

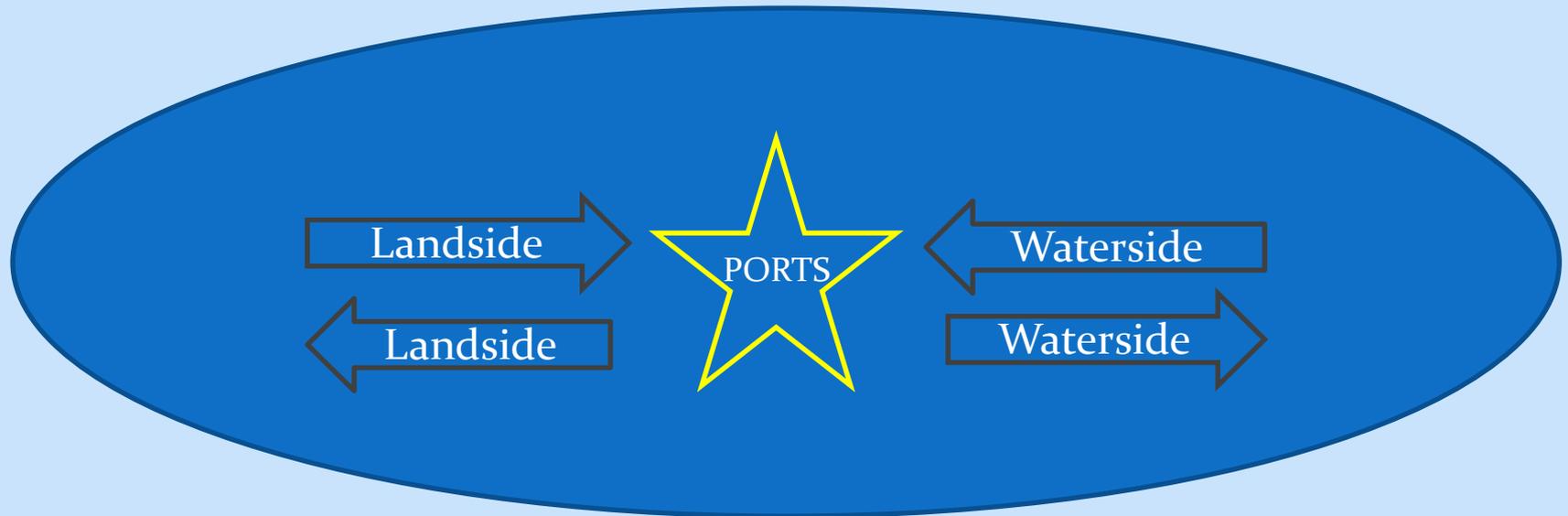


Port Perspectives: The View from the Middle

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Ports are the Essential Link in the Multimodal Global Freight System

Global Economic Climate



The Charge for this Panel

As Port Leaders we must:

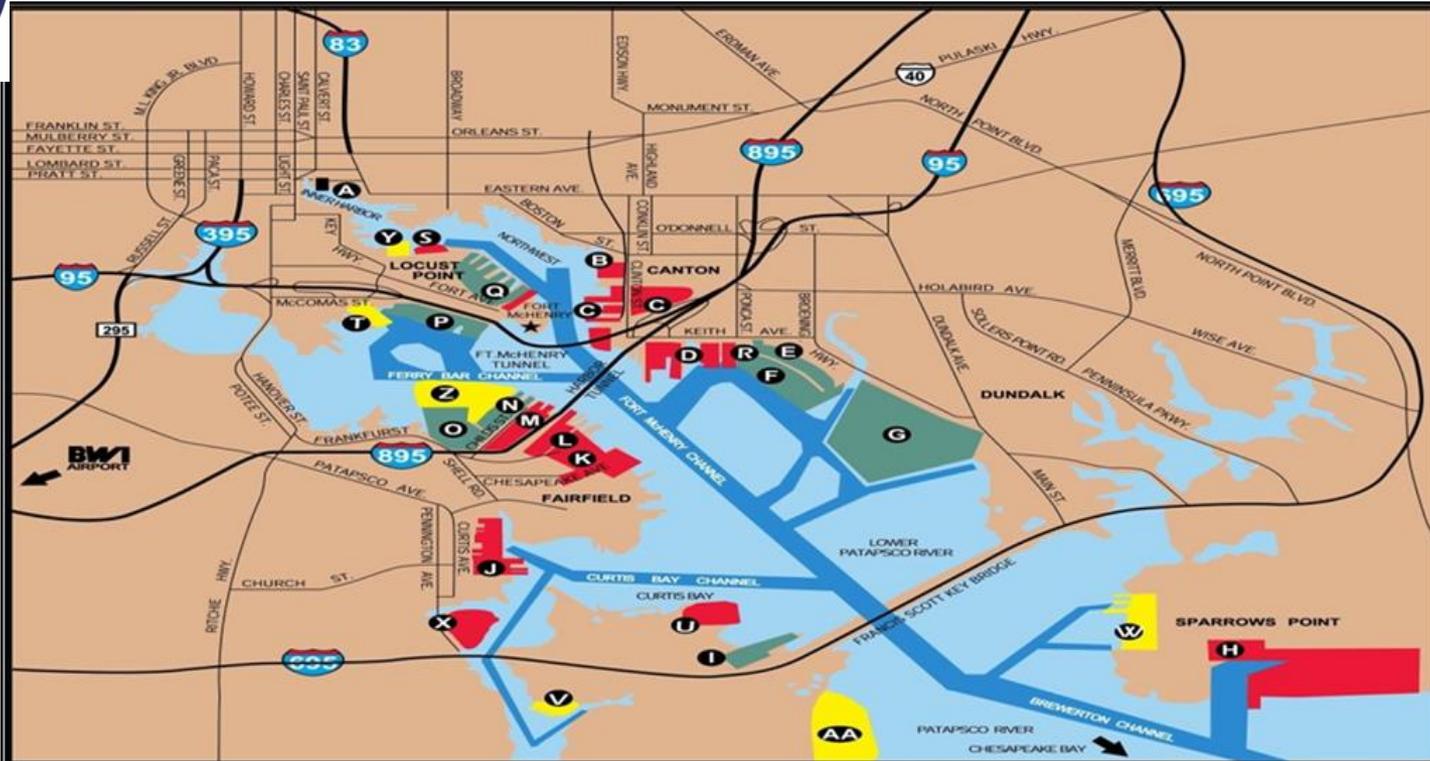
- Participate in National Freight Policy Development
- Understand and Respond to Shifting Trade Patterns
- Advocate for Investment in our Infrastructure Needs: maintenance, expansion, and connections

*“current need of \$28.9 billion in 125 port-related network projects”
AAPA, 2015*

Is FAST Act the answer?



Port of Baltimore Overview



■ Channels
 ■ Private Terminals
 ■ MPA Terminals
 ■ Other Port Facilities

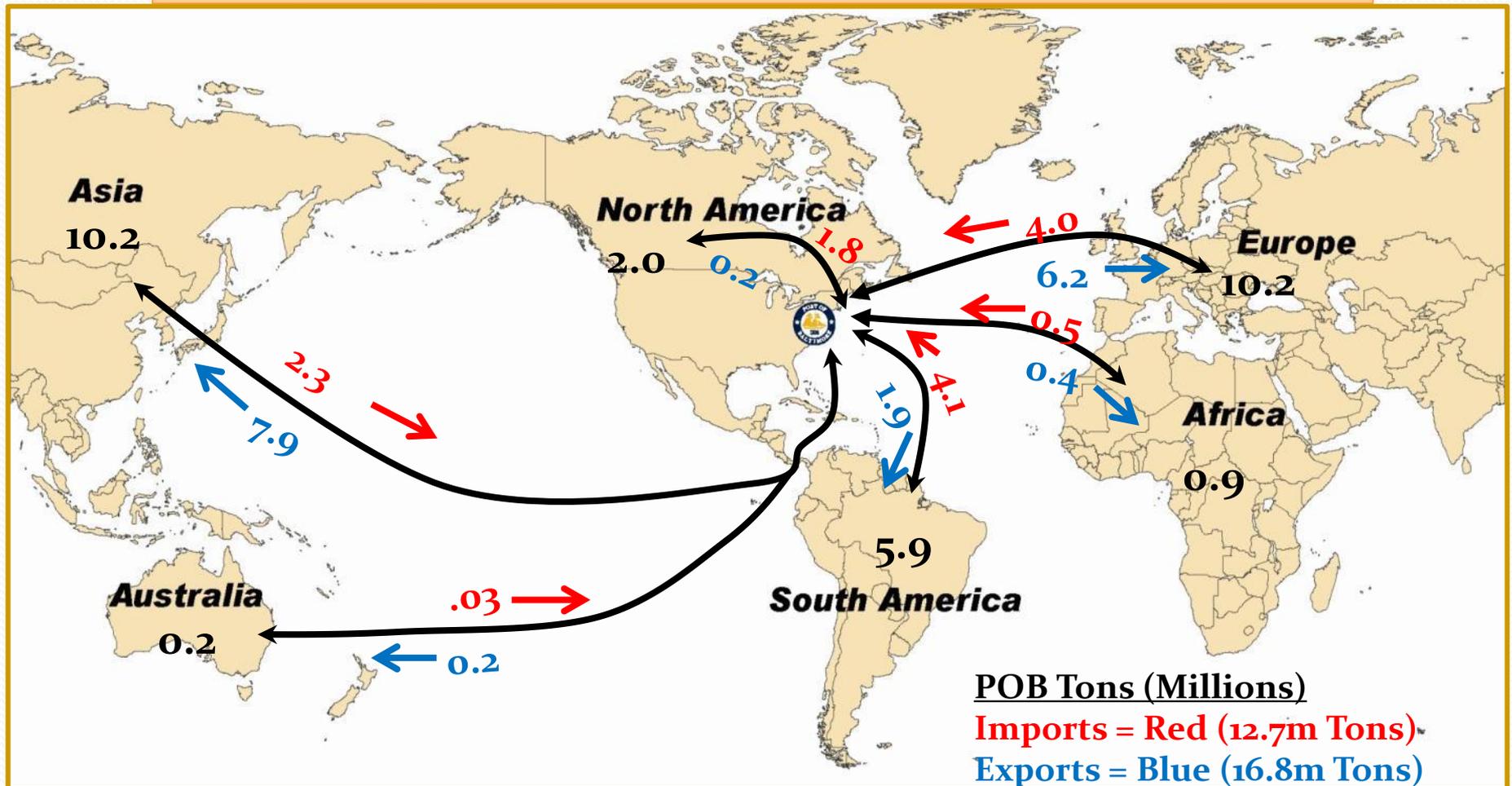
- A** World Trade Center Baltimore
- B** Petroleum Fuel & Terminal
- C** Rukert Terminals Corporation
- D** CNX Marine Terminal
- E** Intermodal Container Transfer Facility (ICTF)
- F** Seagirt Marine Terminal
- G** Dundalk Marine Terminal
- H** Sparrows Point
- I** Hawkins Point Terminal
- J** CSX Transportation Chesapeake Bay Piers
- K** Chesapeake Auto Terminal, Vane Brothers
- L** NuStar Energy, L.P.
- M** Liquid Transfer
- N** Atlantic Auto Terminal
- O** Fairfield Auto Terminal
- Z** Masonville Auto Facility

- P** South Locust Point Marine Terminal
- Q** Cruise Maryland Terminal
- R** North Locust Point Marine Terminal
- S** Westway Terminal Co.
- T** National Gypsum
- U** Domino Sugar
- V** Tycos
- W** US Gypsum
- X** Coast Guard Yard
- Y** BWI Shipyard
- Z** Amerada Hess and Amoco Oil
- AA** General Ship Repair
- BB** Dredge Material Containment Facility
- CC** Cox Creek (DMCF)



The Port has global reach, connecting many Mid-Atlantic suppliers and markets worldwide

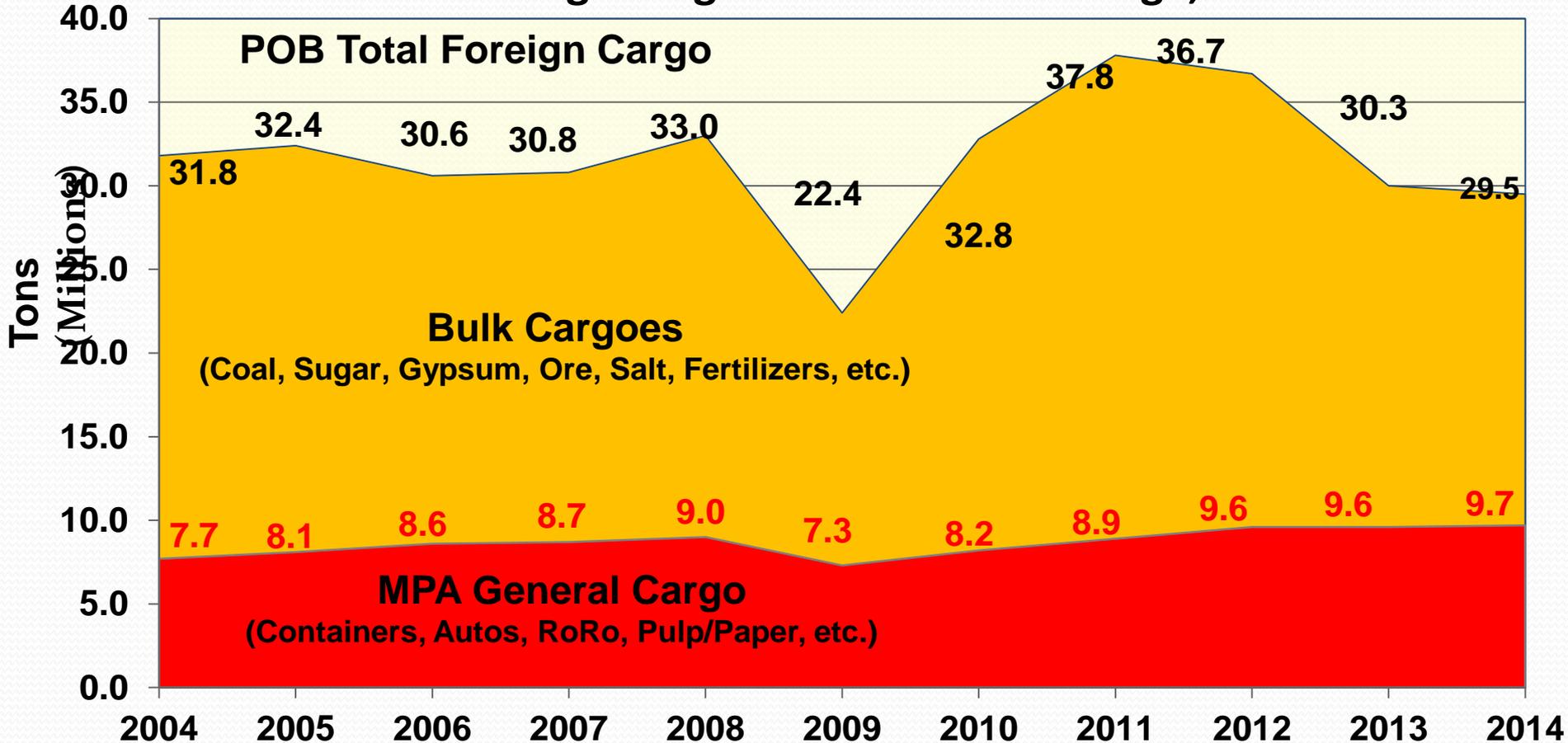
POB's International Cargo in 2014 was 29.5 Million Tons.





The Port of Baltimore's foreign tonnage has recovered from the economic recession.

Port of Baltimore Foreign Cargo & MPA General Cargo, 2004 – 2014



Partnering is the foundation for success

- City of Baltimore—Land use
- Tenants - Long-term lease agreements which supports investments.
- P3—Ports of America/MPA 50-year agreement.
- Private Terminals - Port Alliance monthly meetings.
- Federal agencies - Interagency Port Committee to communicate and coordinate.

Challenges: Known and Controllable Unknown and Uncontrollable

- Increasingly competitive environment
- Ensuring efficient transportation options for cargo
- Growing volumes w/ aging facilities & limited landside capacity
- Cost of dredging & dredged material placement solutions
- Continuing Green Port, Security & Community Initiatives (*Maintaining our Social License to Operate*)
- Tracking and responding to events on the land and in the global economy
- ???

FAST Act took a historic step forward on freight policy and funding

- National Freight Multimodal Freight Policy
- National Multimodal Freight Network
- State Freight Advisory Committees
- State Freight Plans
- National Highway Freight Program
- Nationally / Regionally Significant Freight and Highway Projects
- Innovative financing--TIFIA

FAST Act provisions important for our national agenda

- National Freight Multimodal Freight Policy
- National Multimodal Freight Network
- Nationally / Regionally Significant Freight and Highway Projects

FAST Act has provisions important for our local agendas

- State Freight Advisory Committees—64% of ports surveyed are members of local freight advisory committees (AAPA 2015)
- State Freight Plans--71% of ports surveyed have participated in the development of statewide freight plans (AAPA, 2015)

Conclusions

Ports are the essential link in the global freight system

- We should work together to make sure that ports are well-positioned in national freight policies.
- We need to track and respond to changing trade patterns.
- We must make the case for adequate funding for port-important infrastructure.

Final Thoughts

- Ports have demonstrated they are visible and influential in the national policy discussion.
- Our work is not done. We must continue to stay engaged in the implementation.
- We must focus on preparedness - intellectual and institutional.
- A strong freight policy has clearly established waterside connections and land connections as part of an overall intermodal system.

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