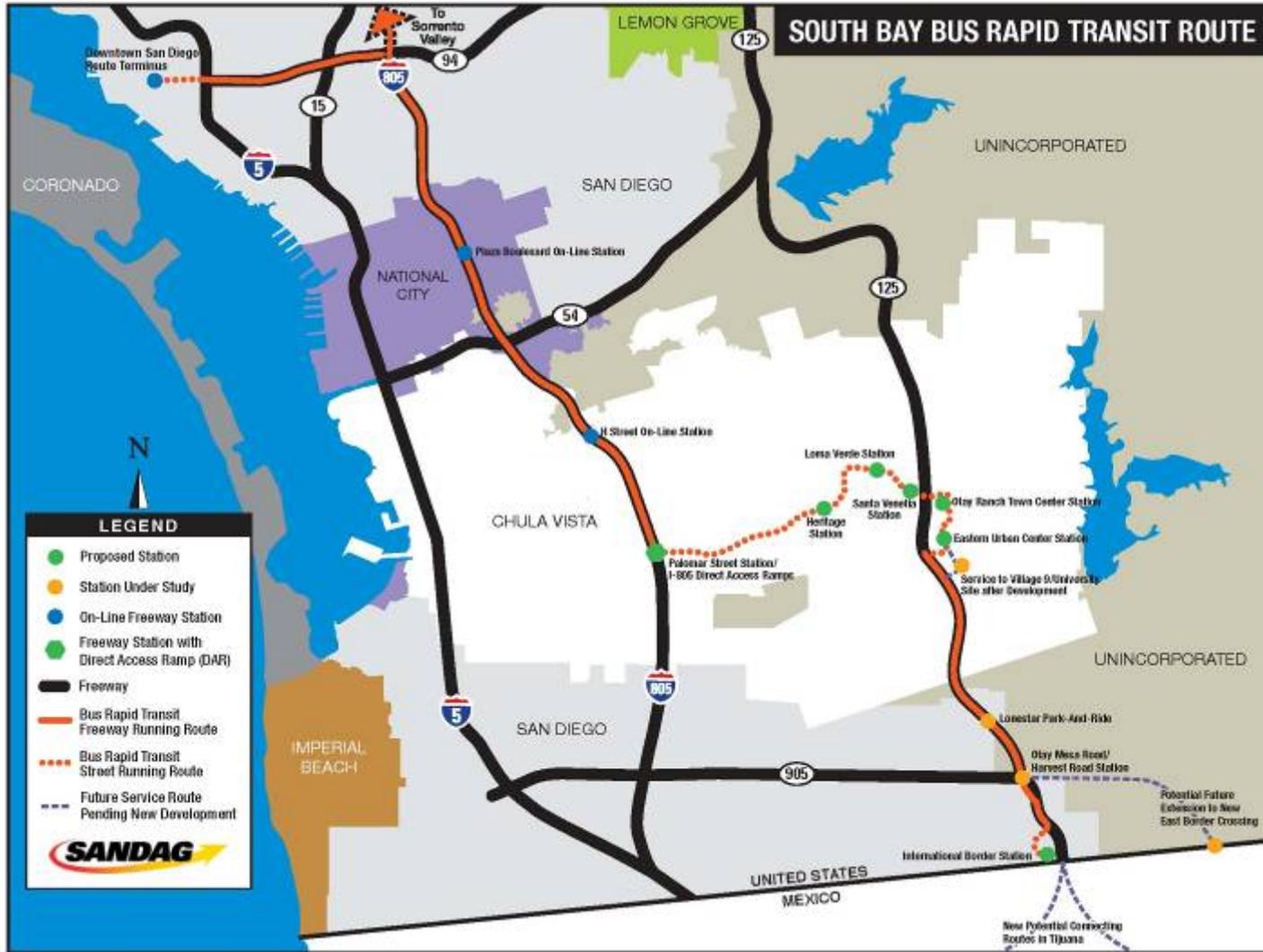
Bus Route 905



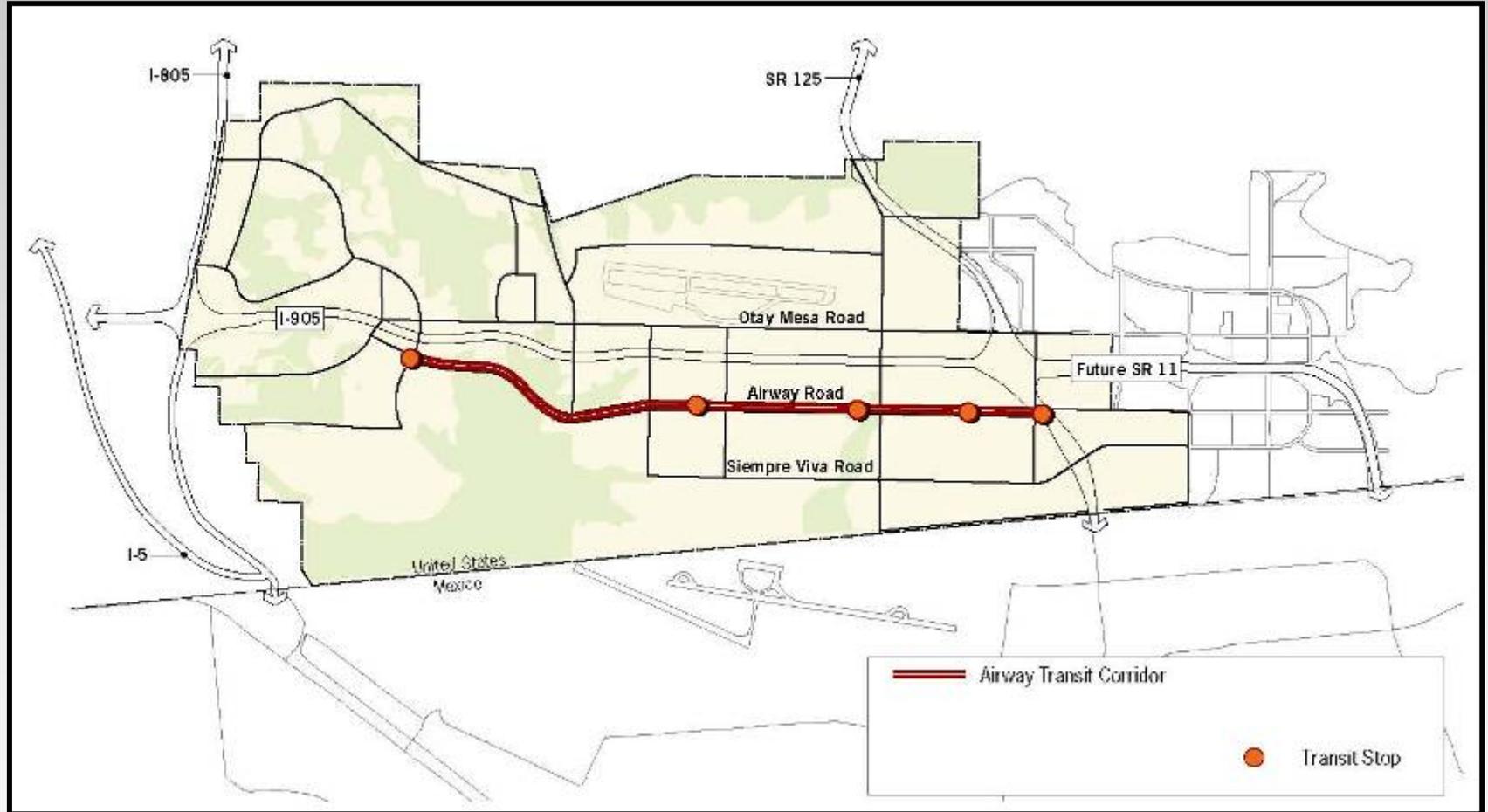
San Diego Trolley



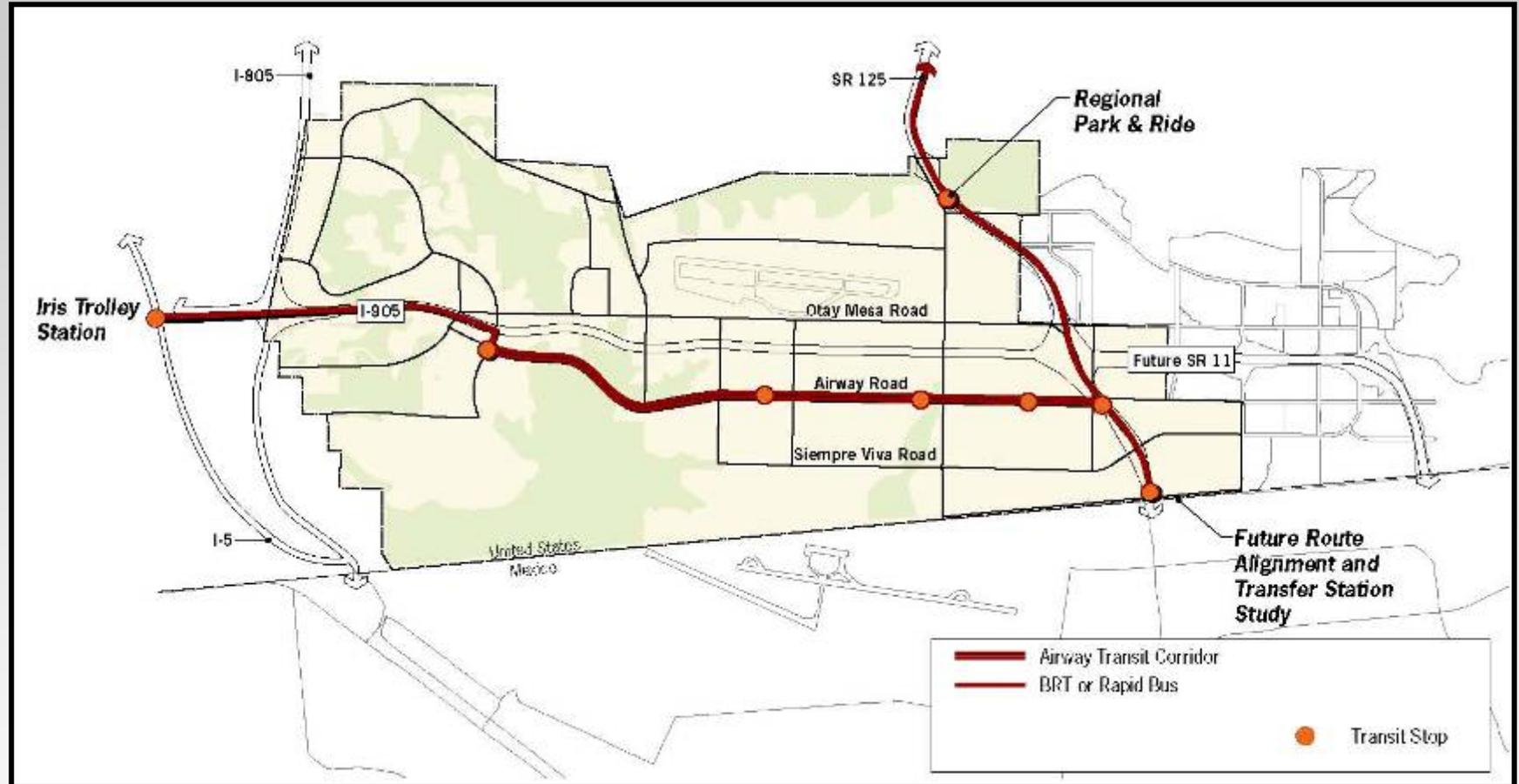
South Bay Bus Rapid Transit



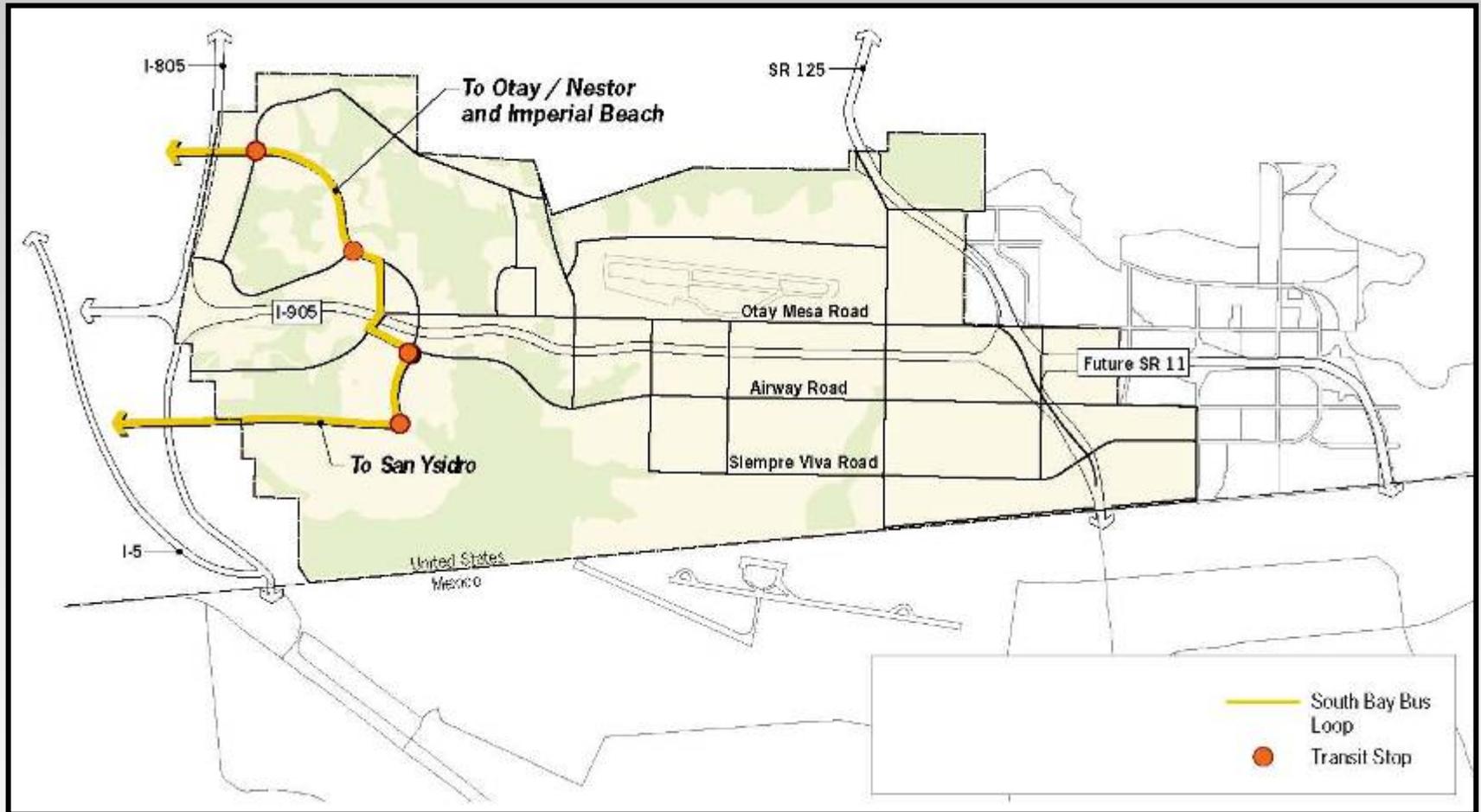
Proposed Airway Road Rapid Bus Transit Corridor



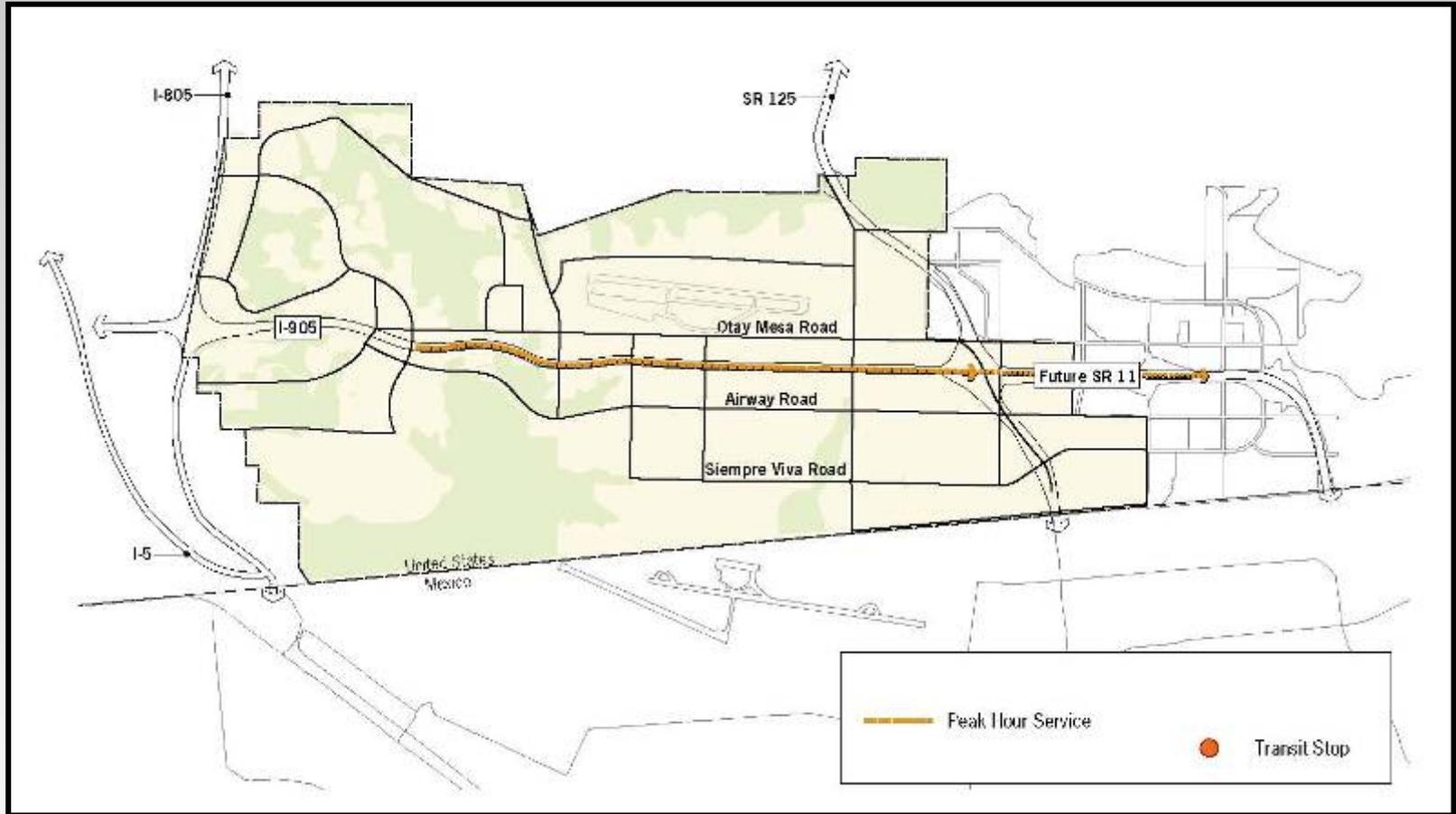
Bus Rapid Transit & Proposed Rapid Bus



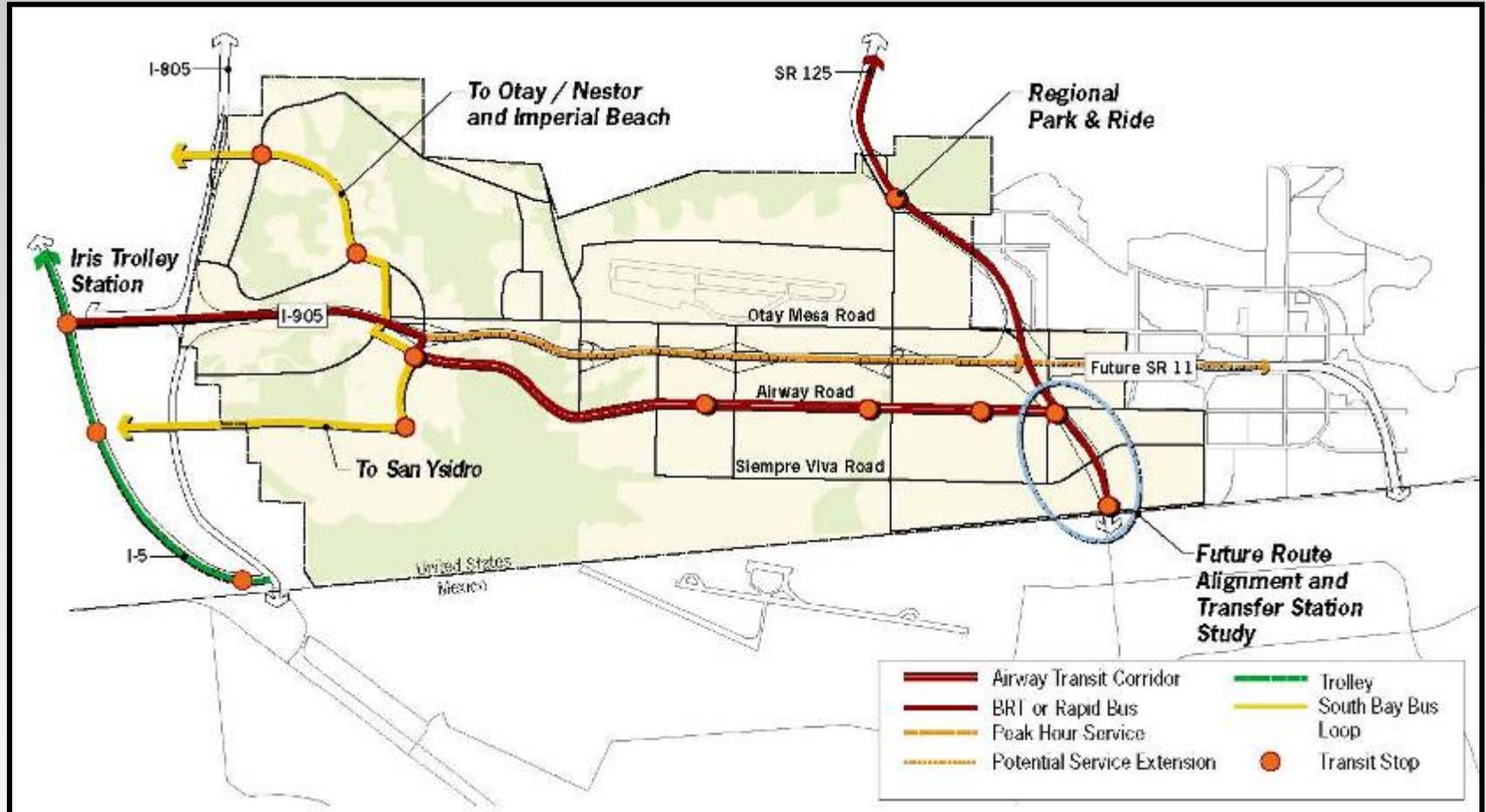
Proposed South Bay Bus Loop



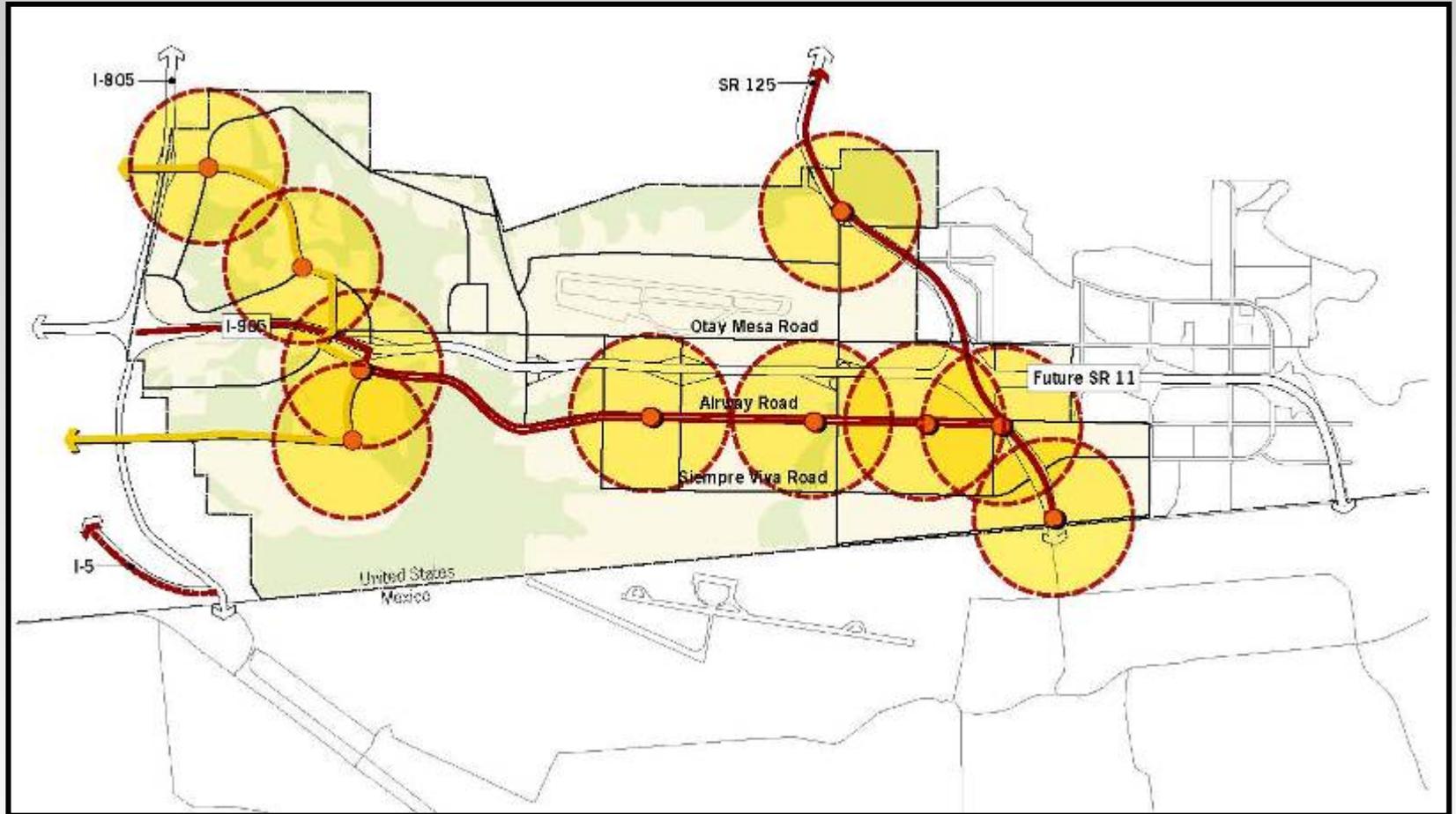
Potential Peak Hour Service & Extension to Planned Otay Mesa East POE



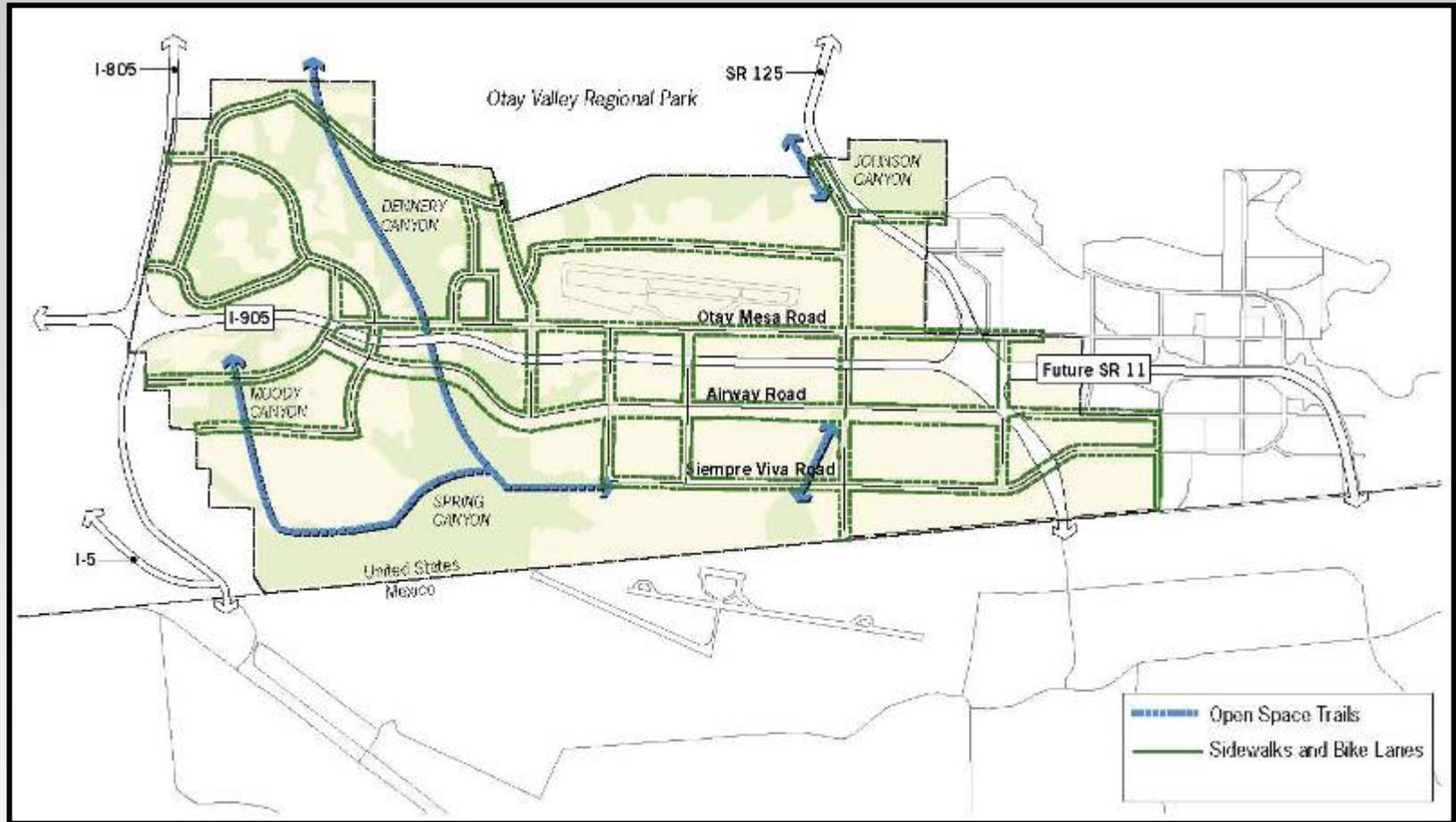
Proposed Transit Plan



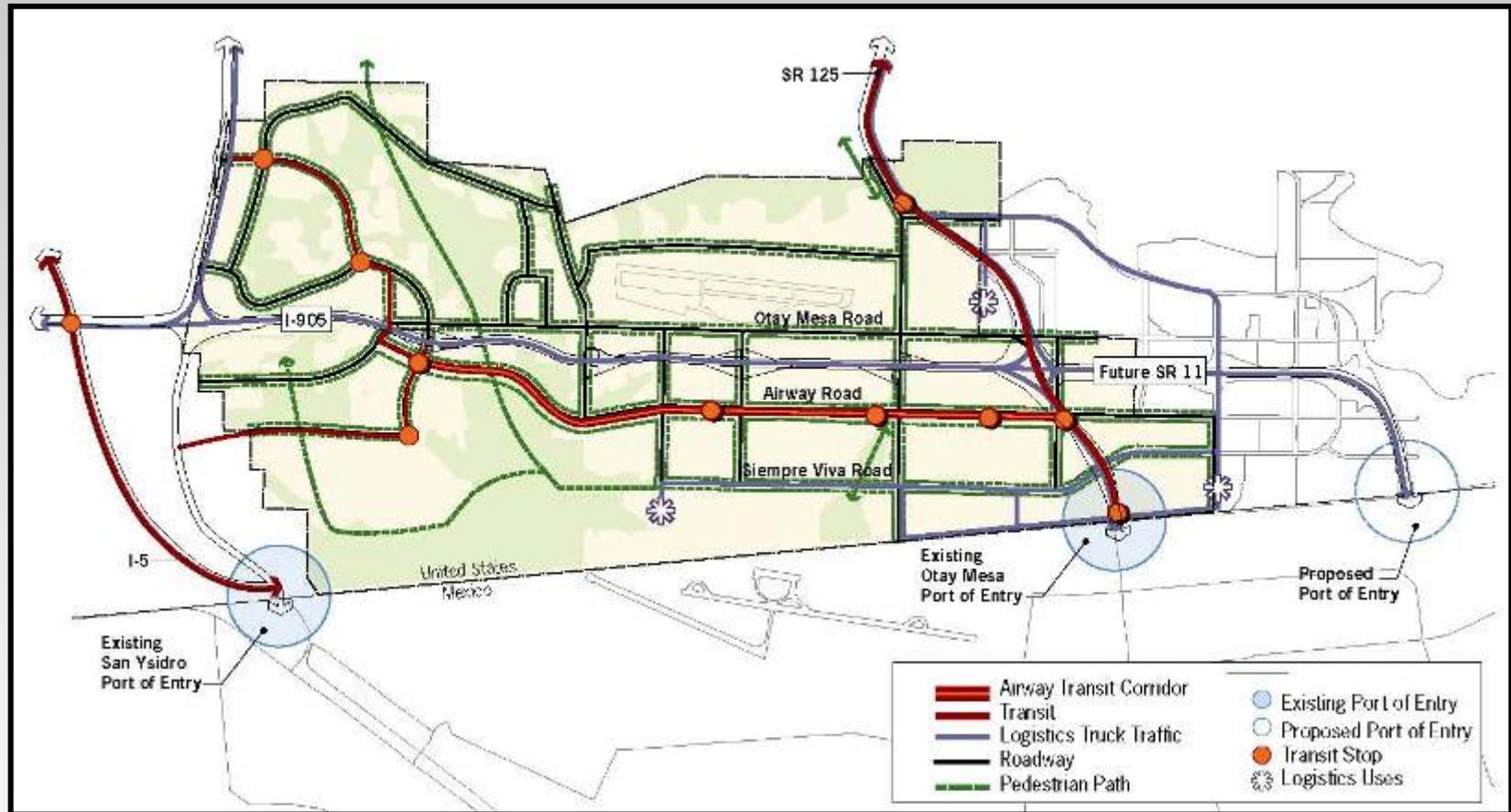
One-half Mile Station Area Coverage



Proposed Bicycle, Pedestrian & Open Space Trail Network



Proposed Circulation Element



Concluding Remarks

William Anderson, FAICP

Director of City Planning and Community Investment,
City of San Diego



Transportation Opportunities and Issues

Opportunities

- Implement City of Villages strategies
- Coordinate land use and transportation planning up front
- Design innovations for accommodating alternative modes of transportation
- Comprehensively plan to support logistics and related truck traffic in the border area

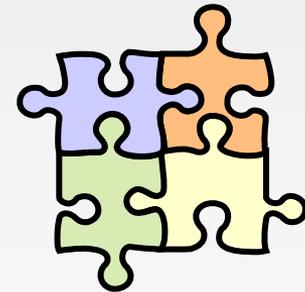
Issues

- Substantial infrastructure improvements needed
- Compatibility with cross-border logistics truck traffic
- Connectivity—internally and to the region
- Current land use pattern heavily influenced by superblocks



Questions for Planning Commission

1. What factors should be evaluated to resolve issues between competing values of truck traffic and other modes of transportation?
2. What other policies and approaches, if any, should staff and the planning team evaluate to provide an efficient, multi-modal transportation network within an integrated, sustainable community?



THE CITY OF SAN DIEGO

OTAY MESA COMMUNITY PLAN UPDATE

Planning Commission
Discussion



THE CITY OF SAN DIEGO

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Public Comment

