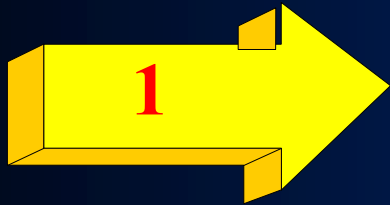
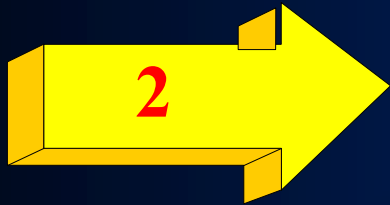




LATTS: Purposes

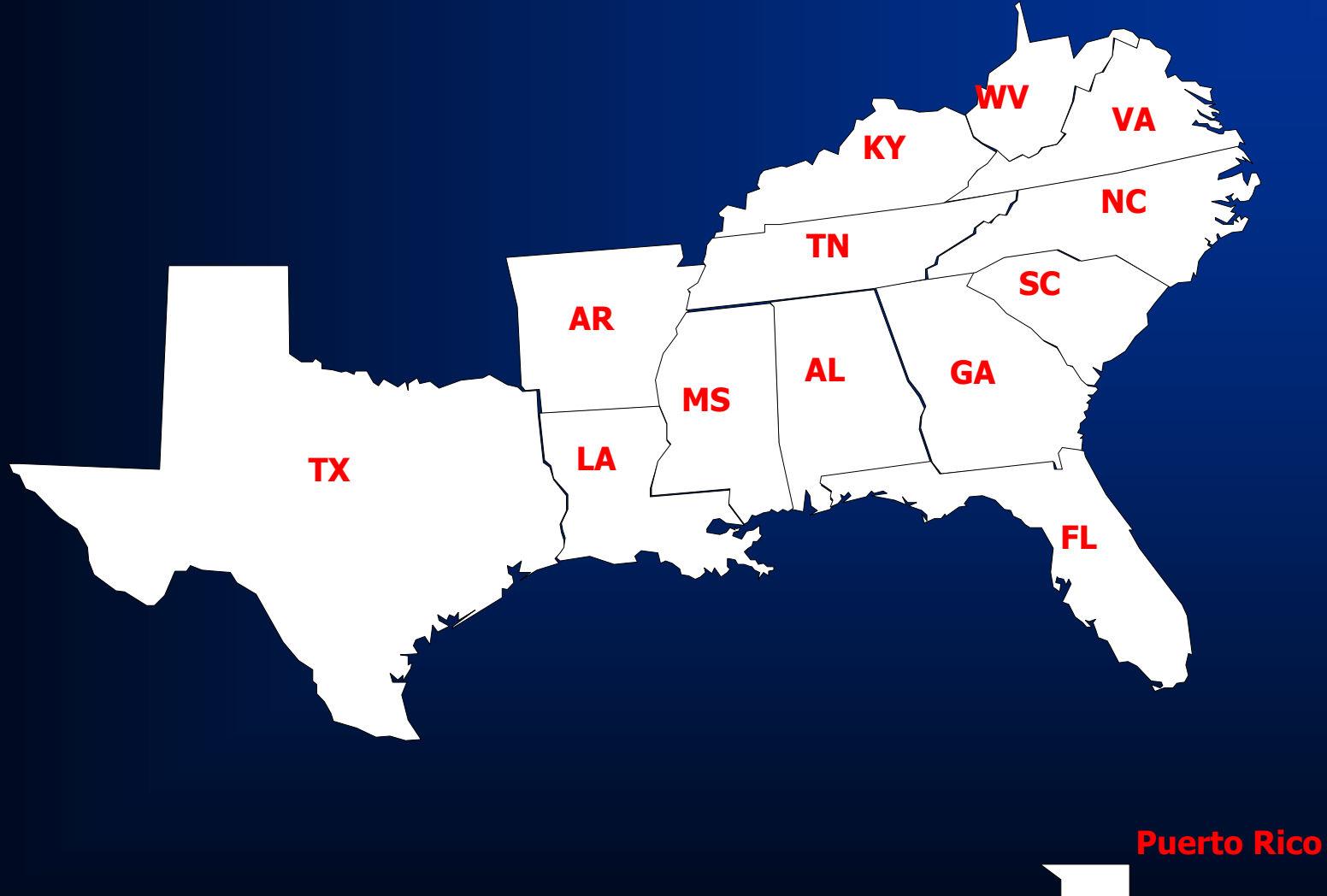


Determine Latin American Trade Opportunities



Identify Transportation Investments to Support Trade Growth

The Alliance Region





Study Regions

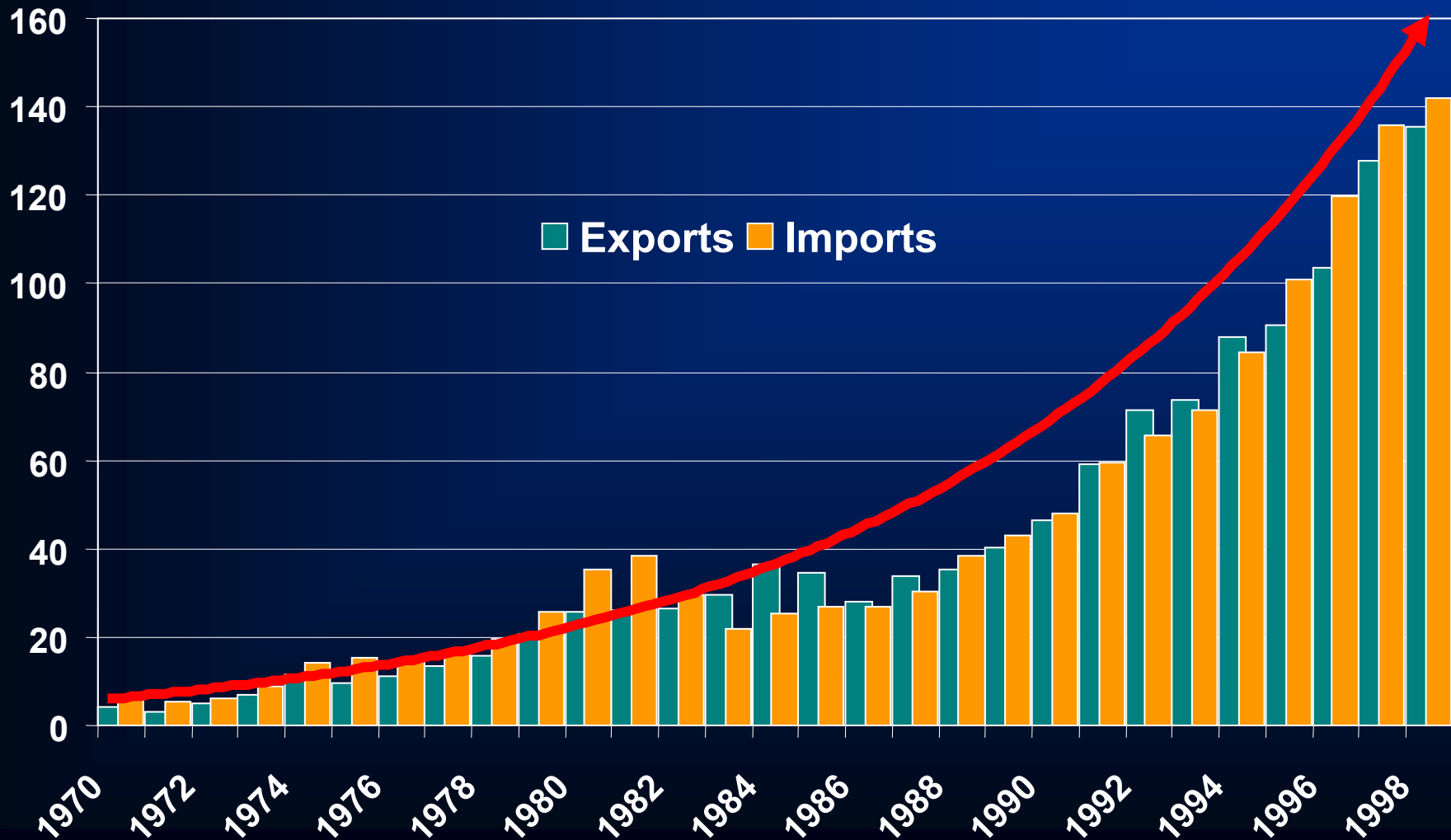




**We Have
A Story**

Trade is Escalating

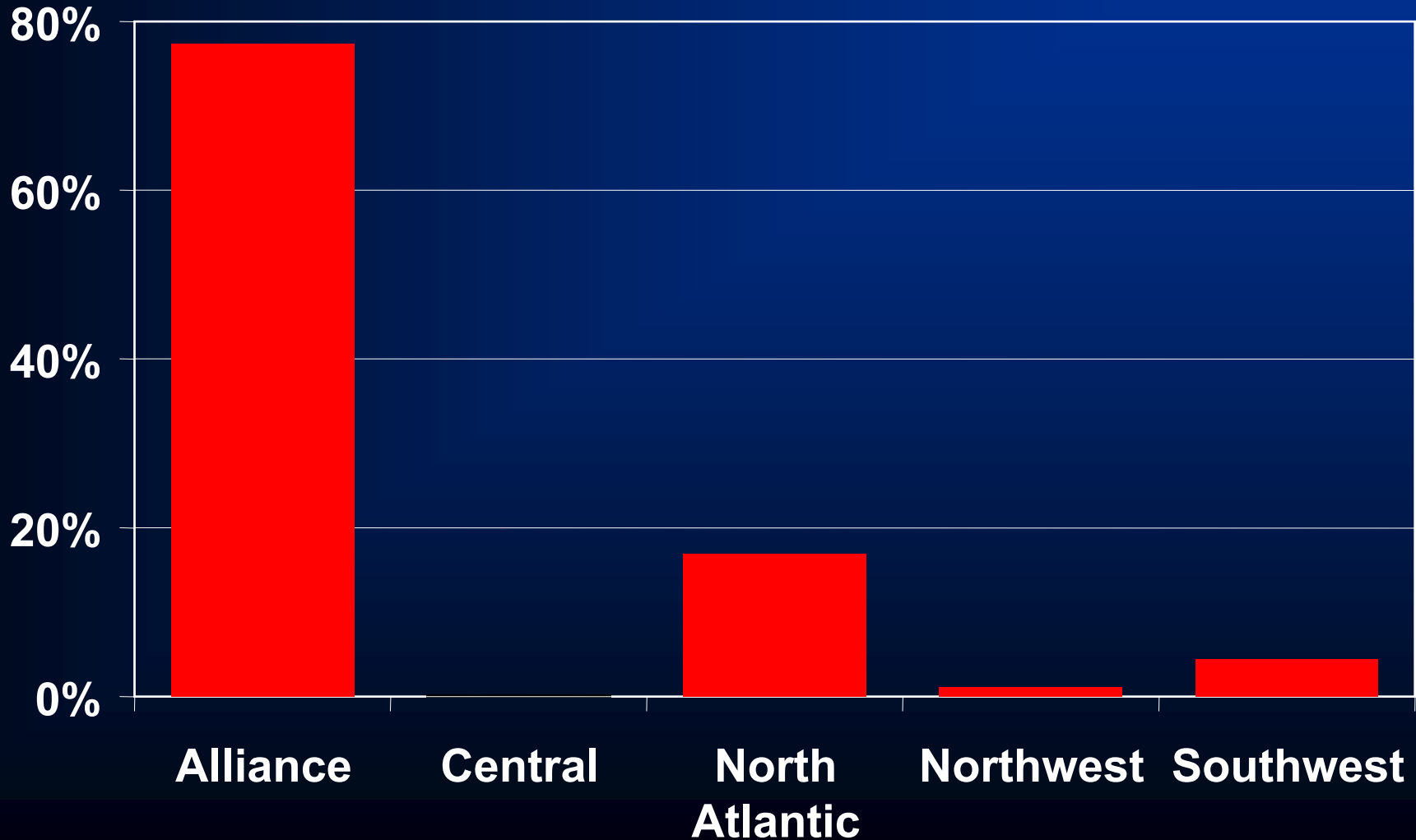
US/Latin American Trade (\$Billion)



The Alliance is The Gateway to Latin America

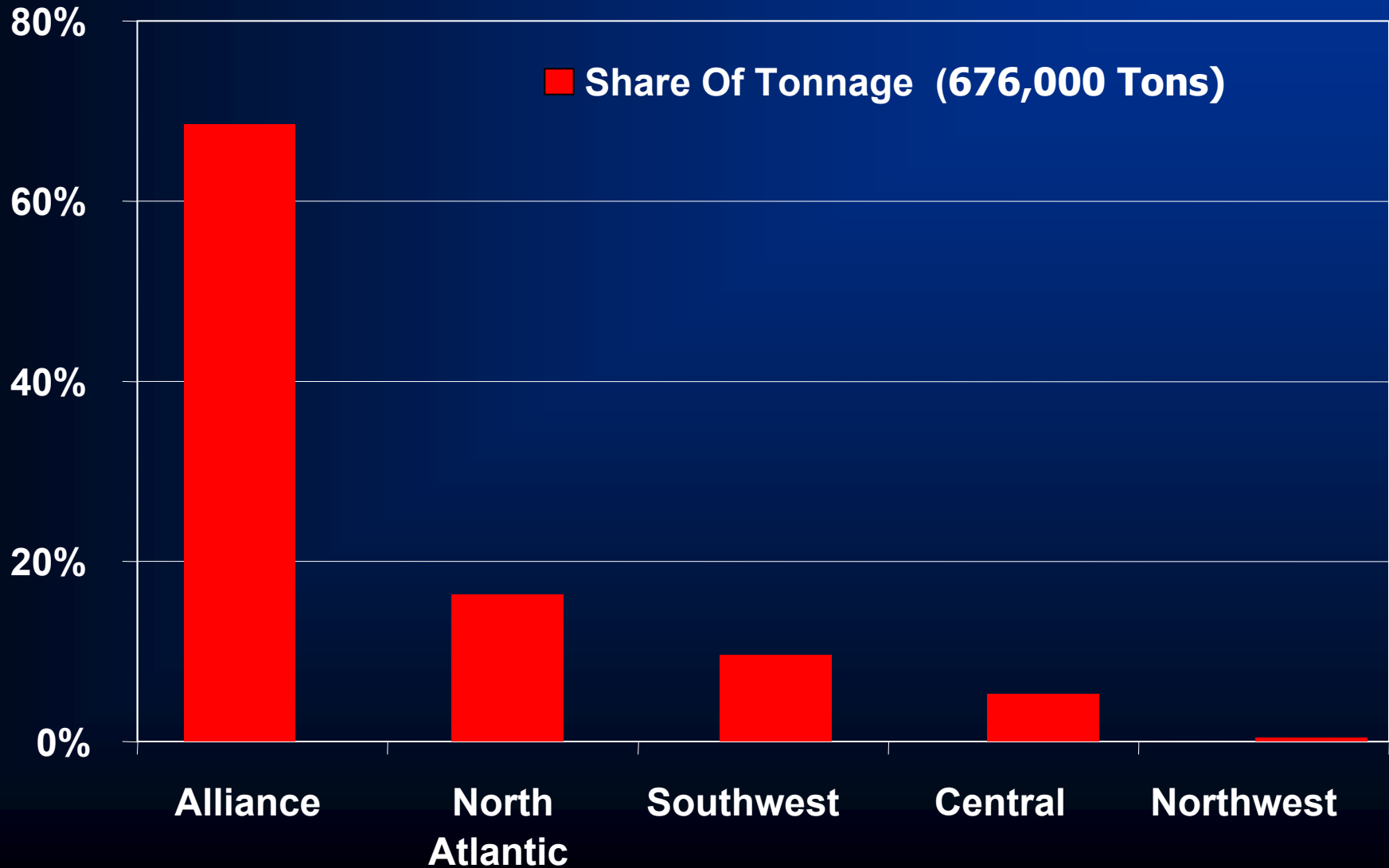
1996 Total Seaborne Trade with Latin America

Based on Tonnage (353 Million Tons)



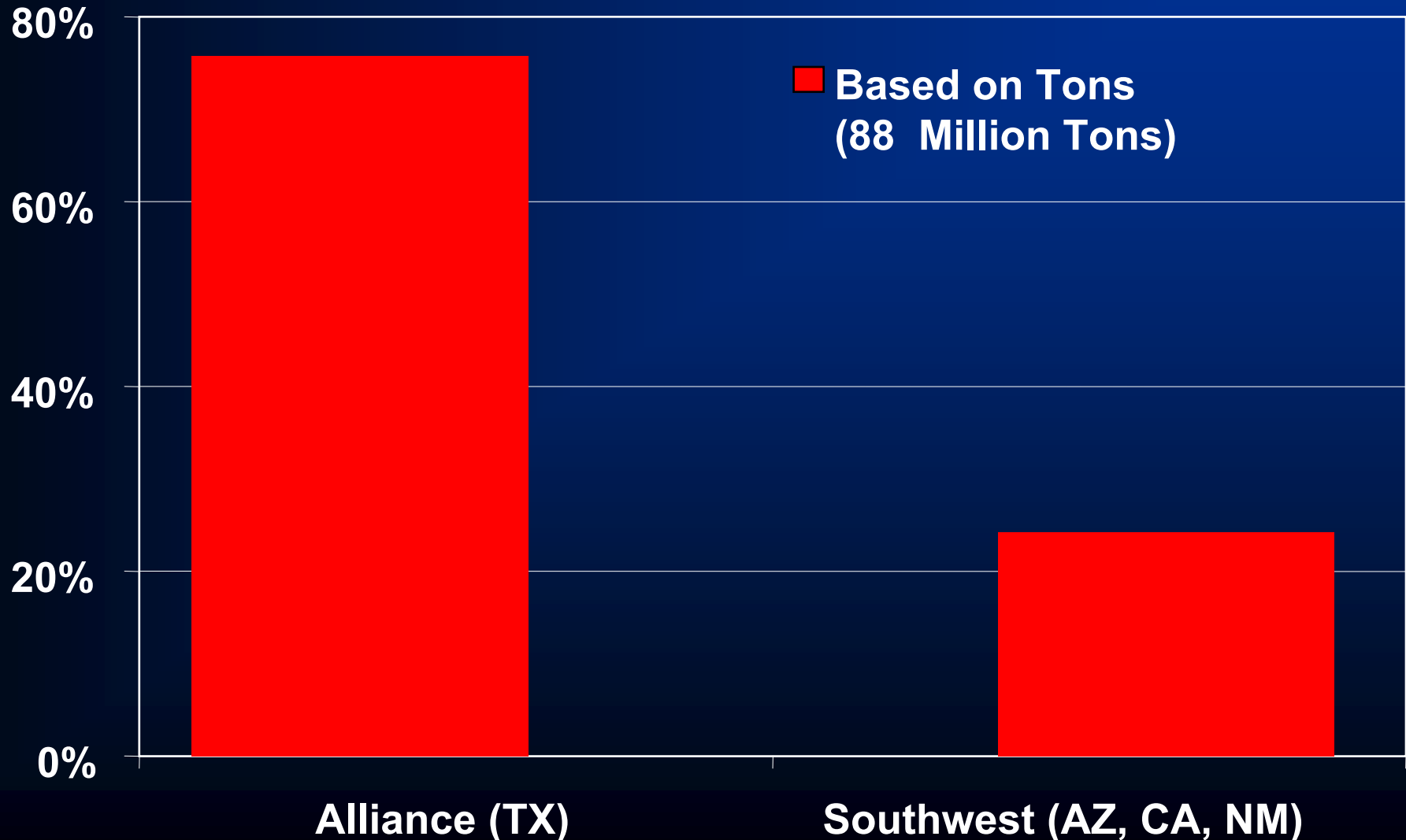
The Alliance is The Gateway to Latin America

1996 Total Airborne Trade with Latin America



The Alliance is The Gateway to Latin America

1996 Total Cross-border Trade with Latin America



Strategically Important: National Economy

Important Gateway For:

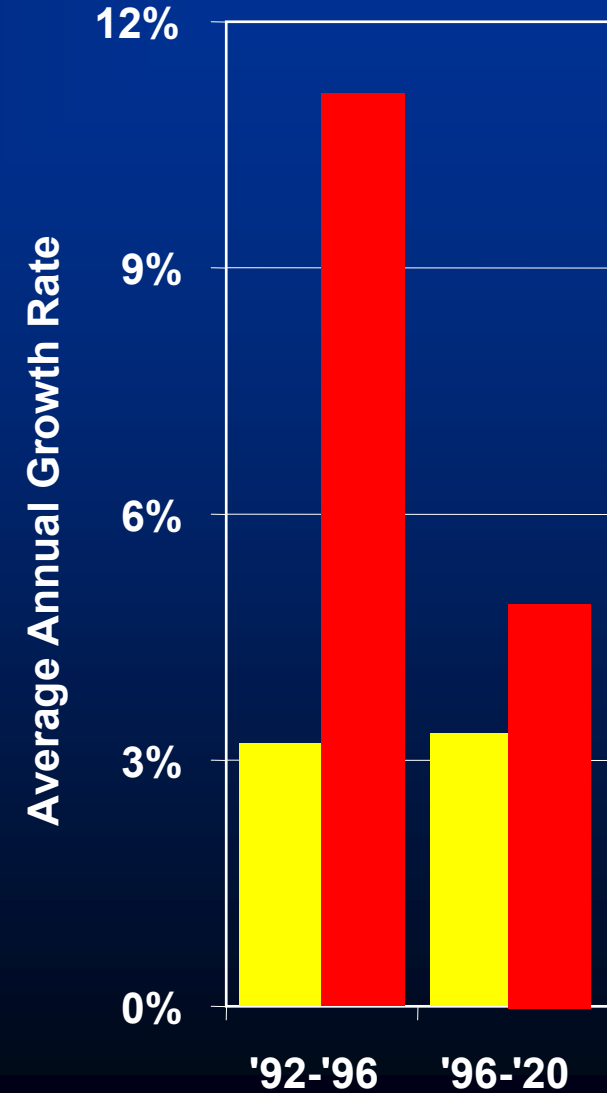
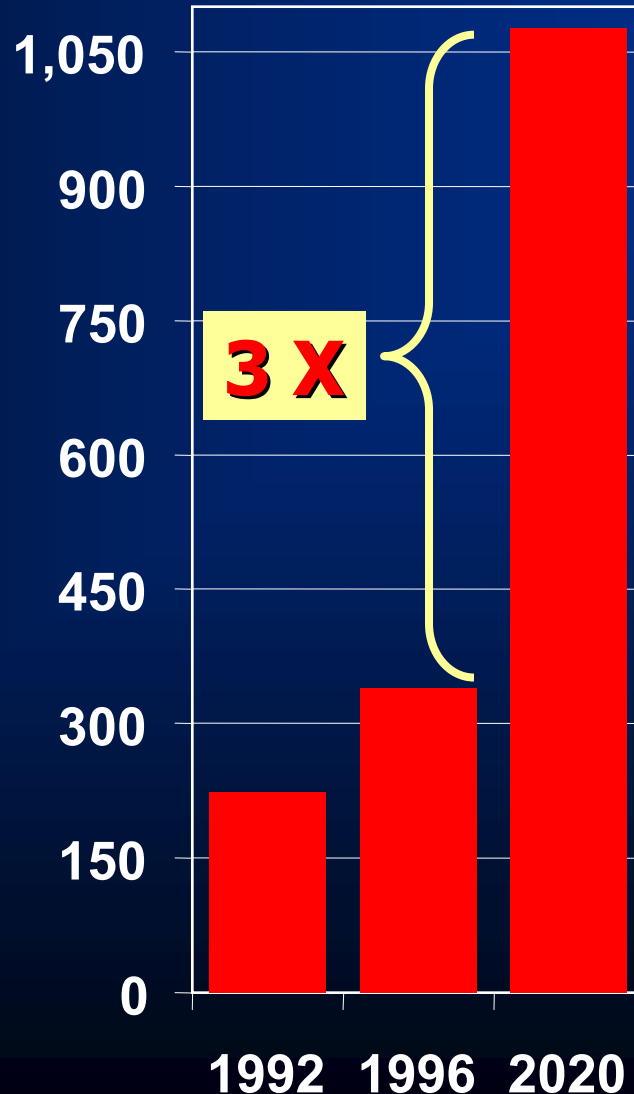
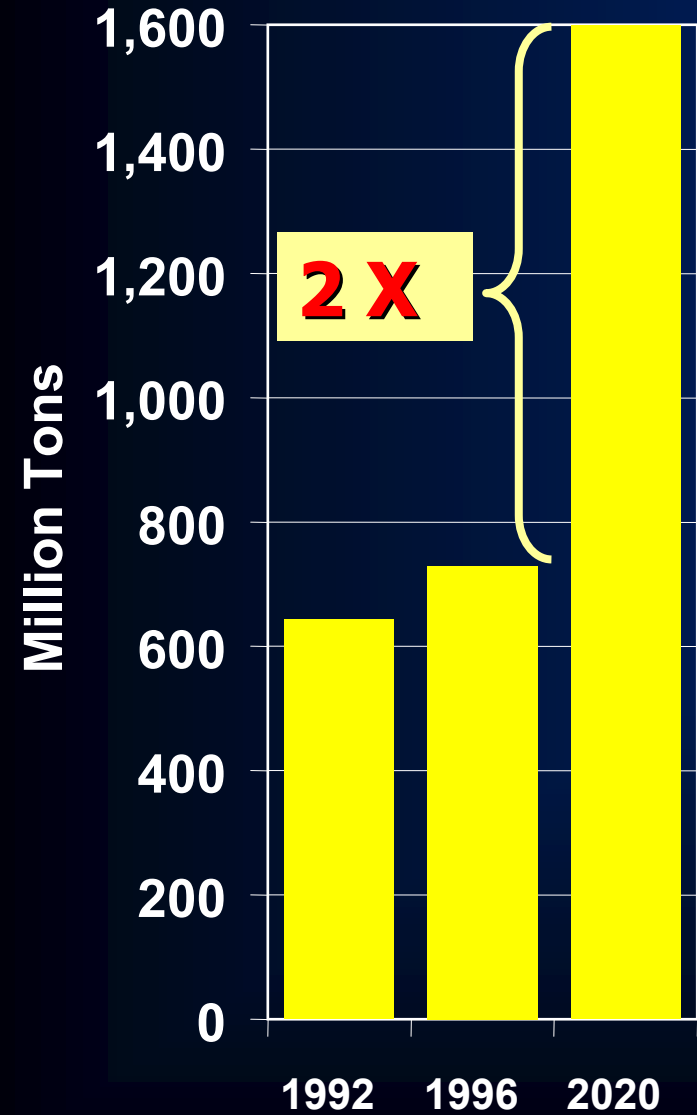
**Alliance
Trade With
Latin America**

**Rest of US
Trade With
Latin America**

Alliance Trade Growth Trends: Forecasts

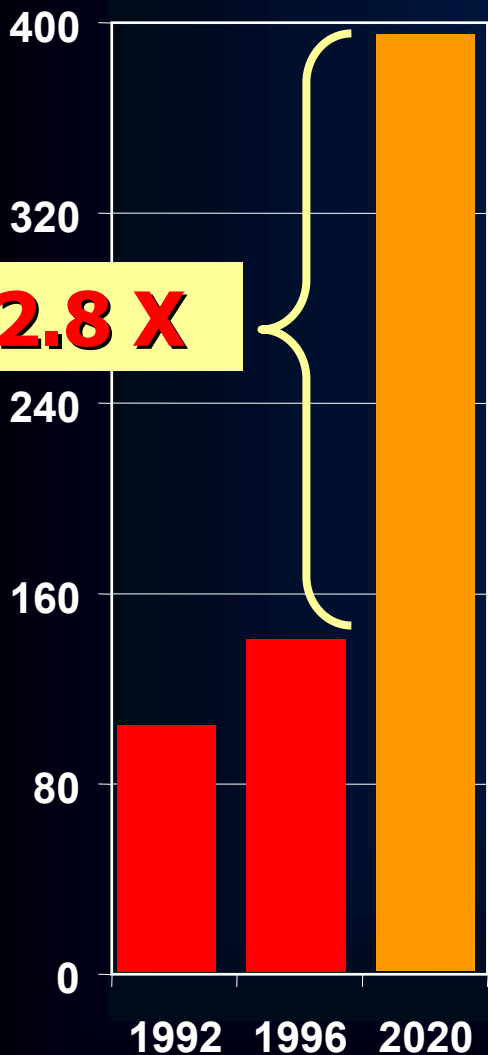
■ World Total

■ Latin America

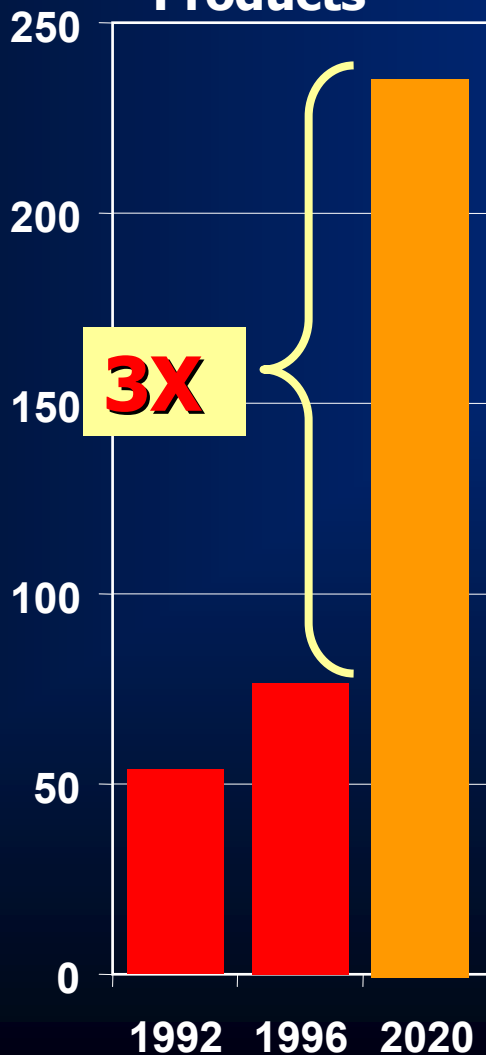


Alliance Trade Growth Trends: Forecasts (Million Tons)

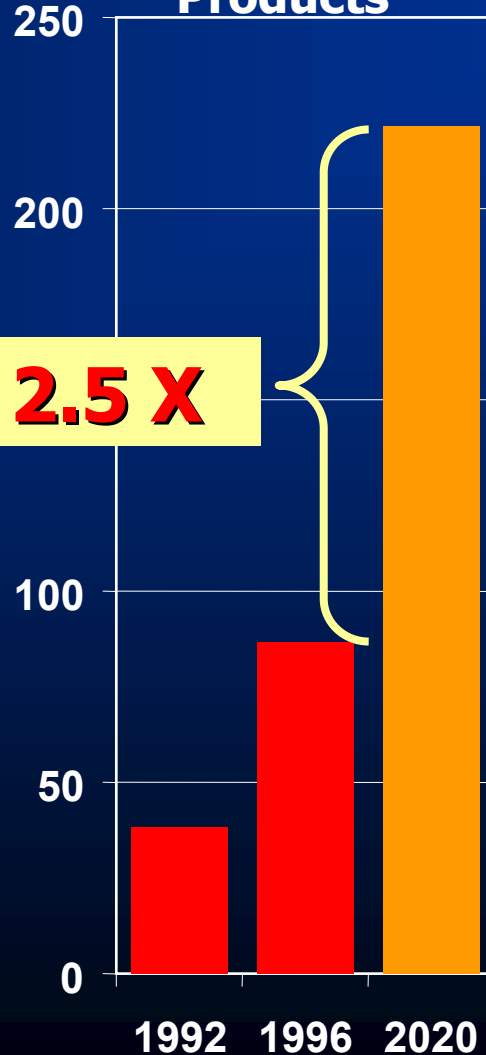
Crude & Petro. Products



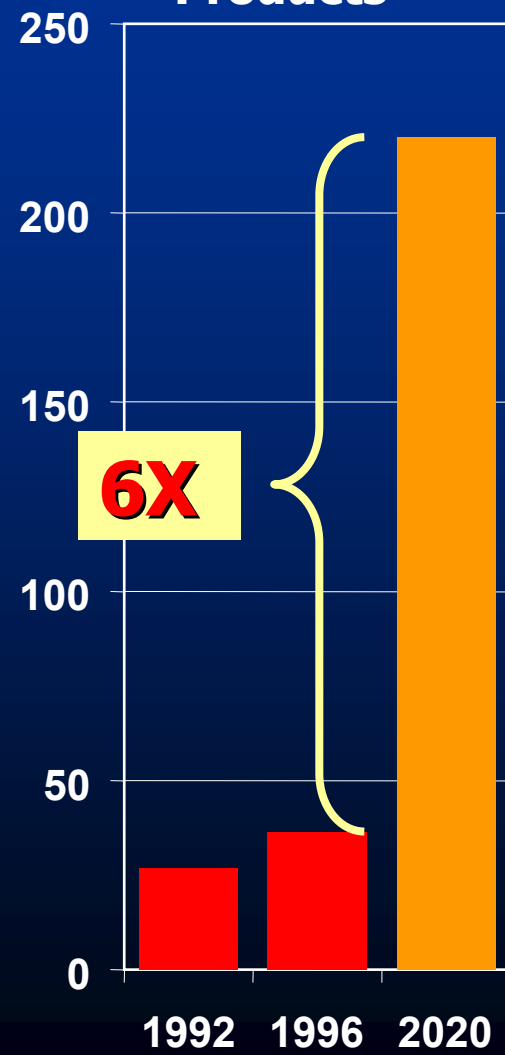
Agric. & Mining Products



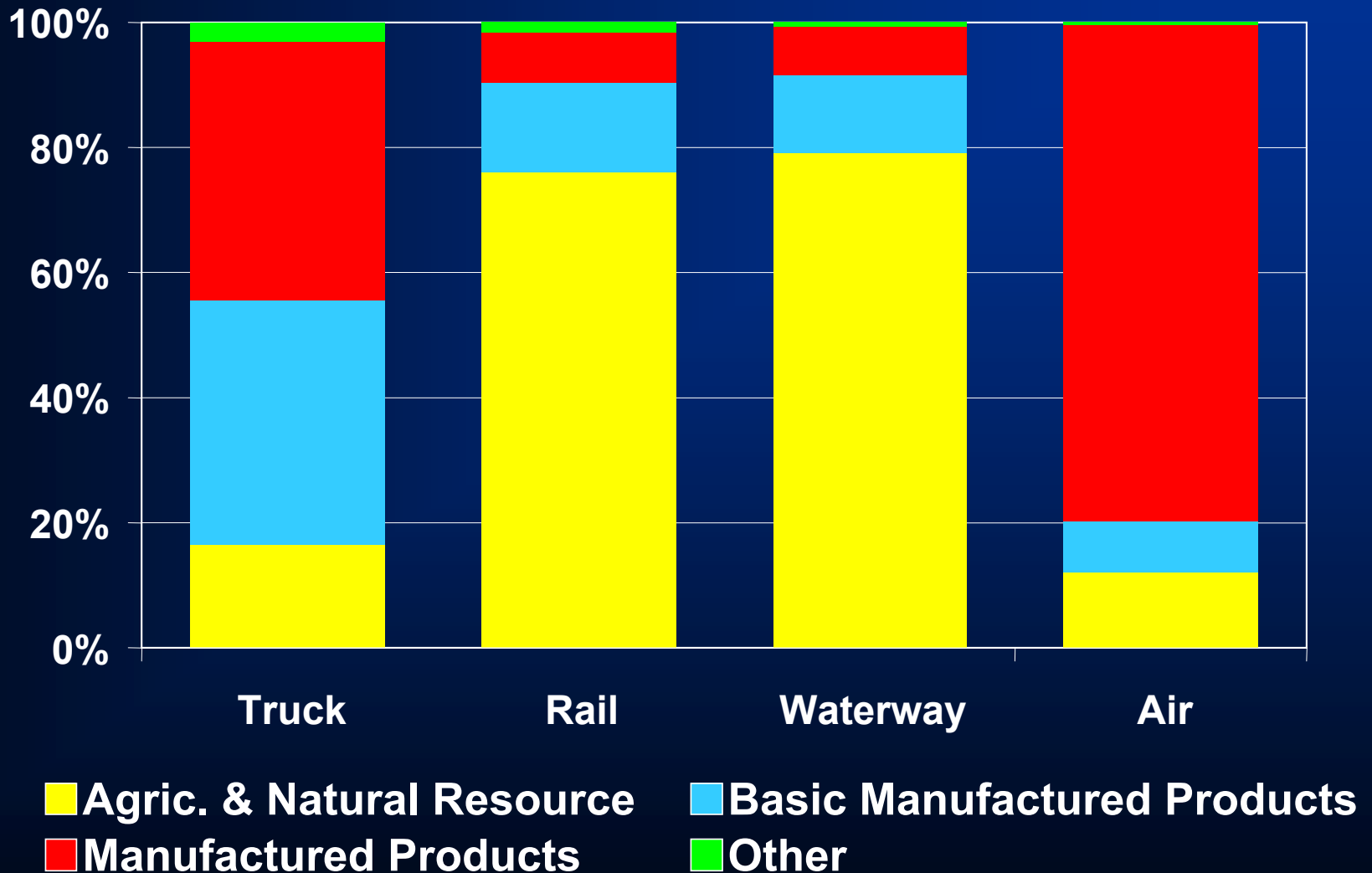
Prim. Manufact'd Products



Manufact'd Products

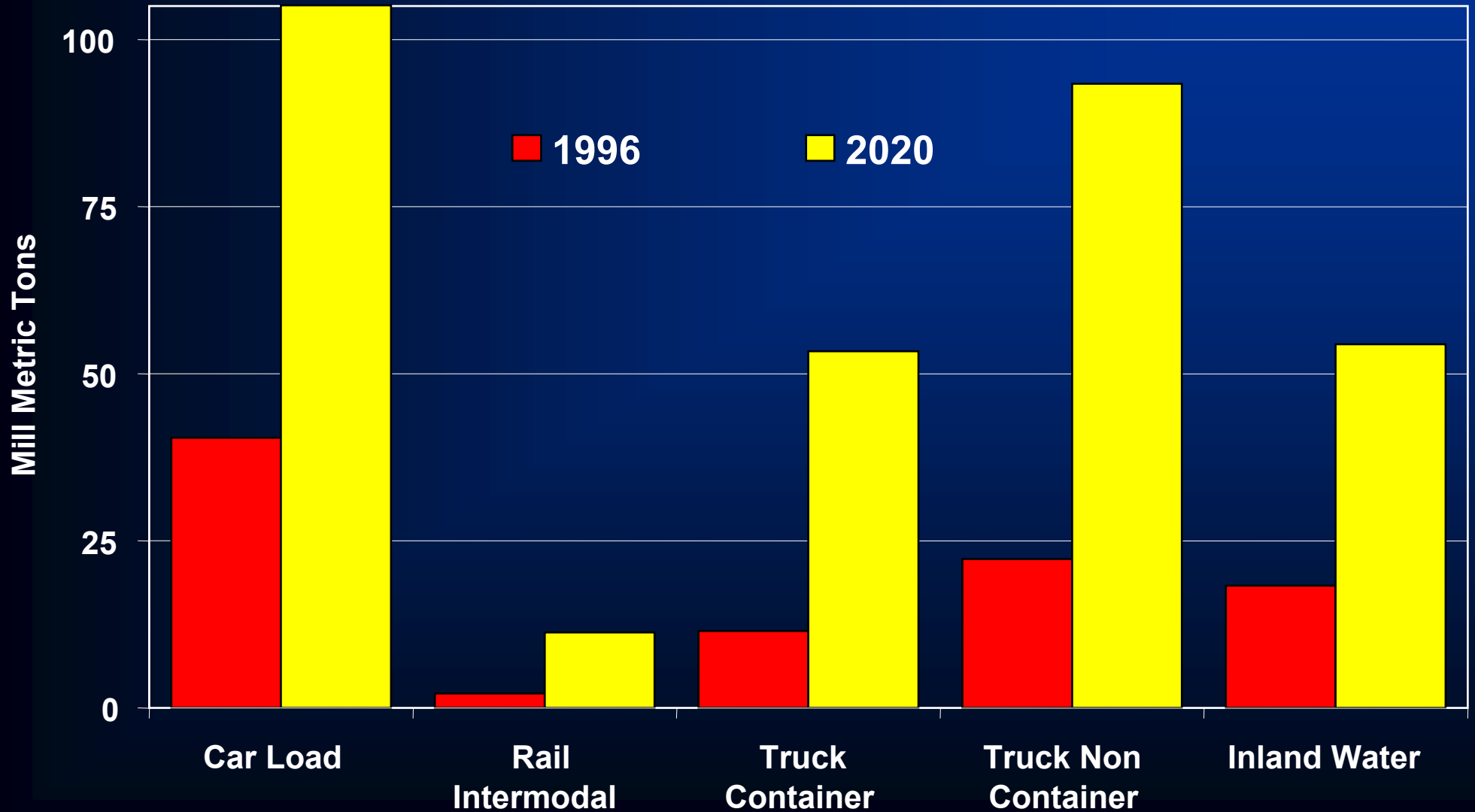


Share of Modal Throughput by Sector For Latin American Trade



2020 Domestic Mode Split Latin American Trade - All Commodities

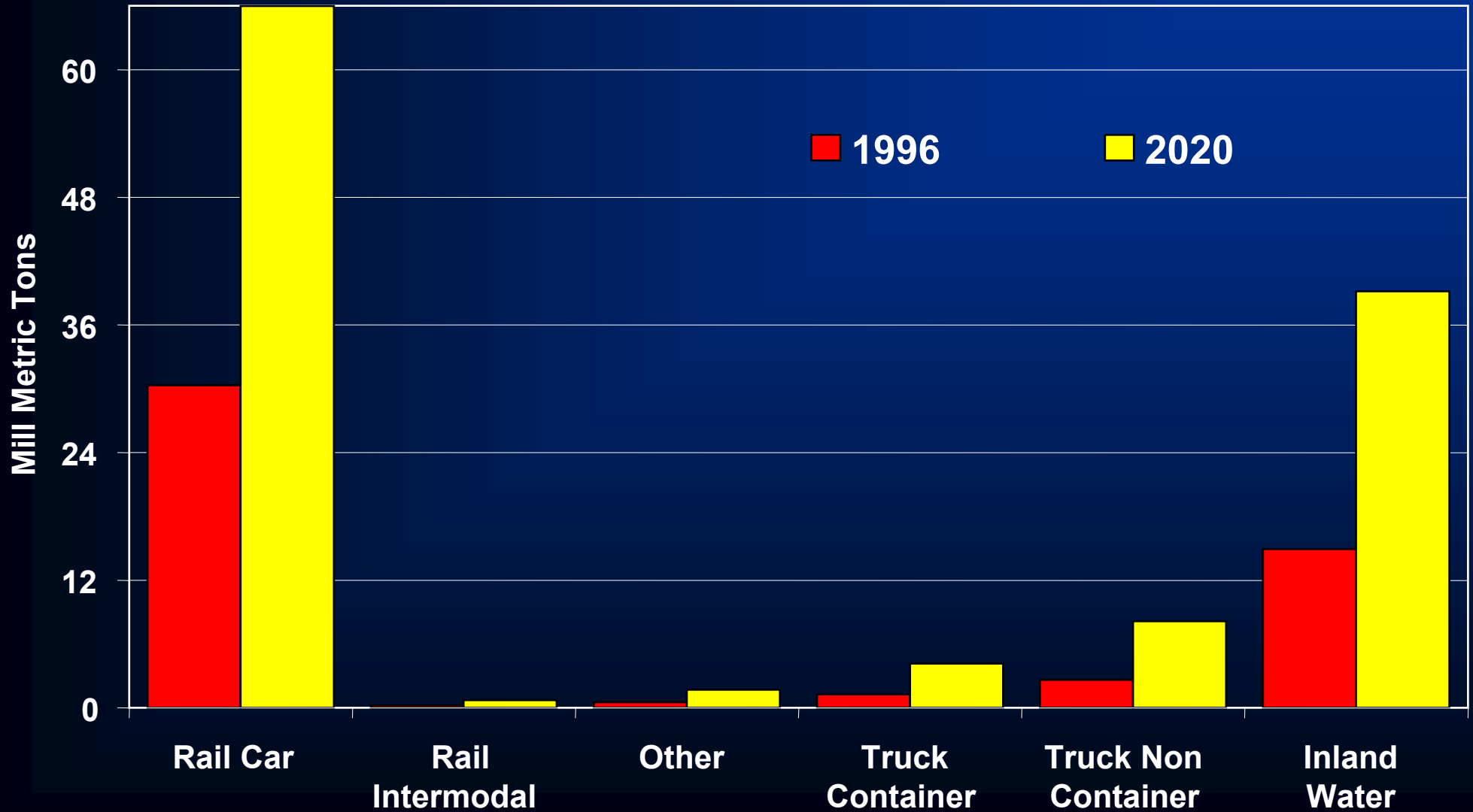
Total Tonnage



2020 Domestic Mode Split

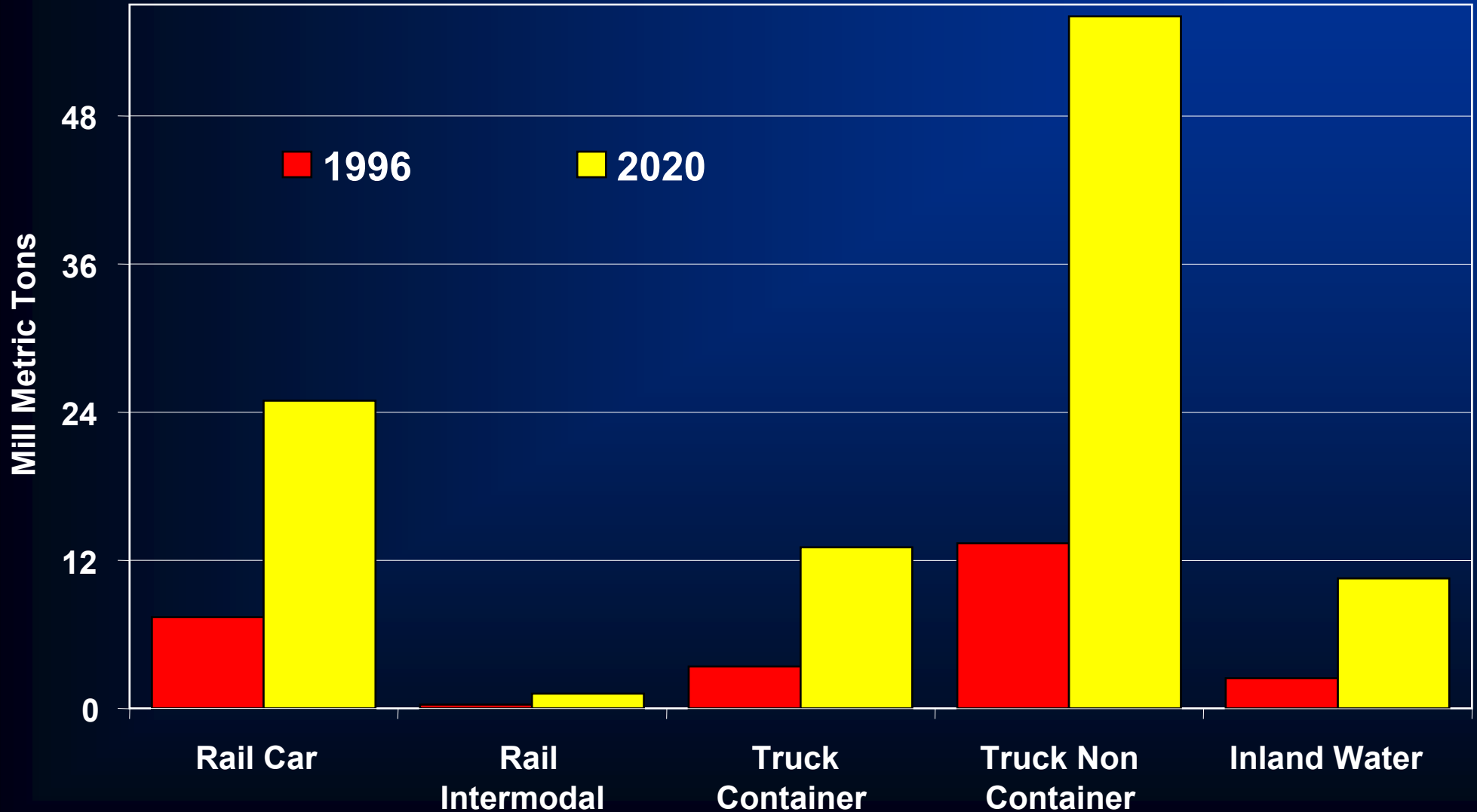
Latin American Trade - Agric. & Nat. Resources

Total Tonnage



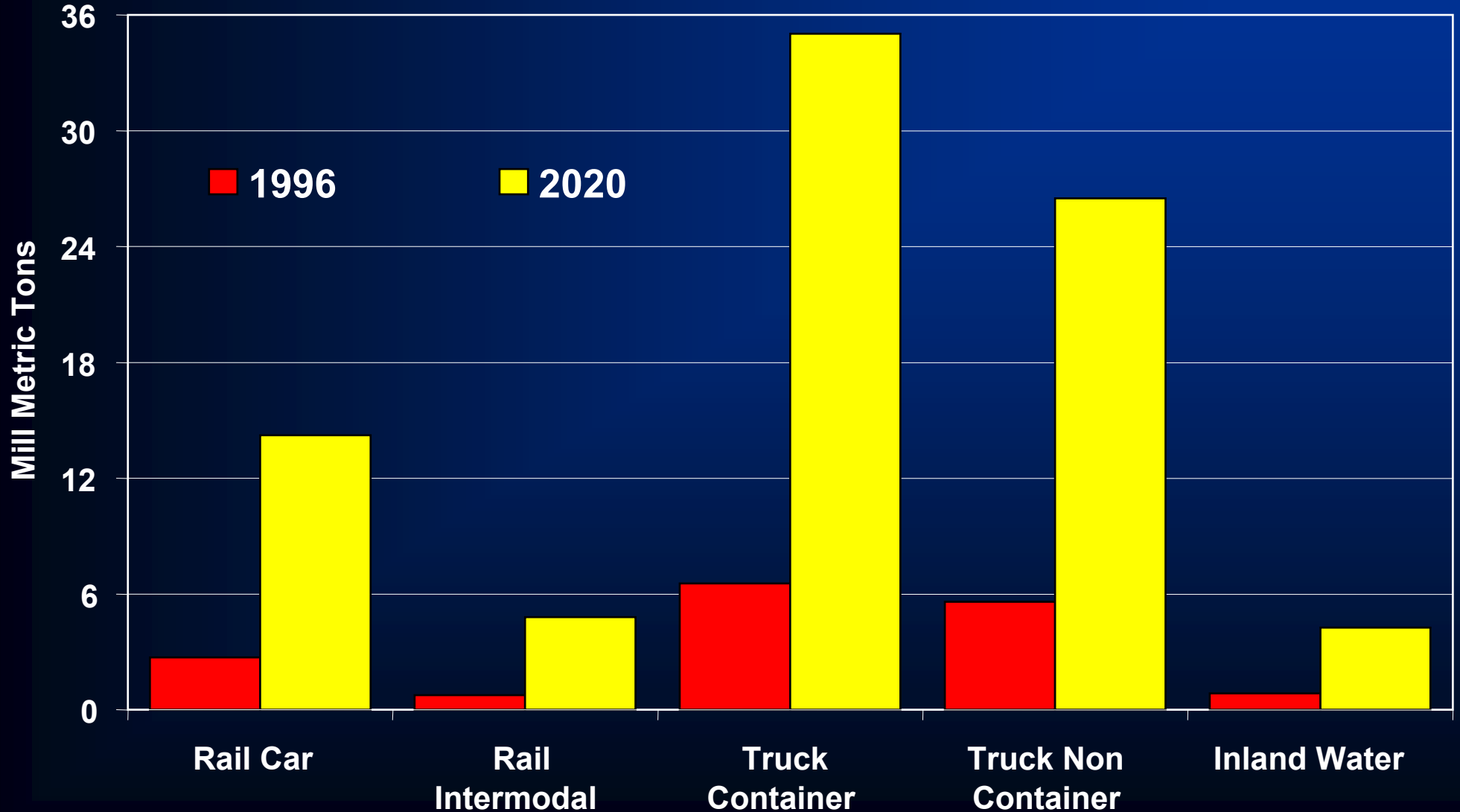
2020 Domestic Mode Split Latin American Trade - Basic Manufactured

Total Tonnage



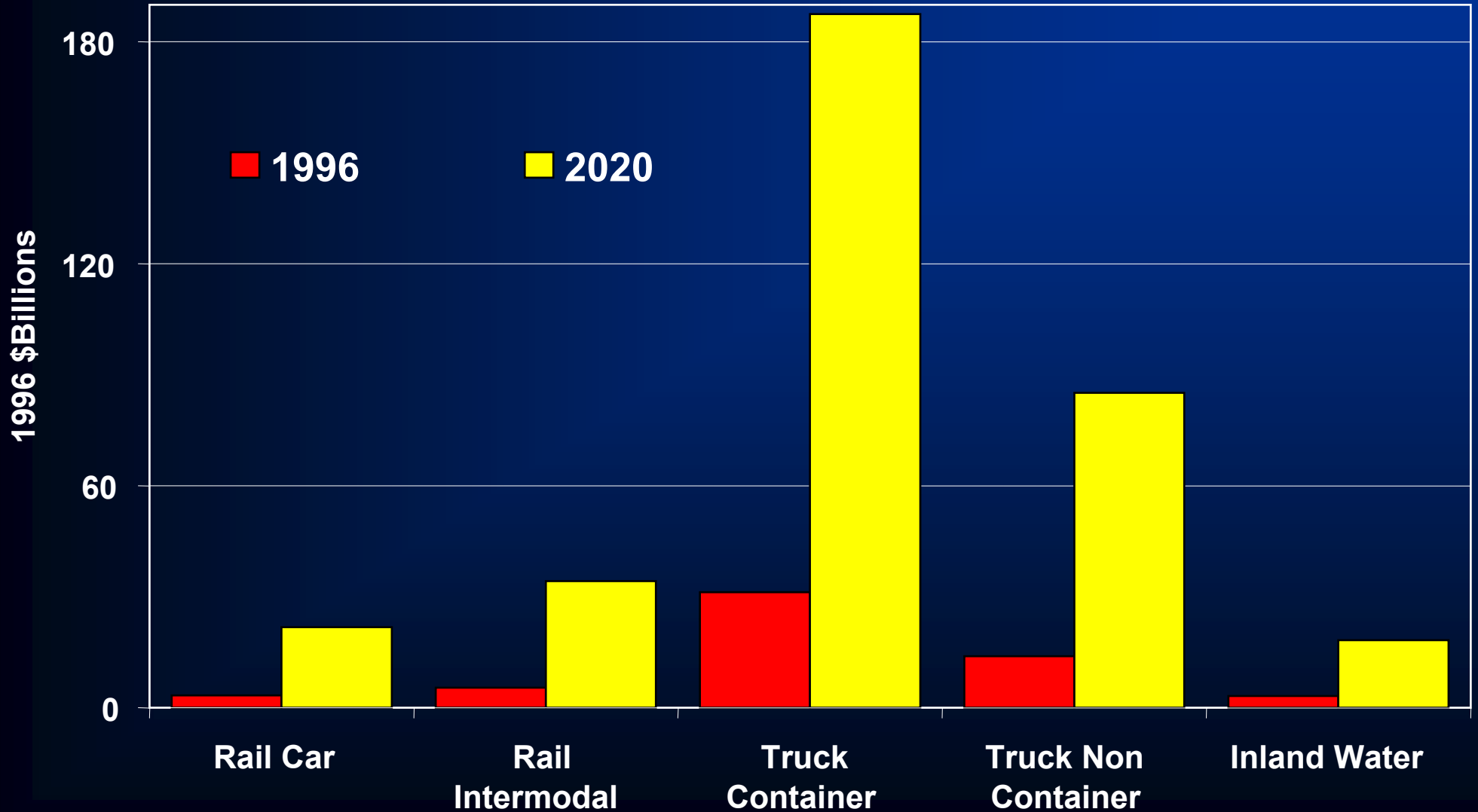
2020 Domestic Mode Split Latin American Trade - Manufactured

Total Tonnage



2020 Domestic Mode Split Latin American Trade - Manufactured

Total Value

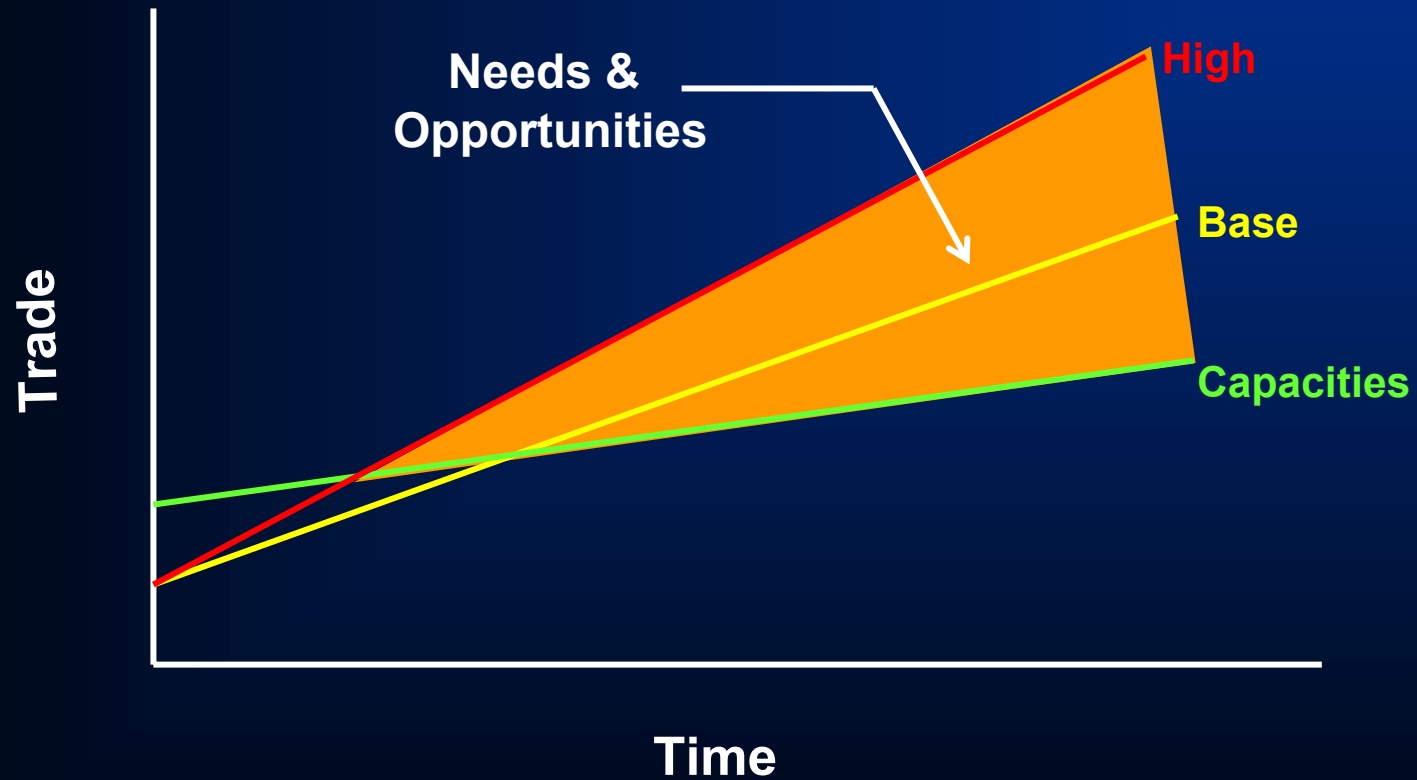


Change in Alliance Employment From 2000 to 2020

(Millions of Jobs)



Demand will Exceed Capacity





**We know
what needs
to be done**

Strategic Transportation System

> Gateways

> Corridors

> Connectors

Gateways

> 42 Waterports

> 46 Airports

> Border Crossings (TX)

Gateways

-- 42 Waterports

--46 Airports

Border Crossings

Corridors

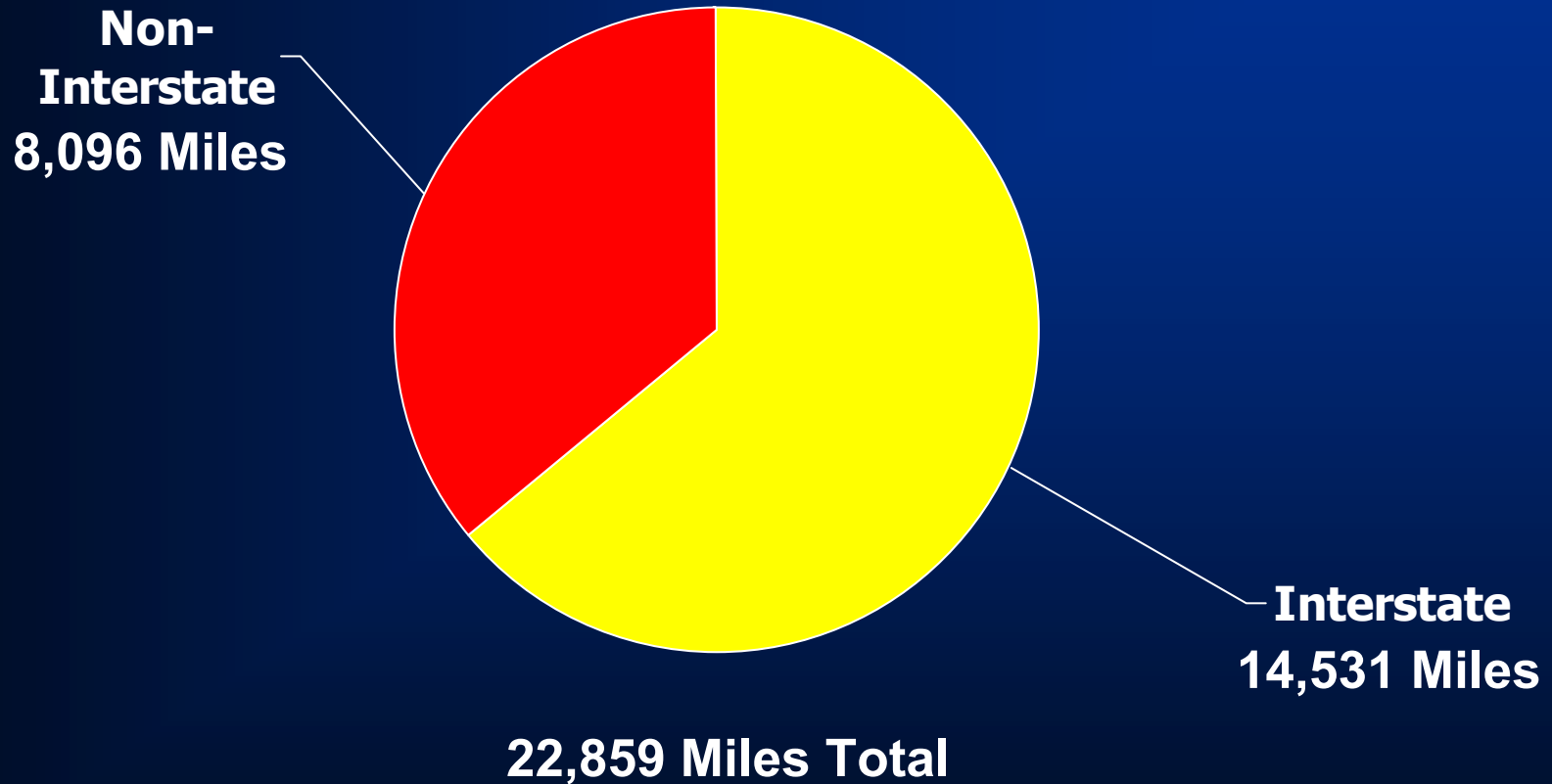
25 Major Trade Corridors

- > 22,285 miles of Railroads
- > 22,859 miles of Highways

Total Latin American Truck Flows - 2020



Highway Corridors



Excludes Connectors

Connectors

**LATTS
WATERPORTS**

69 Connectors

**LATTS
AIRPORTS**

54 Connectors

Gateway Needs

**LATTS
WATERPORTS**

\$22 billion

**LATTS
AIRPORTS**

\$3.3 billion

**LATTS
BORDER
CROSSINGS**

Corridor Needs

**LATTS
HIGHWAYS**

\$67 billion

**LATTS
RAILROADS**

Private Sector

Connectors

Water Ports

Airports

Pavement Condition

17%

8%

Geometrics

77%

58%

RR Crossings

39%

8%

Operations/Safety

75%

58%



**We need
a plan**

Potentially Adverse Consequences

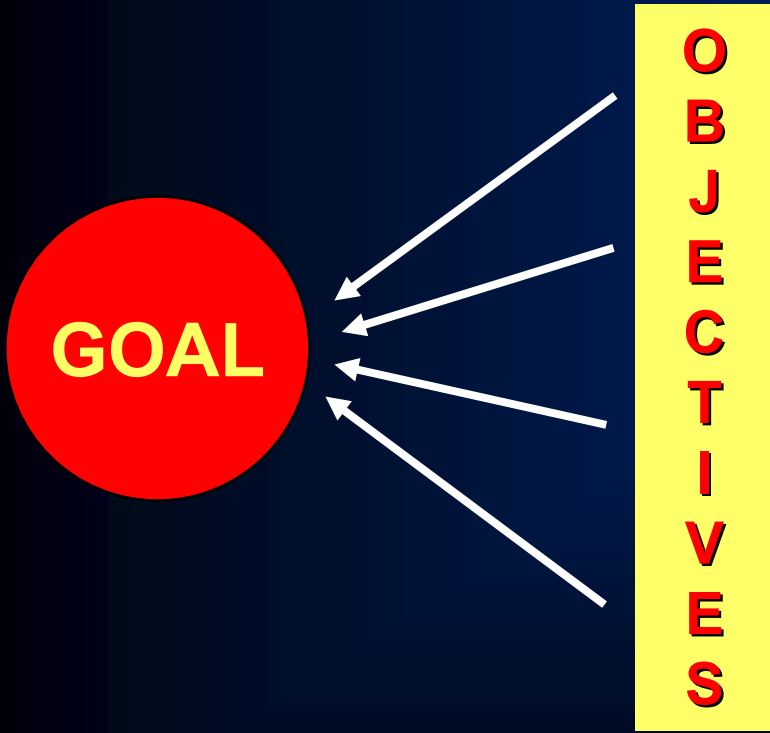
- **Safety**
- **Congestion**
- **Wear and Tear**
- **Environment**
- **Crime**
- **Quality of Life**
- **Rail/Highway Delays**
- **Env./Social Justice**



GOAL

Goal

Support economic development through improved transportation for trade.



LATTS Objectives

One

Regional Competitiveness

Two

Interconnected Multimodal System

Three

Freight Mobility

Four

Efficiency

Five

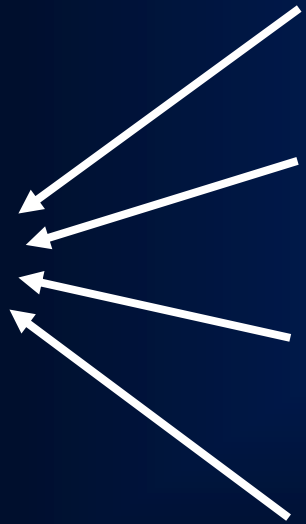
Environment

Six

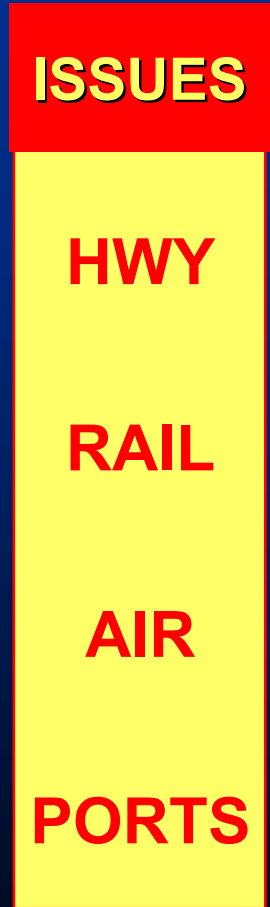
Safety

Seven

National Security



**O
B
J
E
C
T
I
V
E
S**



PORTS-Modal Issues

- **Capacity (Physical)**
 - Marine
 - Landside Access
 - All Cargo Types
 - **Efficiency**
 - Facility utilization
 - **Turnaround**
 - **Intermodal System**
 - **Agility**
- **Competition**
 - Ports are competitive
 - **Operating Environment**
 - Future IIC
 - **Megaload Centers**
 - Feeders
 - **Environment**
 - **Finance**
 - **Jurisdiction**

AIRPORTS-Modal Issues

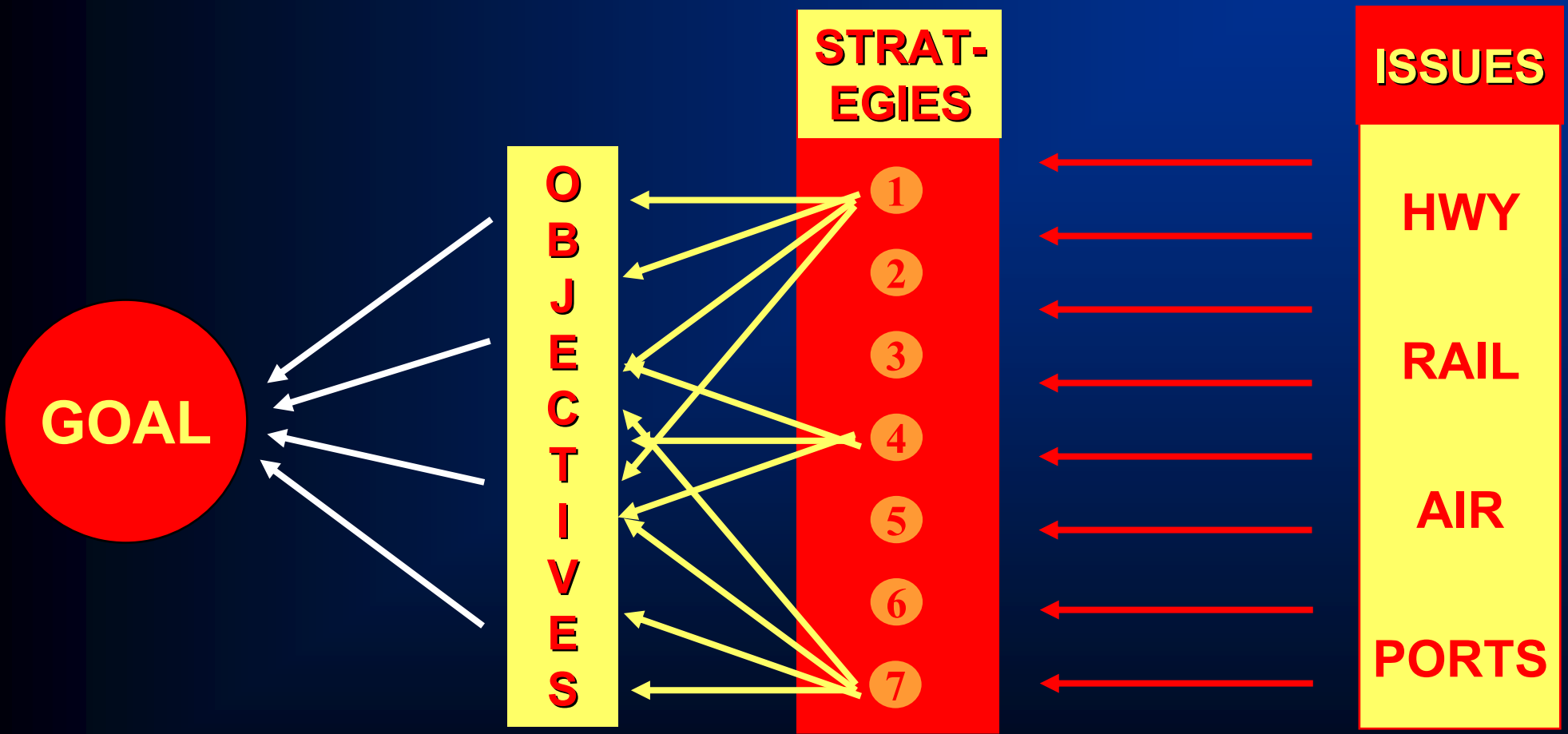
- **Cultural**
- **E-Commerce**
- **Passenger Service to Latin A.**
- **Groundside Access**
- **Seamless Interchange**
- **Market Linkage**
- **Custom Clearance/EDI**
- **Capacity**
 - **Warehouse & Ramps**
 - **Airside, Groundside, Satellite**
- **Clustering on/around airports**
- **Satellite /Industrial/Warehouse (11C)**
- **Linkages**
 - **On-Airport, To Satellites**
- **Funding**
 - **Federal, State, other**
 - **Innovative**
- **Jurisdictional Issues**

RAIL-Modal Issues

- **Physical Capacity**
 - **ROW**
- **Operational**
 - **Not in the Southeast**
- **States have limited jurisdiction**
- **Grade Crossings**
 - **Above Grade**
- **Megaload Centers**
 - **Consolidation**
- **Private operations**
- **Funding**

HIGHWAYS-Modal Issues

- **Additional Physical Capacity**
 - Urban
 - Rural
 - **Capacity Constraints**
 - Environmental
 - ROW
 - Traffic
 - **Intermodal Connectors**
 - **Corridor needs**
- **Operational**
 - ITS
 - **Congestion**
 - **Preservation/Rehabilitation**
 - Pavement, bridges
 - **Safety**
 - **Institutional**
 - Standards



Strategies

- **Utilization of Existing Infrastructure**
- **Add Physical Infrastructure**
- **Increase Operating Throughput**
- **Corridor Approach for Investing**
- **Develop Agile Freight Operations**
- **Improve Clearance at Gateways**
- **Attention to Connectors**
- **Encourage Technology**
- **Integration of Information**
- **ITS Applications**
- **Increase Public Awareness**
- **Improve Institutional Relationships**
- **Improve Freight Profile**
- **Partnerships**