



ANGLE

Technology Group

The Hampton Roads Logistics Industry

A Survey

Prepared by
ANGLE Technology Group

For
Opportunity, Inc.
Norfolk, Virginia

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The Hampton Roads Logistics Industry

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Executive Summary

Opportunity, Inc. contracted with ANGLE Technology LLC for a survey of workforce and technology issues in the seaport-related logistics industry in Hampton Roads to support their Southeastern Virginia Partnership for Regional Transformation (SEVA-PORT) project (<http://seva-port.org>). SEVA-PORT is designed to build linkages between the port-related logistics industry and the technology community in Hampton Roads. These linkages will increase productivity and the competitiveness of the port through workforce development, entrepreneurship, and technology. The Virginia Maritime Association (VMA) supported the project by assisting with questionnaire development, providing a list of potential survey respondents relevant to port operations, and launching the survey.

The survey was sent to 159 members of the VMA, and responses were received from 78 companies, a rate of 49 percent. The respondents represented a broad cross-section of large and small companies engaged in all port operations and logistics functions. A total of 4,873 full-time employees were reported by 52 companies with an average annual salary of \$55,000, 46 percent higher than the average salary in Hampton Roads of \$37,544.

The respondents anticipate very little growth in their operations in the short term due to the economic recession and the reduction in the volume of cargo passing through the port, but they anticipate that historical growth rates will resume in five to seven years. The workforce skills needed by the largest number of respondents were communications and scheduling followed by regulatory compliance and equipment operation. Workforce training needs included computer skills, truck drivers with commercial driving licenses, skilled equipment operators with good math skills, and an understanding of the industry and its regulations.

The technologies in most use by the respondents were computer-based databases followed closely by scheduling and communications technologies. Improvements are needed in communications technologies and systems integration.

The most important constraint to improving port productivity is traffic congestion. Suggestions for improvement include a Third Crossing and optimization of existing traffic corridors.

Twenty-eight respondents stated that they have operations in a wide variety of US ports and provided comments on how Hampton Roads compares with them. Comments were generally favorable mentioning good water depth, efficient operations, good industry-government relations, and expansion potential. Weaknesses include shorter operating hours, transit time to Chicago, higher terminal costs, and traffic congestion.

1. Introduction

Opportunity, Inc. contracted with ANGLE Technology LLC on February 19, 2009, for a survey of workforce and technology issues in the seaport-related logistics industry in Hampton Roads. The Virginia Maritime Association (VMA) provided a list of potential survey respondents, and a draft survey instrument was designed and tested based on inputs from Opportunity Inc and VMA. The survey was launched by VMA on April 10, 2009, asking the respondents to access the questionnaire via a Survey Monkey web site. The initial emails were followed up with numerous emails and telephone calls in an effort to increase the response rate. The survey was concluded on May 15, 2009. The list of respondents is provided in the following section.

2. Response

The survey was sent to 159 members of the Virginia Maritime Association selected for their relevance to port operations. Responses were received from 78 organizations, a rate of 49 percent.

2.1 Respondent Profiles

The respondents conduct their operations throughout Hampton Roads and outside the region. They are concentrated in Norfolk, Chesapeake, and Portsmouth. Others reported locations in New Jersey, Louisiana, Michigan, Florida, and Connecticut.

Table 2.1 indicates that over 60 percent of the companies have annual sales between \$1 million and \$50 million, and eight companies have annual sales more than \$100 million.

Table 2.1 Company Size by Annual Sales

Current Annual Sales	Percent of Companies	Response Count
Less than \$1 million	12.8	6
\$1-\$10 million	38.3	18
\$11-\$50 million	23.4	11
\$51-\$100 million	8.5	4
More than \$100 million	17	8
Answered Question		47

Table 2.2 indicates the number of years these companies have been operating in Hampton Roads. Most have been operating for more than ten years.

Table 2.2 Years in Operation in Hampton Roads

Years in Operation In Hampton Roads	Percent of Organizations	Response Count
Less than 3 Years	0	0
3-5 Years	11.5	6
6-10 Years	9.6	5
More than 10 Years	78.8	41
Answered Question		52

Table 2.3 lists the principal activities of the companies. All port operations and logistics functions are represented.

Table 2.3 Functions

Function	Percent of Organizations	Response Count
Trucking	39.7	31
Warehousing and distribution	28.2	22
Ship Operations	19.2	15
Logistics/Intermediary	16.7	13
Other	16.7	13
Terminal operations	15.4	12
Rail operations	14.1	11
Towing and barges	14.1	11
Freight forwarder and custom house broker	12.8	10
Import/export management	12.8	10
Labor organization	5.1	4
Security	3.8	3
Emergency Response	2.6	2
Government Agency	1.3	1
Answered Question		78

The following additional functions were listed by the respondents:

- ◆ Depot facility
- ◆ Grain and grain products exporter
- ◆ Container & chassis, refrigeration repair
- ◆ Inspection/laboratory services
- ◆ Repair depot
- ◆ Marine surveyors
- ◆ Consulting
- ◆ Chassis pool operator

- ◆ Container crane repairs
- ◆ Cargo access equipment supply, service, and repair
- ◆ Loaded tank container depot

Table 2.4 indicates how the companies vary by number of full-time employees. Note the gap between 100 and 300 employees and the gap between 500 and 1,000 employees. However, both small and large companies were represented.

Table 2.4 Number of Full-Time Employees

Number of Full-Time Employees	Number of Organizations
1-10	20
11-20	10
21-100	13
300-500	2
1,000-2,000	2

There were a total of 4,873 full-time employees reported by 52 companies.

Table 2.5 indicates how the companies vary by number of part-time employees.

Table 2.5 Number of Part-Time Employees

Number of Part-Time Employees	Number of Organizations
0	25
1-10	16
11-20	3
21-100	4
300-800	1

Relatively few companies have part-time employees with 84 percent reporting less than 10.

Table 2.6 indicates how employees are distributed by job function. Companies with less than 10 employees were not counted in the summary data.

Table 2.6 Job Function

Role	Average Percent of Workforce	Range, Percent
Management	10.6	1-30
Operations	66.1	25-100
Support	26.7	1-90

Tale 2.7 shows the distribution of average annual salaries among the companies. The average for all organizations is \$55,000. It is 46 percent higher than the average salary in Hampton Roads of \$37,544¹.

Table 2.7 Average Annual Salary

Average Annual Salary \$	Number of Organizations
25,000-50,000	27
51,000-70,000	7
71,000-100,000	2
101,000-200,000	2

¹ Virginia Workforce Connection, 3rd Quarter 2008, Virginia Beach-Norfolk-Newport News MSA, www.vawc.virginia.gov

3. Survey Results

The following tables provide survey results on

- ◆ Growth rates
- ◆ Workforce skill requirements
- ◆ Workforce training needs
- ◆ Technologies
- ◆ Productivity constraints
- ◆ Solutions
- ◆ Interactions
- ◆ Additional Comments

Table 3.1 shows the estimated annual percentage change in jobs anticipated over the next 2-7 years. Growth rates of five percent or less are projected by 68 percent of the companies in the next 2-3 years. However, this segment drops from 68 to 48 percent in the 5-7 year period. Further optimism can be seen in the segment expecting 6-25 percent growth as it moves from 31 percent of the companies in 2-3 years to 42 percent in 5-7 years. And three companies are projecting growth in the 26 to 50 percent range in 5-7 years.

Table 3.1 Estimated annual percent change in jobs in the future

Percentage Change In Jobs Over The Next 2-3 Years	Number of Organizations	Percentage Change In Jobs Over The Next 5-7 Years	Number of Organizations
0	12	0	7
1-5	12	1-5	9
6-10	5	6-10	7
11-20	4	11-20	5
21-25	2	21-25	2
26-50	0	26-50	3

Table 3.2 lists required workforce skills. Communications and scheduling skills top the list followed by regulatory compliance and equipment operation.

Table 3.2 Skills Required

Skills	Percent of Organizations	Response Count
Communications and scheduling	61.5	32
Regulatory compliance	53.8	28
Equipment operation (fork lift, crane, trucks)	51.9	27
Freight management	44.2	23
Cargo management (containers, commodities) and handling	36.5	19
Inspection and security systems	32.7	17
Manual labor	32.7	17
Operation of warehouse management and inventory control systems	25.0	13
Vessel operation (ship, tug, barge)	15.4	8
Other (please specify)	15.4	8
Answered Question		52

These additional Skills were listed by the respondents:

- ◆ Clerical
- ◆ Sales
- ◆ Negotiations
- ◆ Container repair
- ◆ Administrative
- ◆ Asset management
- ◆ Accounting, billing, and payroll
- ◆ Commercial drivers license (CDL), Hazmat, and Tank

Table 3.3 lists critical workforce training needs listed by respondents.

Table 3.3 Critical Workforce Training Needs

Sales, Equipment operations
Computer skills
Truck drivers with Commercial Drivers Licenses
Machine Training
Understand the industry, proficient on computers, regulations
Fire and Hazmat Safety.
Logistics
Inexpensive, concise training for hazardous materials
Welding; lift training
Skilled equipment operators with good math skills
Computer training
Computer based technology/ risk assessments
Project Management
Warehouses operations and clerical support
D.O.T/ FMCSA Compliance
Seagoing crews need access to Coast Guard approved training.
Entry level training
Commercial truck driver training
Knowledge of systems and PLC technology
Master mariner certification
Safe handling of food products. Safe material handling equipment practices. Ammonia refrigerant.
Operation of clamp trucks and handling of cargo, customer service applications
Dispatcher positions
IT and sales
Safety, service, compliance

Table 3.4 lists the technologies used by the respondents. Databases top the list followed closely by scheduling and communications technologies.

Table 3.4 Technologies in use

Skills	Percent of Organizations	Response Count
Database	78.4	40
Scheduling	62.7	32
Communications	60.8	31
Tracking	54.9	28
Training	43.1	22
Route optimization	39.2	20
Warehouse and inventory control systems	29.4	15
Sensors	15.7	8
Other (please specify)	11.8	6
Modeling and simulation	7.8	4
Answered Question		51

These additional technologies were listed by the respondents:

- ♦ Proprietary IT
- ♦ US Customs
- ♦ Safety
- ♦ Invoicing and invoice approval software
- ♦ Truck driver cell phones
- ♦ Cargo storage and handling

Table 3.5 lists the technology limitations and needed improvements reported by respondents.

Table 3.5 Technology limitations and improvements needed

Network communications
More sophisticated training
Systems are not integrated
Nor really the technology – It is us trying to understand and use the technology correctly.
There are too few companies competing to deliver these products to the industry.
More technology and innovation needs to be brought to the industry to improve productivity
Need better communication between facilities and improved inventory control, more use of RF & RFID

Table 3.6 lists the principal constraints to improving supply chain productivity identified by the respondents. Traffic congestion is clearly the most important constraint.

Table 3.6 Supply chain productivity constraints

Constraint	Percent of Respondents	Response Count
Traffic congestion	58.3	28
Skilled workforce	27.1	13
Regulatory compliance	27.1	13
Compatibility of information and communications systems	27.1	13
Terminal capacity	25.0	12
Other	22.9	11
Warehousing and distribution capacity	12.5	6
Answered Question		48

Other constraints included:

- ◆ Port delays by longshoremen
- ◆ Pier slowdowns
- ◆ Number of rail slots
- ◆ All related to pricing
- ◆ Short supply of trailer load truckers during normal times
- ◆ Need more cargo to be delivered to the port
- ◆ ILA labor who are not cooperative/respectful of truck drivers
- ◆ Less government intervention/regulations
- ◆ Proposed employment legislation
- ◆ Brokers, truckers and shippers looking beyond what needs to be done today to get their work done need to look one to two weeks out and plan their operations, deliveries and workforce to match a changing industry

Table 3.7 lists solutions to the constraints listed in Table 3.6.

Table 3.7 Solutions

Traffic Congestion
Better roads and networks
Third Crossing
Third Crossing - optimization of existing traffic corridors
More infrastructure to support the growing population and growth
Controlled routings
Two loading racks limit the number of trucks loaded at a time.
Mass Transit to and from the bases, Additional tunnels and E-W bound

highways, third crossing, additional mid-town tunnel
Raise taxes and fix and add roads
Inability of government / legislators to act on a plan with some vision
Getting rid of the ban on Hampton Blvd for our trucks after 4 PM would be a start
Rail Connections , 3rd crossing and additional tube at the midtown tunnel between Norfolk and Portsmouth
Skilled Workforce
Transportation training
More training
As the demand increases more qualified Truck Drivers
Company / Industry supported training incentives
More training for the workforce we now have.
Computer training in basic systems for the International Longshoreman's Association (ILA).
Training assistance
Terminal Capacity
Better terminal communications
Better control of union labor
Craney Island development
Get ILA to work on production basis vs. set wages
More terminal space and the new APM terminal in Portsmouth should help
20 million gallons storage capacity necessitates resupply at least once a month in the winter season.
We need a non-union ILA
Terminal congestion reduction
The ports are absolutely ridiculous with the amount of time, problems and attitudes of the port workers. Our drivers are starving to death largely in part of the way the port allows its port workers to play with the drivers time and place. So many hoops to jump through.

Warehousing and Distribution Capacity
Increase cargo volume
A current over-abundance of availability of unused space with more space planned
Proper storage capacity at the right temperatures
New facilities on terminal
Regulatory Compliance
Reduce requirements
Training
Better lines of communications between: Homeland Security/FRA/US Customs
Coast Guard and Customs and Border Protection regulations
Have EPA and OSHA to be not as strict for small business
Legislative plan to eliminate debt is to tax / fine through new and complicated regulation
Training drivers on new regulatory compliance
Compatibility of information and communications systems
Integrated platform that all parties can reference
Improved integration software development
Industry training and development of compatible systems
Standardize all Electronic Data Interchange functions for ease of communications between truckers, brokers, shippers, and terminal operators.
Other
Production quotas
May only fit up to seven rail cars on site, limiting our rail capability.
Labor needs to respect others who help create their jobs.

Twenty-eight respondents stated that they have operations in a wide variety of US ports. Table 3.8 lists strengths and weaknesses of Hampton Roads compared with other ports listed by respondents.

Table 3.8 Comparative strengths and weaknesses

Water and transit from ocean, on dock rail, and good productivity are strengths. The Hampton Roads Chassis Pool is a strength. Transit to Chicago currently a weakness. Terminal costs are above other competitive ports on the east coast.
Weakness: barriers for entry. Strength: enormous freight opportunities
Southern ports have much better relations with port labor.
Strength of community; relationship between state and terminal operation
Great geography, rail access and deep water
The other ports are open more hours to spread the load and the traffic
3-4 hour transit from outer bay to our facility along with daylight transit restrictions causes up to a day of additional transit time for vessels at our facility. 35' draft depth of Southern Elizabeth River limits the size of the ships as well as the amount of cargo we can receive, incurring \$250,000 or more in additional cargo charges from each vessel.
Strengths: water depth, strong working relationship with state government. Aggressive position in the market. Weaknesses: only NIT has 50 ft water draft, severe highway traffic congestion in Norfolk.
HR has good communications with a flat management structure willing to work to achieve success for customers.
Good thing is, we can take complaints as a group to the VMA vs. addressing problems as an individual company
Strength >>> deep water >>> weaknesses: some other states Ports/GA in particular give new industries incentives that Virginia does not.
HR has deepest water and good facilities and equipment. Road infrastructure is missing.
Good relationship between labor and management.
Our clients prefer Hampton Roads
Strengths – Hampton Roads organizations are very accessible and easy to do business with.

Hampton roads has a better turn time than either of the other ports I listed
Hampton Roads has terrific expansion potential
Strength is relationship with Coast Guard & proactive Maritime Association
By far the best operation of any port we do business with, and that is all of them in the US.
Strengths-Labor force, deep water, rail connection, ability to grow. Weaknesses- short sea shipping
In general, easier to work with than many other ports
Good working relationship with partners
Natural Deep Water Port. All facets of the Maritime Community of Hamptons Roads work well together for improvement and continued success
Our greatest strength is our ability to be able to sit around one table and discuss the good and bad of our industry with a representative from each segment of the industry. We have monthly meetings at the Port Authority with round table discussions.
Weaknesses - High terminal costs, Lack of two competitive railroads. Strengths - Proximity to ocean, Good NS rail service, Labor harmony, Distribution warehouses, Virginia Maritime Association

Table 3.9 lists the organizations that the respondents work with in conducting their business. It is clear that trucking and terminal operations organizations have the highest interactions followed closely by freight forwarders and customs house brokers, rail operations, warehousing and distribution, and ship operations.

Table 3.9 Organization interactions

Organization	Percent of Organizations	Response Count
Trucking	78.0	39
Terminal operations	74.0	37
Freight forwarder and custom house broker	62.0	31
Warehousing and distribution	60.0	30
Rail operations	60.0	30.0
Ship Operations	54.0	27
Logistics/Intermediary	54.0	27
Import/export management	54.0	27
Government Agency	52.0	26
Labor organization	28.0	14
Towing and barges	28.0	14
Security	26.0	13
Emergency Response	26.0	13
Other	4.0	2
Answered Question		50

Table 3.10 lists additional comments made by the respondents.

Table 3.10 Additional Comments

Re-open Newport News for container handling
Offer open competitive bids
Pier delays have become a major problem.
Market the Port
Simply need the port to focus on the transportation companies' abilities to minimize turn times in the facilities
The draft issue mentioned in Question 19 is of paramount importance to our organization. Increasing the channel draft to 40' or more would allow more products at a cheaper cost to get to our facility.
Improve the competitive position of Portsmouth Marine Terminal's infrastructure: water depth, crane capacity, etc.
I am pleased as a shipper with the supply chain through Ports of Virginia
I am told we are the most expensive port to work vessels compared with any other US port.
The largest is development of Craney Island as the next port and building the Third Crossing.
Off-terminal container storage. Local cities banning the storage of empty containers
Competitiveness of the Port of VA could be enhanced if the State's and Ports transportation incentives were more than the current initiative of "Getting trucks off the road."
Move forward with Craney Island Expansion
Hampton Roads is an ideal location for transshipment of containers on barges. Infrastructure and labor make the process unprofitable. Port should look to the future to become a hub of short sea shipping.
Collaborate between Federal & State Governments and labor unions to develop a cost effective solution to transit the waterways from NY to FL cost effectively. This will develop jobs up and down the coast and propel VA as the premier East Coast port solution for international trade.
We need a better route west of here other than 58 to get out to I-95 to head south and west.
Must be aggressive in attracting breakbulk carriers to Hampton Roads in order to break the monopoly Baltimore currently holds.
Fire the Union
Lower terminal costs, competitive 2nd railroad serving the port.

4. Summary

The Port of Virginia is clearly an important asset for the economy of Hampton Roads. Although port activity has declined along with the current international recession, most organizations associated with port operations are optimistic about the future. Technology capabilities and workforce skills needed to maintain the port's competitive position are focused on database operations, communications, systems integration, and regulatory compliance as well as an adequate supply of qualified truck drivers.

The principal opportunities for productivity improvements are the reduction of traffic congestion through improvements in transportation infrastructure and route optimization. Many port users with operations in other ports rank their experience in Hampton Roads very favorably in comparison and recognize the potential for maintaining this position in the future.

Appendix I: Survey Cover Letter



Port of Virginia

Dear Virginia Maritime Association Member:

The Southeastern Virginia Partnership for Regional Transformation (SEVA-PORT) is building linkages between the port-related logistics industry and the technology community in Hampton Roads. These linkages will increase productivity and the competitiveness of the port through workforce development, entrepreneurship, and technology. Success requires knowledge of future workforce needs and technology transfer opportunities.

The Virginia Maritime Association (VMA) is assisting SEVA-PORT in the development and deployment of a web-based survey to collect this information from our members. I urge you to take a few minutes to complete the brief questionnaire.

Your participation will:

- Assist workforce development organizations with providing qualified employees for your organization in the future
- Identify current problems affecting productivity of the logistics system
- Identify opportunities for technology to solve these problems
- Support improved communications and operations in the industry

Your organization has been identified among our members as one that is involved with these issues.

Your responses will be treated as confidential information. SEVA-Port has contracted with ANGLE Technology, an independent consulting firm, to collect, protect, and report the results of the survey in aggregate form to assure confidentiality. You may direct questions to Bob Rea at ANGLE at 757-271-8892 (www.angletechnologyus.com). His email address is robert.rea@angletec.com.

All survey participants will be provided with an Executive Summary of the report in advance of its publication. The deadline for completing the survey is May 8, 2009.

Your participation is extremely important for continuous improvement of the competitiveness of the Port of Virginia. Thank you for your help.

Sincerely,
Arthur W. Moye, Jr.
Executive Vice President

Appendix II: Survey Questionnaire

Port of Virginia

1. Organization:

2. Title of Person Completing the Survey:

3. Focus of Your Organization (Check all that apply):

- Ship operations
- Terminal operations
- Labor organization
- Trucking
- Rail operations
- Towing and barges
- Warehousing and distribution
- Logistics/intermediary
- Security
- Emergency response
- Freight forwarder and custom house broker
- Import/export management
- Government agency
- Other (please specify)

4. Location of principal business unit (city):

5. Current Annual Sales (Check only one):

- Less than \$1 million
- \$1 – 10 million

- \$11 - \$50 million
- \$51 - 100 million
- More than \$100 million

6. Years your organization has been in operation in Hampton Roads:

- Less than 3 years
- 3 - 5 years
- 6 - 10 years
- More than 10 years

7. Number of full-time employees in Hampton Roads:

8. What is the percentage distribution among the following job functions?

Management	<input type="text"/>
Operations	<input type="text"/>
Support	<input type="text"/>

9. Number of part-time employees in Hampton Roads (include contractors):

10. Estimated average annual salary for employees working in Hampton Roads:

11. Estimated annual percentage change (+/-) in number of jobs.

In next 2-3 years	<input type="text"/>
In next 5-7 years	<input type="text"/>

12. What skills are required of your employees?

- Equipment operation (fork lift, crane, trucks)
- Vessel operation (ship, tug, barge)
- Cargo management (containers, commodities)/cargo handling
- Operation of warehouse management and inventory control systems
- Communications and scheduling
- Inspection and security systems
- Regulatory compliance
- Freight management
- Manual labor
- Other (please specify)

13. What are your critical workforce training needs?

14. What kinds of technologies do you work with?

- Database
- Scheduling
- Warehouse and inventory control systems
- Sensors
- Communications
- Training
- Modeling and simulation
- Tracking
- Route Optimization

Other (please specify)

15. What are the limitations of these technologies, and what improvements are needed?

16. What are the principal constraints to improving supply chain productivity? Please specify:

- Traffic congestion
- Skilled workforce
- Terminal capacity
- Warehousing and distribution capacity
- Regulatory compliance
- Compatibility of information and communications systems
- Other (please specify)

17. Please suggest solutions to address any of the constraints identified above:

Traffic congestion	<input type="text"/>
Skilled workforce	<input type="text"/>
Terminal capacity	<input type="text"/>
Warehousing and distribution capacity	<input type="text"/>
Regulatory compliance	<input type="text"/>
Compatibility of information and communications systems	<input type="text"/>
Other (please specify)	<input type="text"/>

18. If you have operations in other ports, please identify them.

19. Please compare strengths and weaknesses of Hampton Roads with the other port(s)

20. What other types of organizations in the supply chain do you work with?

- Ship operations
- Terminal operations
- Labor organization
- Trucking
- Rail operations
- Towing and barges
- Warehousing and distribution
- Logistics/intermediary
- Security
- Emergency response
- Freight forwarder and custom house broker
- Import/export management
- Government agency
- Other (please specify)

21. Please comment on any other issues we should be aware of for increasing the competitiveness of the Port of Virginia.

Thank you for your participation in the survey. The results of this survey are confidential; answers are compiled and reported in aggregated data. An executive summary of the results will be provided to all respondents.