



Missouri River - M-70 and M-29 Marine Highway Corridors Update

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America's Marine Highways

Agenda

- Background
- M-70 Update
- M-29 Update
- Marine Highway & TIGER Projects
- Marine Highway Studies – M-55, M-94, & M-5
- Marine Highway Themes
- Marine Highway Services
 - Examples: M-64, M-580
 - Lessons Learned
 - Forming Marine Highway Services – Primary Considerations
 - Future Services Coming Online

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Background

- Authorized in 2007
- Grant program created in 2010
- \$7M awarded in 2010
 - ✓ Four new services funded
 - ✓ Three market studies funded
 - ✓ New vessel designs funded



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M-70 Update

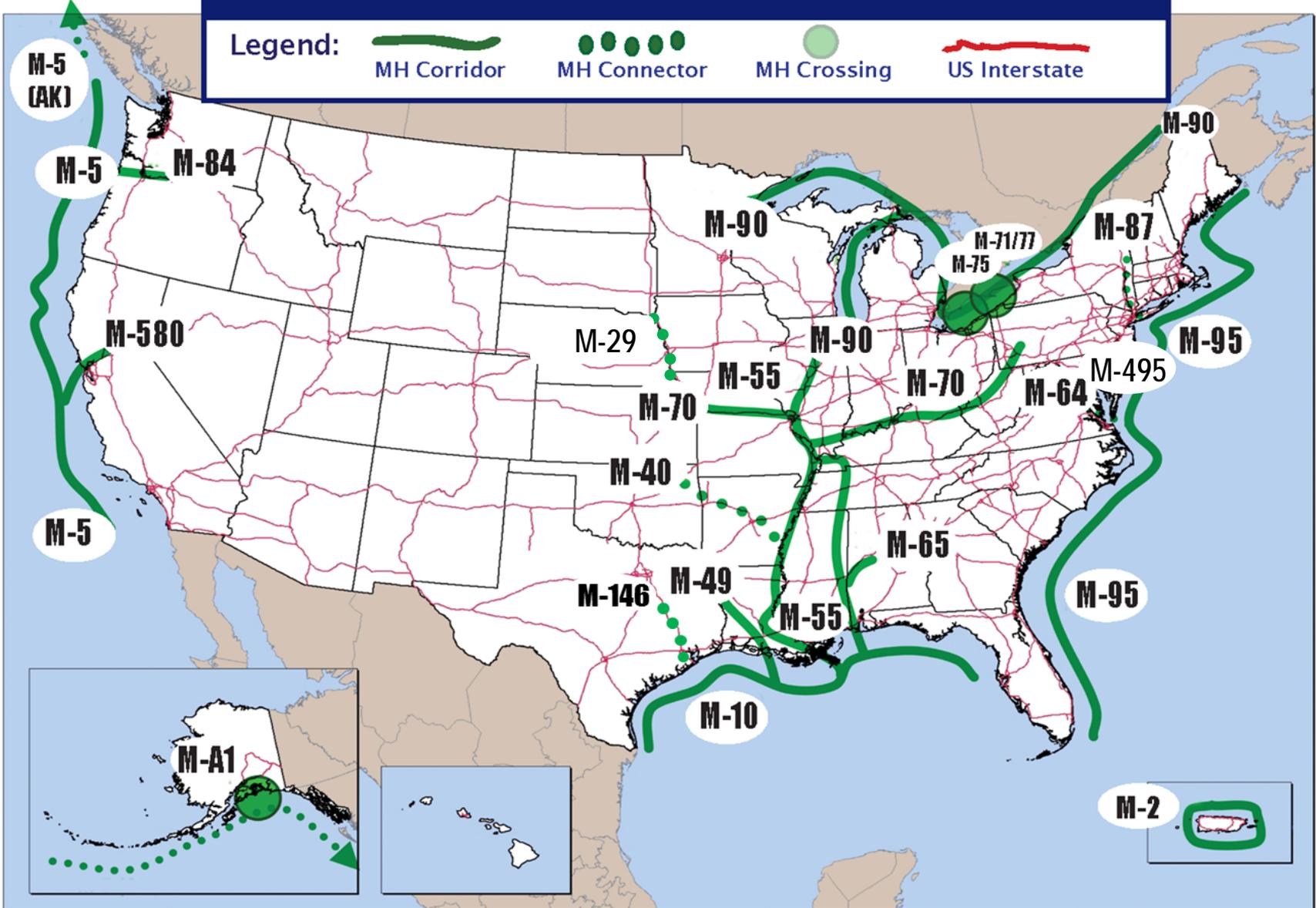
Objective: Establish a economically sustainable Marine Highway Service

Current Actions:

- Formed a seven state coalition (PA, OH, IN, IL, MO, KY, WV)
- Formalized stakeholders into four working groups:
 - ✓ Market Analysis
 - ✓ Infrastructure
 - ✓ Operational Framework
 - ✓ Communications
- Develop a demonstration project

America's Marine Highway Routes

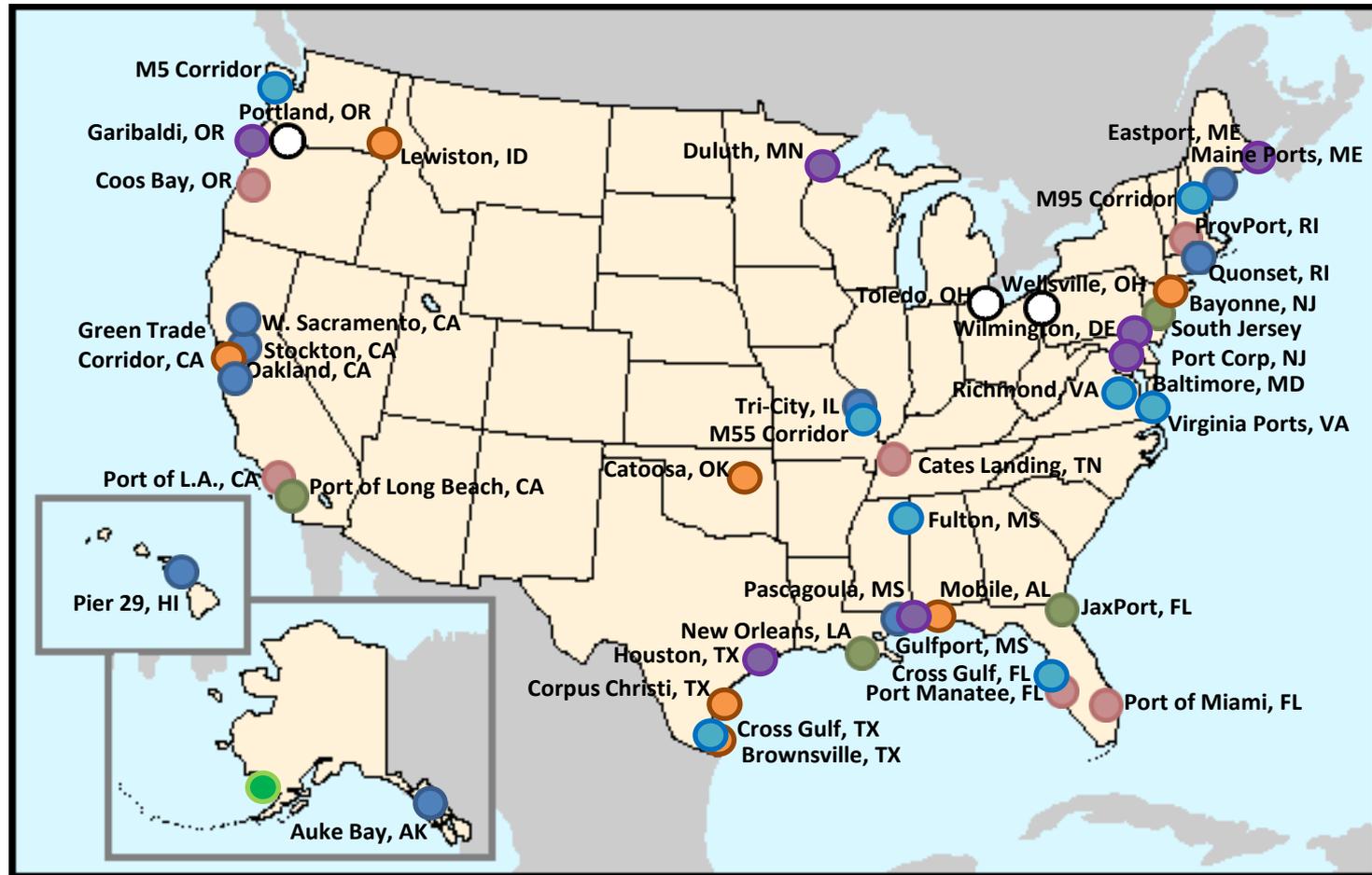
Legend:  MH Corridor  MH Connector  MH Crossing  US Interstate



Disclaimer: This map is not a navigation tool. This is a representation to the approximate locations.

15 FEB 2013

America's Marine Highways - *Projects*



- ARRA Grants
- TIGER FY 2009
- TIGER FY 2010
- TIGER FY 2011
- TIGER FY 2012
- TIGER FY 2013
- Marine Highway

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Tenn-Tom Waterway Pilot Project

- MARAD Marine Highway Grant Funds provided for landside container handling equipment
- Service between Mobile and Fulton to begin 2nd Qtr 2014
- Provides modal choice and an all water alternative versus east/west coasts to Memphis rail ramps
- Potential to expand to other Ports along the waterway and extend the service further north



America's Marine Highways *Studies*

- Three Routes Studied (M-5, M-55, & M-95)
 - ✓ Market Analysis
 - ✓ Operation/Infrastructure Analysis
 - ✓ Business Case
- Major Findings
 - ✓ Where geography and market were favorable, services could work
 - ✓ Infrastructure gaps and modal connectivity need to be addressed
 - ✓ Handling costs and vessel operations continue to be the major cost drivers
 - ✓ Must be part of a total supply chain package

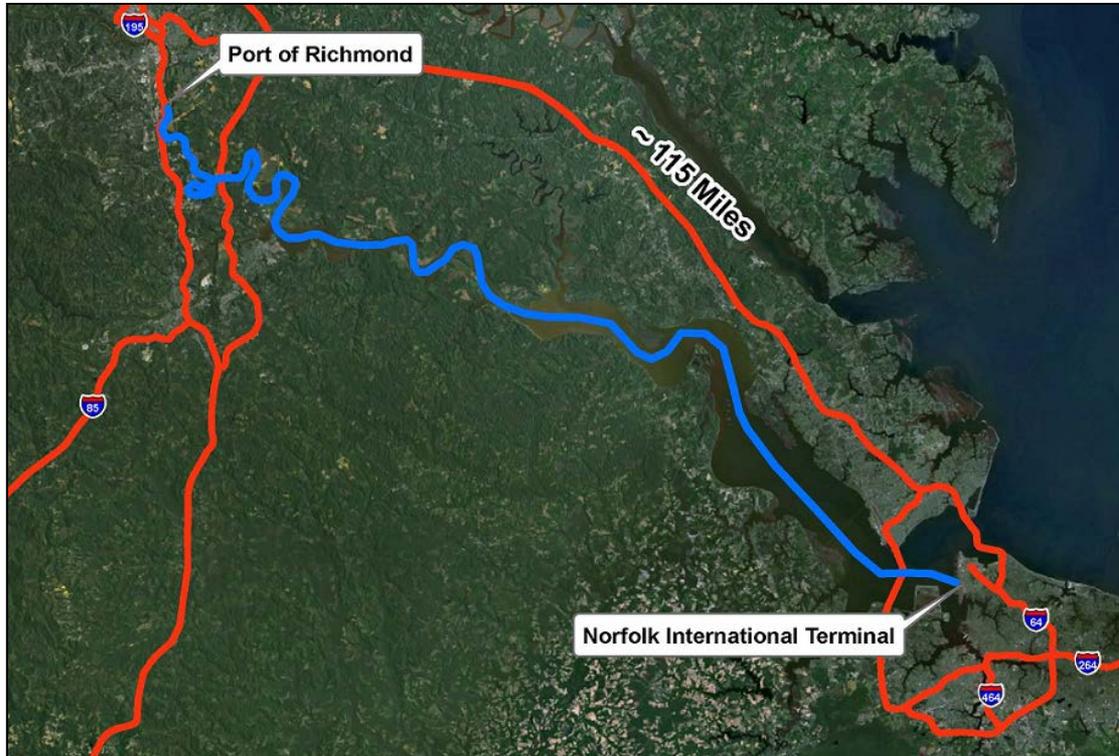
America's Marine Highways - Themes

COB Service	Service To / From	COB Dist. / Time	Approx. Ann. COB Volume (containers)	Port Volume (TEU's)* Export / Import (Ann.)
Tidewater	Various - Portland	≤ 360 miles ≤ 51 hours	11,000	101,000 82,000
Columbia Transport	Baltimore -	181 miles 18 hours	10,400	342,000 336,000
	Norfolk			1,100,000 974,000
64 Express (James River Barge Line)	Richmond - Hampton Roads, VA	70 miles 12 hours	7,000	1,100,000 974,000
Couch Lines	Cedar Bayou - Houston	4.2 miles** 2 hours	5,200	1,000,000 917,000
Port of Stockton	Stockton, CA - Oakland	76 miles 9.5 hours	18,000	1,300,000 1,100,000

*Source: statistics published by seaports

**Couch Lines also provides longer service to Freeport, TX

Marine Highway Service: *64 Express*



- MARAD Marine Highway Grant Funds provided for purchase of barges
- Service started in 2008
- Moves approx. 8000 TEUs annually
- Provides relief of congested I-64 corridor

Marine Highway Service: M-580

California Green Trade Corridor – TIGER Grant

- DOT Tiger Grant Funds provided for landside improvements and two barges
- Service started in June 2013 between Stockton and Oakland
- Improves air quality and reduces highway congestion along I-580
- Allows shipments of heavy weight containers



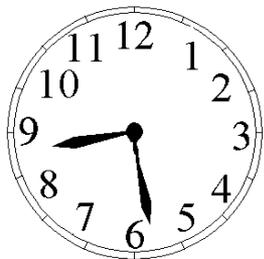
Forming Marine Highway Services

Lessons Learned

- Partnerships must be formed among State DOTs, MPOs, Port Authorities, Terminal Operators, Service Operators, Logistics Providers/Shippers & Federal Agencies (i.e. U.S. Customs)
- Communication and Cooperation
- In-depth Market Analysis
- Sufficient start up capital
- Part of a complete, door to door supply chain
- Value-added services as part of the total service package

Forming Marine Highway Services

Prime Considerations



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Major Cost Factors

- Maximizing vessel utilization
- Efficient terminal and
- How much will it cost me?



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Future Services Coming Online

- M-10 Service connecting Brownsville, Manatee, and all points in between
- M-95 Service connecting Portland, ME with New York City
- M-80 Service connecting West Sacramento & Oakland, CA
- M-87 Service connecting Albany, NY & New York City
- M-495 Commuter Ferry connecting communities along the Potomac, Anacostia, and Occoquan Rivers



Questions?

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