

# Oregon Freight Plan

Oregon Freight Advisory Committee

April 8, 2026



 Oregon  
Department  
of Transportation



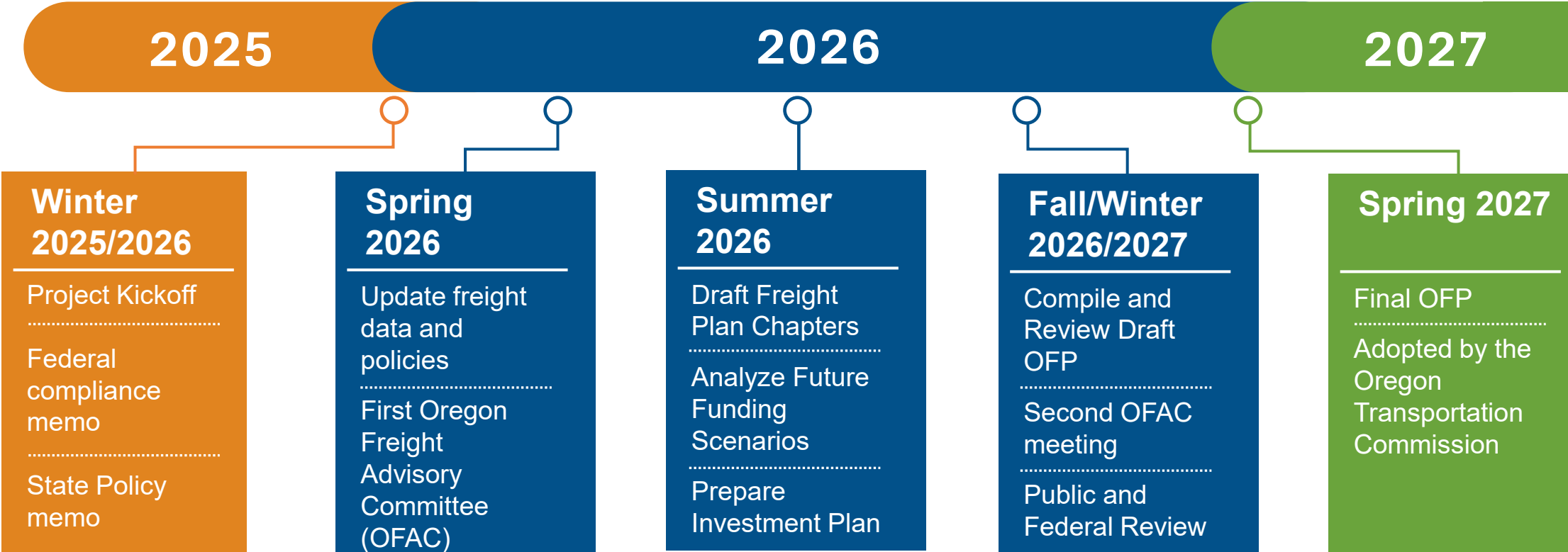
# Agenda

- **Introductions and Purpose**
- **Data and Trends Update**
  - Freight flows, modal shares and commodity trends
  - Broader industry and economic issues
  - Input from OFAC
- **Freight Plan Policy Update**
  - Background on OFP policies
  - Alignment with OTP
  - Major areas of focus or change
  - OFAC discussion

## Background and Purpose of OFP Update

- FHWA required state freight plan due spring 2027
- 2027 update is focused on policy
  - Policy chapter dates back to 2011 with minor update in 2023
  - Need to align with recent Oregon Transportation Plan (OTP)
- Limited update of other elements to meet federal requirements
  - 2023 plan updated all data and trends
  - Demonstrated alignment with federal goals and BIL requirements
  - Oregon has completed extensive work on truck parking, bottlenecks and other requirements since 2017 FAST Act

# Timeline for Key Deliverables and Events



# Data and Trends Update



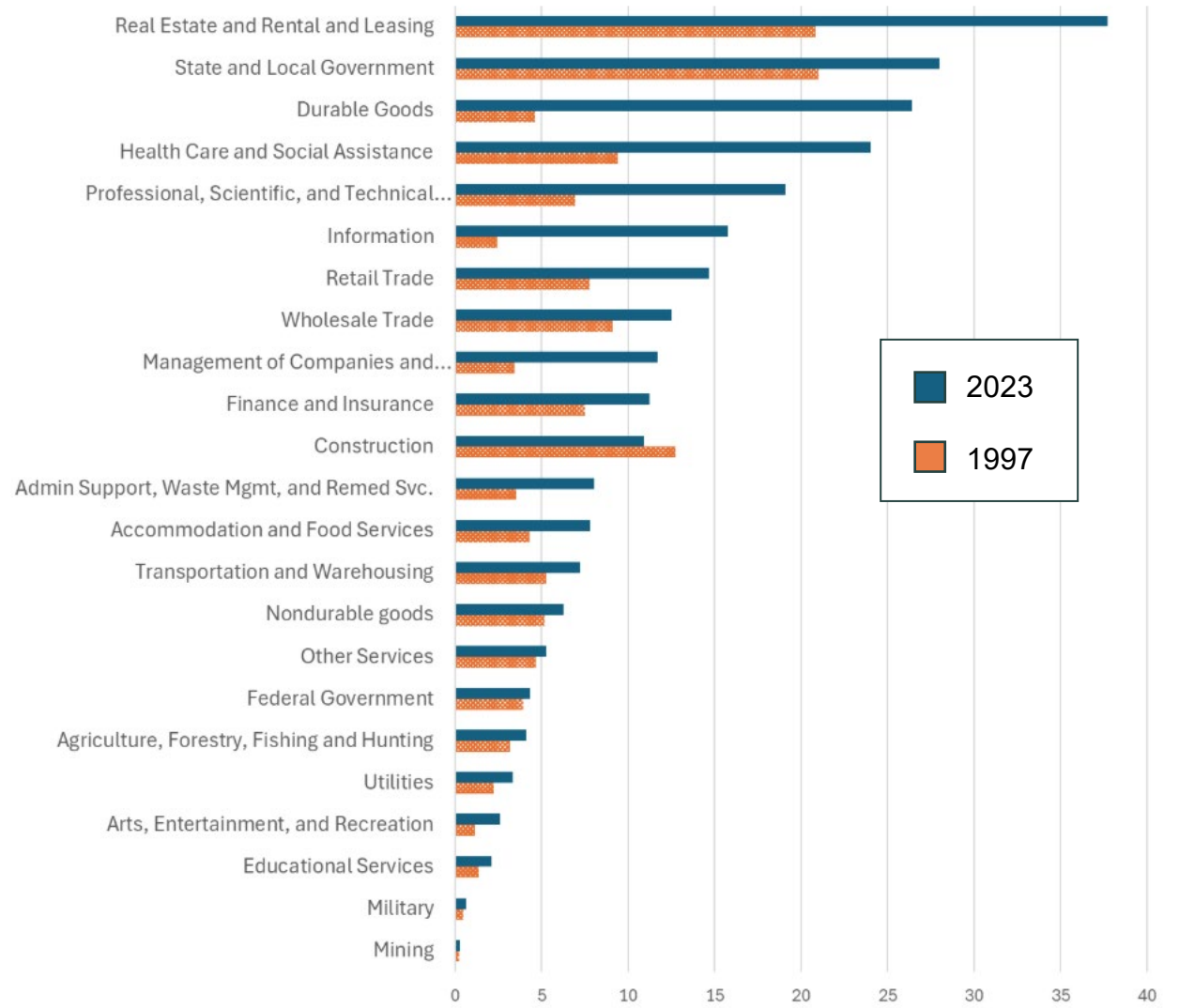
# Data and Trends Update

- Freight Flows
- Modal Shares
- Commodity Trends
- Broader Industry and Economic Issues



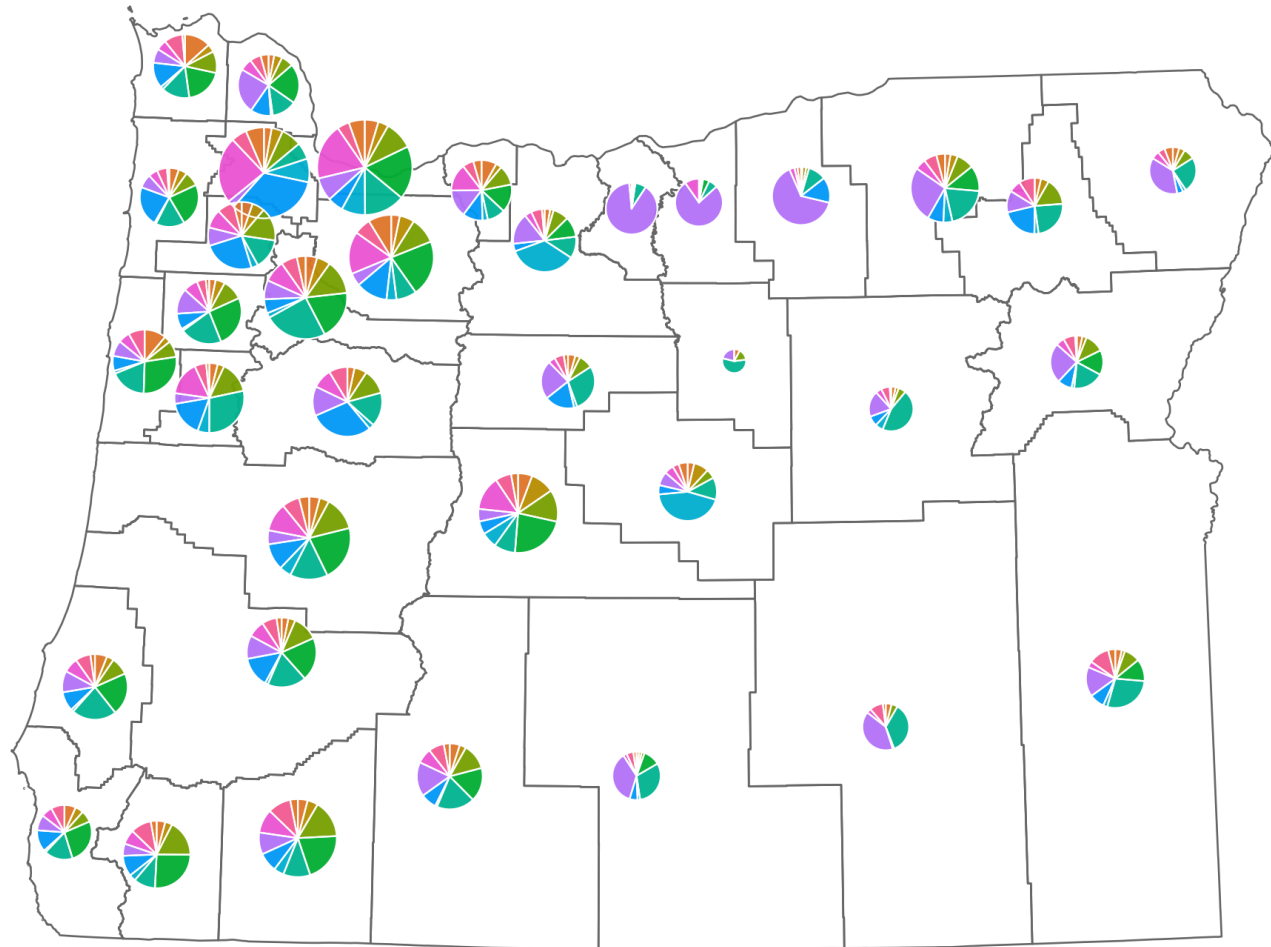
# GSP by Sector

- Top sectors in 2023:
  - Real estate
  - Government
  - Durable Goods
- Largest Growth:
  - Durable Goods
  - Information
  - Management of Companies...
  - Prof., Sci., and Tech Services



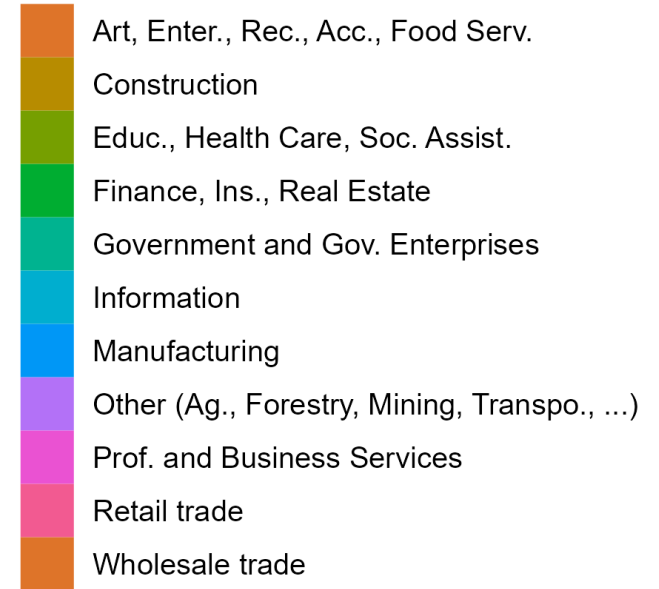
Source: Bureau of Economic Accounts, 2025

# Oregon County GDP by Industry

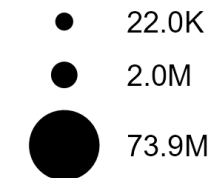


Source: GDP by County (CAGDP9), BEA 2023

## Industry

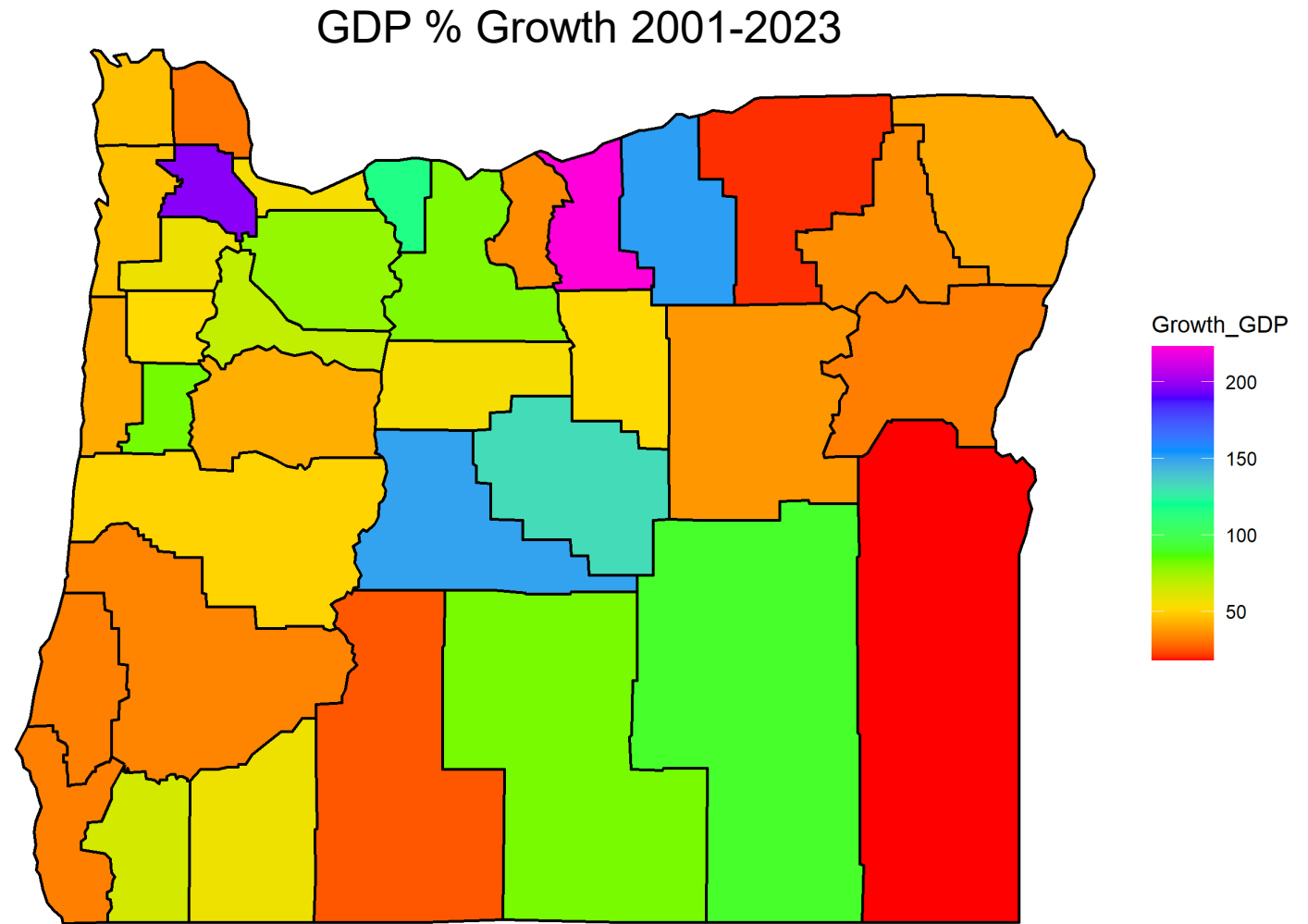


## Total County GDP (log scale)



# GDP Growth by County

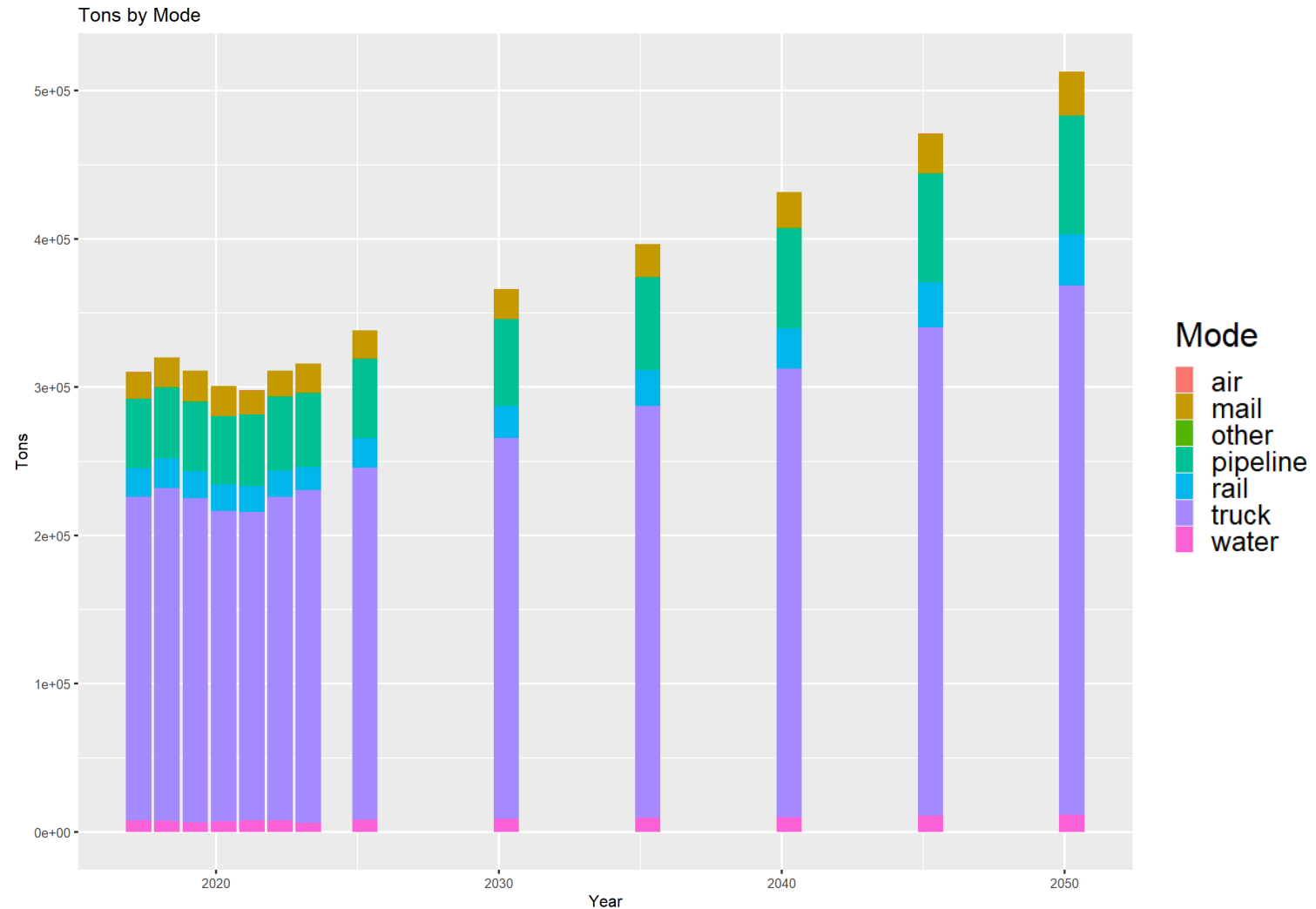
- Highest % growth along I-84 and US97 corridors
- Highest absolute growth in Portland, Salem, Eugene (I-5) and Bend (US97)



Source: Bureau of Economic Accounts, 2025

# Freight Mode Share by Tonnage

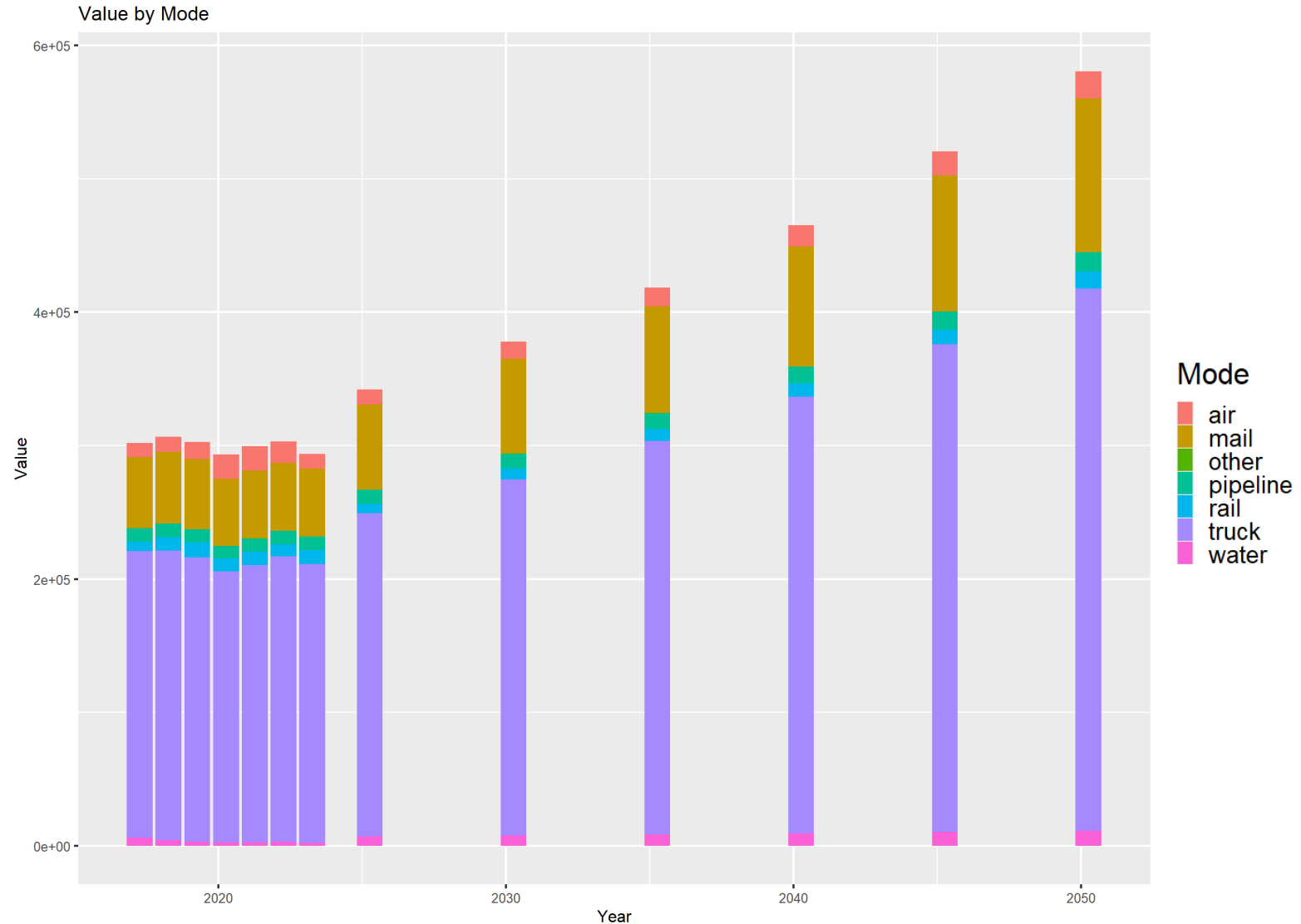
- Truck has largest share
- Rail and water small but stable, small decrease
- Total tonnage relatively stable 2017-2023



Source: Freight Analysis Framework 5.7.1, 2025

# Freight Mode Share by Value

- Truck has largest share
- Rail has smaller share compared to tonnage, but stable over time
- Water has smaller share compared to tonnage, but decreasing over time
- Air has higher share by value than by tonnage, growing over time



Source: Freight Analysis Framework 5.7.1, 2025

# Top Commodities by Mode

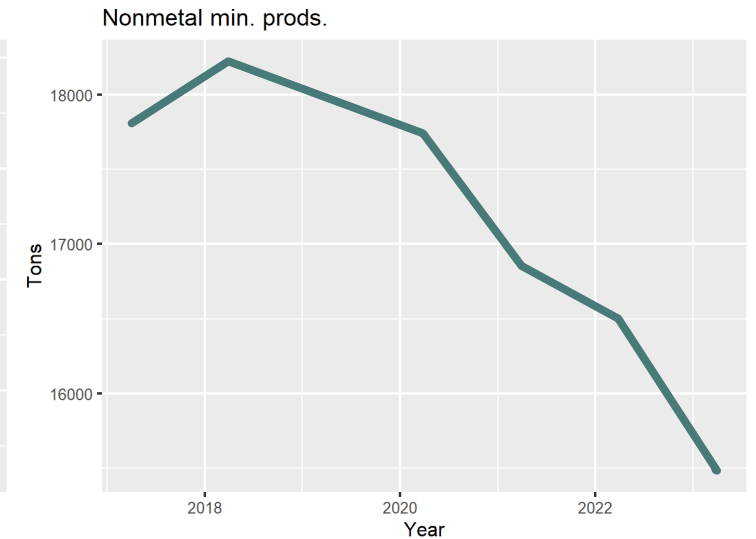
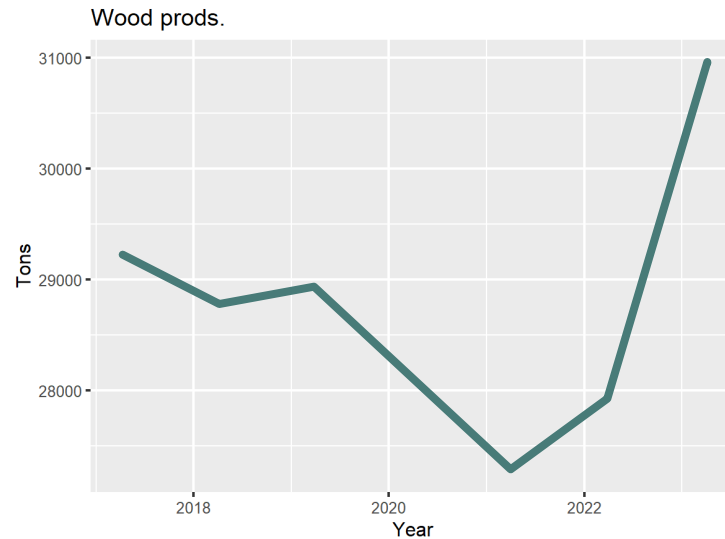
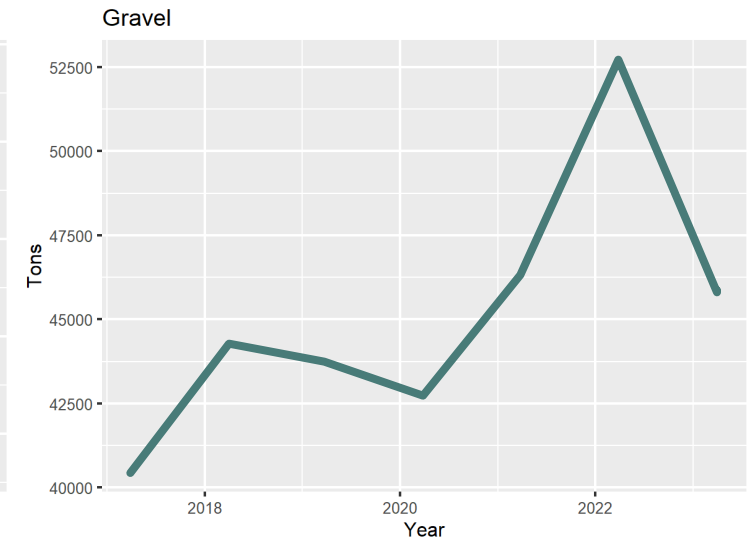
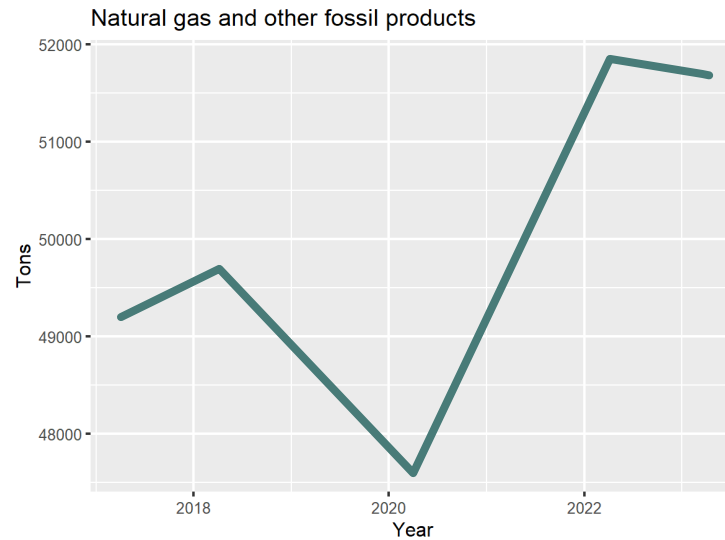
- Gravel, logs, wood products consistently top commodities by tonnage across modes
- Mixed freight, electronics, machinery, precision instruments high value low weight
- Low value high weight goods more prominent on rail, water
- Air used primarily for low weight high value goods

Mode	Top Commodities (Tonnage)	Top Commodities (Value)
Truck Freight	Gravel	Mixed freight
	Logs	Electronics
	Wood products	Machinery
Rail Freight	Fertilizers	Motorized vehicles
	Wood products	Wood products
	Cereal grains	Other ag products
Water/Marine Freight	Cereal grains	Motorized vehicles
	Gravel	Fuel oils
	Fuel oils	Paper articles
Air Freight (including truck-air)	Machinery	Electronics
	Electronics	Machinery
	Basic Chemicals	Precision Instruments
Pipeline	Natural gas and other fossil products	Natural gas and other fossil products
	Gasoline	Gasoline
	Fuel oils	Fuel oils
Multiple Modes and Mail	Cereal grains	Electronics
	Wood products	Pharmaceuticals
	Basic chemicals	Misc. manufacturing products

Source: Freight Analysis Framework 5.7.1, 2025

# Freight Flow Tons

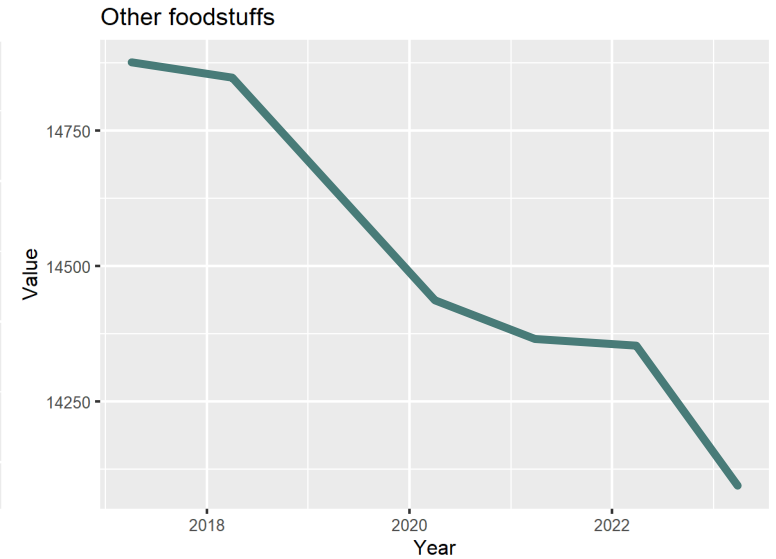
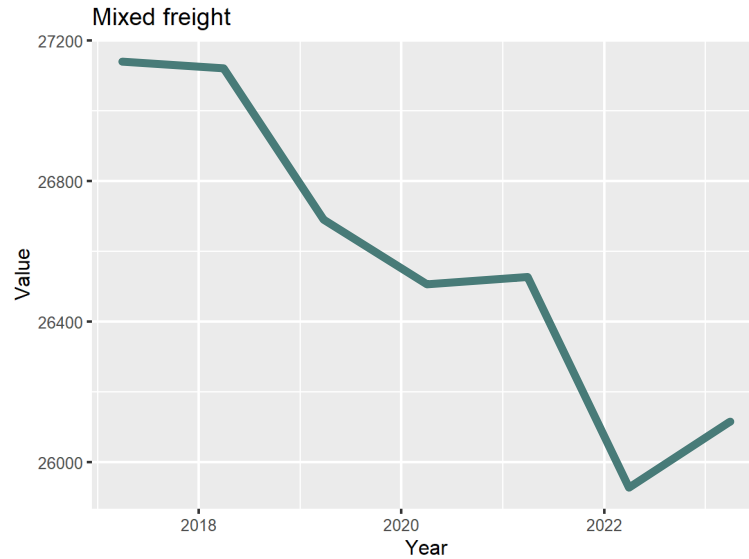
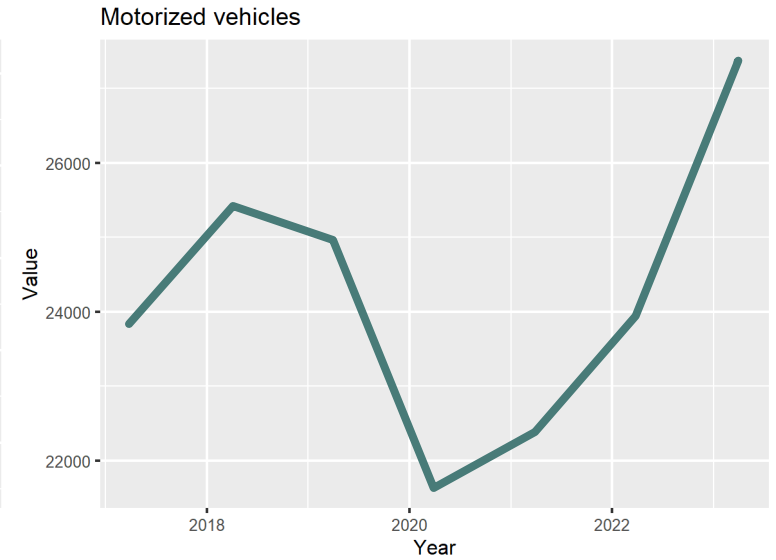
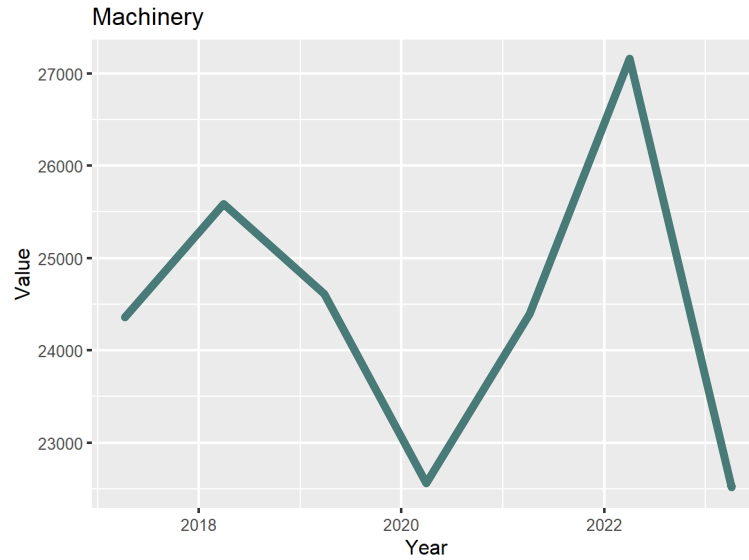
- Top 4 commodities
- Many industries rebounded after COVID, but not all



Source: Freight Analysis Framework 5.7.1, 2025

# Freight Flow Value

- Top 4 commodities
- Many industries rebounded after COVID, but not all



Source: Freight Analysis Framework 5.7.1, 2025

# Internal > Inbound > Outbound

- Oregon to Oregon freight has the highest tonnage
- Imports slightly higher than exports

	Year		CAGR 2023-2050
	2035	2050	
<b>Inbound</b>	77,165	125,386	1.81%
<b>Internal</b>	150,156	268,782	2.18%
<b>Outbound</b>	62,233	118,747	2.42%

Source: Freight Analysis Framework 5.7.1, 2025

# General Trends and Uncertainties

- Economy stabilized after COVID
- Last few years have shown return to moderate growth but with higher inflation
- Disruptions to trade from tariffs and wars
- Labor market uncertainty
- AI and RAM production
- Climate change, wildfires
- Policy changes around timber harvesting
- ODOT funding shortfall
- Near and on-shoring
- E-commerce Growth

# OFAC Input



Any clarifying questions on what you've heard so far?

What issues, challenges or opportunities do you see in your industry today?

What major trends do you anticipate will affect freight in Oregon in the future?

# Freight Policy Update

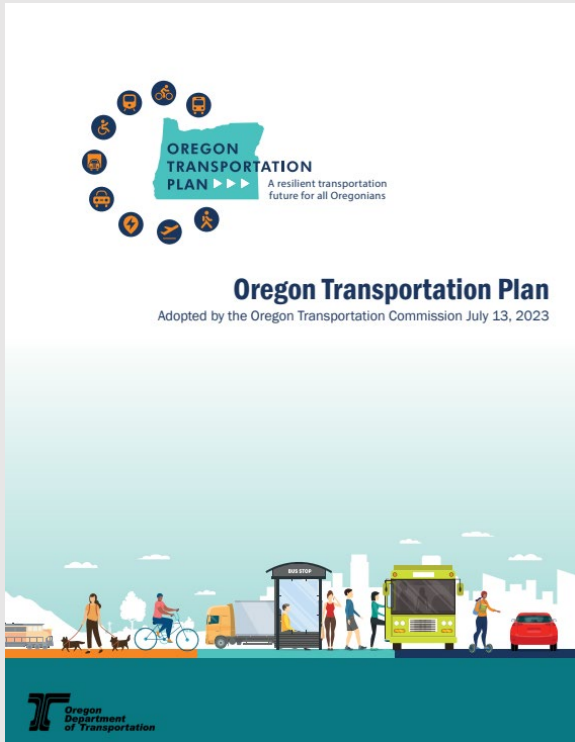


# Freight Policy Update

- Background and alignment with OTP
- Truck parking
- Marine system planning
- Funding
- Alternative fuels
- Network designations

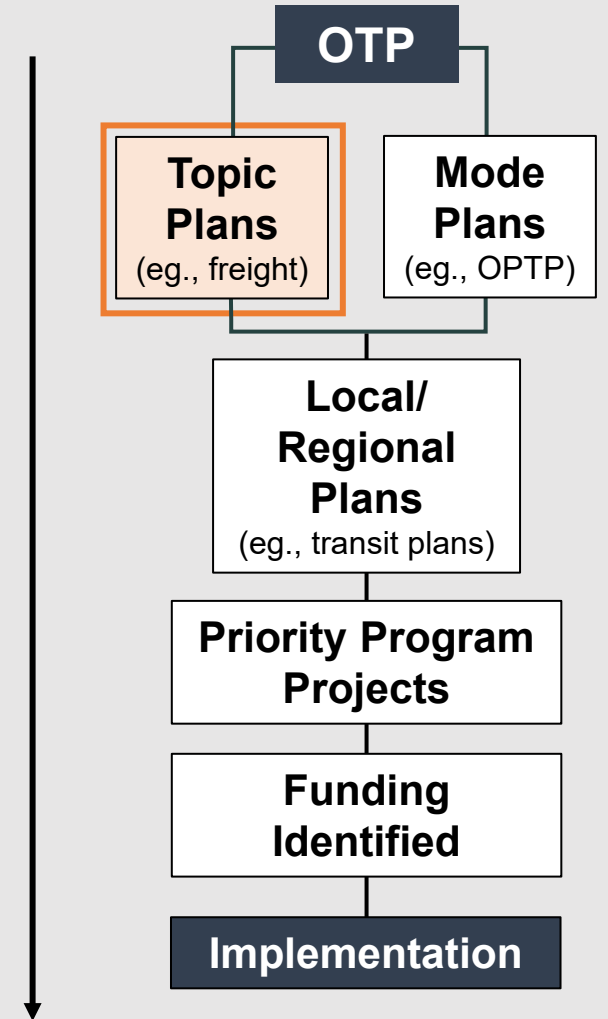


# Background and Alignment with OTP



**Purpose:** Updated OFP Goals, Objectives, Strategies and Actions must be in **alignment with 2023 OTP goals, objectives, policies, and strategies**

- Restructuring to ensure consistency with OTP as they apply to the multi-modal freight system
- Proposal of new policies and strategies where there are gaps between the existing OFP and OTP



# OTP Goals, Objectives, Policies & Strategies



**Economic and  
Community Vitality**



**Mobility**



**Safety**



**Sustainability and  
Climate Action**



**Stewardship of  
Public Resources**



**Goals**  
(What/Who)

These are specific areas where Oregon can take actions and adopt policies to realize the overall Vision.



**Objectives**  
(How)

These define the desired outcomes that the goals can achieve.

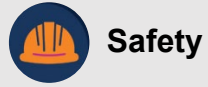


**Policies  
& Strategies**

These are specific actions that state what needs to happen to make progress toward those outcomes outlined in the objectives.

# Truck Parking

## Rest Area Expansion



- Address commercial parking needs along key freight corridors, prioritizing locations with high incidence of undesignated parking (e.g. highway off-ramps and shoulders)
- Modernization and driver amenities
- Improved safety and security (Jason's Law)

## Truck Parking Information Management Systems (TPIMS)



- Provide information to drivers regarding truck parking availability
- Other Intelligent Transportation Systems (ITS) and freight applications





# Marine System Planning

## Dredging



- Prioritize support for shipping channels with highest return on investments

## Container Assessment



- Develop a statewide container shipping strategy
- Include evaluation of financial support to maintain service as well as amount/frequency of service

## Marine System Plan



- Currently the only mode without a system plan
- Support efforts by Business Oregon to develop a state marine ports system plan (like other states)
- Ensure long-range documents have well-developed marine freight component



# Funding & Workforce

## Funding Sources



- Reinforce existing sources such as Connect Oregon for multimodal freight projects (instead of a dedicated fund)
- Explore public private partnerships to leverage additional funds through the Office of Innovative Funding

## Career Development



- Coordinate with Employment Division and others to:
  - Review current programs
  - Identify freight-specific workforce needs
  - Support development of necessary training programs



# Climate Strategies

## Expand charging infrastructure



- Medium- and heavy-duty electric vehicle charging infrastructure on high truck volume corridors
- Tailor incentives to mode and/or fuel type most appropriate for the commodity

## Alternative Fuels



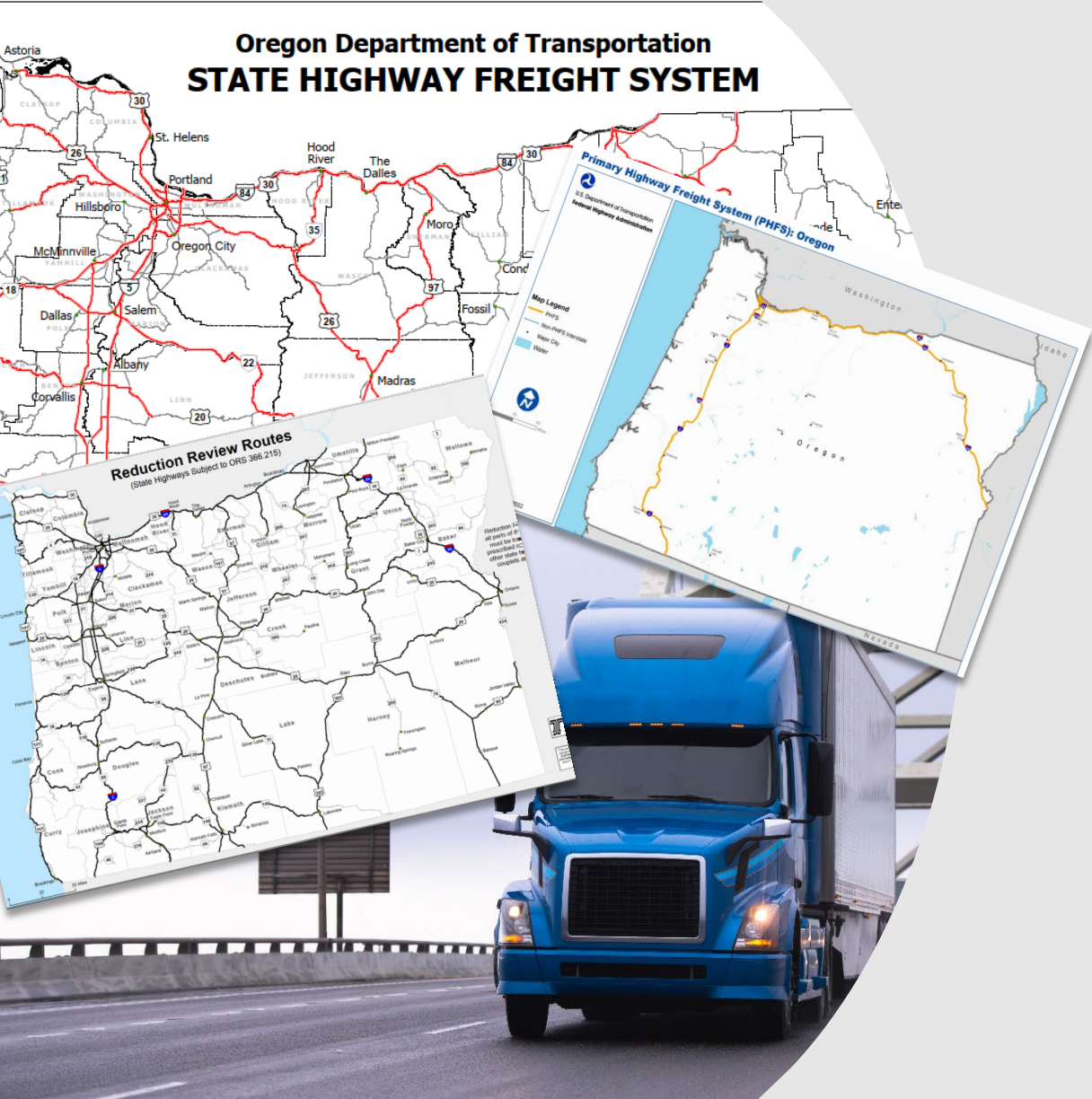
- Incentivize fleet transitions to low- or zero-emission for last mile delivery
- Opportunities for electrification in port operations. Short, defined distances that can work for heavier vehicles and last mile deliveries

## Other Climate Strategies



- Work with private-sector freight stakeholders to identify efficient and cost-effective climate approaches
- Consider modal impact on climate in freight transportation planning and decision-making processes

Oregon Department of Transportation  
**STATE HIGHWAY FREIGHT SYSTEM**

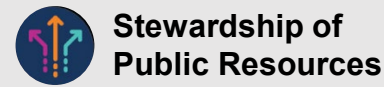


# Freight Routing



## Network Designations

- Numerous highway designations with limited funding for maintenance.
- Opportunity for streamlining as part of Oregon Highway Plan (update pending adoption in 2027), informed by freight stakeholder input
- Preserve the ability of highway facilities to accommodate freight, including heavy and over-dimensional freight loads, while balancing the needs of other modes



## Milk Transport Pilot Program (HB 4007)

- To test lifting weight limits to match other states
- Promote greater uniformity in size/weight standards

# OFAC Input



Any questions or comments on policy topic areas?

Are there other major topic areas that should be addressed in this update?

What topics do you see as most pressing from a policy standpoint?

# Wrap Up and Next Steps

- Plan must be consistent with federal and state policy
- Completing limited updates to meet federal and state requirements
- Updating chapters Spring and Summer 2026
- Compile and review Fall 2026
- Public comment period in Winter 2026-2027
- Adoption by OTC Spring 2027



# For more information:

## Contact

## Email

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## Website

<https://www.oregon.gov/odot/Planning/Pages/Oregon-Freight-Plan-Update.aspx>

