

Upper Mississippi River System Inland Waterway

Stakeholder Survey

2015

Upper Mississippi River System Ports, Terminals, and Operators Workshop

A cooperative effort between the Inland Rivers, Port, & Terminals Association, the Upper Mississippi River Basin Association, and the Mid-America Freight Coalition.



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Upper Mississippi River Stakeholder Survey:

- Open January 20-February 13, 2015.
 - Includes perspectives of up to 50 respondents.
 - Provides basis for discussions
 - Issues and opportunities
 - Solutions and Priorities
- Thanks to all who participated!





The Process this morning:

- 1) Review the survey results
- 2) General Questions
- 3) Breakout Groups – 8:45am
 - a) Focus areas and actions
 - b) Prioritization and Importance
- 4) Group break-out reports to all
- 5) Discuss and develop Agenda to get more freight on the Mississippi!

Collaboration

Opportunities

Actions

MID-AMERICA



FREIGHT COALITION

#1 For ports, terminals, and local governments] What commodity(ies)/freight in your surrounding area provides the greatest demand for shipping via the Upper Mississippi?

- Industrial sand
- Bakken and tar sand oil products
- Corn
- Cement
- Coal
- Fertilizer
- Grain
- Soybeans, Soybean Meal, Soybean hulls
- Aggregate
- Scrap metal
- Salt
- Soybean
- Distiller's dried grains (DDGs)
- Clay
- Glass
- Steel products
- Petroleum and Petro-Chemicals
- Food grade oils

#2 What commodities/freight are not currently shipped on the Upper Mississippi?

- Industrial Sand
- Oil/petroleum products
 - Bakken/North Dakota
- Containers
- Automobiles
- Retail goods
- Semi-finished parts
- Parcel freight
- Roll-on/Roll-off cargoes
- Waste materials
- Heavy lift/oversize
- Identity preserved crops
- Ethanol
- Lumber/wood products
- Machinery
- Fabricated metal
- Iron ore
- High value assembled items

#2a What additional infrastructure or development is needed to support those listed in 2?

- Load out facilities between Dubuque and Prescott
- Increase size of Lock and Dam system
- Public docks for larger passenger vessels
- Terminal equipment for containers
- Inland waterway integrated cross-dock
- RORO equipment
- Terminal security systems
- Develop port at old Savanna Army Depot
- Road access/improvements
- Rail access/improvements
- Heavy lift equipment
- Intermodal transfer facilities
- Bulk liquid transload equipment (rail to barge)
- Improved logistics system
- Loadout structure with fugitive dust collection systems
- Improved/Additional terminals
- Improved/Additional fleeting areas
- Reinvestment and attraction of rural industries that utilize bulk freight materials



#3 Trends in next 5-10 years.....

Rail safety, energy products, energy prices, infrastructure change or failure, manage as freight corridor, global markets and panama canal, funding, policy, COB, dredging, rail and road congestion, project cargo, increased exports, new technology, environmental issues, multi-attribute use of waterways...



Q4.	Is the current Upper Mississippi infrastructure capacity sufficient to support increased shipping demand?	Is the current Upper Mississippi infrastructure condition sufficient to support increased shipping demand?
Min Value	1	1
Max Value	5	5
Mean	2.92	3.74
Mode	Somewhat (14)	Not Really (13)
Variance	1.68	1.43
Standard Deviation	1.30	1.20
Total Responses	36	35

1=very much
2=somewhat
3=undecided
4=not really
5=not at all



#5 What infrastructure types require investment?

Statistic	New lock and dams	Lock and dam rehabilitation	9-foot channel (i.e., dredging)	Ports	Docks	Harbor dredging	Fleet	Fleet services	Pilot Boats
Min Value	1	1	1	1	1	1	1	1	1
Max Value	5	5	5	5	5	5	5	5	5
Mean	2.09	1.63	1.76	2.19	2.25	2.03	2.71	2.68	2.97
Mode	Very Much (13)	Very Much (19)	Very Much (17)	Somewhat (15)	Somewhat (14)	Somewhat (15)	Somewhat (12)	Somewhat (10)	Undecided (13)
Variance	1.59	0.95	1.06	1.23	1.23	1.00	1.08	1.26	1.00
Standard Deviation	1.26	0.98	1.03	1.11	1.11	1.00	1.04	1.12	1.00
Total Responses	33	32	33	31	32	32	31	28	30

Statistic	Mooring cells	Guiding walls	Docks	Intermodal facilities	Other
Min Value	1	1	1	1	1
Max Value	4	4	5	5	5
Mean	2.45	2.82	2.76	2.30	4.67
Mode Rank (n)	2 (11),3 (11)	3 (13)	2 (11), 4 (11)	1 (17)	NA
Variance	0.94	0.97	1.38	2.34	0.92
Standard Deviation	0.97	0.98	1.17	1.53	0.96
Total Responses	33	33	33	33	33

#6 Small scale improvement Priorities also include: fleeting/staging, lock maintenance, scheduling, connectors, equipment, flood protection.-

#7 Rank the infrastructure developments based on their ability to make service routes more direct and accessible.



Statistic	Ports in closer proximity customers	Docks	Intermodal transfer connections	Equipment	Other
Min Value	1	1	1	1	1
Max Value	5	4	4	5	5
Mean	2.28	2.69	2.00	3.28	4.75
Mode Rank (n)	1 (11)	3 (18)	2 (13)	4 (19)	NA
Variance	1.50	0.74	0.90	1.31	0.97
Standard Deviation	1.22	0.86	0.95	1.14	0.98
Total Responses	32	32	32	32	32

#8 Identify at least one example on the Upper Mississippi of where and what new infrastructure development would better facilitate freight mobility.

- **Frac Sand**
 - loading facility between Alma and Trempealeau
 - loading facility in La Crosse
- **Intermodal and heavy duty docking and handling infrastructure in**
 - Quincy, IL.
 - Mile 13-14 on Minnesota River
 - St. Louis
- **New port at old Savanna Army Depot**
- **Government Bridge at Rock Island Arsenal/Lock & Dam 15**
- **Expand any/all lock and dams to 1200'**
- Investment in higher speed unloading systems and more storage space at terminals
 - Increase velocity and reduce overall equipment needs
- **Fertilizer and salt moved in winter months**
- Maintain channel depth via dredging
 - Find new places to store dredged material
- **Oil transfer terminal or oil refinery on the UMR**

#9

If private investors were to engage in P3, what are investment priorities?

Navigation

Lock and Dams

Terminals/ports

Intermodal facilities

Technology

Systems approach



...dredging, buoys, hi-speed unloading, land, docks, 1200', maintenance, helper boats, mooring, fleetings, security, terminals, flood protection, AIS, ecosystem restoration, energy, recognize multipurpose, modernize transportation.....



#9 What regulations constrain freight transportation on the Upper Mississippi?

...environmental for new facilities, dredging, vessel permit, land use; Jones Act; USACE has limits, multiple missions, permit, funding, leadership.....

#10 Solutions?change perception, bar too high, waivers, long shelf life for waivers/permits, dredge materials are good - reclassify, on going, reliable funding, incentive programs, reduce ag subsidies, promote cooperation.



What, if any, policies or regulations best support freight transportation on the Upper Mississippi and must be maintained?

- Balanced approach to industry, health, environment
- Shared waterways
- Marine Highways
- Inland fuel tax
- Incentivize private investment
- NESP





#12 Confusing regulations?

- Cumulative Impacts
- HMT for eventual international trade?
- ESA
- State's role in Interstate Commerce
- Public funds for private venture?
- 408 permits standards
- Coast Guard regs – subchapter M
- EPA's general vessel permit

**“There are a number of things wrong with Washington. One of them is that everyone is too far from home.”
President Dwight D. Eisenhower.**

13 Would the following types of regional collaboration be of value to you? (+ research, consensus, sharing)

Statistic	Advocacy	Service development	Marketing	Economic Development	Identify other regional collaboration that you would find valuable
Min Value	1	1	1	1	1
Max Value	4	4	4	4	3
Mean	1.81	2.28	2.09	1.77	1.71
Mode	Very Much (17)	Undecided (13)	Somewhat (11)	Very Much (14)	NA
Variance	1.00	0.66	0.86	0.71	1.25
Standard Deviation	1.00	0.81	0.93	0.84	1.12
Total Responses	32	32	32	31	9

#14 What are the biggest opportunities that exist for ports, terminals, and operators to work together on service development or other efforts?

...awareness and education for public, elected officials, across markets; reliability, intermodal and containers, business development, improve efficiency and capacity, cooperation at local, state and national level.....

#15 What should state's do to enhance and strengthen river's role in freight movement?

....continue to build relations, support Governor as champions, support MH, NESP, O&M; focus on economic development, educate, update terminals, create master plan, reform environmental laws, expand work with truck and rail, support investment.....

#16 What should the federal government do to enhance ports and terminals and strengthen the river's role in freight movement?

....maintain infrastructure, resolve funding issues, increase funding, streamline permits, develop freight network that includes marine, consider Jones Act, update condition assessment, assess costs/benefits and market, modernize the system....



#17 Based on your answers above, what are the greatest needs for stakeholder advocacy to the Administration and Congress in the following categories?

....New policy or adjustments, private funding, uniform rules, funding support, dredging, capital investment for new cargoes, new infrastructure, intermodal center, P3's, consistent message, understand consequences of no-action, 1200' lock,.....

#19 Other suggestions for improving commercial navigation on the upper Mississippi?

...demonstrate environmental benefits of navigation, increase/improve stakeholder communication with USACE, winter service with ice breaker, deepen channel, make the business case, engage investors, make it a priority, make a plan.

Thank you for Participating!

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