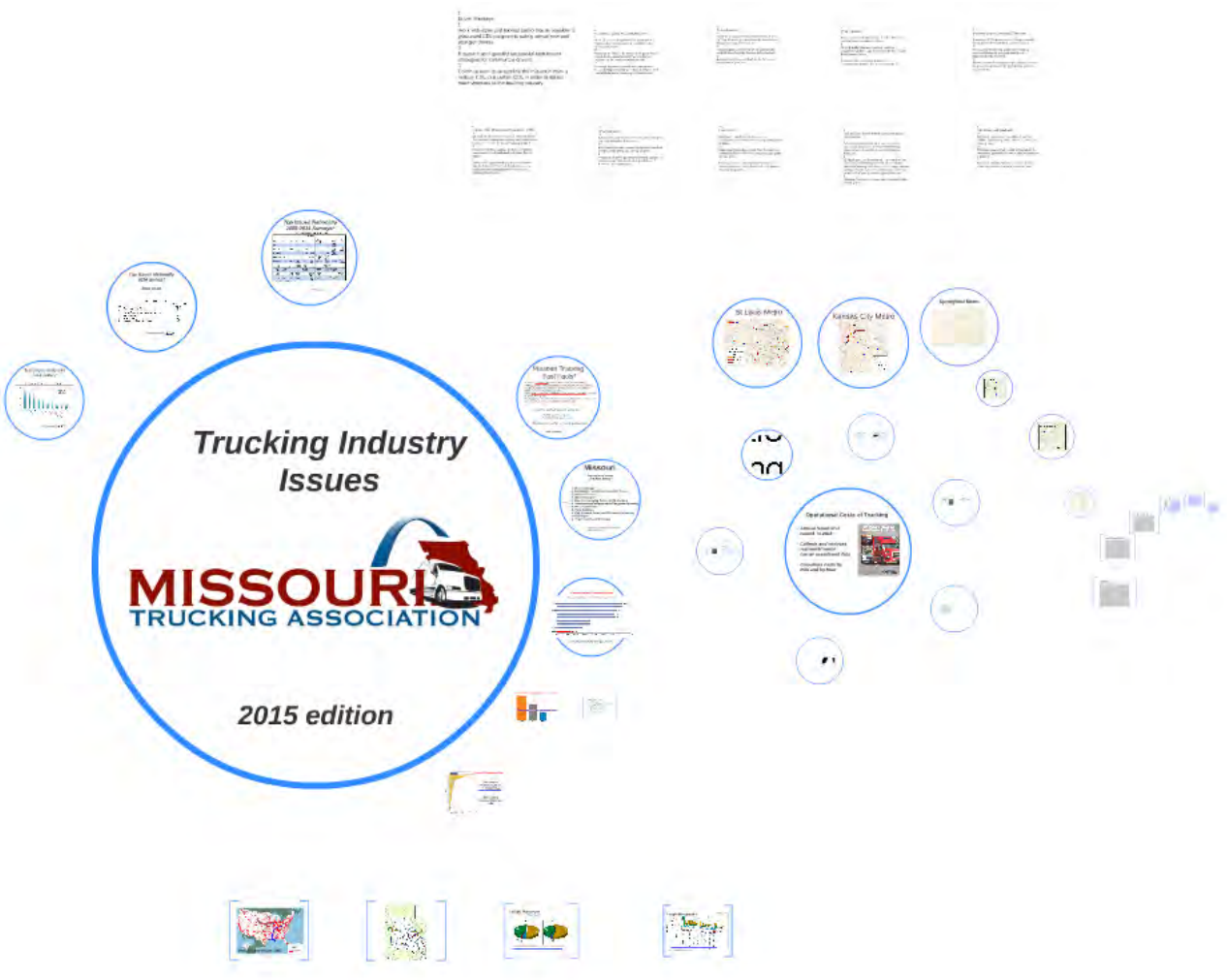
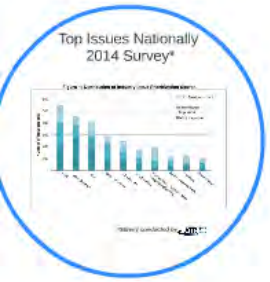
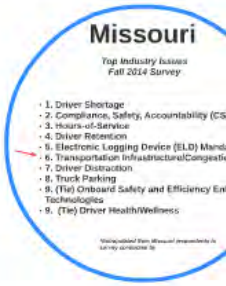
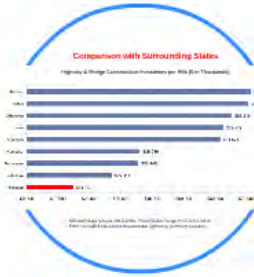

Trucking Industry Issues
MISSOURI
TRUCKING ASSOCIATION
2015 edition



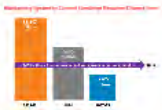
Trucking Industry Issues



MISSOURI
TRUCKING ASSOCIATION



2015 edition



Missouri Trucking Fast Facts*

- Employs 1 in every 16 Missourians (134,040 jobs in MO).
- Over 12,050 trucking companies in MO, mostly small businesses.
- Trucks transport 81% of total manufactured tonnage hauled in Missouri, or 479,499 tons per day.
- Over 72% of Missouri communities depend EXCLUSIVELY on trucks to move their goods.
- Trucking pays 39% of all taxes and fees owed by Missouri motorists, but only drives 14% of the vehicle miles traveled.

Typical Fees paid by 5-axle Semi combination:

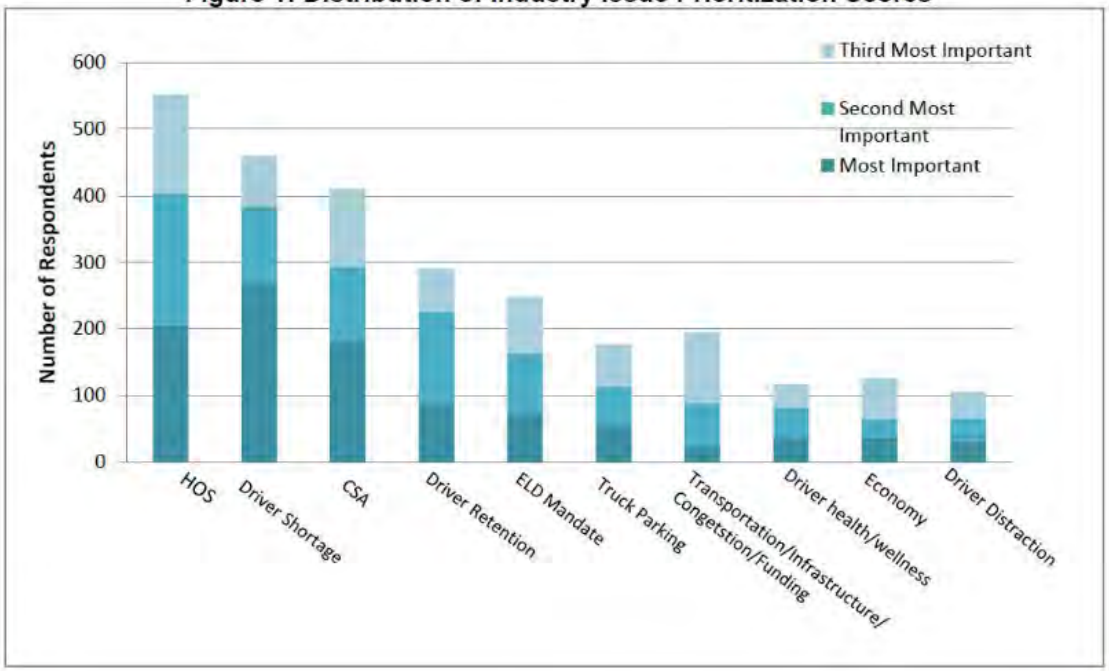
- $5,856 state fees & taxes
- $8,906 federal fees & taxes

The above are in addition to "normal" business taxes

Data provided by ATRI

Top Issues Nationally 2014 Survey*

Figure 1: Distribution of Industry Issue Prioritization Scores



*Survey conducted by ATRI American Transportation Research Institute

*Top Issues Nationally 2014 Survey**

Rank 11-15

Table 1: Issues 11 – 15

Rank	Issue	Industry Concern Index
11	Fuel Supply/Fuel Prices	15.4
12	Sleep Apnea Screening/Treatment	10.7
13	Onboard Safety and Efficiency Enhancing Technologies	9.1
14	Tort Reform	8.9
15	Independent Contractor Status	8.7

**Survey conducted by* ATRI American Transportation Research Institute

Top Issues Nationally 2005-2014 Surveys*

Table 2: Top Industry Issue Rankings, 2005 – 2014

	Issue Rank									
	1	2	3	4	5	6	7	8	9	10
2014	Hours-of-Service	Driver Shortage	CSA	Driver Retention	ELD Mandate	Truck Parking	Infrastr./ Congestion/ Funding	Driver Health/ Wellness	Economy	**Driver Distraction**
2013	Hours-of-Service	CSA	Driver Shortage	Economy	ELD Mandate	Truck Parking	Driver Retention	Fuel Supply/ Fuel Prices	Infrastr./ Congestion/ Funding	Driver Health/ Wellness
2012	CSA	Hours-of-Service	Economy	Driver Shortage	Fuel Supply/ Fuel Prices	**ELD Mandate**	Driver Retention	**Truck Parking**	**Driver Health/ Wellness**	Congestion/ Truck Bottlenecks
2011	Economy	Hours-of-Service	Driver Shortage	CSA	Fuel Issues	Congestion	Transportation Funding	Tort Reform	Onboard Truck Technology	Truck Size and Weight
2010	Economy	**CSA**	Government Regulation	Hours-of-Service	Driver Shortage	Fuel Issues	Transportation Funding/ Infrastr.	Onboard Truck Technology	Environmental Issues	Truck Size and Weight
2009	Economy	Government Regulation	Fuel Issues	Congestion/ Highway Infrastr.	Hours-of-Service	Commercial Driver Issues	Environmental Issues	Tolls/ Highway Funding	**Truck Size and Weight**	Onboard Truck Technology
2008	Fuel Costs	**Economy**	Driver Shortage/ Retention	Government Regulation	Hours-of-Service	Congestion	Tolls/ Highway Funding	Environmental Issues	Tort Reform	Onboard Truck Technology
2007	Hours-of-Service	Driver Shortage	Fuel Issues	Congestion	Government Regulation	Tolls/ Highway Funding	Tort Reform/ Legal Issues	Truck Driver Training	Environmental Issues	**Onboard Truck Technology**
2006	Driver Shortage	Fuel Issues	Driver Retention	Hours-of-Service	Congestion	Government Regulation	Highway Infrastr.	Tort Reform	Tolls/ Highway Funding	Environmental Issues
2005	Fuel Costs	Driver Shortage	Insurance Costs	Hours-of-Service	Tolls/ Highway Funding	Tort Reform/ Legal Issues	Government Regulation	Congestion	Environmental Issues	Truck Security

Note: **Bold** indicates first year in top ten.

*Survey conducted by ATRI American Transportation Research Institute

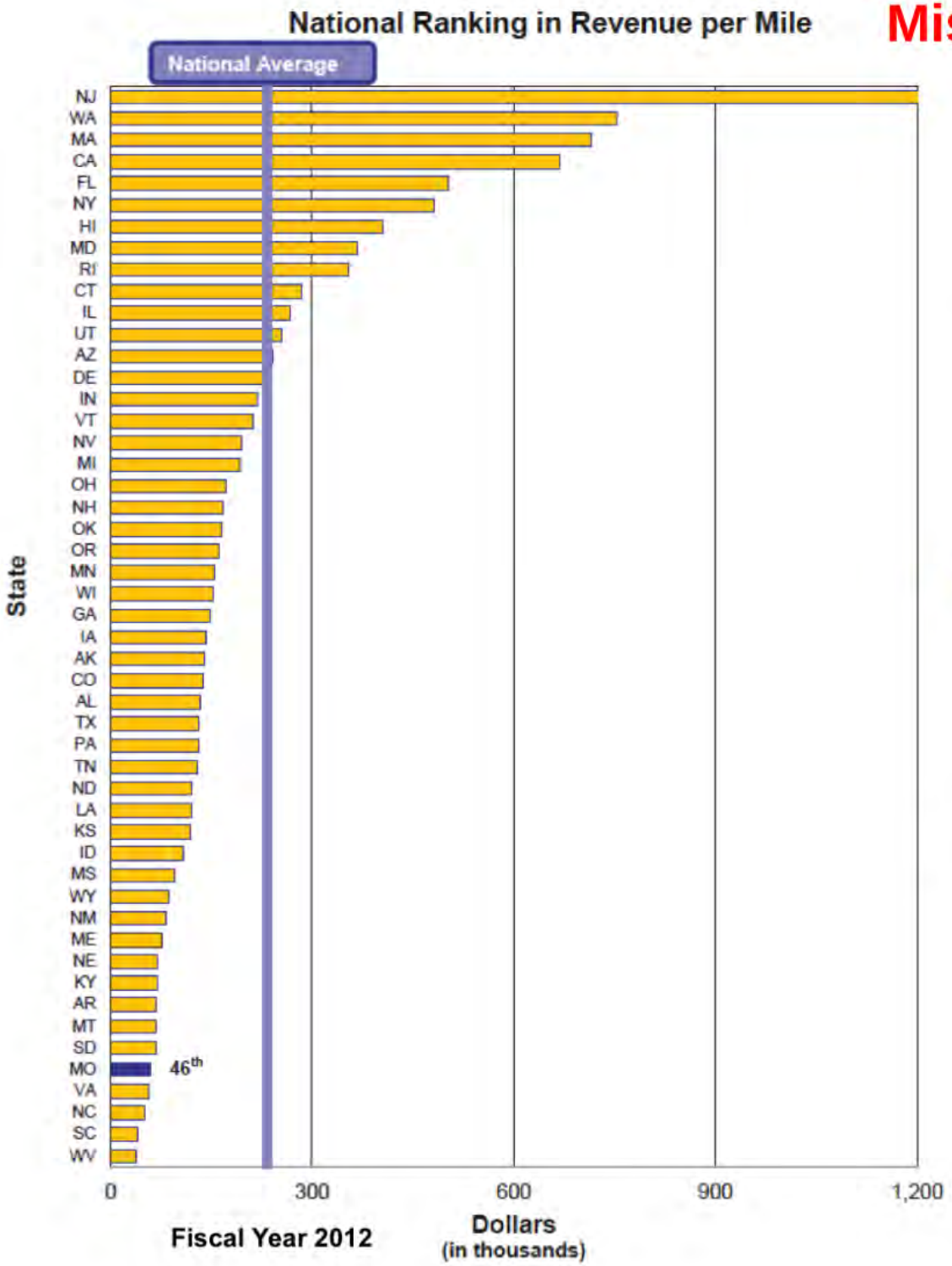
Missouri

Top Industry Issues
Fall 2014 Survey

- 1. Driver Shortage
- 2. Compliance, Safety, Accountability (CSA)
- 3. Hours-of-Service
- 4. Driver Retention
- 5. Electronic Logging Device (ELD) Mandate
- 6. Transportation Infrastructure/Congestion/Funding
- 7. Driver Distraction
- 8. Truck Parking
- 9. (Tie) Onboard Safety and Efficiency Enhancing Technologies
- 9. (Tie) Driver Health/Wellness

**Extrapolated from Missouri respondents to survey conducted by* ATRI

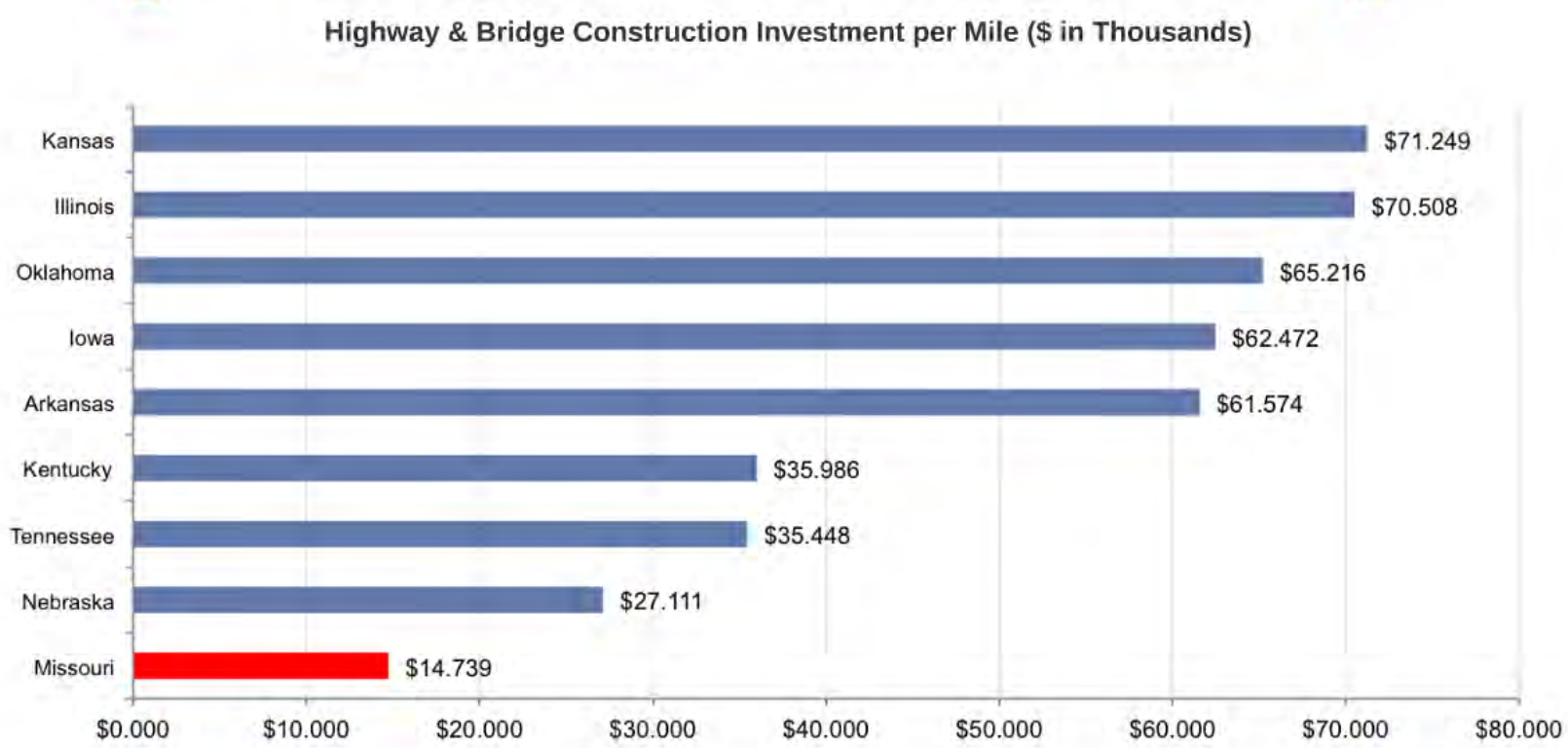
Missouri's Transportation System



7th Largest Highway System > 34,000 miles

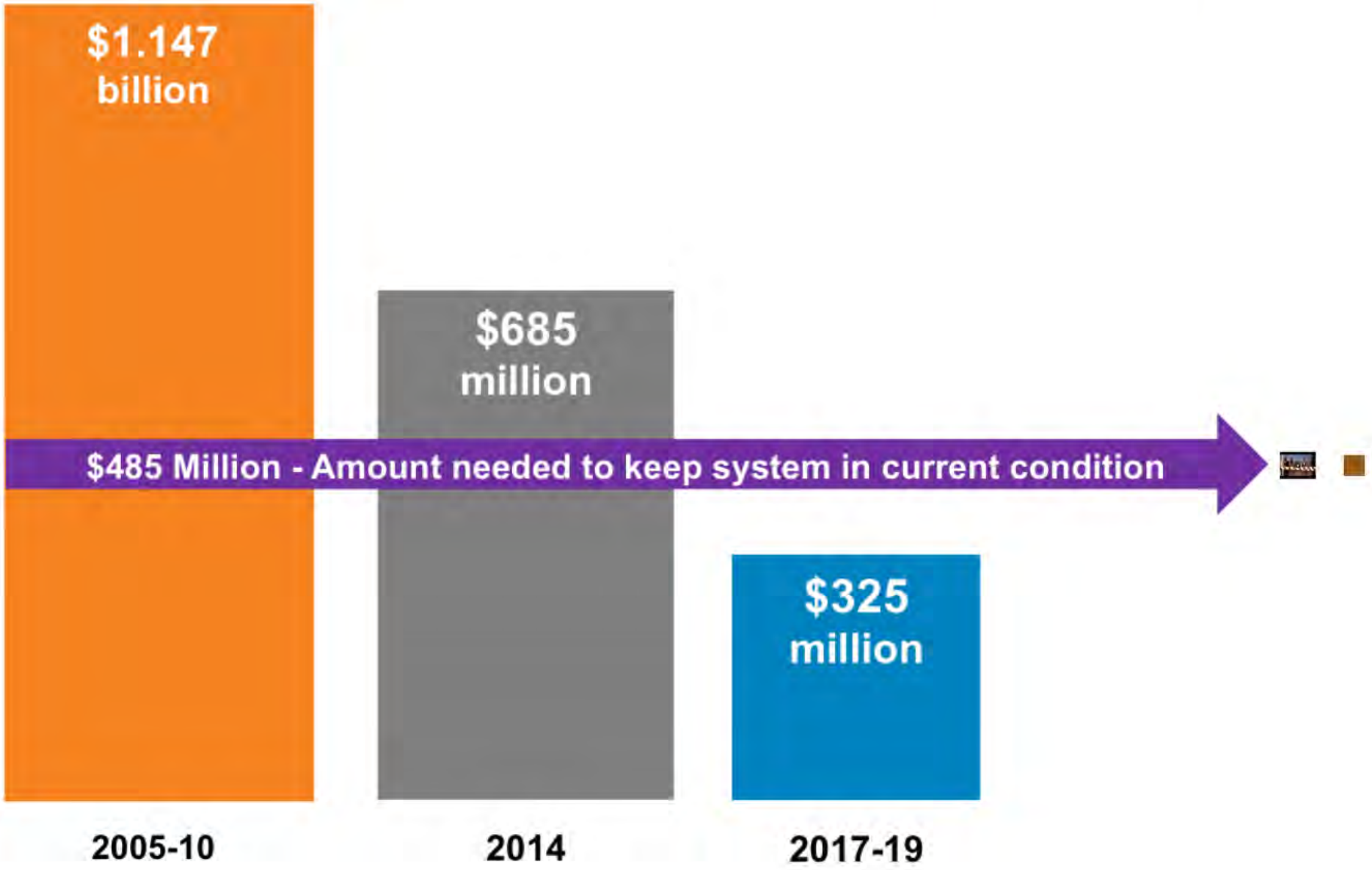
46th Lowest Revenue spent per mile

Comparison with Surrounding States



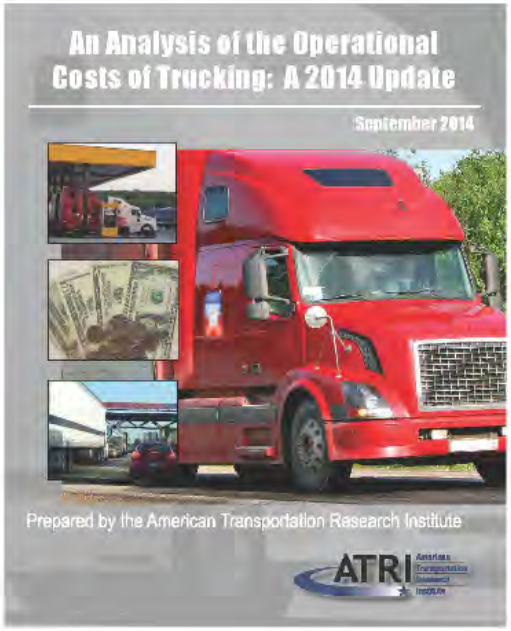
- Missouri data ranges 2014-2019. Other states range from 2014-2020.
- Data Compiled via state transportation agencies' planning divisions.

Maintaining System in Current Condition Requires Change Soon



Operational Costs of Trucking

- *Annual report first issued in 2008*
- *Collects and analyzes real-world motor carrier operational data*
- *Calculates costs by mile and by hour*



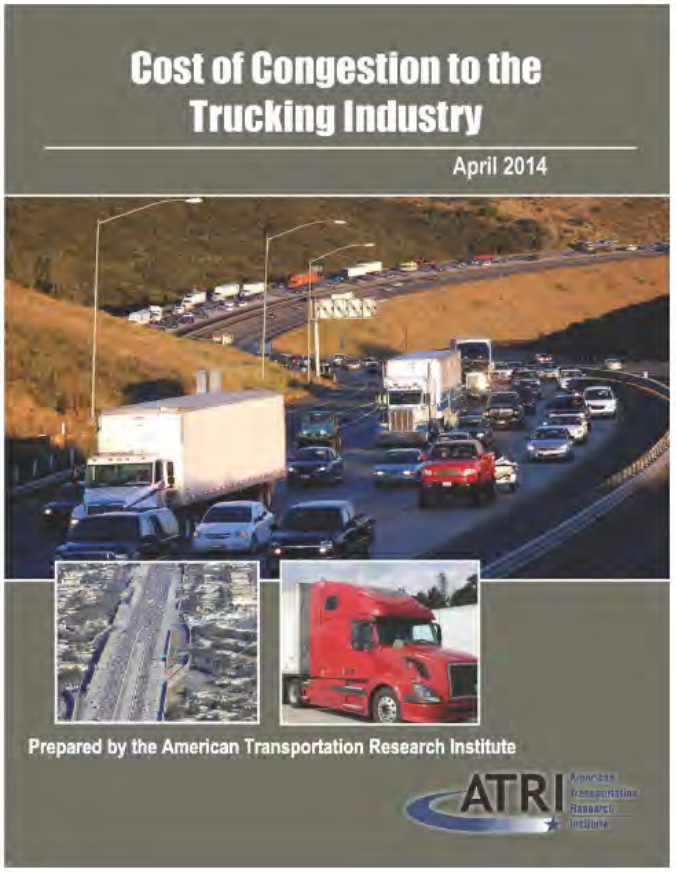
Calculating the Cost of Congestion

ATRI analysis calculates total trucking industry cost of congestion on Interstates

Empirical truck GPS data

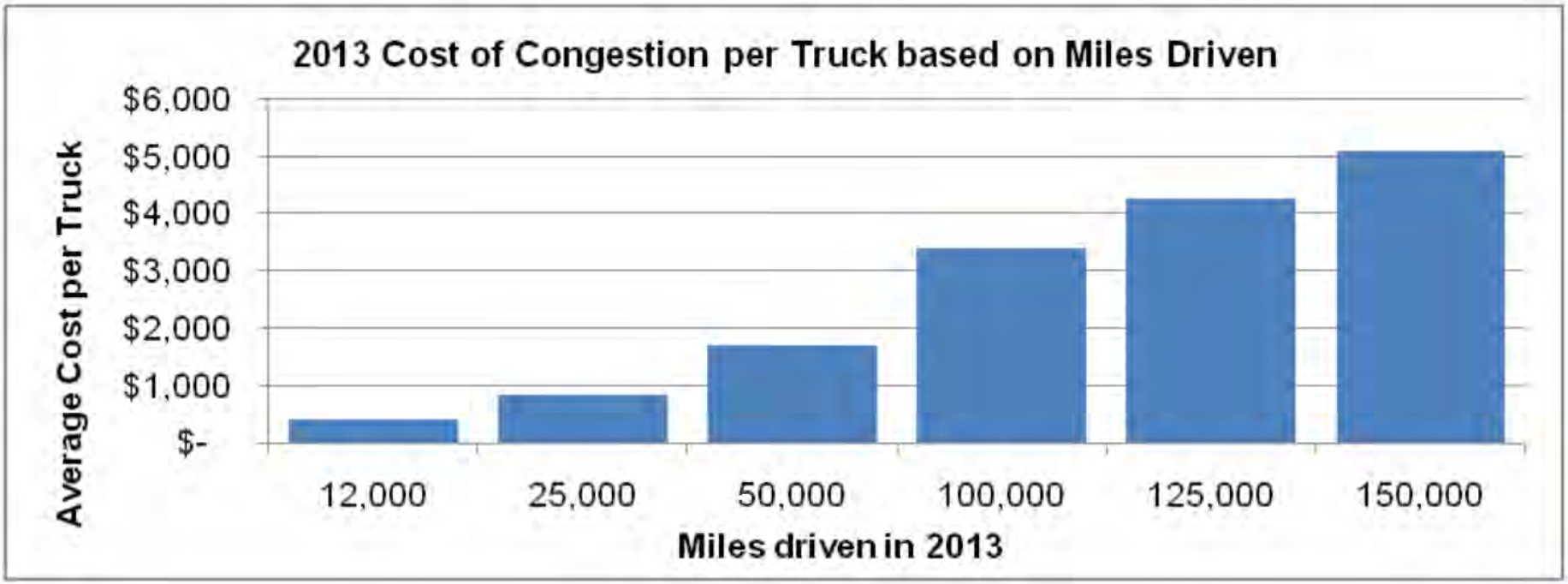
National volume estimates

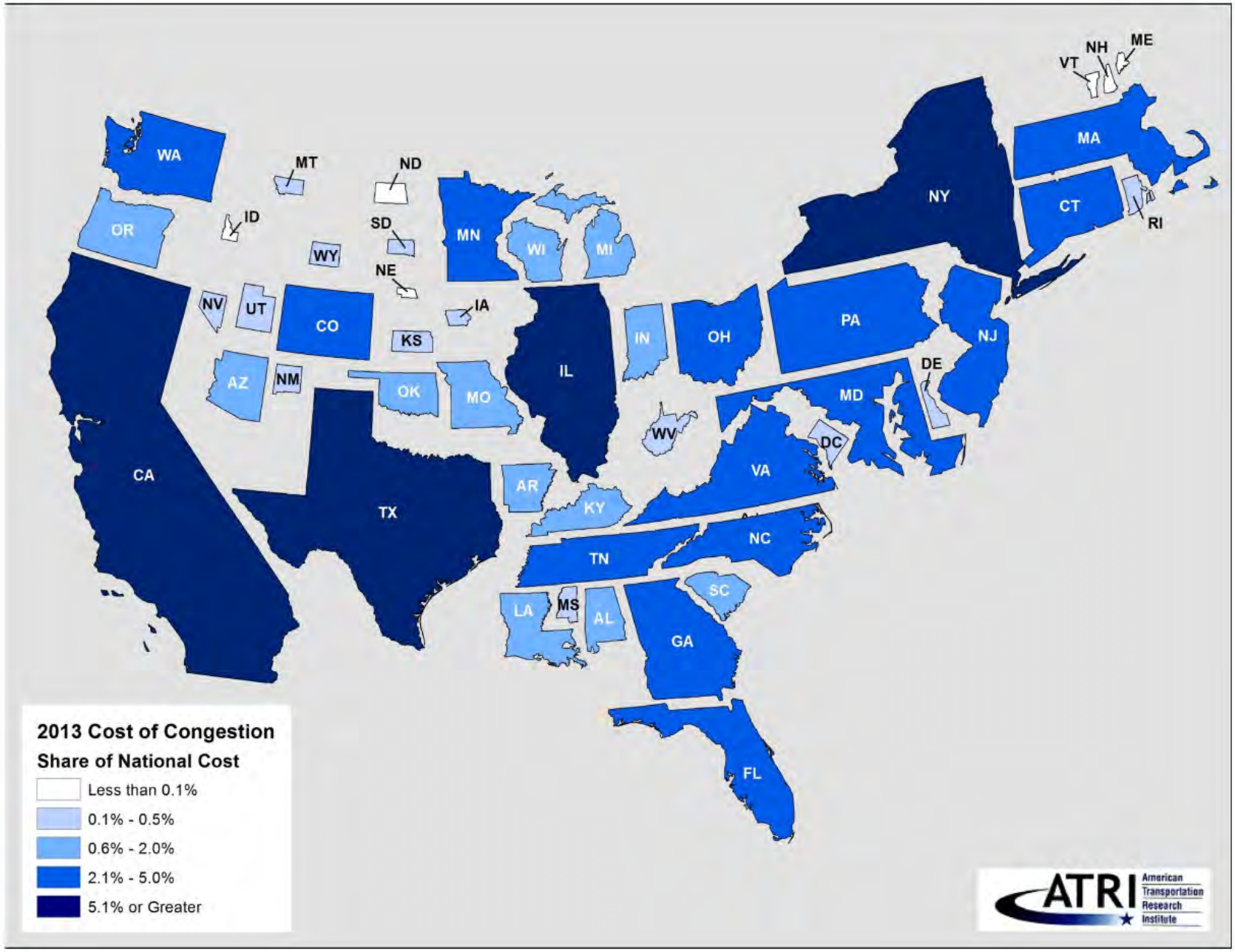
Ranks by state, metro and county



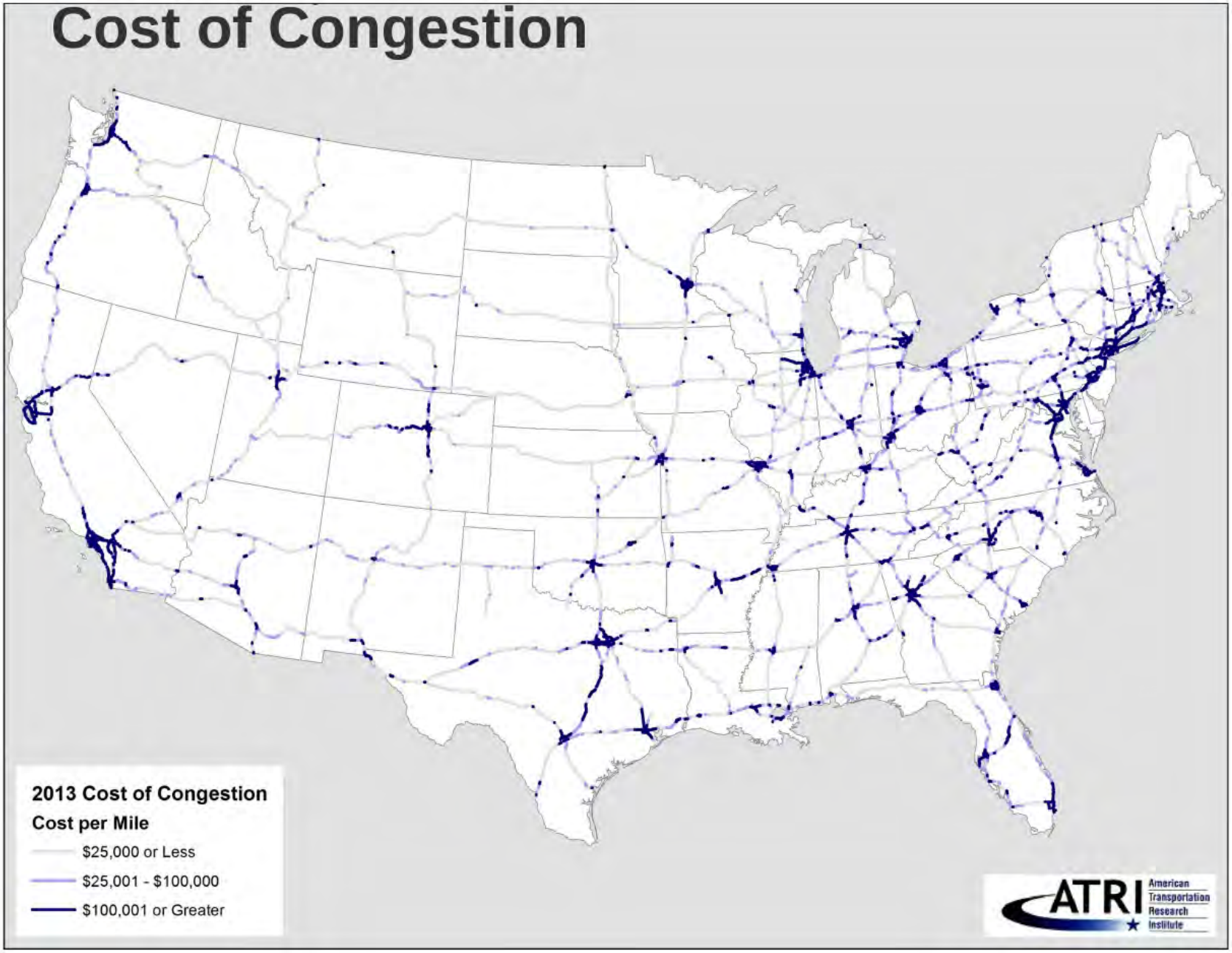
Cost of Congestion

- 2013 cost = $9.2 billion
- 141 million lost hours of productivity
- Translates to over 51,000 drivers sitting idle for a working year
- Overall average of $864 per registered large truck (GVWR 10k+ lbs.)



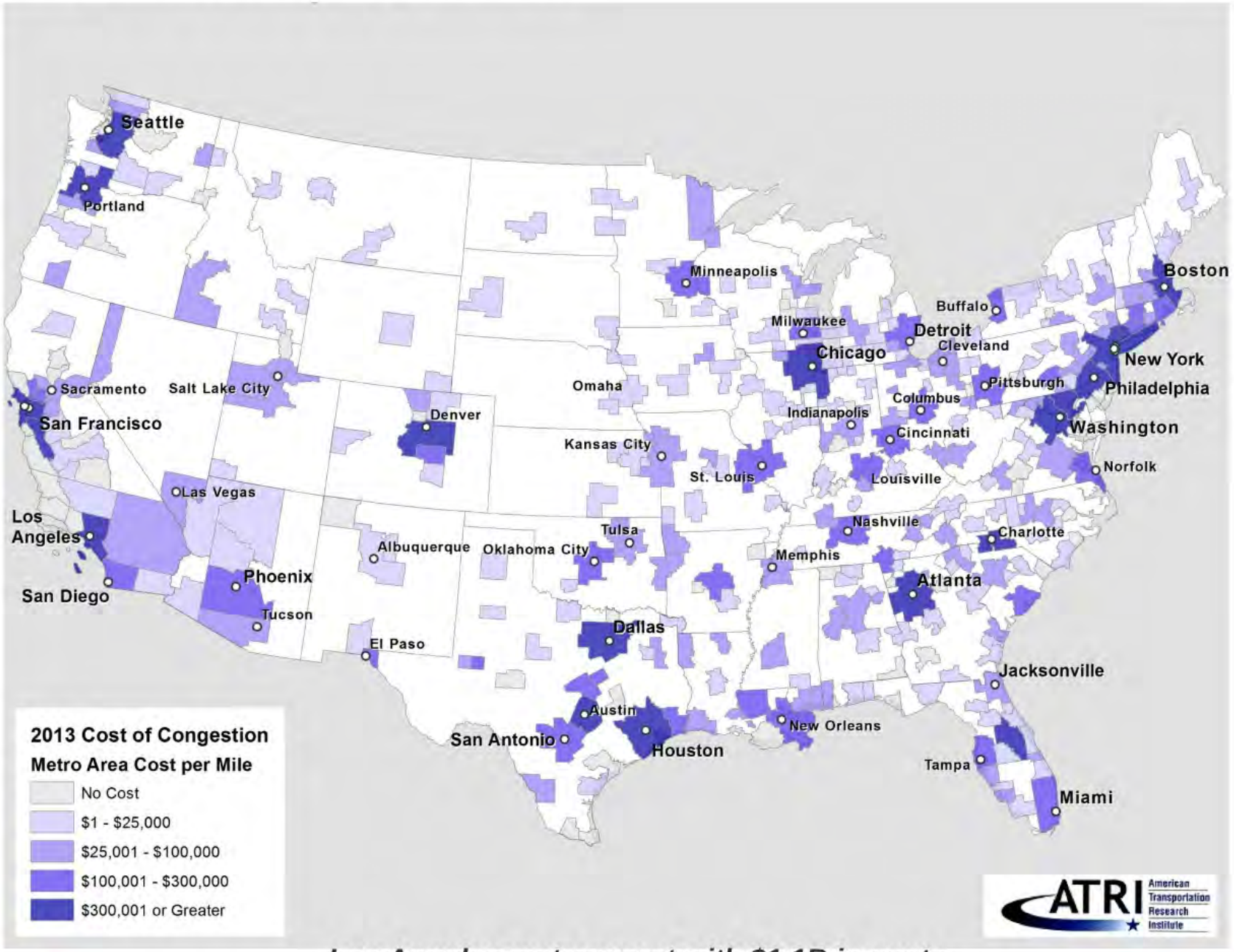

WA
OR
CA
ID
NV
MT
WY
UT
AZ
CO
NM
ND
SD
NE
KS
OK
TX
MN
IA
MO
AR
LA
WI
IL
MS
MI
IN
KY
TN
AL
OH
WV
GA
FL
SC
NC
VA
PA
NY
MD
DC
DE
NJ
CT
RI
MA
VT
NH
ME
2013 Cost of Congestion
Share of National Cost
Less than 0.1%
0.1% - 0.5%
0.6% - 2.0%
2.1% - 5.0%
5.1% or Greater
ATRI
American Transportation Research Institute

Cost of Congestion



89% of cost concentrated on 12% of Interstate miles

Cost of Congestion



Los Angeles metro worst with $1.1B in costs

Congestion Costs per Mile

Rank	State	2013 Cost per Mile
Top Ten by Total Cost per Mile		
1	District of Columbia	$1,087,578
2	California	$343,450
3	Maryland	$320,231
4	Connecticut	$272,729
5	New Jersey	$266,214
6	Massachusetts	$264,047
7	New York	$244,839
8	Delaware	$199,388
9	Washington	$163,612
10	Texas	$156,034

Rank	State	2013 Cost per Mile
Bottom Ten by Total Cost per Mile		
49	Nebraska	$5,387
48	Montana	$5,596
47	Idaho	$6,264
46	Iowa	$6,878
45	Maine	$7,022
44	North Dakota	$7,328
43	South Dakota	$7,806
42	Wyoming	$11,102
41	New Mexico	$11,221
40	Vermont	$11,469

Freight Bottleneck Analysis

Ongoing monitoring of 250 truck freight-significant locations

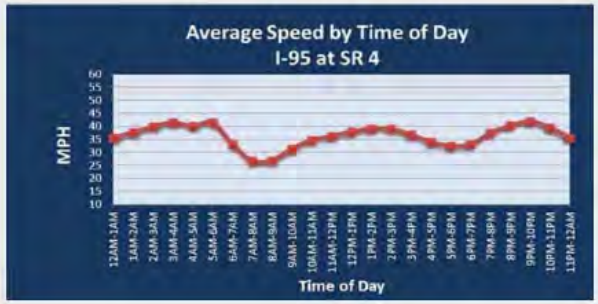
Carriers use the info to aid in avoiding/scheduling around truck freight congestion chokepoints

2014 Top 10 Freight Bottlenecks

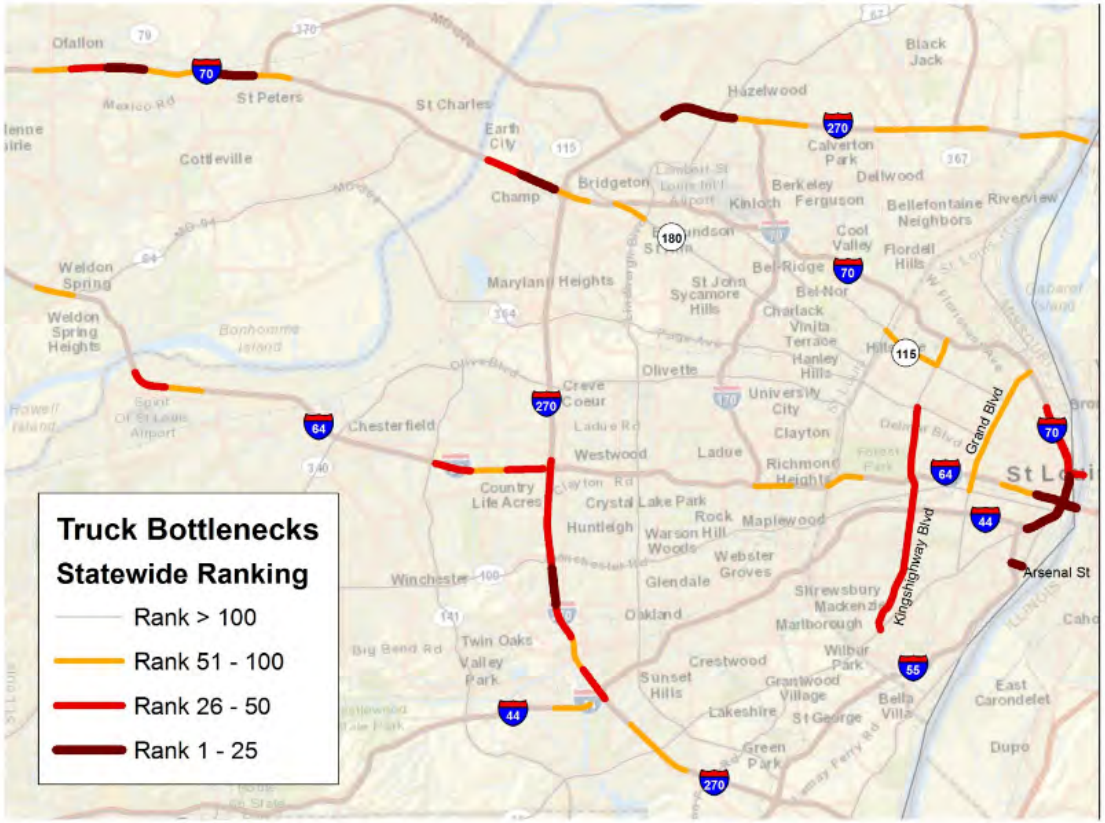
Rank	Location	Average Speed	2013 Rank	Change
1	Fort Lee, NJ: I-95 at SR 4	36	4	+3
2	Chicago, IL: I-290 at I-90/I-94	30	1	-1
3	Atlanta, GA: I-285 at I-85 (North)	42	14	+11
4	Cincinnati, OH: I-71 at I-75	47	8	+4
5	Houston, TX: I-45 at US 59	39	7	+2
6	Houston, TX: I-610 at US 290	42	2	-4
7	St. Louis, MO: I-70 at I-64 (West)	43	5	-2
8	Los Angeles, CA: SR 60 at SR 57	47	15	+7
9	Louisville, KY: I-65 at I-64/I-71	47	6	-3
10	Austin, TX: I-35	36	3	-7

Fort Lee, NJ: I-95 at SR 4

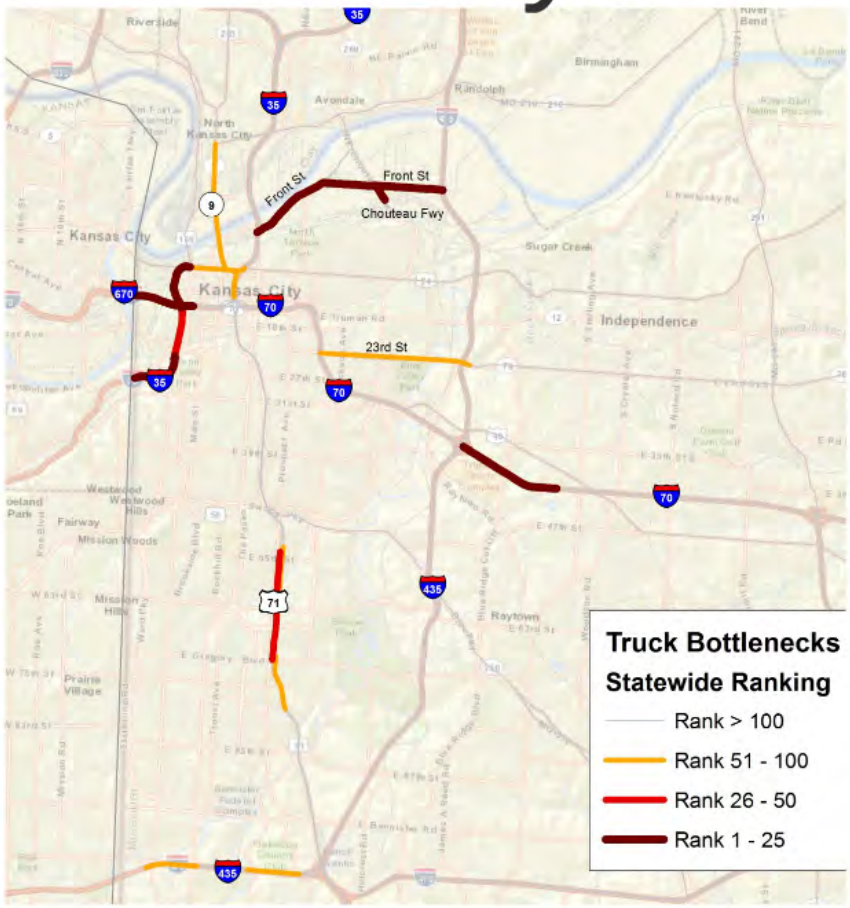
Summary	
National Ranking by Congestion Index	1
Average Speed	36
Peak Average Speed	30
Nonpeak Average Speed	38
Nonpeak/Peak Ratio	1.25



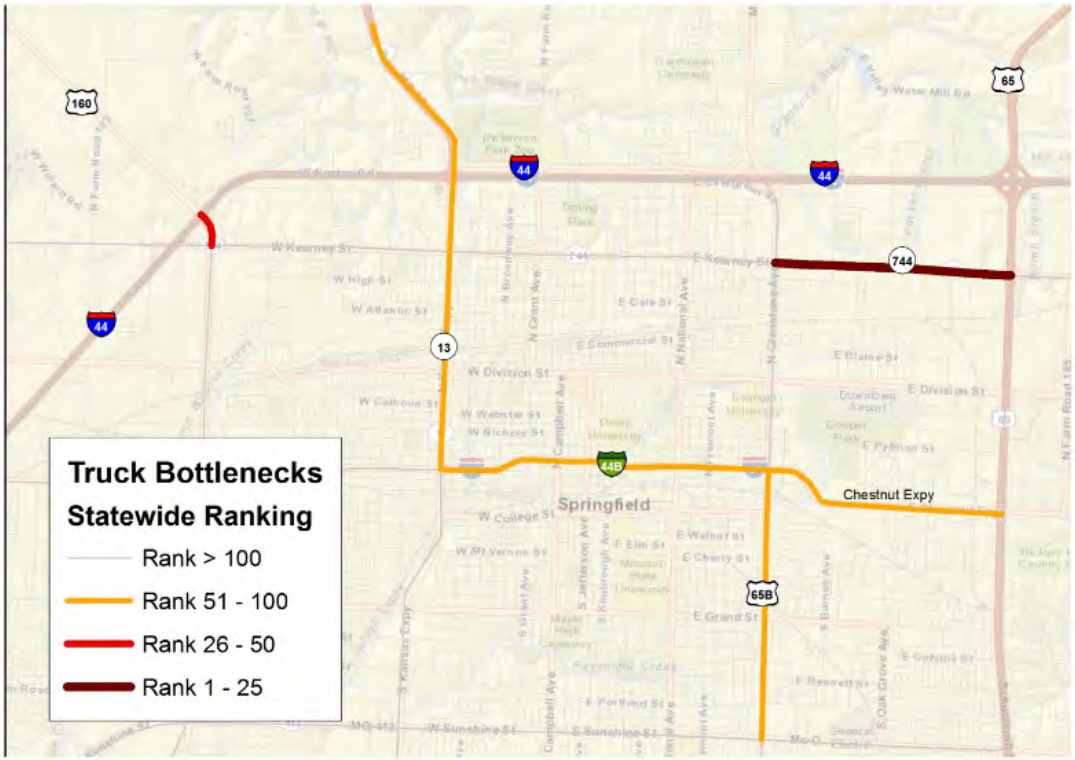
St Louis Metro

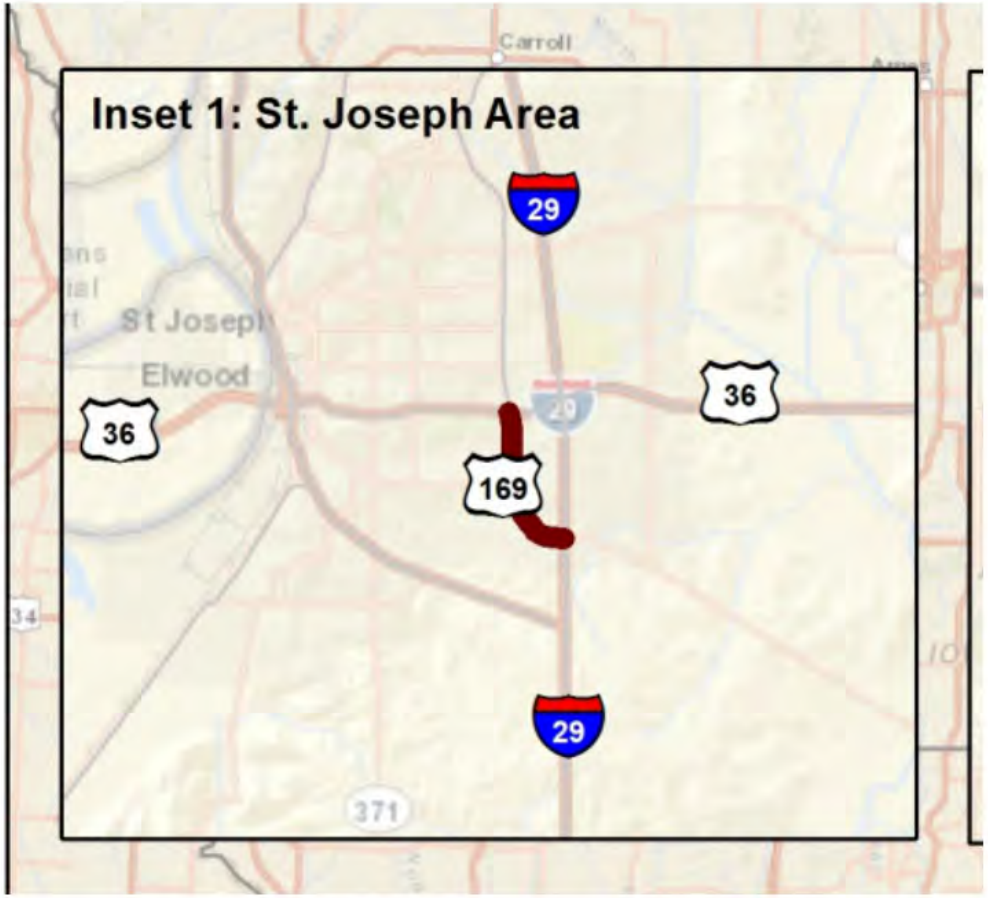


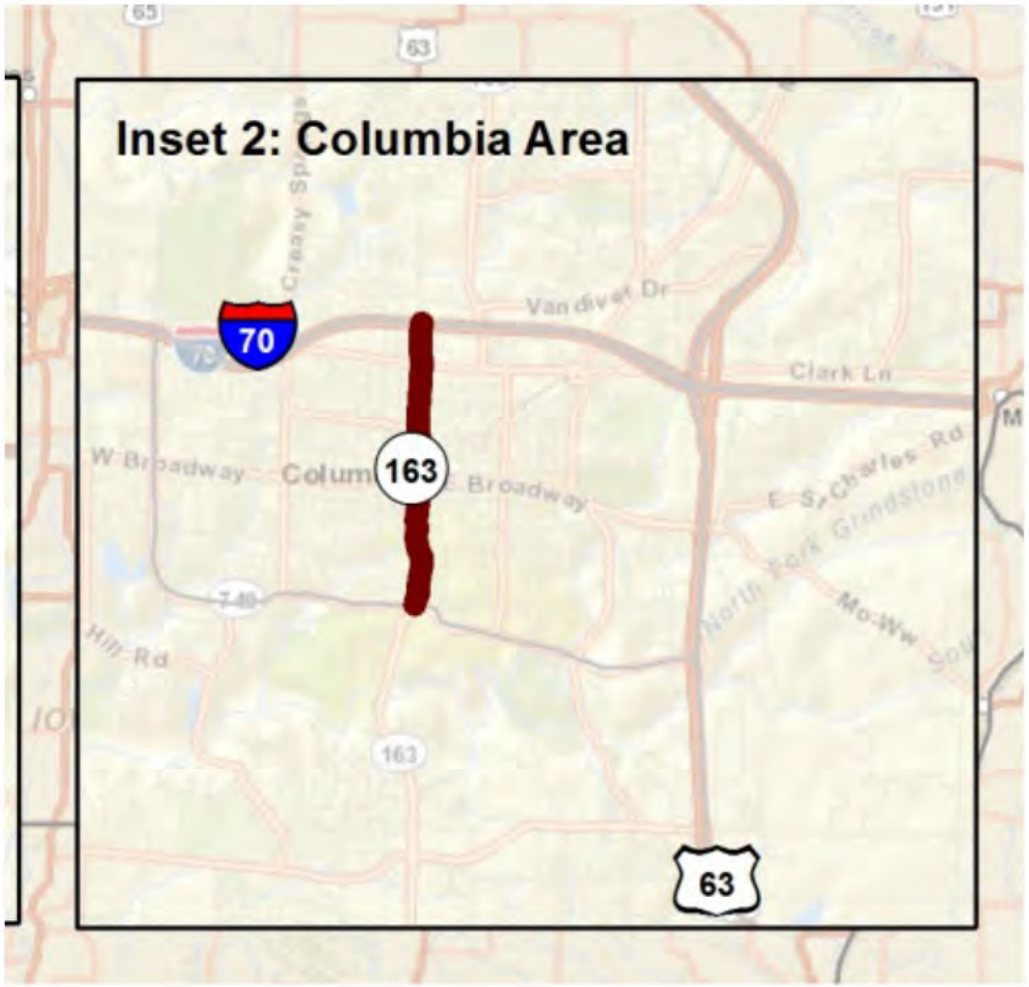
Kansas City Metro



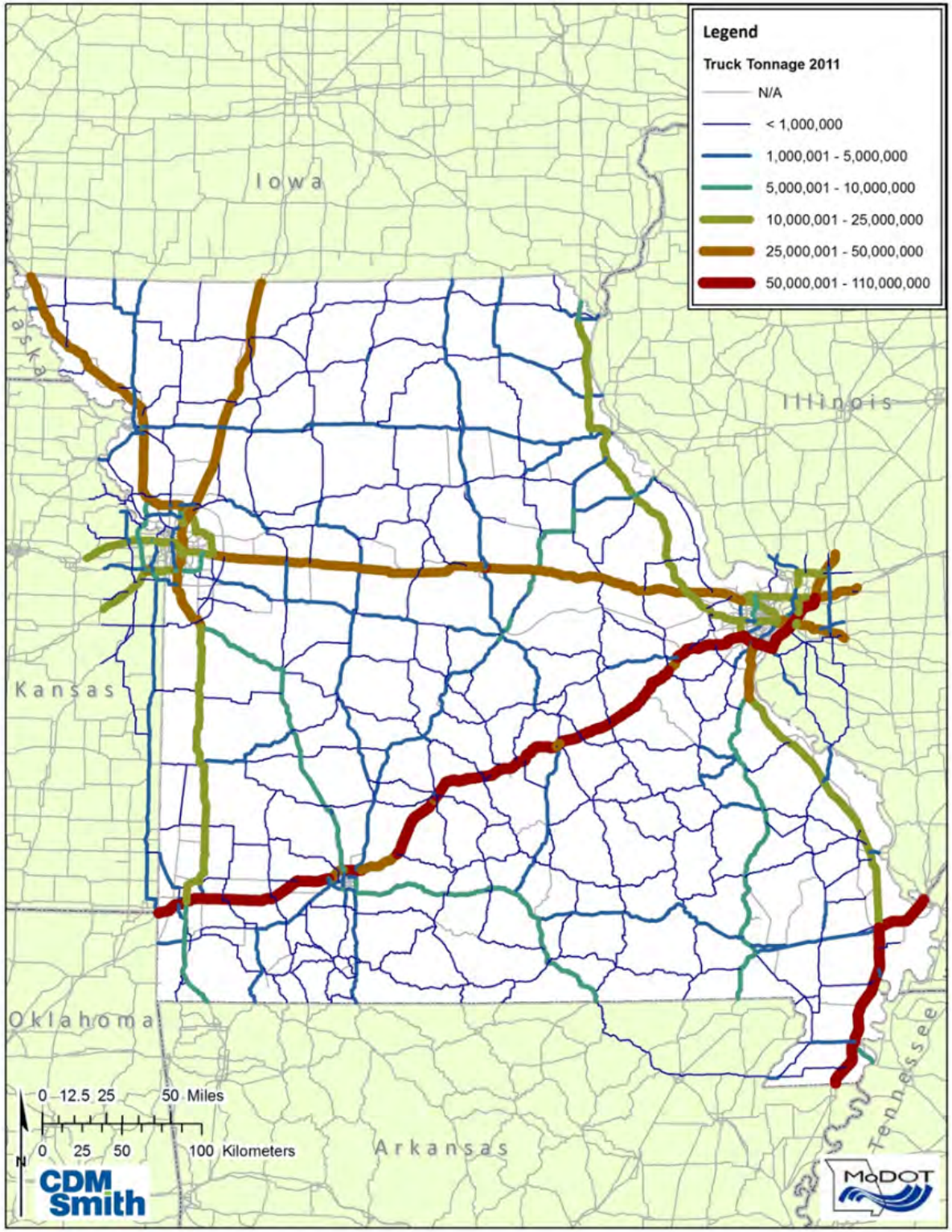
Springfield Metro




Inset 1: St. Joseph Area
Carroll
St Joseph
Elwood
29
36
20
36
169
34
29
371

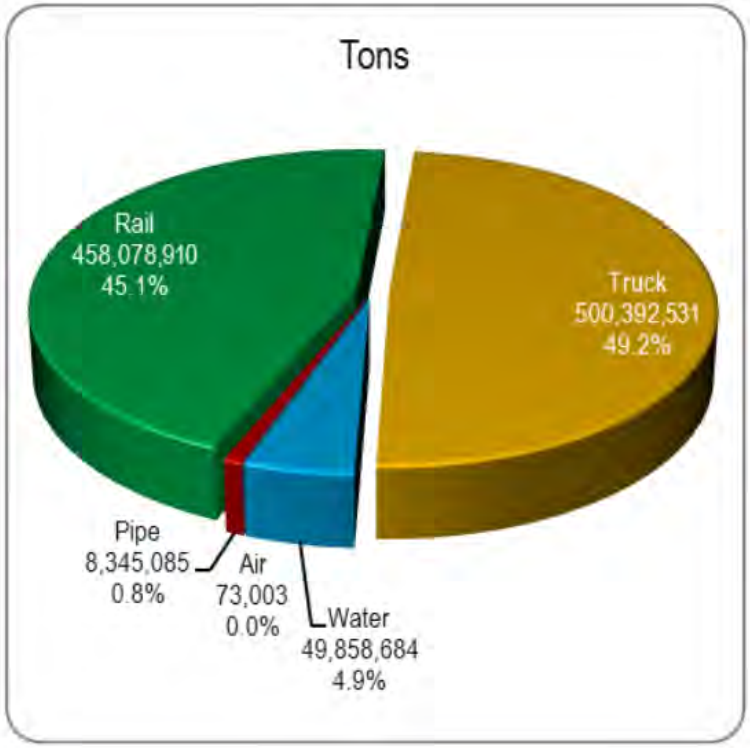

Inset 2: Columbia Area
70
163
63
Vandiver Dr
Clark Ln
W Broadway
Broadway
Hill Rd
Creasy Springs Rd
E St Charles Rd
North Fork Grindstone
Mo-Ww
65
63
163

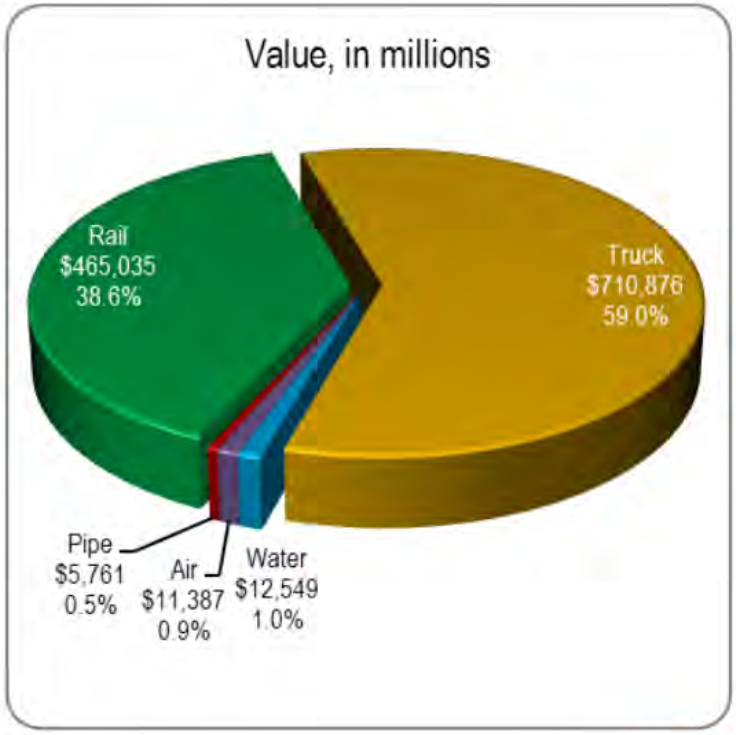
Inset 3: Jefferson City Area
54
50
50 B
54
50
Jefferson City
W Mccarty St
Park
Stadium Blvd
E High St


Legend
Truck Tonnage 2011
N/A
< 1,000,000
1,000,001 - 5,000,000
5,000,001 - 10,000,000
10,000,001 - 25,000,000
25,000,001 - 50,000,000
50,000,001 - 110,000,000
Iowa
Illinois
Kansas
Oklahoma
Arkansas
Tennessee
0 12.5 25 50 Miles
0 25 50 100 Kilometers
N
CDM Smith
MoDOT

Freight Movement

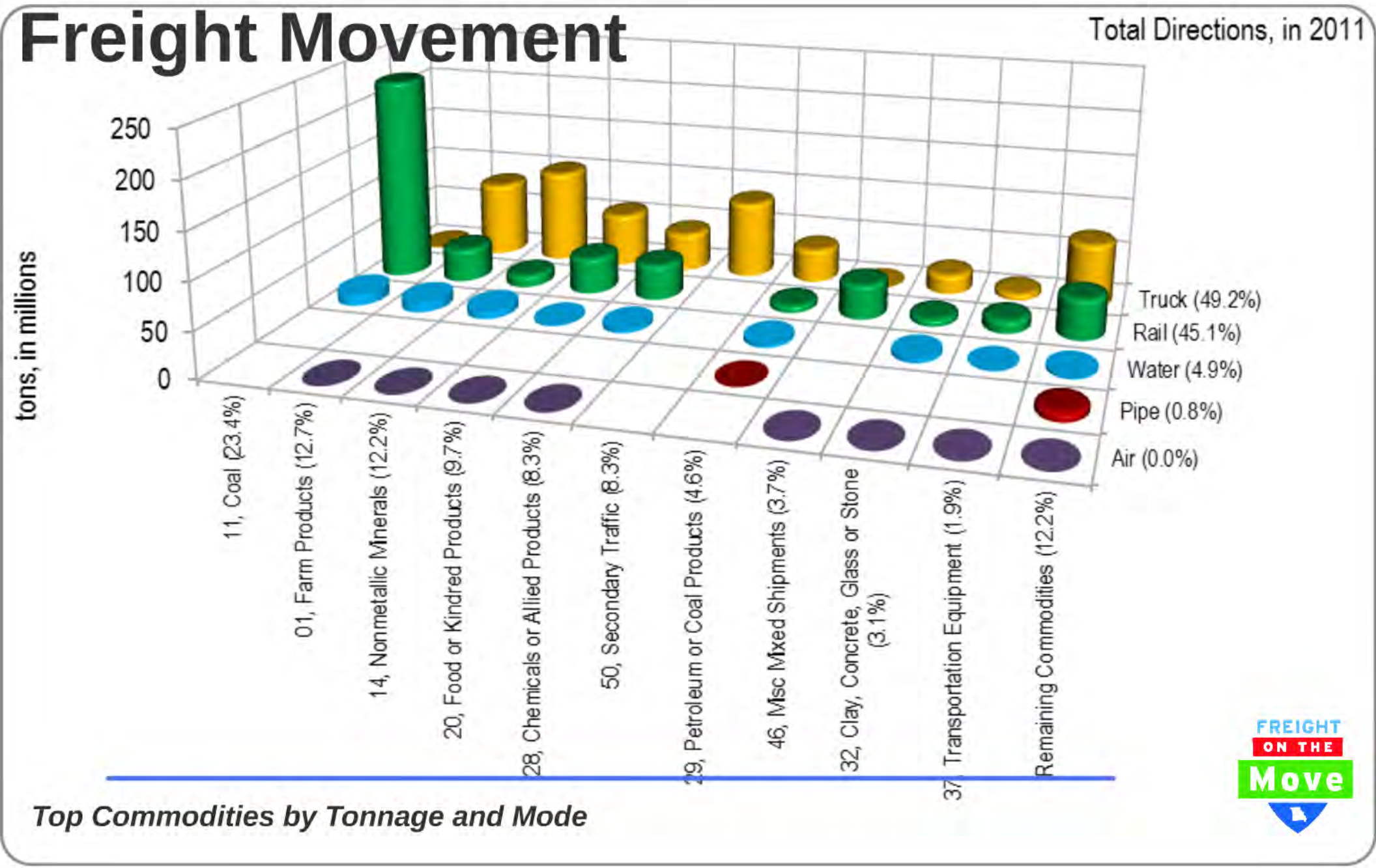
Total Tons and Value by Mode, 2011





FREIGHT ON THE Move

Freight Movement

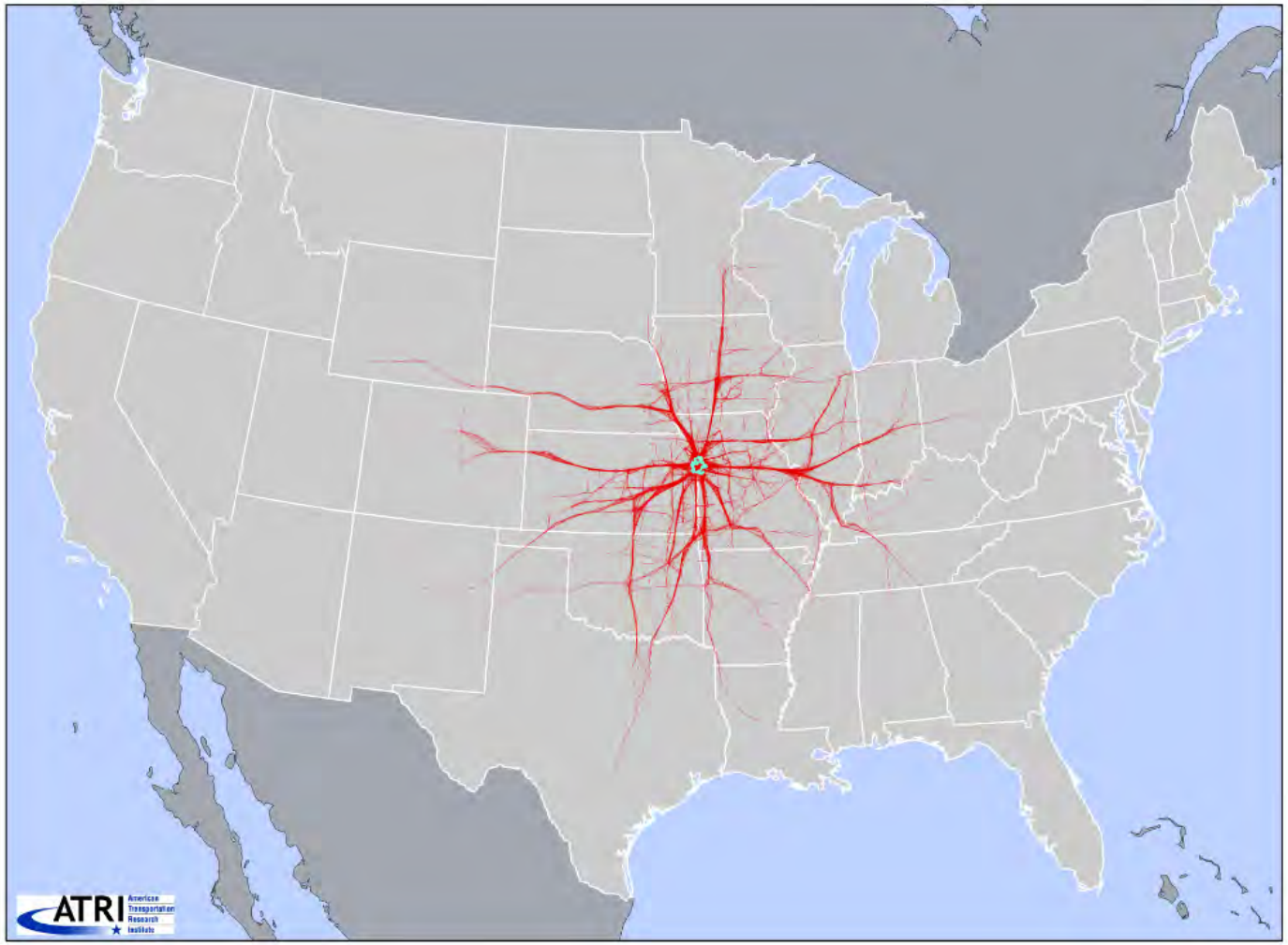


Top Commodities by Tonnage and Mode

FREIGHT ON THE Move

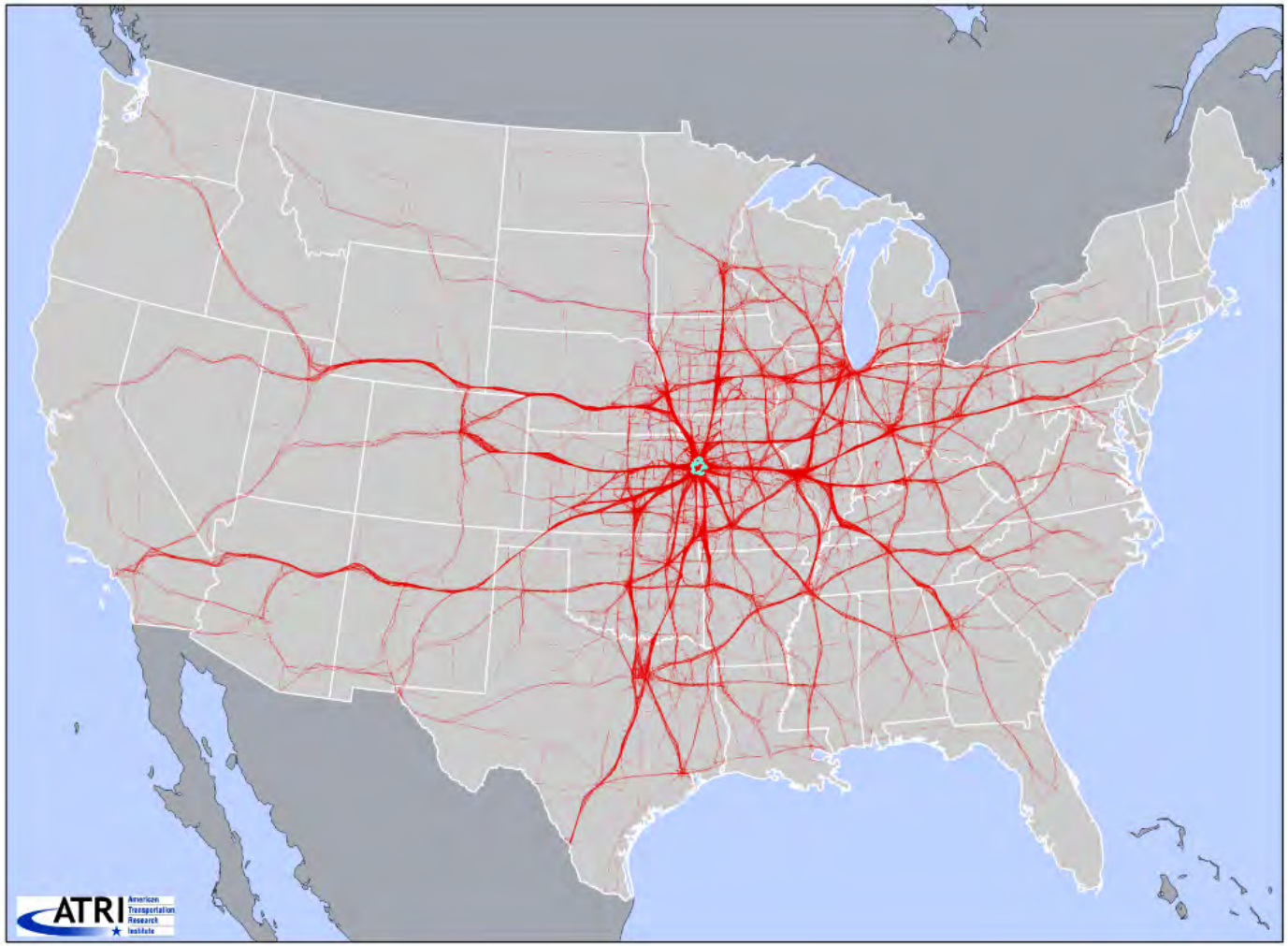
Kansas City
2,000 Truck Sample

Same 2,000 Trucks After 24 Hours

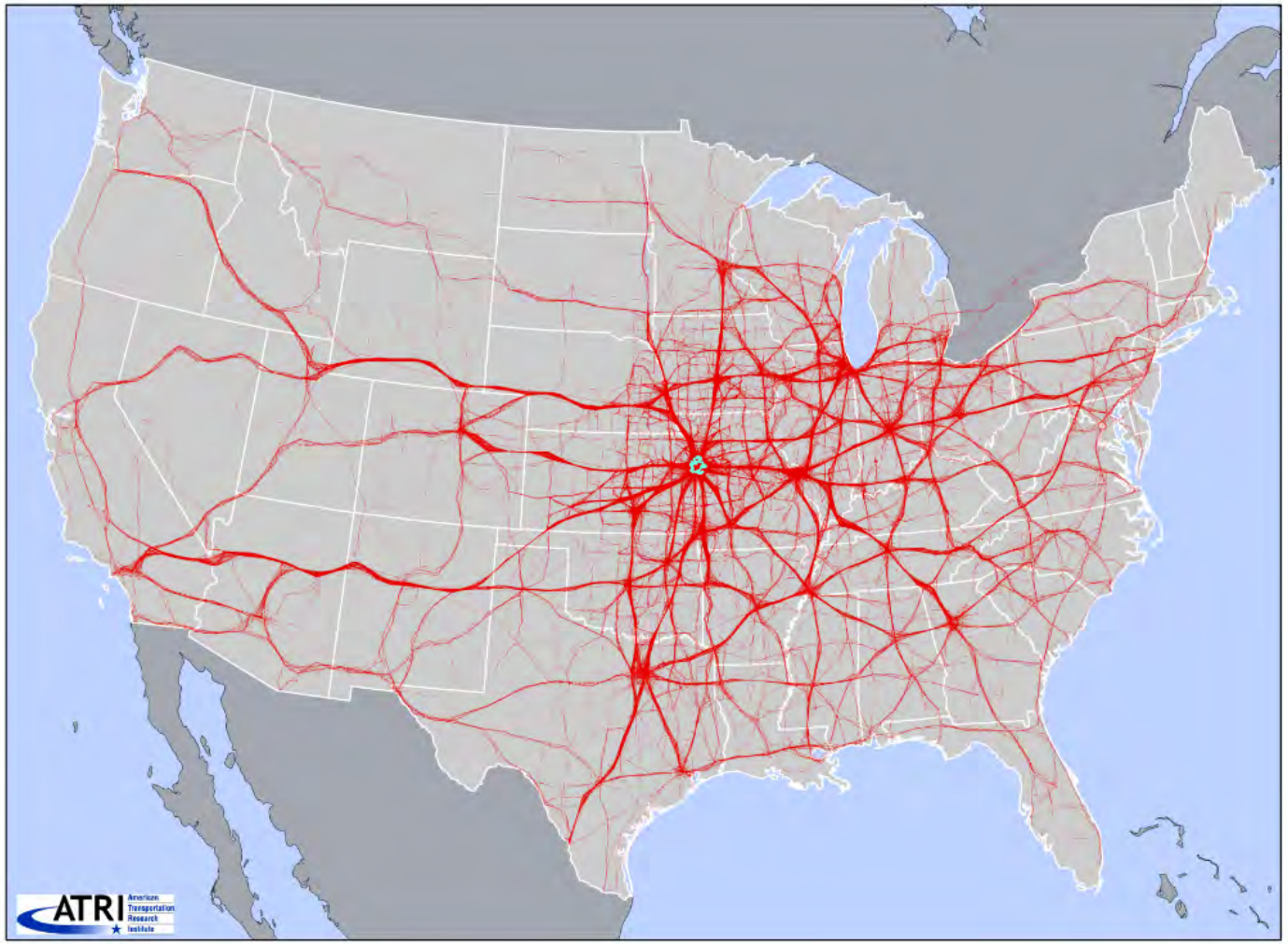
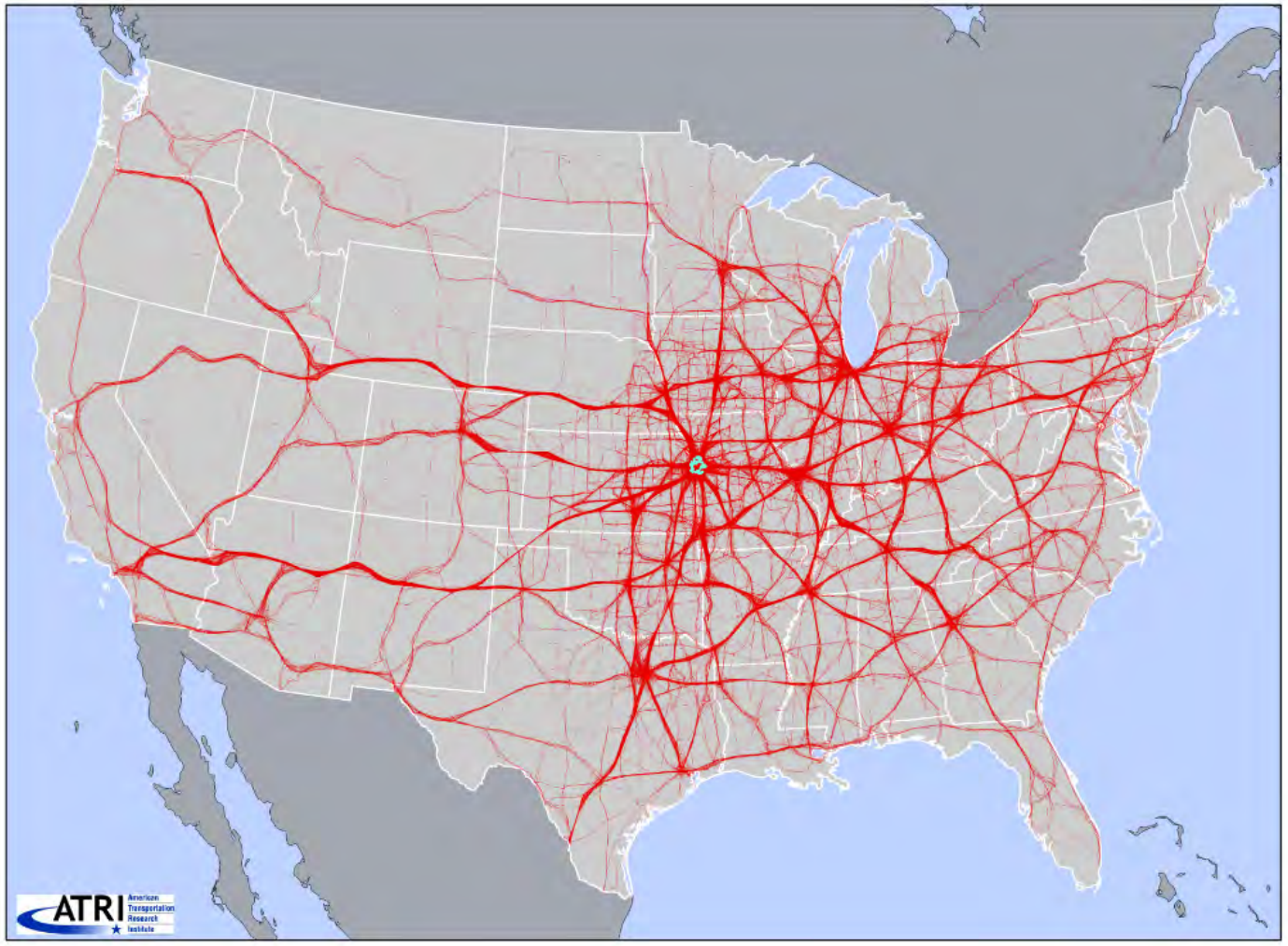


Same 2,000 Trucks After 48 Hours

Same 2,000 Trucks After 72 Hours



Same 2,000 Trucks After 5 Days



Same 2,000 Trucks After 7 Days