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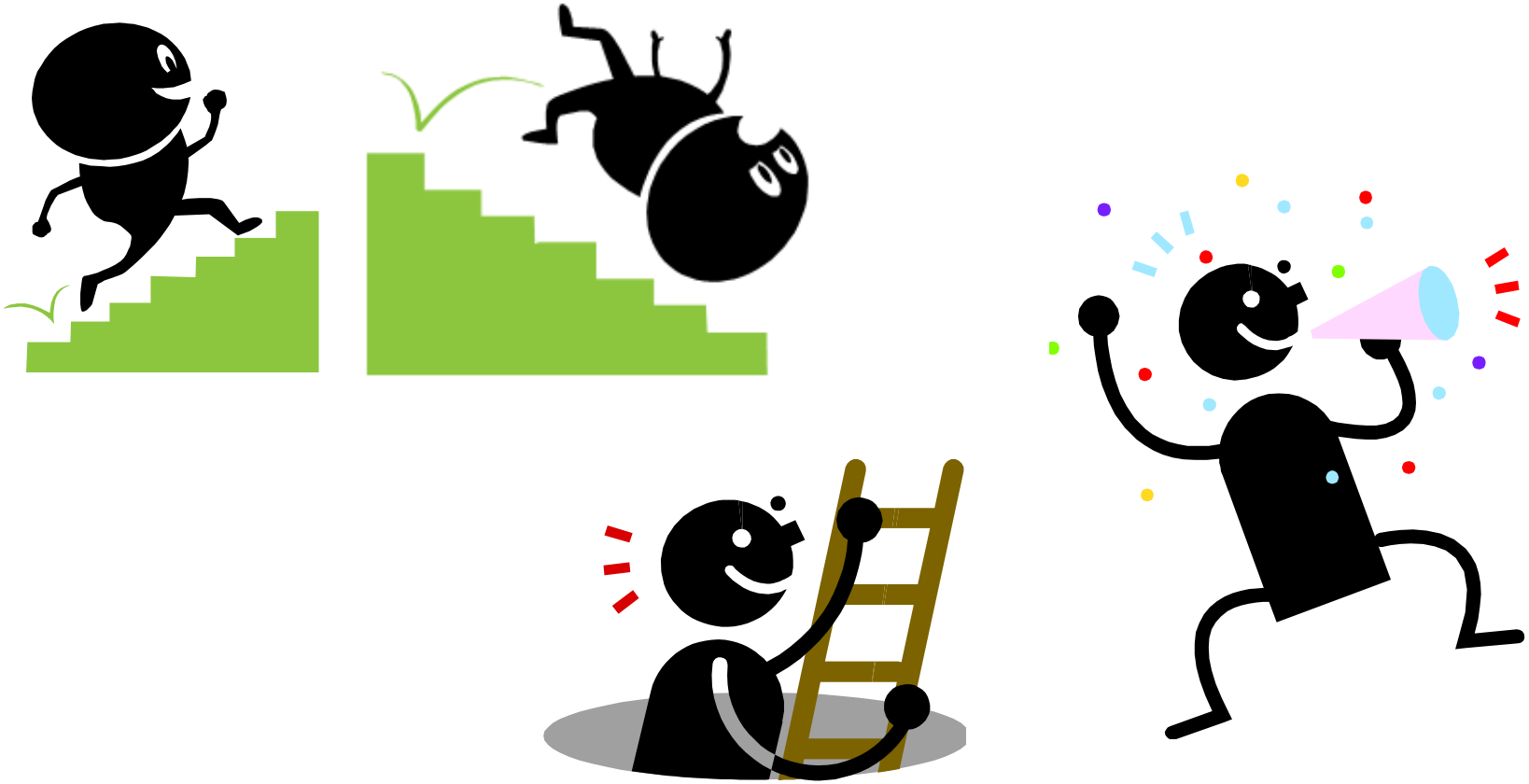
Experiences, Perspectives, & Issues of the Freight Corridor and Gateway Development Process

What does experience tell us?



Success Factors for Development

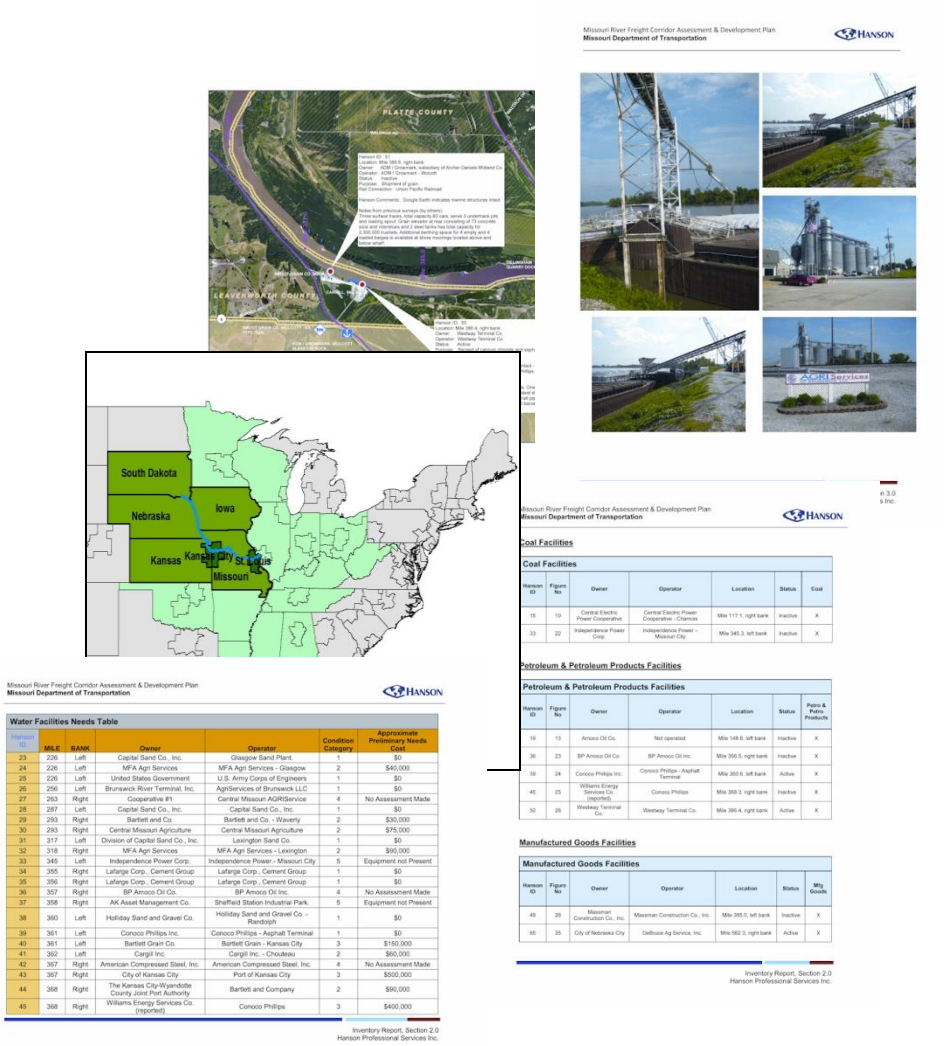
- Position
- Potential
- Partners
- Plan
- Persistence

- Examples

Missouri River

The Objective

- Redevelop the Missouri River as a freight corridor



Missouri River Freight Corridor Assessment & Development Plan

Position – wide ranging needs

- Numerous challenges leading to declining freight
- A few players remain
- Some infrastructure remains

Potential

- Markets – old, existing, & new
- Nodes and needs

Partners

- Public – Ports, State Agencies, Politicians, etc.
- Private – Terminals, Carriers, B2B

Plan

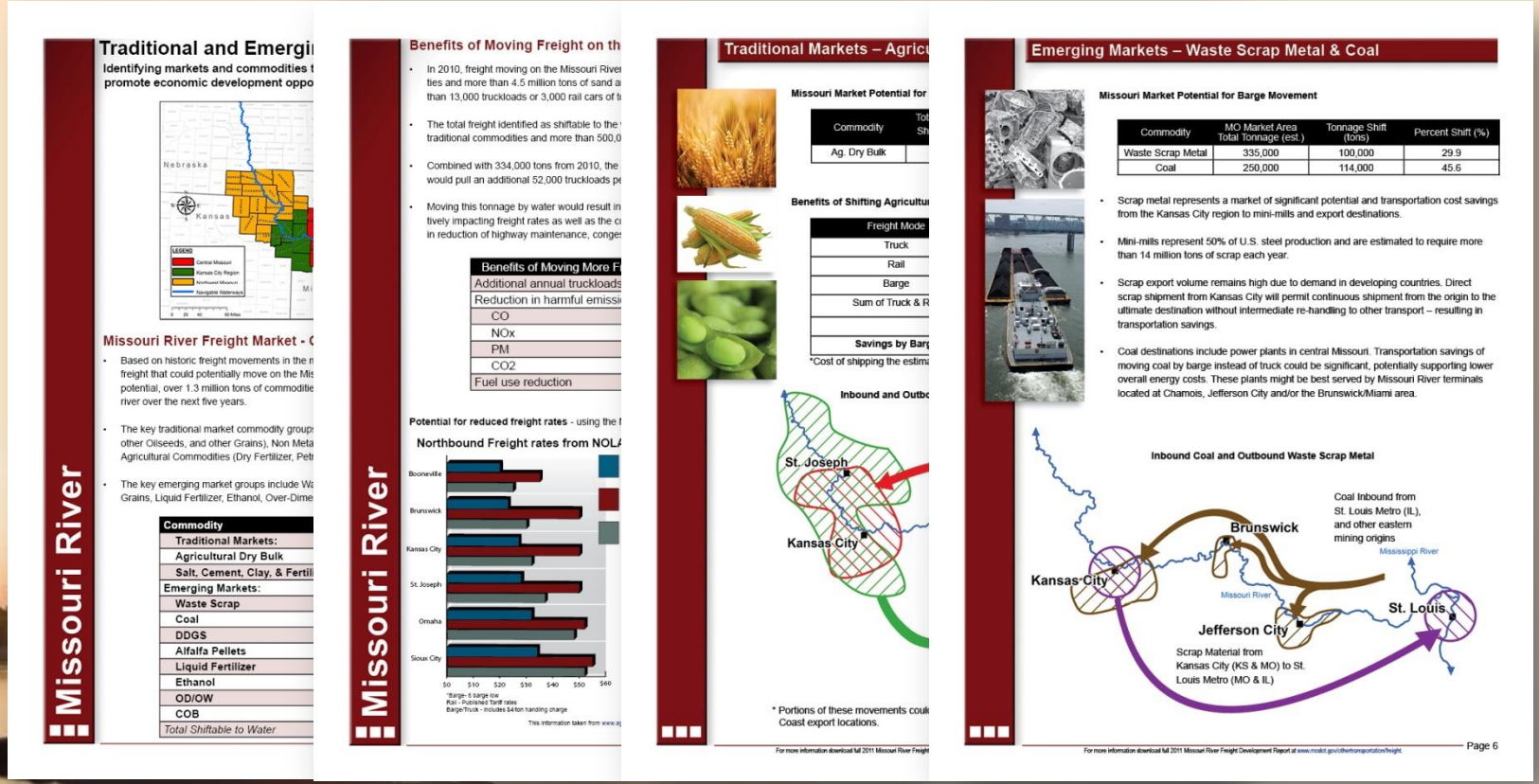
- Development and Implementation

Missouri River

Specific Implementation

Opportunities, Strategies & Benefits

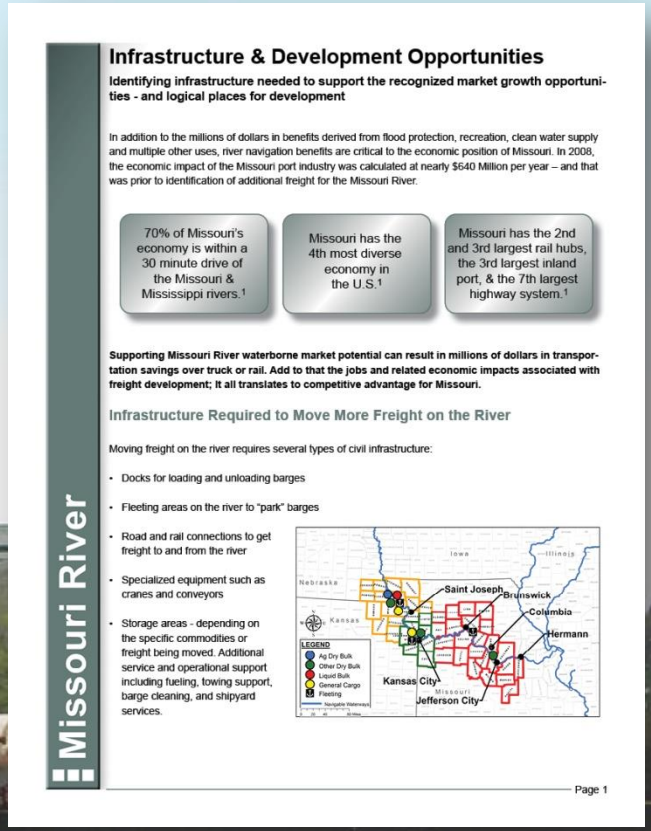
- Traditional and Emerging Markets – *Picking the right targets and communicating the advantages*



Specific Implementation

Opportunities, Strategies & Benefits

- Infrastructure and Market Centers - *Understanding where and in what to invest*



Missouri River

Infrastructure & Development Opportunities

Identifying infrastructure needed to support the recognized market growth opportunities - and logical places for development

In addition to the millions of dollars in benefits derived from flood protection, recreation, clean water supply and multiple other uses, river navigation benefits are critical to the economic position of Missouri. In 2008, the economic impact of the Missouri port industry was calculated at nearly $640 Million per year – and that was prior to identification of additional freight for the Missouri River.

70% of Missouri's economy is within a 30 minute drive of the Missouri & Mississippi rivers.[1]

Missouri has the 4th most diverse economy in the U.S.[1]

Missouri has the 2nd and 3rd largest rail hubs, the 3rd largest inland port, & the 7th largest highway system.[1]

Supporting Missouri River waterborne market potential can result in millions of dollars in transportation savings over truck or rail. Add to that the jobs and related economic impacts associated with freight development; It all translates to competitive advantage for Missouri.

Infrastructure Required to Move More Freight on the River

Moving freight on the river requires several types of civil infrastructure:

- Docks for loading and unloading barges
- Fleeting areas on the river to "park" barges
- Road and rail connections to get freight to and from the river
- Specialized equipment such as cranes and conveyors
- Storage areas - depending on the specific commodities or freight being moved. Additional service and operational support including fueling, towing support, barge cleaning, and shipyard services.

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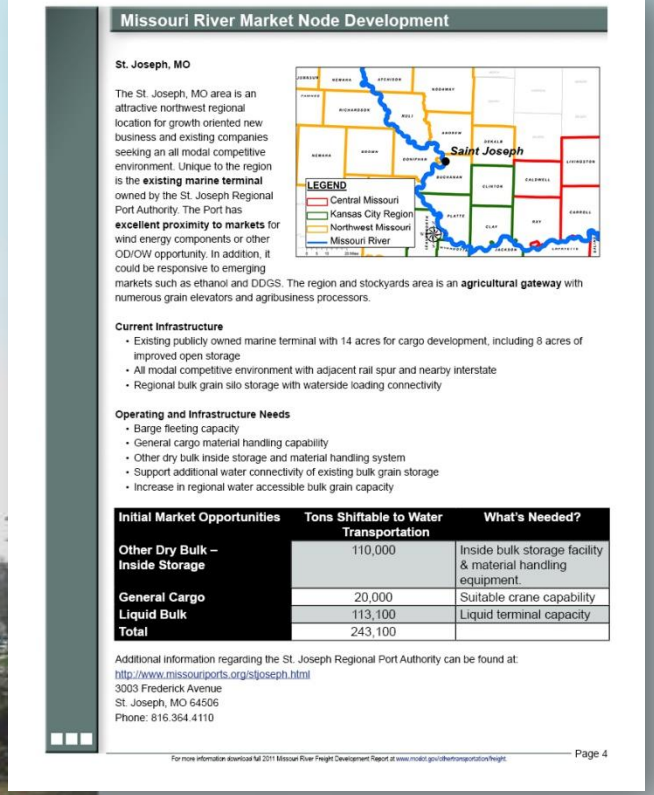

Missouri River Market Node Development

St. Joseph, MO

The St. Joseph, MO area is an attractive northwest regional location for growth oriented new business and existing companies seeking an all modal competitive environment. Unique to the region is the **existing marine terminal** owned by the St. Joseph Regional Port Authority. The Port has **excellent proximity to markets** for wind energy components or other OD/OW opportunity. In addition, it could be responsive to emerging markets such as ethanol and DDGS. The region and stockyards area is an **agricultural gateway** with numerous grain elevators and agribusiness processors.

Current Infrastructure

- Existing publicly owned marine terminal with 14 acres for cargo development, including 8 acres of improved open storage
- All modal competitive environment with adjacent rail spur and nearby interstate
- Regional bulk grain silo storage with waterside loading connectivity

Operating and Infrastructure Needs

- Barge fleeting capacity
- General cargo material handling capability
- Other dry bulk inside storage and material handling system
- Support additional water connectivity of existing bulk grain storage
- Increase in regional water accessible bulk grain capacity

Initial Market Opportunities	Tons Shiftable to Water Transportation	What's Needed?
Other Dry Bulk – Inside Storage	110,000	Inside bulk storage facility & material handling equipment.
General Cargo	20,000	Suitable crane capability
Liquid Bulk	113,100	Liquid terminal capacity
Total	243,100	

Additional information regarding the St. Joseph Regional Port Authority can be found at:
http://www.missouriports.org/stjoseph.html
3003 Frederick Avenue
St. Joseph, MO 64506
Phone: 816.364.4110

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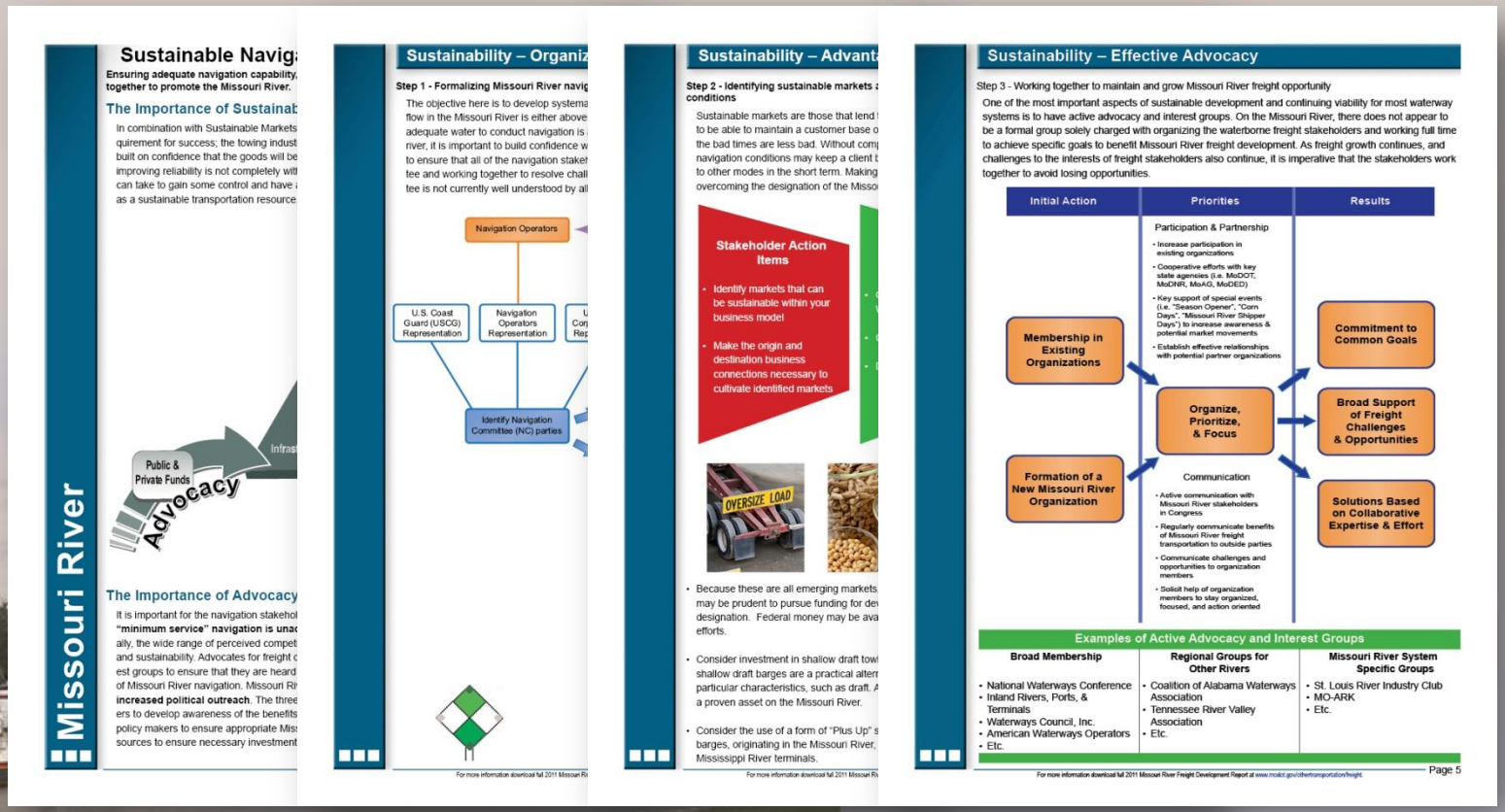
Specific Implementation

Opportunities, Strategies & Benefits

- Sustainable Navigation, Sustainable Markets, and Advocacy – *Working together toward common goals*



Missouri River Freight Corridor Assessment & Development Plan

Positive Outcomes – in spite of ongoing challenges

- Greater coordination among stakeholders including new business relationships
- Attention at the legislative and executive level resulting in funding for Missouri Ports & Waterways

…Persistence

Southeast Iowa Regional Economic & Port Authority

Position

- Brand new Port Authority
- Zero revenue, no assets

Potential

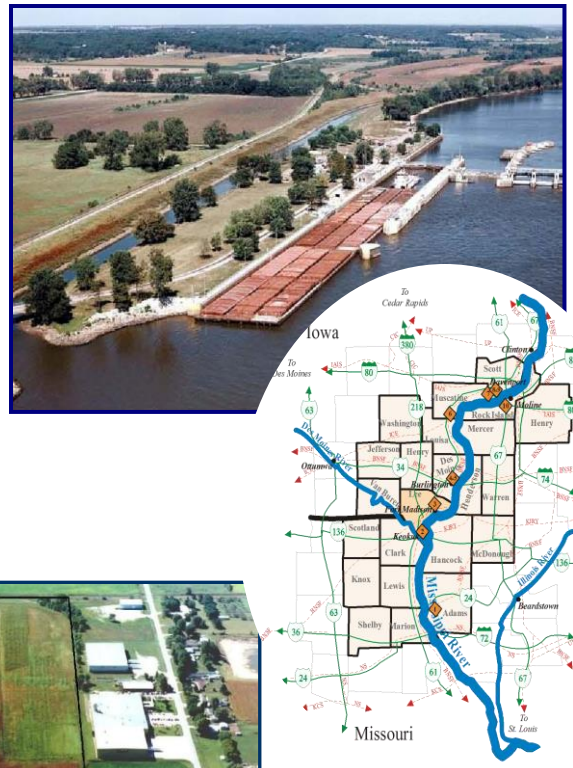
- Wide-ranging purview

Partners

- Yep, need some

Plan

- Where do we go from here?

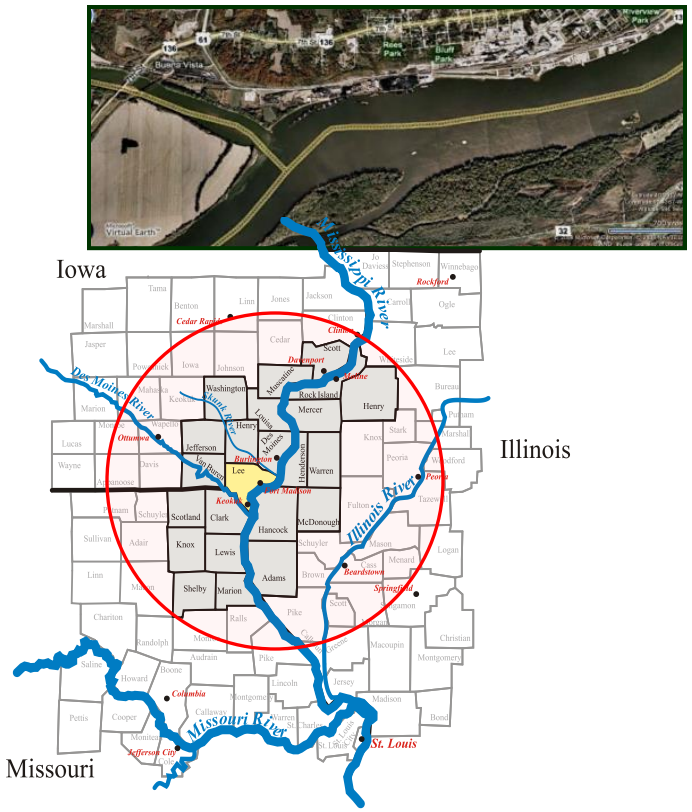


Southeast Iowa Regional Economic & Port Authority

Positive Outcomes

- Implementation funding
- Local private economic investment
- Organizational improvements
- Focus

…Persistence



Port of Palacios, TX

The Objective

- Understand **Position** and **Potential**

Positive Outcome

- Successfully developed new barge commodity revenue without any additional investment (good **Plan**)

…Persistence

Rochester Harbor Management, NY

The Overall Objective

- Develop a Plan with a clear understanding of short-term policy, regulatory, organizational and capital needs, as well as long-term vision of how the Port will holistically develop within the broad needs of the community.

The Immediate Need

- Help stakeholders understand the impacts of losing specific commerce on the Genesee River

Rochester Harbor Management, NY

Position

- Critical dredging need
- Low use waterway

Potential

- Loss of high-impact business
- Loss of future commercial and recreational opportunity

Partners

- Politicians, Local Government(s)
- U.S. Army Corps of Engineers
- Private Business

Plan

- Pilot Program
- Understanding the Economic Impacts

Rochester Harbor Management, NY

Positive Outcome

- City…
- County…
- Private partner…
- USACE…
- Dredging completed

…Persistence

Tulsa Port of Catoosa, OK

Did I mention …?

- **Position**
- **Potential**
- **Partners**
- **Plan**
- **Persistence**

Tulsa Port of Catoosa, OK

- Started with a plan
- Formed partnerships early
- Learned lessons from others
- Developed focus
- Stuck to the plan and kept moving
- Continuous Improvement
- Continued strategic alliances

- …one piece at a time, over time, ongoing…**persistence**

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Thank you