



Niagara Frontier Urban Area Freight Transportation Study

Final Presentation



GREATER BUFFALO-NIAGARA

REGIONAL TRANSPORTATION COUNCIL

Buffalo-Niagara Falls Metropolitan Planning Organization (MPO)

Project No. 06Freight

December 10, 2010

Presented to:
Greater Buffalo-Niagara Regional Transportation Council

Presented by:
Wilbur Smith Associates

WilburSmith
ASSOCIATES

Agenda

- Background of Study
- Summary of Key Findings
- Identified Projects/Solutions
- Steps Forward



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BACKGROUND



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Origin/Need for Study

- Changing freight needs of the region
 - Shift from heavy manufacturing to light manufacturing and logistics
 - Increasing cross-border trade
 - Evolving railway network – network rationalization, growth of containerized service
- Freight assets can help to facilitate trade/economic development
 - Border crossings
 - Airports
 - Port facilities
 - Rail network and terminals
- Need to conduct comprehensive assessment of the region's entire regional freight transportation network



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Background of Study

<u>Deliverable</u>	<u>Content</u>
Tech Memo 1	<ul style="list-style-type: none"> •Economic overview of the region
Tech Memo 2	<ul style="list-style-type: none"> •Air, highway, rail, marine profiles •Cross-border freight system profile •Preliminary identification of opportunities
Tech Memo 3	<ul style="list-style-type: none"> •Rail, truck, marine, cross-border traffic flow profile •Forecasted freight volumes
Tech Memo 4	<ul style="list-style-type: none"> •Needs assessment (summary of stakeholder input, freight performance indicators, network analysis) •Proposed projects •Freight issues/solutions matrix
Tech Memo 5	<ul style="list-style-type: none"> •Evaluation of maritime, rail, highway projects •Evaluation of potential logistic center in Buffalo •Presentation of marketing plan outline, FAC
Final Report, Executive Summary	<ul style="list-style-type: none"> •Summary of previous tech memos •More detailed marketing plan •Summary and prioritization of project recommendations



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SUMMARY OF KEY FINDINGS



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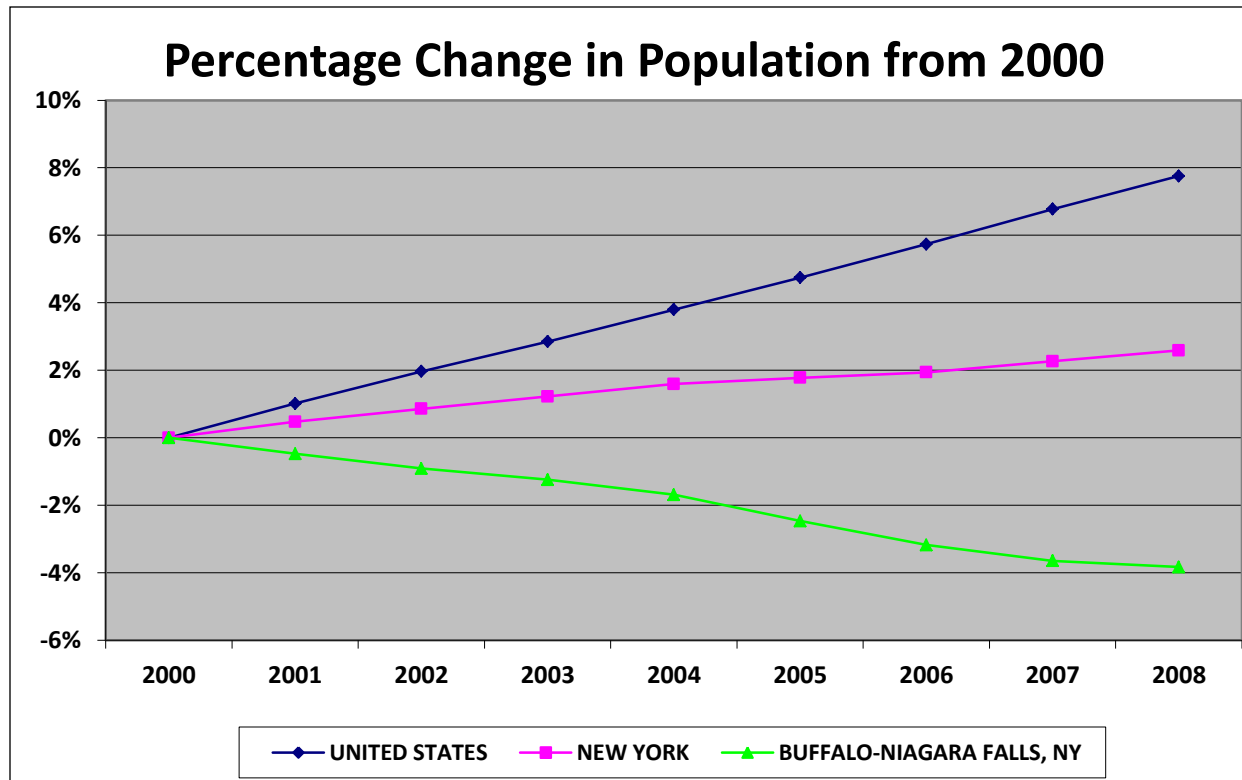
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Economic development is a pervasive need for the region



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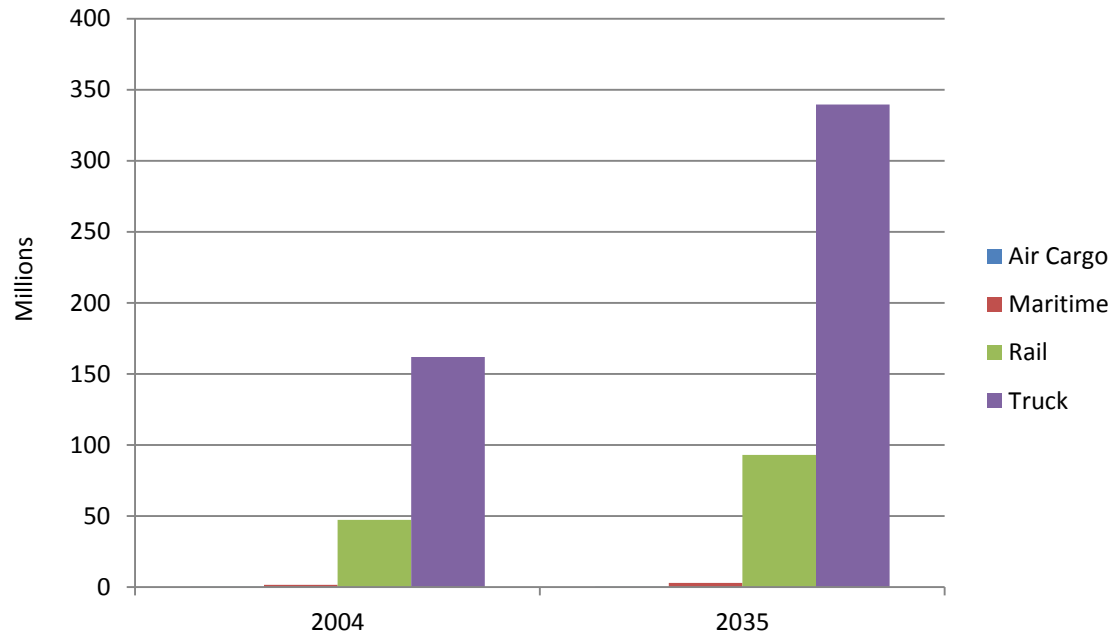
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Despite “no-growth” population forecasts, IHS Global Insight forecasts predict that regional freight volume will more than double

Freight Tonnage by Mode



Source: IHS Global Insight TRANSEARCH database

Most of the region's freight is carried by truck or rail



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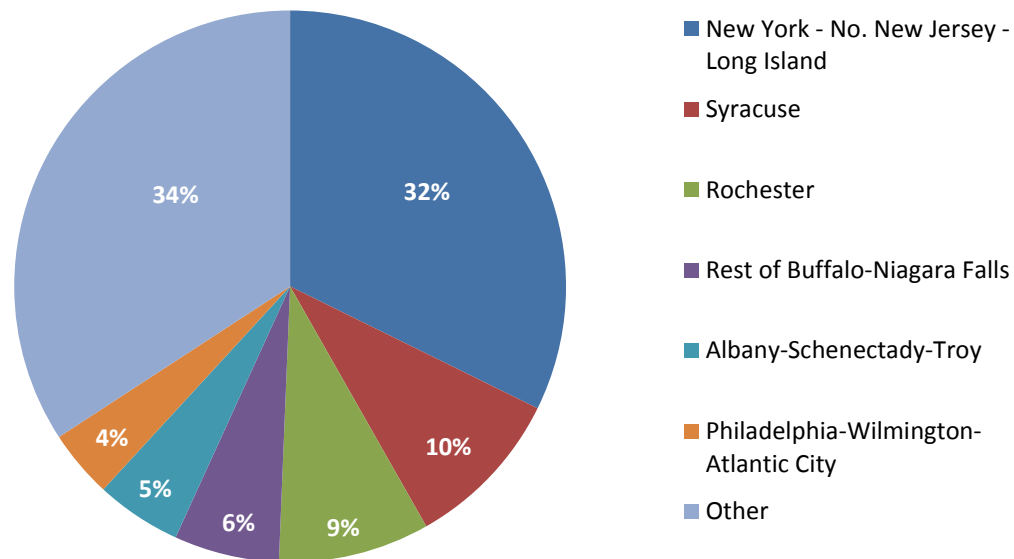
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The New York City Metropolitan Area is the region's largest trading partner

Combined 2004 Inbound/Outbound Tonnage by BEA



Projects that improve connections with NYC and other Mid-Atlantic markets can have large impacts



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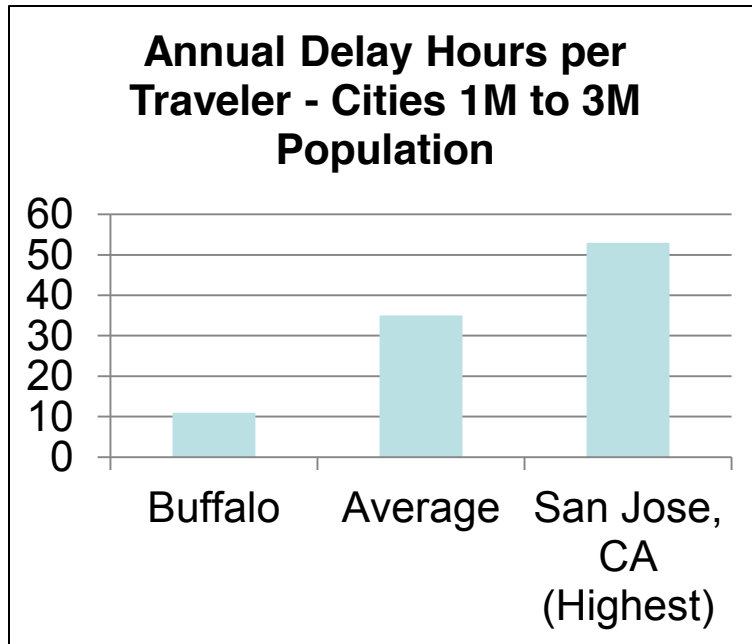
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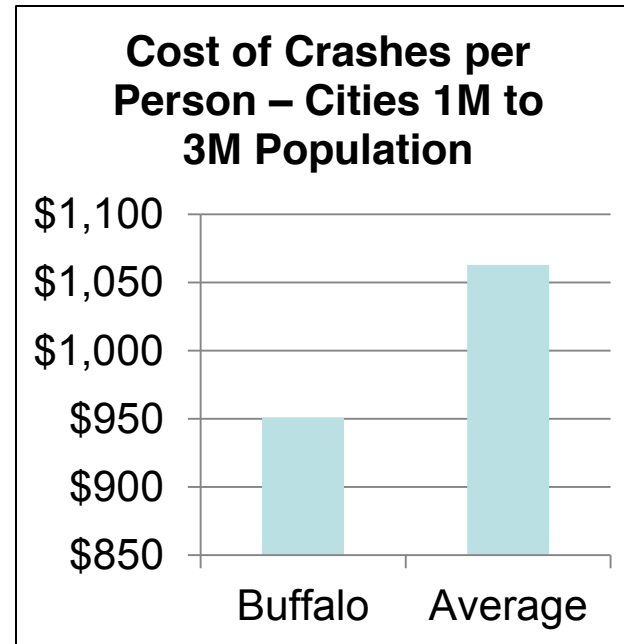
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Compared to other large metro areas, the region's roadways are less congested and safer



Source: Texas Transportation Institute



Source: Cambridge Systematics

...but this just makes the region's traffic issues just "less bad"



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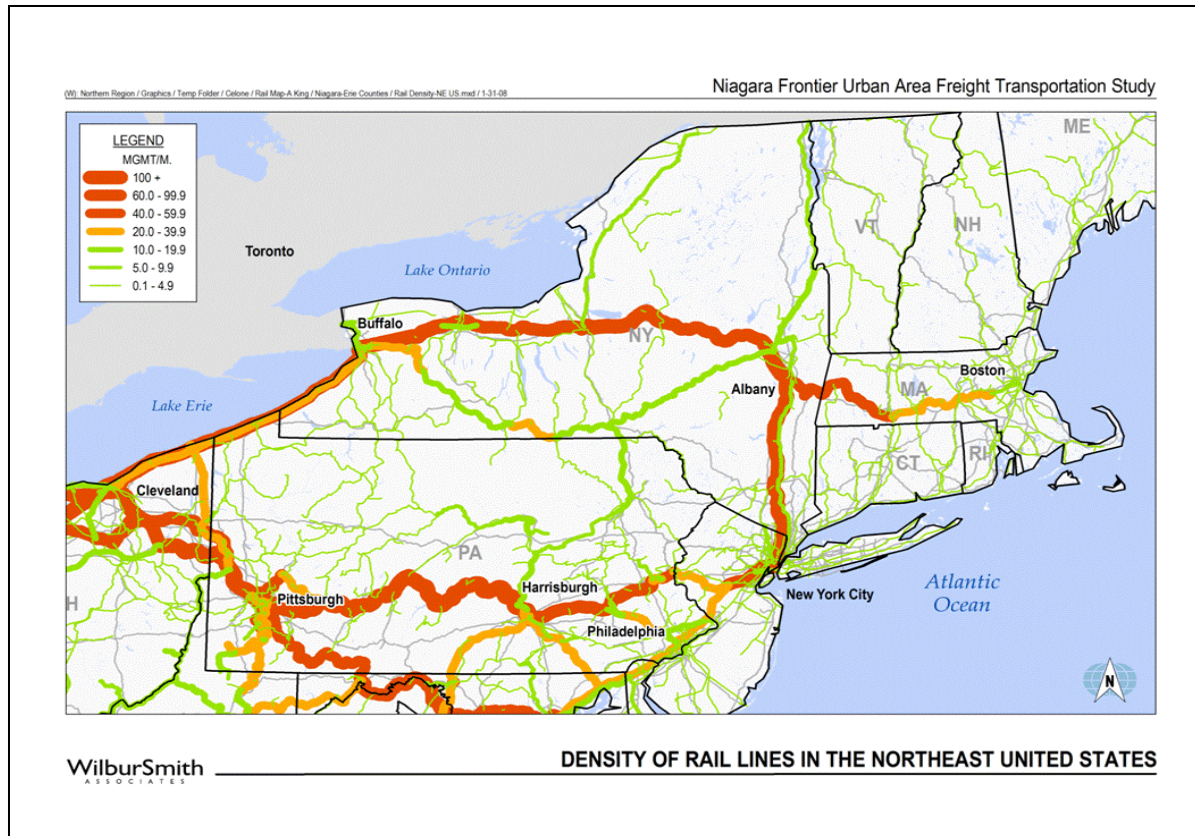
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The region has good east-west rail connections



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....but the region's highway connections to the south/southwest are indirect or circuitous



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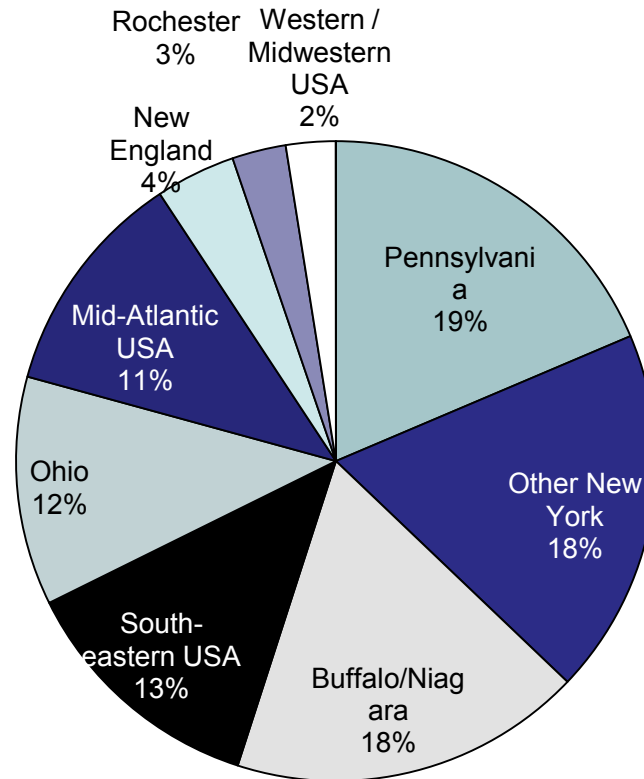
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Cross-border traffic moving through the Buffalo-Niagara region has diverse U.S. origins and destinations

Origin/Destination U.S. Region for 2004 Freight Tonnage Crossing the Lewiston-Queenston Bridge



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Stakeholders cited issues with the region's rail network

- Rail bridges at the end of their life
- Bottlenecks
- Lack of competitive access
- Lines in poor condition

CP Draw



Portage Bridge



Falls Road Bridge



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The Port of Buffalo is relatively small, but has a diverse traffic base

Great Lakes Port Profile

Port	Tons (Millions)	Waterbody	Population (Thousands)
Duluth-Superior	44.7	Superior	114
Montreal	26.0	Seaway	1,600
Chicago	25.8	Michigan	2,840
Detroit	17.4	Huron	887
Cleveland	13.6	Erie	452
Hamilton	13.6	Ontario	500
Toledo	10.5	Erie	300
Burns Harbor	9.8	Michigan	<1
Ashtabula	9.7	Erie	21
Conneaut	7.4	Erie	12
Milwaukee	3.8	Michigan	600
Toronto	2.8		2,480
Green Bay	2.7	Michigan	100
Buffalo	1.6	Erie	300
Monroe	1.6	Erie	22
Erie	1.1	Erie	100
Oswego	0.7	Ontario	17
Oshawa	0.2	Ontario	141

Buffalo Share of Traffic

Commodity	Great Lakes	Buffalo	Share
Food, Farm Products	5,496	373	6.80%
Petroleum	4,593	193	4.20%
Manufactured Products	103	3	2.90%
Lime, Cement	10,489	153	1.50%
Coal	44,773	493	1.10%
Sand, Stone, Iron Ore	102,800	398	0.40%
Chemicals	1,077	0	0.00%
Unknown, Misc.	86	0	0.00%
Total	169,417	1,613	1.0%



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Traffic on the GLSLS system has generally declined over the past several decades

U.S. Freight Demand (Millions of Ton-Miles)

Mode	1980	1990	2000	2004	Percent Change 1980 - 2004
1. All modes	3,404,015	3,621,943	4,328,642	4,541,668	33.4%
2. Air	4,840	10,420	15,810	16,451	239.9%
3. Truck	629,675	848,779	1,192,825	1,281,573	103.5%
4. Railroad	932,000	1,064,408	1,546,319	1,684,461	80.7%
5. Domestic water transportation	921,835	833,544	645,799	621,170	-32.6%
a. Coastwise	631,149	479,134	283,872	279,857	-55.7%
b. Lakewise	61,747	60,930	57,879	55,733	-9.7%
c. Internal	227,343	292,393	302,558	284,096	25.0%
d. Inraport	1,596	1,087	1,490	1,484	-7.0%
6. Pipeline	915,666	864,792	927,889	938,013	2.4%
7. Oil and oil products	588,000	584,100	577,000	599,600	2.0%
8. Natural Gas	327,666	280,692	350,889	338,413	3.3%

8 of 22 terminals within the Buffalo-Niagara region are inactive



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Strengths, weaknesses, opportunities, and threats to the region's air cargo

Strengths/Opportunities	Weaknesses/Threats
Located at center of key international market	Air cargo leakage to competing airports is significant with 11 daily truck departures
Canadian customers can clear customs by road while in custody of goods rather than rely on agent	Kitty Hawk Cargo ceased operations at NFIA as a result of its bankruptcy and termination of service.
Quest Diagnostics uses BNIA for 18 weekly flights	Sharing air cargo between two NFTA airports in a market the size of Buffalo-Niagara is a challenge
The region is home to industries that typically use air cargo, such as automotive, medical device manufacturing, pharmaceutical	Moderate passenger traffic, so limited opportunity for belly cargo
NFIA has lowest landing fees in region, a 10,800 foot runway, and is located in a FTZ	General competition from competing airports, and regional hubs
NFIA operating at 18% capacity	Modal shift to trucks by integrated express carriers



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Despite some weaknesses, the region is a promising location for a logistics center

Strengths/Opportunities	Weaknesses/Threats
<p>Located near existing and future sources of consumption or production</p> <ul style="list-style-type: none"> •2.3 million population in Western New York •5.5 million population in Greater Toronto Area 	<p>No container pool, imbalance of inbound/outbound freight, which increases costs of container drayage to/from region</p>
<p>Efficient access to multiple modes of transportation, including rail services by four class 1 carriers, several border crossings, port terminals, two airports</p>	<p>Other corridors have larger freight volumes, such as I-80 through Pennsylvania</p>
<p>Fit within NS and CSX railroad intermodal networks</p>	<p>Competing logistics hubs, such as Ohio-based logistics centers</p>
<p>Direct connection to the Port of NY/NJ, serving as best rail access point between Port of NY/NJ and Greater Golden Horseshoe</p>	<p>Cost of toll facilities to motor carriers within the region</p>
<p>Need for inland centers to serve Port of NY/NJ</p>	



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IDENTIFIED PROJECTS/SOLUTIONS



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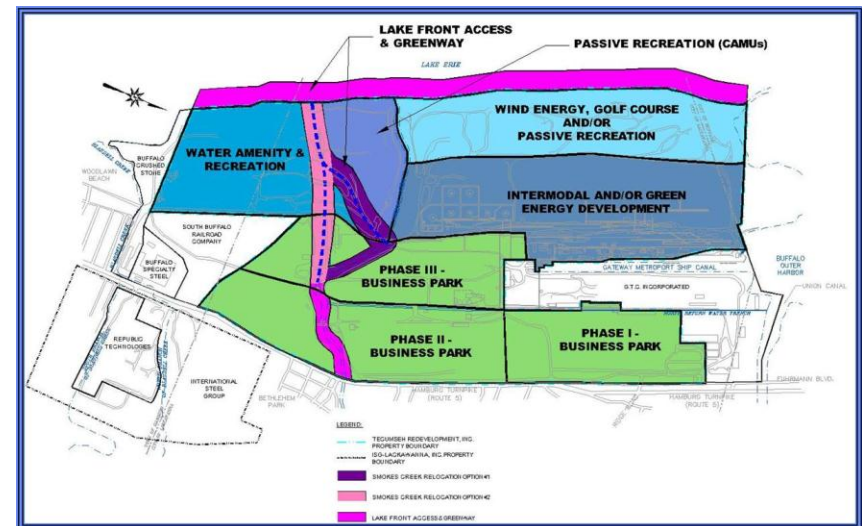
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What would a Buffalo-Niagara logistics complex entail?

- Eventually a new truck/rail intermodal facility
 - Potentially a shared facility
 - Public/private partnership
- Logistics and distribution facilities
- Transload facilities
- Marketing initiative
- Information technology initiative

Bethlehem Steel Site



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Benefits of a Logistics Complex

- Companies tend to locate near transportation/distribution hubs
- Value added to products at all points of supply chain
- Provide economic benefit to region from overhead international traffic, particularly to/from Port of NY/NJ
- As many as 7,050 job-years, \$297 million income over 20 year period
- Improve competitiveness of shippers, NPV benefits as high as \$557 million



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Highway Recommendations

Project	Priority	Timing	Comments
Peace Bridge Expansion	High	Long	The draft FEIS for the project found that the benefit/cost ratio of the project is 8.4 for one alternative and 8.9 for another alternative. These ratios suggest that the project is an efficient use of funds and worth GBNRTC's support.
New York Route 63 Bypass - Recommend Additional Study	High	Long	<ul style="list-style-type: none"> •NY 63 is shortcut between I-90 and I-390 •NYSDOT study found that a new bypass would save trucks \$43.43 in truck operating costs compared to I-90/I-390 route •If only a portion of Buffalo-Niagara trade with NY Metro, other Mid-Atlantic markets, still amounts to over a million trucks per year, which is forecasted to double by 2035 •May justify estimated \$400 million cost
Southern Expressway Extension - Springville to Salamanca	Medium	Medium	<ul style="list-style-type: none"> •Provides connection to I-86 so freeway doesn't just end •Previous study by NYSDOT suggests that may be difficult to justify by user benefits alone •However, other report suggests significant economic development benefits



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Benefits of Highway Recommendations

- Improve flow of trade with Canada
- Reduce costs to shippers moving goods to/from important markets to the south/southwest



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Rail Recommendations

Project	Priority	Timing	Comments
Portage Bridge Replacement	High	Medium	<ul style="list-style-type: none"> •Benefit/cost ratio of over 7 •Bridge at the end of useful life •Severely restricts NS operations •Essential for competitive access to markets in New York, New England
G&W Connection from NS to Buffalo Line to BPRR Line	High	Short	<ul style="list-style-type: none"> •Benefit/cost ratio over 4 •Could relieve traffic on the CP Draw
Falls Road Bridge over Erie Canal Rehabilitation	High	Short	<ul style="list-style-type: none"> •Could impact 1,700 tank cars of ethanol and 1,500 hoppers of DDGS •Should justify \$1M cost
Rehab BSOR, SB lines	High	Short	<ul style="list-style-type: none"> •Rail lines in poor condition - need rehab
CP Draw Replacement	Medium	Long	<ul style="list-style-type: none"> •Needs more study using simulation modeling •Bypasses could relieve congestion at lower cost •Benefit/cost ratio < 1
CN Northern Connection/ CN Southern Connection	Medium	Medium	<ul style="list-style-type: none"> •Could relieve congestion at CP Draw •Benefits would rely on CSX providing trackage rights to CN •Limited by clearance issues on the Niagara Branch •Perhaps could offer assistance to CSX on clearance in return for CN trackage rights
Lehigh Valley Yard Intermodal Expansion	Low	Medium	<ul style="list-style-type: none"> •Not on NS/CSX mainline •CN has not expressed reasonable interest in serving •Would compete with CN Brampton, ON terminal
Encourage joint marketing agreement for intermodal service between New York, Toronto	Medium	Short	<ul style="list-style-type: none"> •Would relieve truck congestion at border crossings •Could cannibalize Buffalo logistics center



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Benefits of Rail Projects

- Don't miss trade opportunities over NS Southern Tier line
- Improve rail operations – faster transit times, more reliable service
- Shift traffic to rail, which benefits emissions and safety



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Maritime Infrastructure Recommendations

Project	Priority	Timing	Comments
AES Lake Unloading Project	Medium	Medium	<ul style="list-style-type: none"> •AES Somerset has proposed to invest \$25 million to construct a 3,200-foot long pier-conveyor for waterborne deliveries of coal, petroleum coke and limestone •Company has expressed willingness to allow others access to 1,800 acre site and presumably to pier •Would provide between \$0.69 and \$3.85 in safety benefits per ton of coal delivered
Revitalized Erie Canal	Medium	Medium	<ul style="list-style-type: none"> •Very useful for project cargo, marine construction equipment, small military watercraft •Volume of traffic is only 30K tons system-wide
Short Sea Shipping	Low	Medium	<ul style="list-style-type: none"> •Port of Hamilton's Sea3 service has been suspended •Some challenges to overcome in terms of the service's economics •Environmental and safety benefits •Conditions may change



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Maritime Marketing Opportunities

- Ethanol could be a growth area, particularly if the RiverWright plant is built. Market conditions shift rapidly for this commodity.
- Because of New York State, Ontario renewable energy mandates, wind turbines are a short-term growth area of maritime freight
- Coal could be a growth cargo as eastern power plants shift to using western coal
- The Port of Buffalo carries a lower volume in building materials than would be expected for the market, so this could be an opportunity
- Grain exports are a growth area this year



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Benefits of Maritime Initiatives

- Focus on potential growth areas
- Bring un/underused ports back to life
- Maritime is the safest and most fuel-efficient mode of transportation



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Aviation Marketing Opportunities

- Market air cargo services to automotive and medical device industries
- Recruit an anchor tenant
 - NY 3rd nationally in grape production, although seasonal cargo
 - Retailer
 - Pharmaceutical and bio sciences is a growth area
- Market to overhead cargo, determine what is passing, whether there is a reason to stop
- Develop NFIA as an “industrial” airport, directed at manufacturers of aircraft and equipment to support the aviation industry



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Benefits of Aviation Initiatives

- Use air cargo as a component of economic development



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Marketing Opportunities - Organization

- Freight Advisory Committee
 - Suggested by stakeholders
 - Exchange information and build relationships
 - Engage in the regional planning process
 - Voluntary organization
 - Could assist in marketing process through peer-to-peer exchange, gather market data, organize marketing initiatives
 - Ad hoc or with mandate
- KC SmartPort Model
 - Small staff of full-time professionals
 - Investment by public/private membership
 - Affiliated with economic development agency



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Why a freight/logistics marketing function/ organization?

- Specialized knowledge
- Buffalo/Niagara region has numerous logistics assets and high potential as a logistics hub



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STEPS FORWARD



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Steps Forward - Meetings

- Meet with stakeholders to create FAC/logistics marketing initiatives
- Work with regional economic development agencies and Tecumseh Redevelopment to encourage re-development of the former Bethlehem Steel site to support regional logistics needs
- Meet with officials from the Port of Buffalo and the area's airports to review maritime and aviation marketing recommendations:
 - Reactions to recommendations
 - Who will be addressing recommendations
 - Whether there are other actions that could be taken to help these organizations in marketing their logistics assets



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Steps Forward – Rail Meetings

- Meet with CSX/CN to facilitate CN access to Niagara Branch in return for clearance projects, as well as explore additional uses of Lehigh Valley Yard
- Meet with Canadian, U.S. and Canadian rail carriers to investigate the possibility of a joint marketing agreement for intermodal service between Port of New York/New Jersey and Ontario terminal



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Steps Forward – Studies

- Develop more detailed marketing plan for marketing areas logistics assets, starting with the plan within this study
 - Clarify roles/organizational components
 - Build upon opportunities
 - Clarify next steps, timing, responsibility
- Make a request to NYSDOT for additional analysis of potential bypass between I-90 and I-390 near NY Route 63
- Coordinate with CSXT, NYSDOT, etc. for funding of simulation modeling of CP Draw forecasted delays. CSXT would need to provide detailed track charts, train schedules



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Steps Forward – Funding/Advocacy

- Seek/secure funding from available NYSDOT rail assistance programs or future federal funding sources for the Portage Bridge replacement, G&W Connection from NS to BPRR line, Falls Road Bridge rehabilitation, and other high priority projects from NY State Rail Plan
- Support the Peace Bridge expansion project
- Support the Southern Expressway Extension



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