



Baltimore
Metropolitan
Council

Port of Baltimore

Rail Analysis Study

Project Update

June 16, 2011



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EST. 1915

POB- Rail Analysis Study – Project Update

Agenda

- Project Description
- Study Process
- Project Study Area
- Database
- Railroad Operations
- Opportunities Analysis



Project Description

Evaluate Rail-served properties in the Port of Baltimore area in order to understand land uses and capacity opportunities.

- ✓ Task 1- Mobilize Project and Identify Stakeholders
- ✓ Task 2- Identify Geographic Boundary and Develop Matrix of Rail Served Properties
- ✓ Task 3- Develop Opportunities Narrative
- ✓ Task 4- Develop an Electronic Database of Property Information



Study Process

- This team effort has included guidance and input from the following project partners:
 - Baltimore Metropolitan Council (BMC)
 - Baltimore Development Corporation (BDC)
 - Maryland Department of Transportation (MDOT)
 - Maryland Department of Business and Economic Development (DBED)
 - Maryland Port Administration (MPA)



Study Process

- Items that were developed in cooperation with the project partners at the beginning of the study were:
 - Identification of geographic study boundary that will be used to conduct the project.
 - Identification of major stakeholders
 - ✓ railroad representatives
 - ✓ economic development professionals, industrial park owners/developers, real estate brokers
 - What are the specific technical requirements in regard to the finished database.
 - ✓ Database structure
 - ✓ Desired attributes to include in the property database

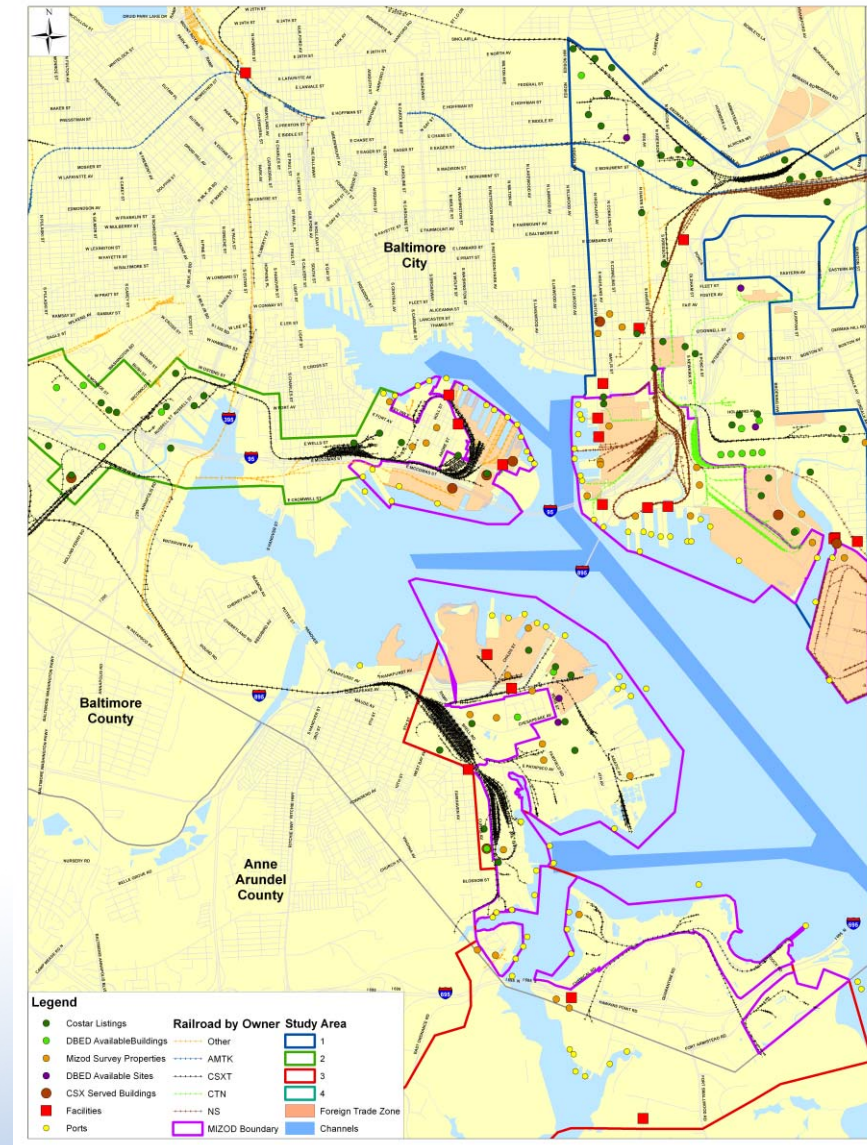


Definition of Project Study Area

- The Project Team assembled information on rail served properties from DBED, CSX, BDC, and MDOT
- Properties were plotted based on proximity within the Study Area, and analyzed within important rail locations (MIZOD, Foreign Trade Zones, Enterprise Zones and Port Locations).

Project Study Area

- Property addresses were geocoded using GIS software.
- The Four Non-Contiguous study areas within Baltimore City were presented to the project partners for review and approval.



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Rail-Served Properties Database

- GIS point layer for properties that are rail-served.
- Sources for the data include MIZOD Survey, DBED data, and Maryland Property View.
- Layer will be stored in a File Geodatabase.

Minimum Attribute Information

► Fields to be used in the layer

- ◆ Property ID
- ◆ Address Information
- ◆ Name of Property Owner
- ◆ Block and Lot
- ◆ Zoning
- ◆ Acreage
- ◆ Age and Square feet of structure
- ◆ Rail Provider
- ◆ Rail Information – Active/Condition/Maintenance responsibility/Cost to connect/Distance from Rail
- ◆ Data Source



Rail-Served Properties Report

- Excel Spreadsheet
- Extracted from GIS Layer
- Visual Representation of Attributes
- Used to obtain missing information

Rail-Served Properties Report

Port of Baltimore Rail-Served Properties (Preliminary)

| Property ID | Address | Zip | County | Block/Lot | Zoning | Acreage | Building Square Footage | Age of Structure | Rail Provider | Data Source |
|-------------|-----------------------------|-------|----------------|-----------|------------------------------|---------|-------------------------|------------------|---------------|-------------|
| 892 | 1430 S Monroe St | 21230 | Baltimore City | 0812001 | M-2-2, Baltimore | 11.45 | | | CSX | COSTAR |
| 894 | 2331-2339 Washington Blvd | 21230 | Baltimore City | | M-2-1, Baltimore | 4.75 | | | CSX | COSTAR |
| 895 | 1200 Bernard Dr | 21223 | Baltimore City | | M-2-1, Baltimore | 3.00 | | | CSX | COSTAR |
| 921 | 1850-1870 Frankfurst Ave | 21226 | Baltimore City | | M030 | 16.54 | | | CSX | COSTAR |
| 923 | 2120 W Lafayette Ave | 21217 | Baltimore City | 0069001 | M012 | 0.89 | 180500.00 | | B & O Railway | COSTAR |
| 956 | 1870 Frankfurst Ave | 21226 | Baltimore City | | M-3, Baltimore | 2.00 | | | CSX | COSTAR |
| 1020 | 901 W Ostend St | 21230 | Baltimore City | 0799004 | M-2-2, Baltimore | 4.42 | | | CSX | COSTAR |
| 1036 | 1700 Ridgely St | 21230 | Baltimore City | 0828010 | M3, Baltimore | 13.89 | 180000.00 | | CSX | COSTAR |
| 1049 | 1901 Edison Hwy | 21213 | Baltimore City | 4179H061 | M-2-2 | 1.77 | | | CSX | COSTAR |
| 1072 | 601 E 27th St | 21218 | Baltimore City | | M-2-2 | 2.46 | | | CSX | COSTAR |
| 1076 | 4600-4700 E Wabash Ave | 21215 | Baltimore City | | M-2-1 | 0.67 | | | CSX | COSTAR |
| 1079 | 1215 E Fort Ave | 21230 | Baltimore City | 2034003 | M-3 | 9.44 | | | CSX | COSTAR |
| 1082 | 1900 Frankfurst Ave | 21226 | Baltimore City | | M-3 | 3.57 | 41275.00 | | CSX | COSTAR |
| 1092 | 1415 Russell St | 21230 | Baltimore City | 0842001 | M-3 | 2.26 | | | | COSTAR |
| 1097 | 1201-1301 Wicomico St | 21230 | Baltimore City | | M3, Baltimore | 16.00 | 32480.00 | | CSX | COSTAR |
| 1185 | 2121 Wicomico Street | 21227 | Baltimore City | 7887001 | M-3 | | | | | DBED |
| 1404 | 1800 Washington Boulevard | 21230 | Baltimore City | 0731001A | Commercial/Office/Industrial | | | | CSX | DBED |
| 1831 | 1500 Chesapeake Avenue | 21226 | Baltimore City | | M-3/Heavy Industrial | | | | CSX | DBED |
| 1831 | 1500 Chesapeake Avenue | 21226 | Baltimore City | | M-3/Heavy Industrial | | | | CSX | DBED |
| 1866 | Broening Highway & Holabird | 21224 | Baltimore City | | M-3/Heavy Industrial | | | | CSX | DBED |
| 1888 | 2121 Wicomico Street | 21227 | Baltimore City | 7887001 | M-3 Heavy industrial | | | | CSX | DBED |
| 2030 | 3501 East Biddle Street | 21213 | Baltimore City | 6150A005 | Heavy Industrial | | | | CSX | DBED |
| 2195 | 2000 Washington Boulevard | 21230 | Baltimore City | | M-2-2/Industrial/Warehouse | | | | CSX | DBED |

Current Status

- About 250 properties have been identified.
- Most property attributes are populated.
- Most rail attributes are still missing.
- A Geodatabase design is in the early stages; more information is needed to complete.

What's Next

- Verify property information accuracy.
- Populate the missing attributes.
- Design the Geodatabase.
- Populate the Geodatabase with updated data.

Railroad Operators Stakeholder Outreach

Status:

- The project team has contacted the Canton, NS and the P& BR Railroads to get information on the properties they serve.
- Since CSXT/NS are the largest railroad stakeholder in the port, spreadsheets are still being prepared. These list properties according to the particular branch on which they are located to avoid duplication of entries or confusion about location.



Railroad Operators Stakeholder Outreach

- Each railroad serves different users roughly grouped under manufacturing, intermodal, and warehousing/distribution
 - ◆ P&BR serves manufacturing operations, a few warehousing/distribution operations, and has the capability in space requirements, track capacity and experience of handling unit trains of bulk materials.
 - ◆ The Canton RR serves more warehousing/distribution operations, only a few manufacturing operations.
 - ◆ NS serves more bulk freight and intermodal operations, relatively few warehousing/distribution operations, and only one manufacturing operation
 - ◆ CSXT serves the largest number of shippers in the port area with an almost equal distribution among bulk freight, intermodal, manufacturing, and warehousing/distribution operations



Railroad Operators Stakeholder Outreach

Actual track inspections and acquisition and analysis of track inspection reports will not be performed as part of this project. The following will be applied to the spreadsheets:

- Track conditions will be considered “Good” if the track is in service, “Fair” if the track has been out of service but left in place, or “Removed.”
- A generic cost to rehabilitate tracks in “Fair” condition will be used.
- A generic cost to reconstruct will be applied to locations where track has been removed.



Freight Railroad Opportunities

- Major eastern terminal on the main lines of two Class I railroads: NS and CSX
- Class I's are connected to each other and short lines Canton RR, and P&BR forming a network around the port
- Rail is usually more cost effective per unit over longer distances and with heavier tonnage commodities
- Panama Canal Widening (2014-15)– potential for more traffic to port.
- Railroad capital programs are planned to provide double stack container efficiencies



Opportunities Analysis

- Industrial Market Opportunities Analysis
 - ◆ Component of freight rail opportunities analysis
 - ◆ Important to understand industrial market, as industrial users most likely to demand rail access
 - ◆ Determining target industries offers insight to land use planning considerations
 - ◆ Tied to geographic and business/market opportunities



Opportunities Analysis

➤ Factors Contributing to Demand

- ◆ Growth of standard freight predicted over next 30 years, based on population, job, and GDP growth
 - Results in enhanced demand for goods movement
 - Population and jobs expected to grow in City and Region
- ◆ Industry characteristics
 - Warehouse/distribution sector on the rise
 - Manufacturing declining
- ◆ Transportation/logistics costs – congestion and fuel
 - Long-term rising costs could contribute to some shift from truck transportation to rail

➤ Factors show positive indications of demand



Opportunities Analysis

- Future Trends in Freight – Statewide
 - ◆ Long-term growth of freight tonnage
 - ◆ Value of freight also showing long-term increase

| State of Maryland: Summary of Statewide Freight Flows by Weight | | | | | |
|---|---------------|---------------|-------------|------------|---------|
| Tons | | | | | |
| | Total | Truck | Rail | Water | Air |
| 2006 | 692,308,371 | 584,291,493 | 69,056,232 | 38,803,636 | 157,010 |
| 2035 | 1,421,905,338 | 1,215,176,106 | 132,130,100 | 74,155,094 | 444,037 |
| Change, 2006-2035 | 729,596,967 | 630,884,613 | 63,073,868 | 35,351,458 | 287,027 |
| Total Percent Change | 105% | 108% | 91% | 91% | 183% |
| Annual Percent Change | 3% | 3% | 2% | 2% | 4% |

Source: Maryland Department of Transportation, Maryland Statewide Freight Plan

| State of Maryland: Summary of Statewide Freight Flows by Value (in Millions) | | | | | | |
|--|-------------|-------------|-----------|-----------|---------|--|
| Millions Dollars | | | | | | |
| | Total | Truck | Rail | Water | Air | |
| 2006 | \$2,288,454 | \$1,972,507 | \$187,683 | \$127,341 | \$743 | |
| 2035 | \$4,981,834 | \$4,348,099 | \$344,889 | \$285,678 | \$3,168 | |
| Change, 2006-2035 | \$2,693,380 | \$2,375,592 | \$157,206 | \$158,337 | \$2,425 | |
| Total Percent Change | 118% | 120% | 84% | 124% | 326% | |
| Annual Percent Change | 3% | 3% | 2% | 3% | 5% | |

Source: Maryland Department of Transportation, Maryland Statewide Freight Plan



Opportunities Analysis

- Increasing Goods Movement in Baltimore
 - ◆ Port recently exceeded previous record for container traffic
 - Over 630,000 containers from year ending March 2011
 - Container traffic growth area compared to more traditional strengths in forest products, bulk commodities, automobiles and roll-on/roll-off cargo
 - ◆ Port outperformed competition in New York, Norfolk and Philadelphia
 - Percentage and absolute tonnage growth higher in 2010
 - Attributed to gains in import and export of bulk commodities (export coal, import iron ore, and import salt in particular)



Opportunities Analysis

- Investments Enhancing Baltimore's Competitive Position Related to Panama Canal Expansion
 - ◆ Construction of 50-foot berth and associated Cranes at Seagirt Marine Terminal
 - Result of partnership between MPA and Ports America
 - Will position Baltimore among first two East Coast ports with depths to handle larger ocean vessels (Norfolk is only East Coast port that already has such depths)
 - ◆ CSX National Gateway project will provide double stack container efficiencies to points south and west



Opportunities Analysis

► Baltimore's Industrial Market

- ◆ Rebounding from economic downturn
 - Increased activity at Port of Baltimore generating demand for warehouse space
- ◆ Features lower vacancy rate than in region
- ◆ Absorbed 133,000 square feet of industrial space in the first quarter of 2011, representing 63% of city-wide absorption
- ◆ Contains 23% of region's warehouse space
- ◆ Vacancy rate for warehouse lower than all industrial spaces, indicative of demand for warehousing



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THANK YOU!

