



Indiana Multimodal Freight & Mobility Plan Project Update

presented to

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Indianapolis, Indiana**

presented by

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Indiana Multimodal Freight & Mobility Plan

Scope of Work

- **Identify Existing and Future Conditions**
 - Supply and Demand
 - Policy and Issues
 - Passenger Rail
- **Identify Freight Transportation Gaps & Needs**
- **Establish Methodology to Evaluate & Prioritize Freight Projects**
- **Explore Funding Sources**
- **Establish Implementation & Action Plan**





Existing & Future Conditions

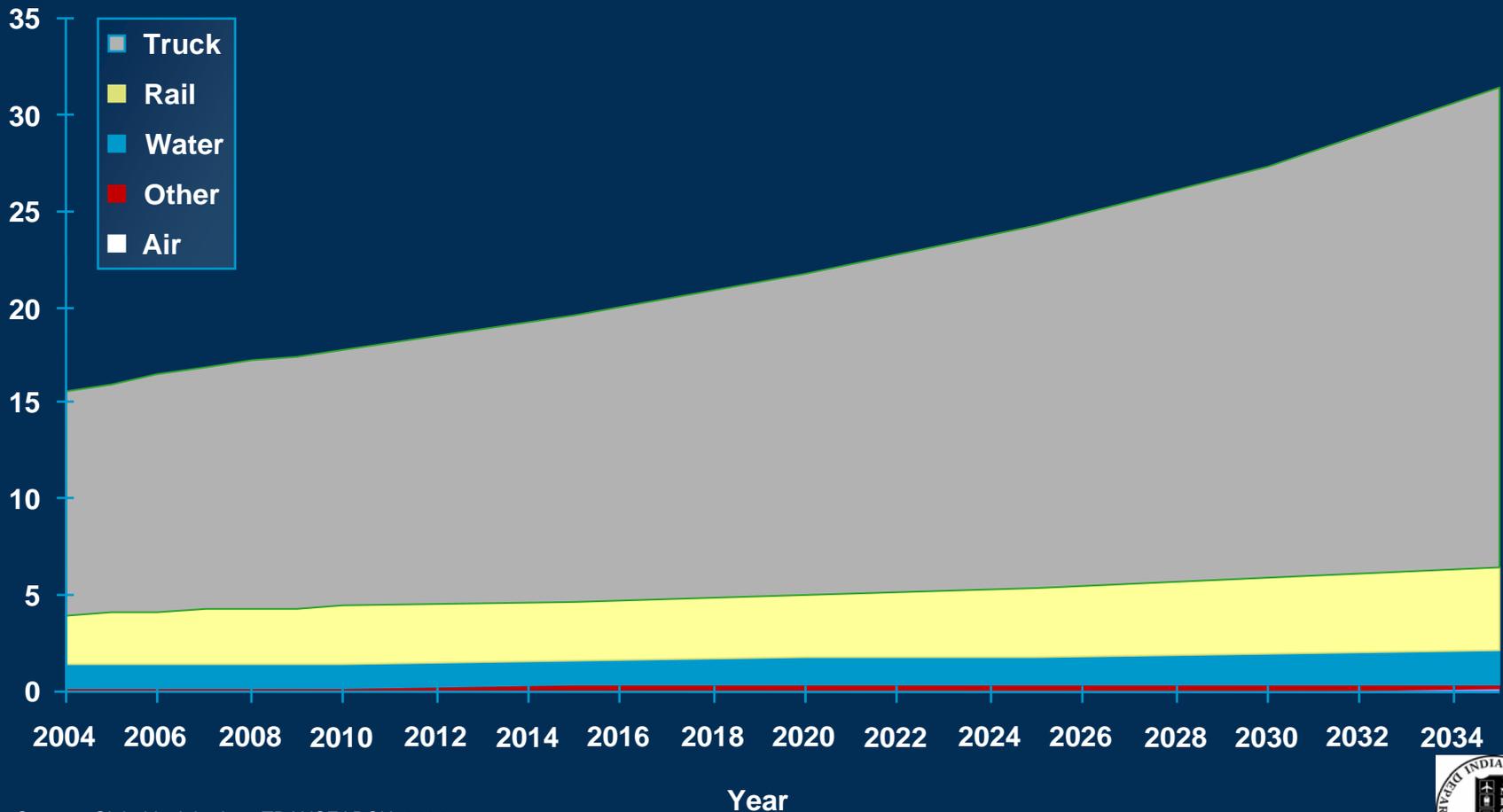
Key Issues from Stakeholder Interviews

- **Truck parking**
- **24-hour distribution of freight movement / deliveries**
- **Increasing highway congestion**
- **Availability of skilled labor**
- **Rail connectivity to west coast that can bypass Chicago**
- **Connectivity between (rail) operators and modes**
- **Funding / support for intermodal facilities (several potential locations have been identified)**
- **Significant % of pass-through rail traffic in Indiana**
- **Growth potential for freight generating uses around Indianapolis International Airport**
- **Increased opportunities for ports**



National Freight Transportation *Demand at an All-Time High and Growing*

Net Freight Tons (in Billions)

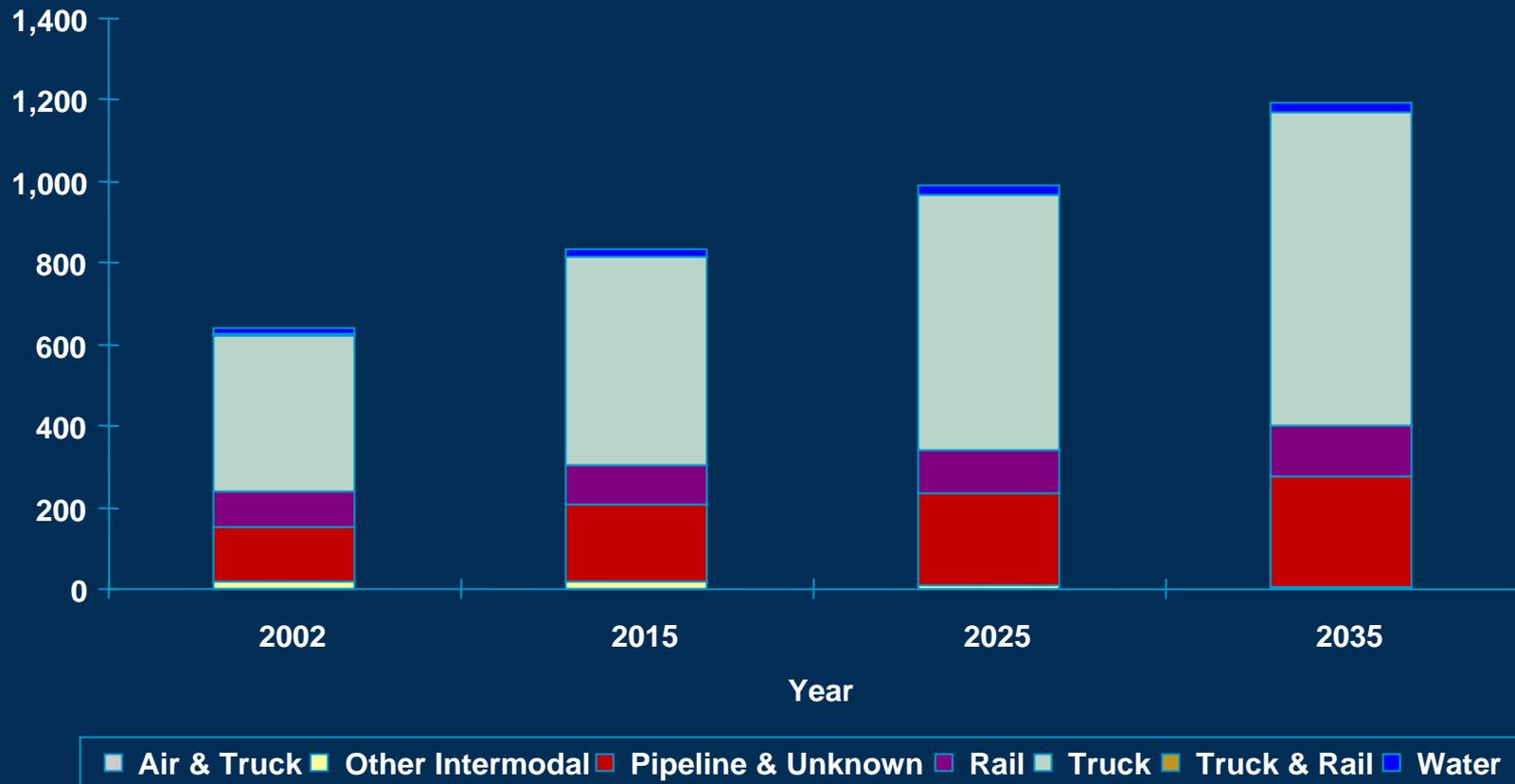


Source: Global Insight, Inc., TRANSEARCH, 2004



Freight Tonnages by Transportation Mode Inbound to Indiana

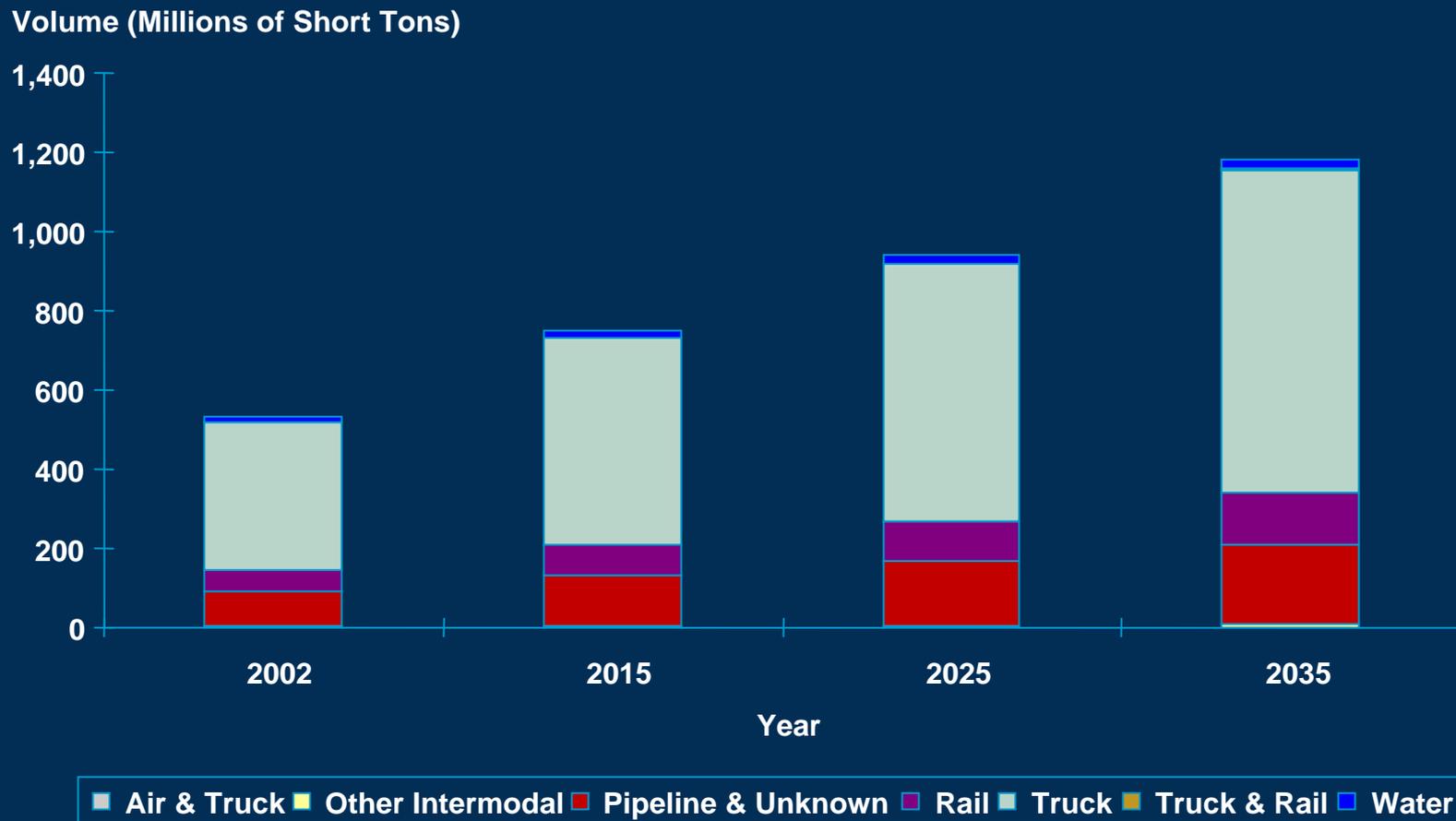
Volume (Millions of Short Tons)



Source: FHWA Freight Analysis Framework Version 2.2



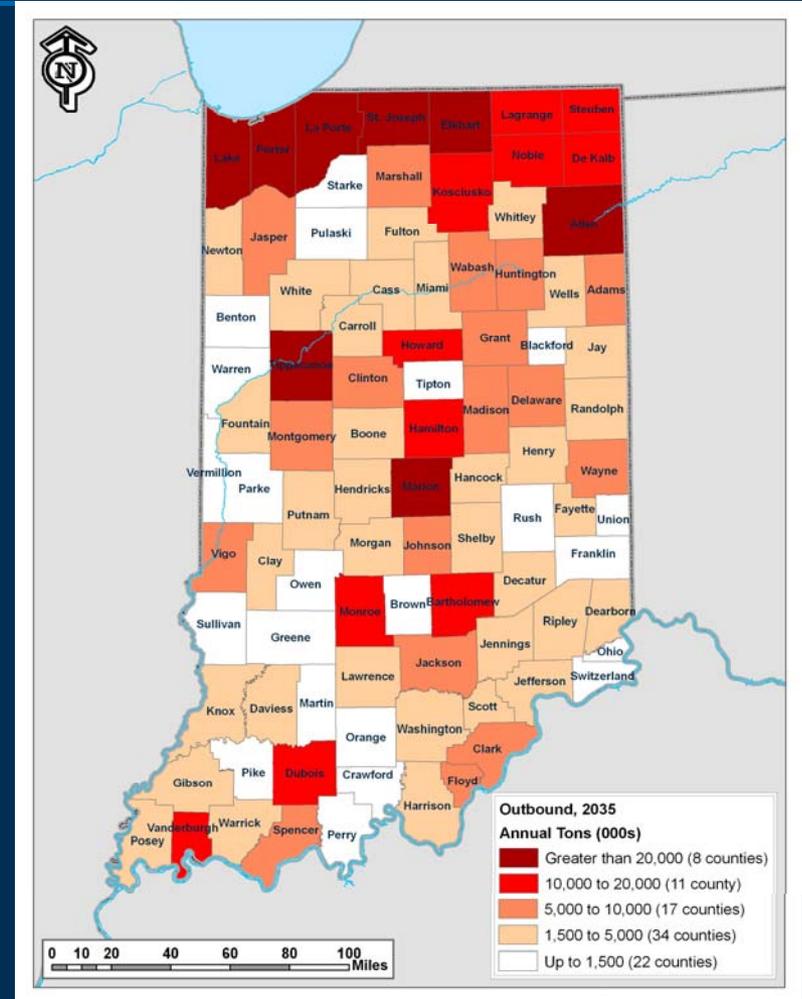
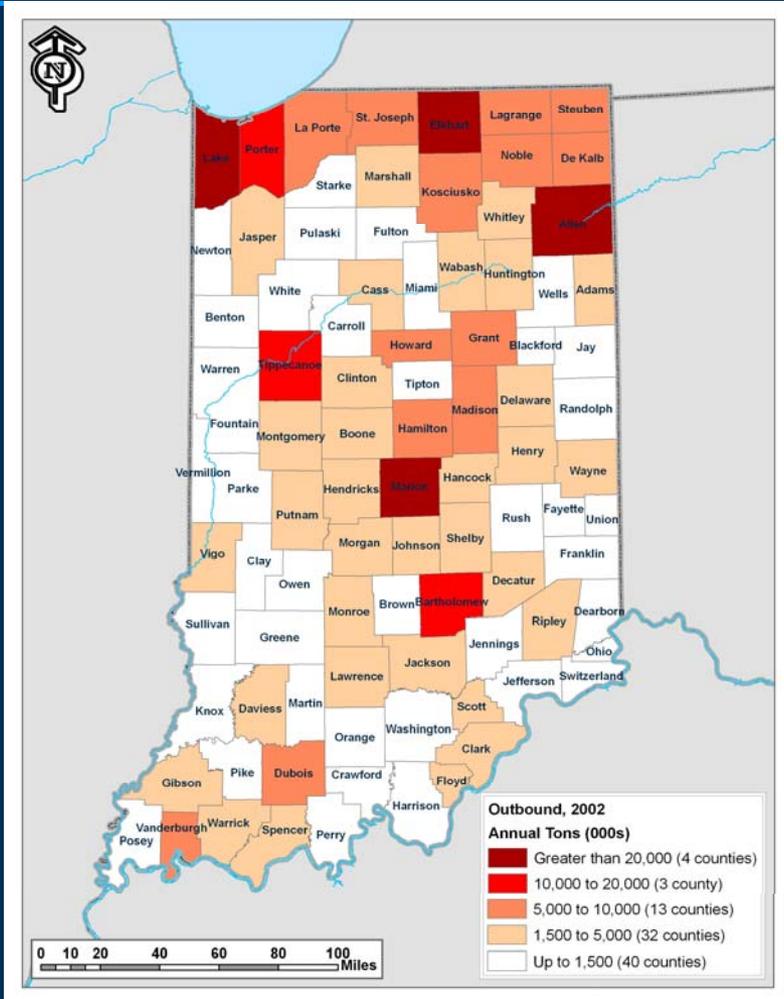
Freight Tonnages by Transportation Mode Outbound from Indiana



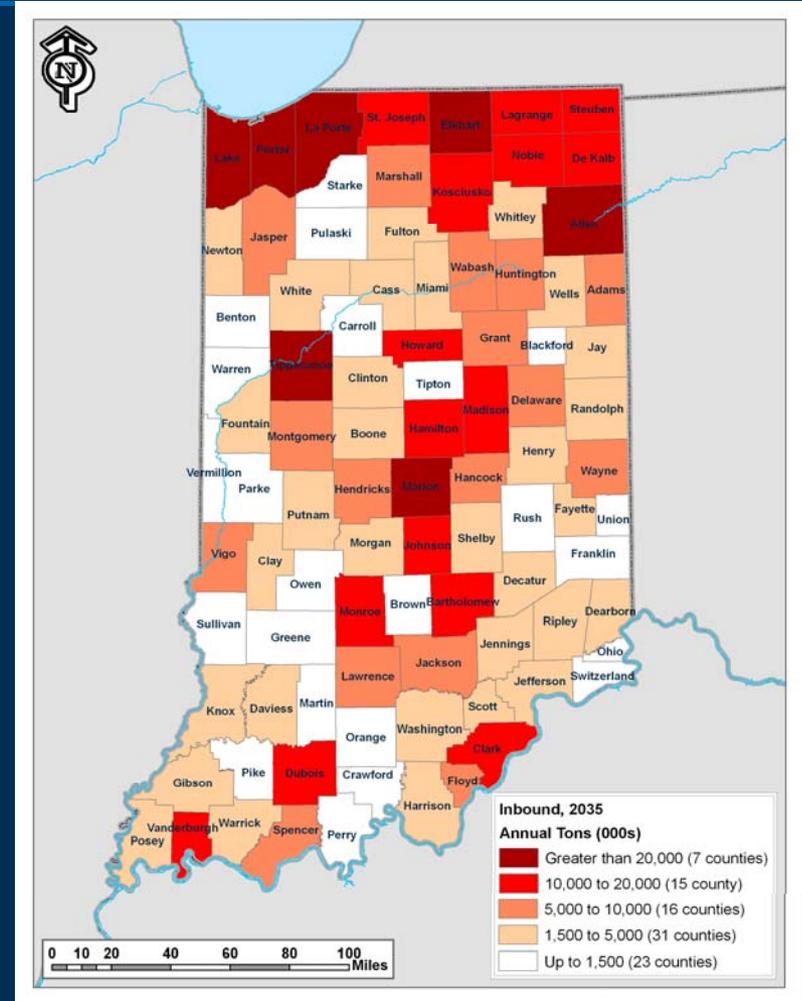
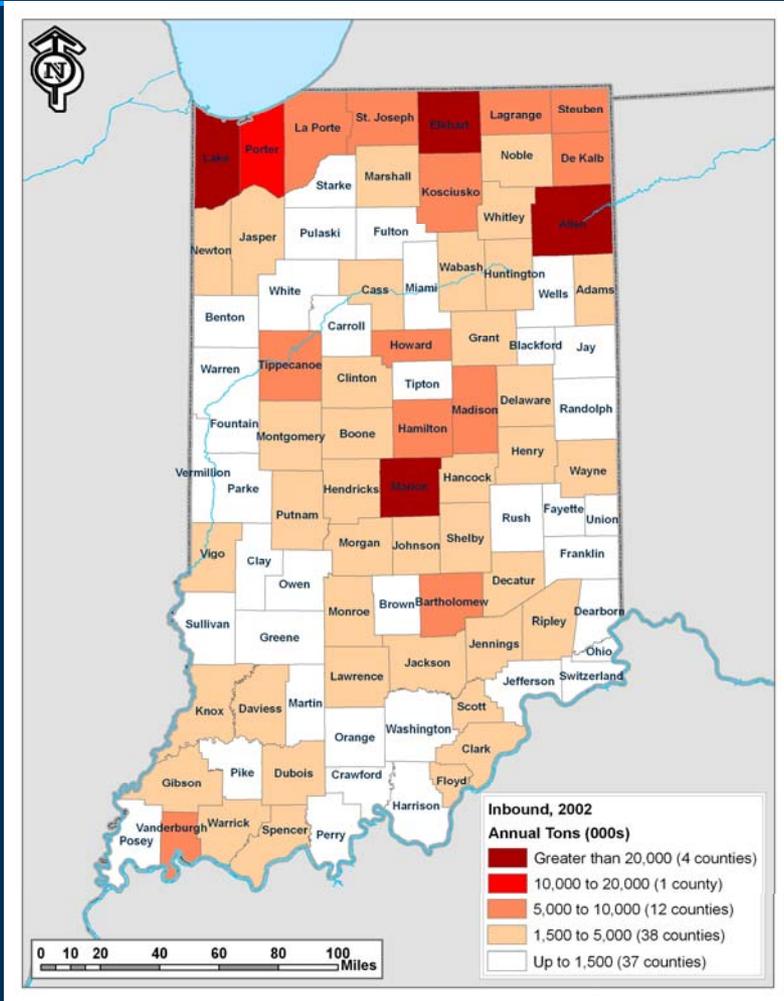
Source: FHWA Freight Analysis Framework Version 2.2



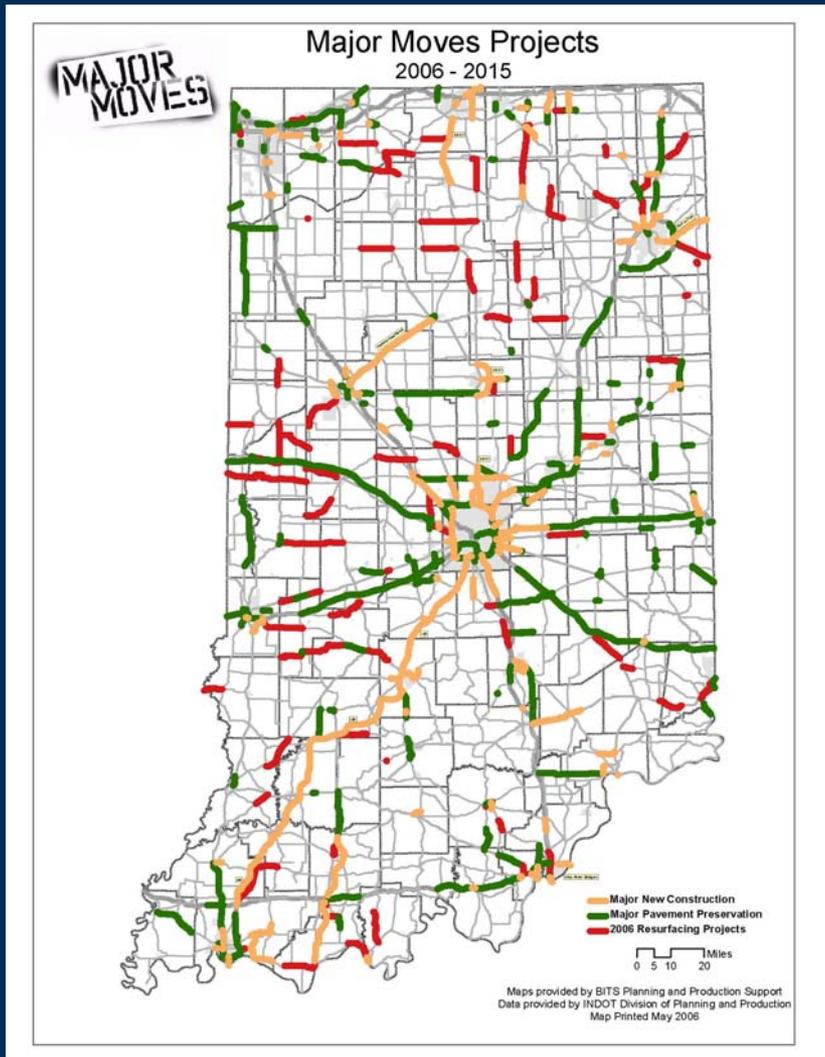
Indiana Truck Commodity Flow Origins (2002, 2035)



Indiana Truck Commodity Flow Destinations (2002, 2035)



Indiana's "Major Moves" Program

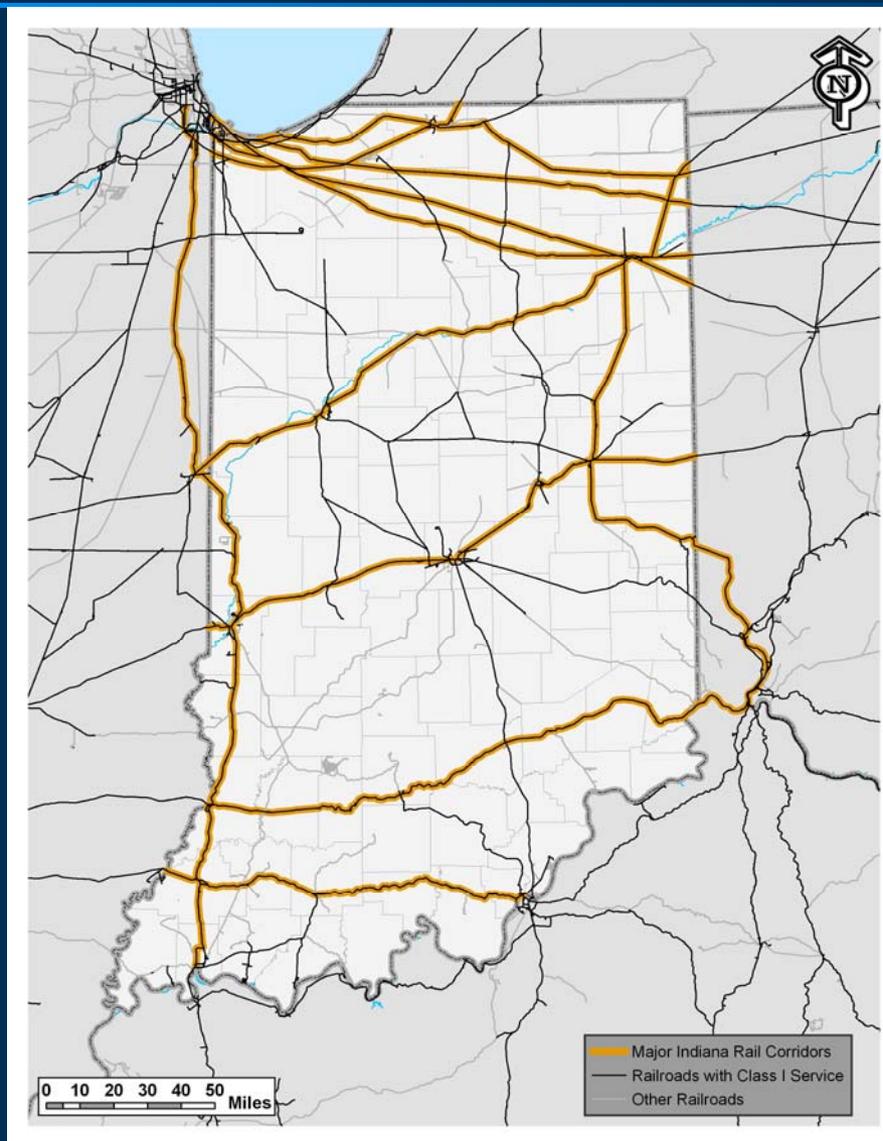


- 10 Year plan (2006-2015)
- 200+ new construction projects
- 200+ major preservation projects
- Includes I-69 Evansville to Crane (1 – 3 sections)

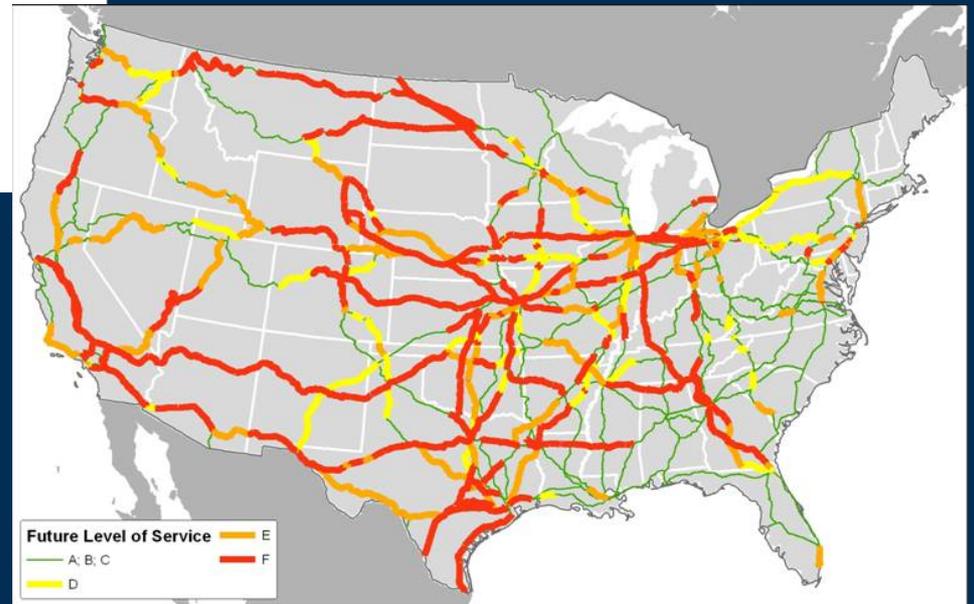
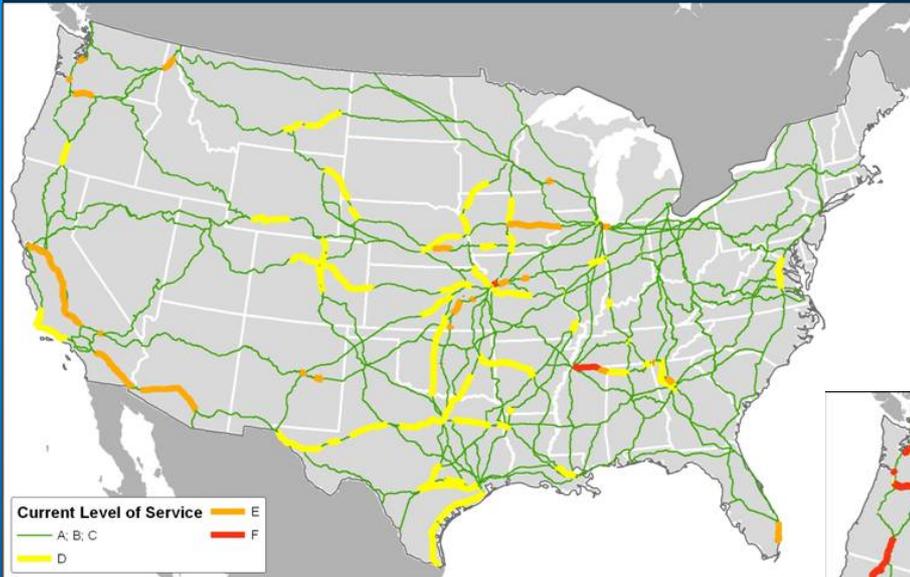


Indiana's Rail Network

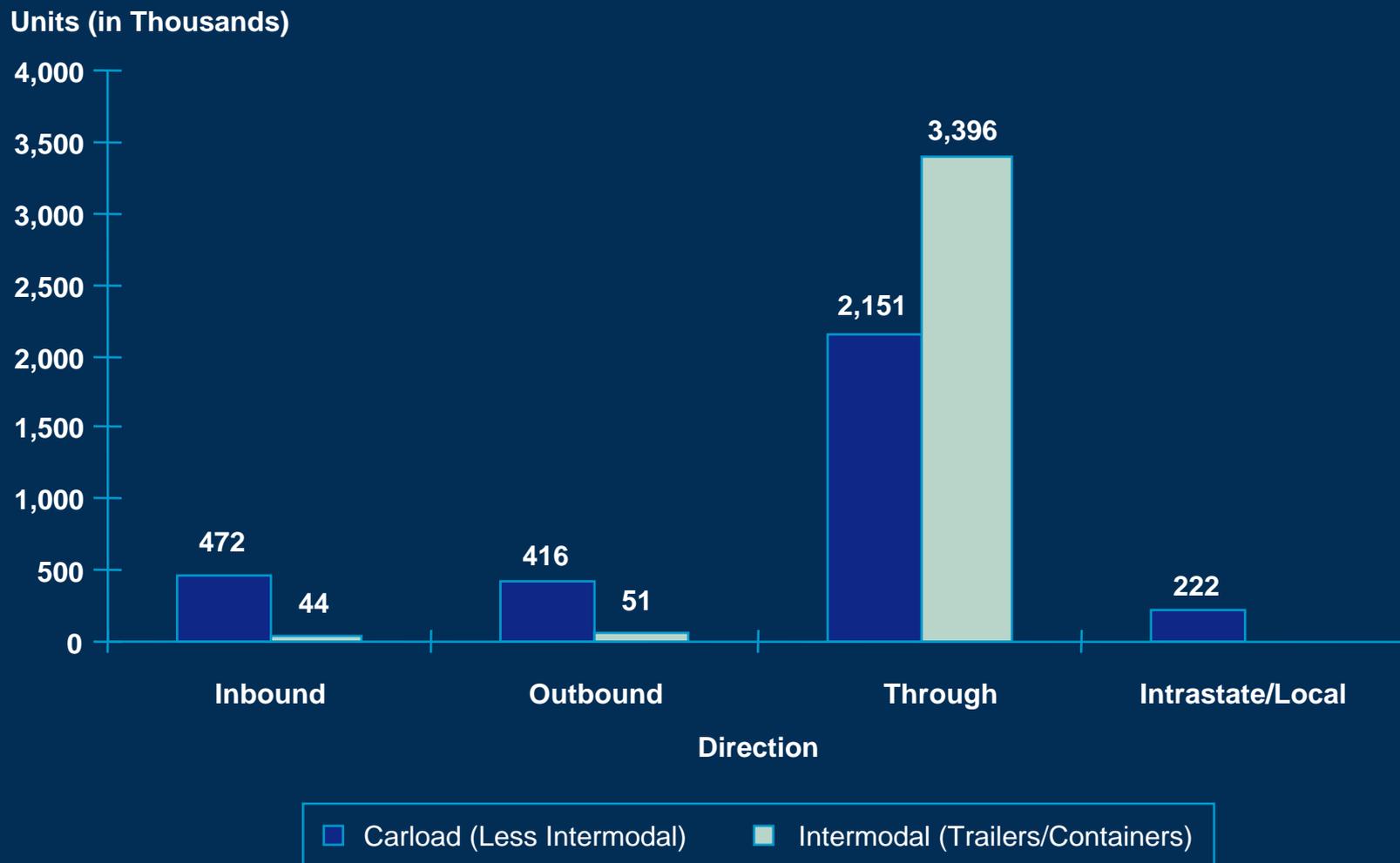
40 Freight railroads operating on 4,165 miles. Hauled 298 million tons in 6.8 million railcars. (Source: AAR 2005 data)



Current and Projected Rail Levels of Service (2007, 2035)

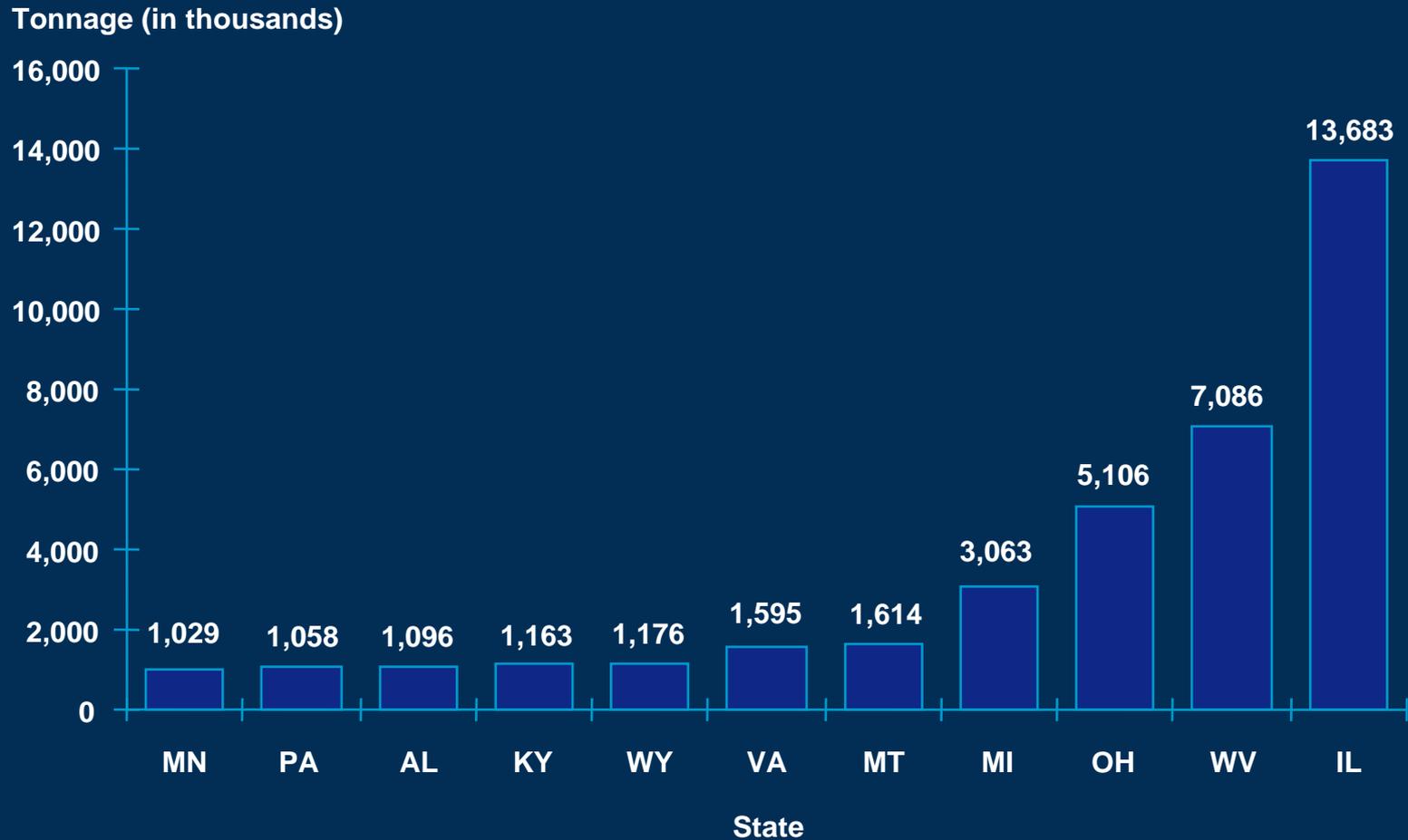


Indiana Rail Carload and Intermodal Movements by Direction (2005)



Indiana's Trading Partners

Inbound Rail Tonnage by Origin State (2005)



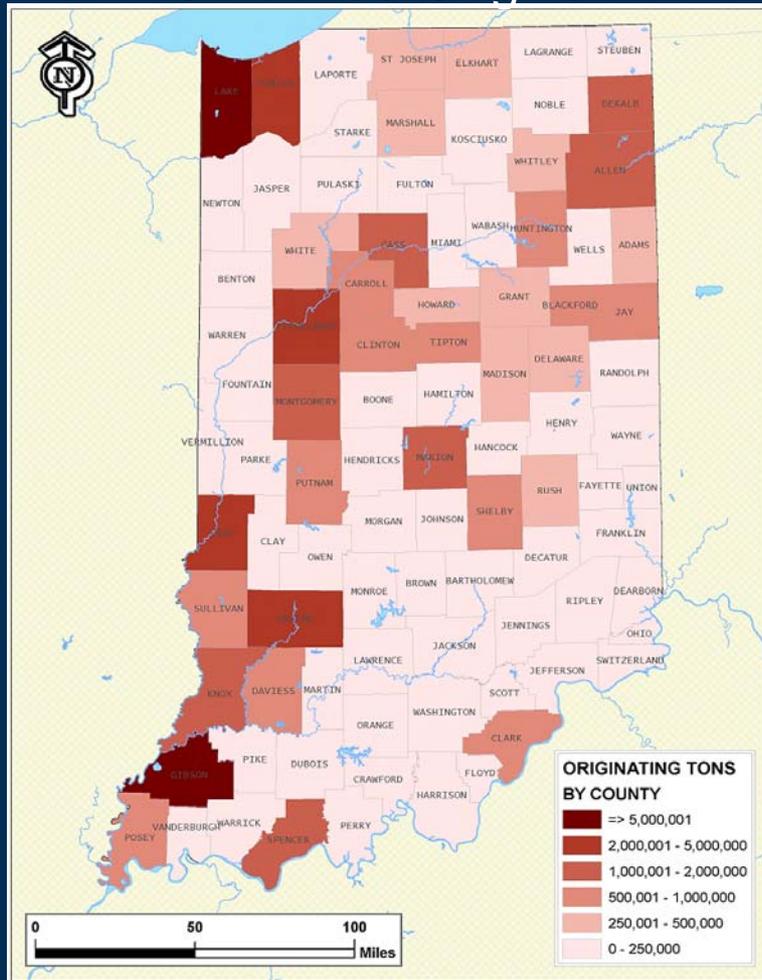
Indiana's Trading Partners

Outbound Rail Tonnage by Destination State (2005)

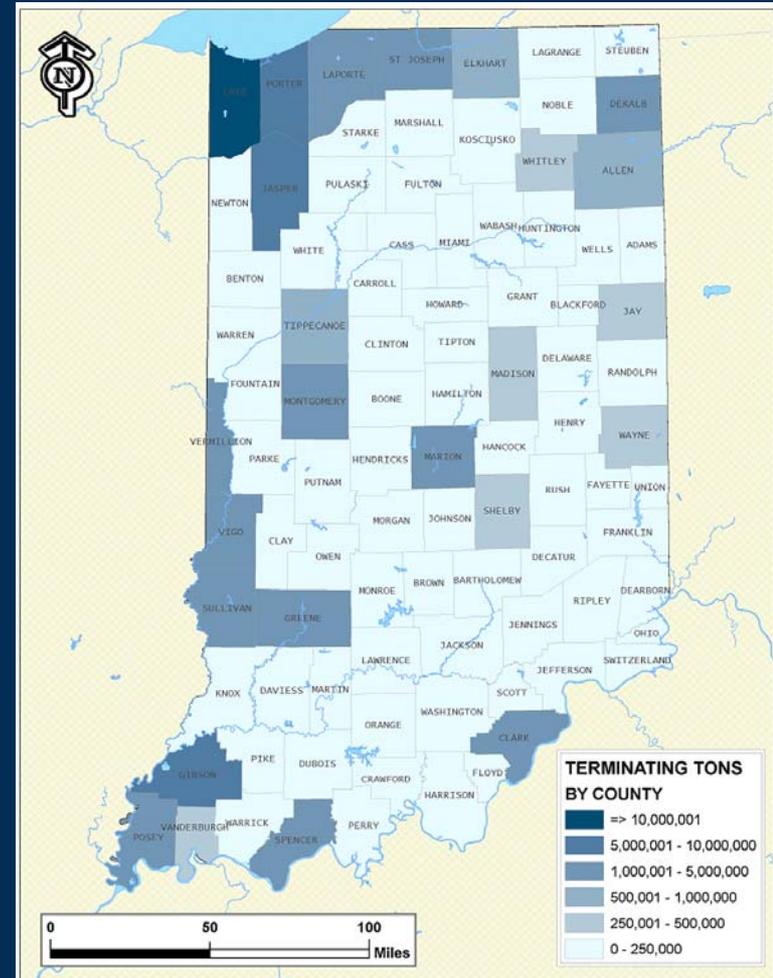


Indiana Inbound & Outbound Rail Commodity Flows by County (2005)

Outbound Origins

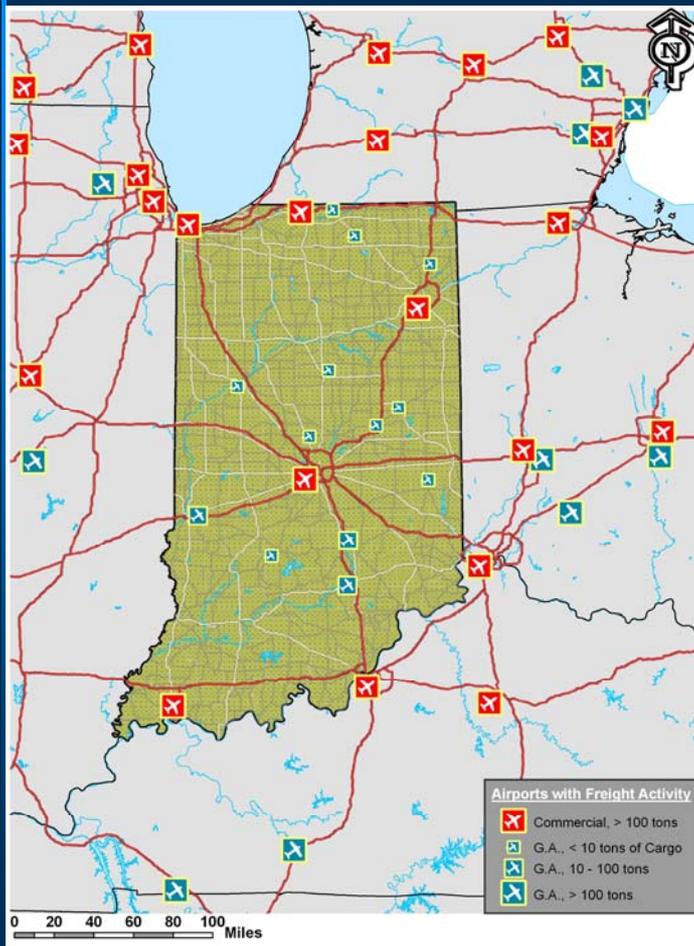


Inbound Destinations

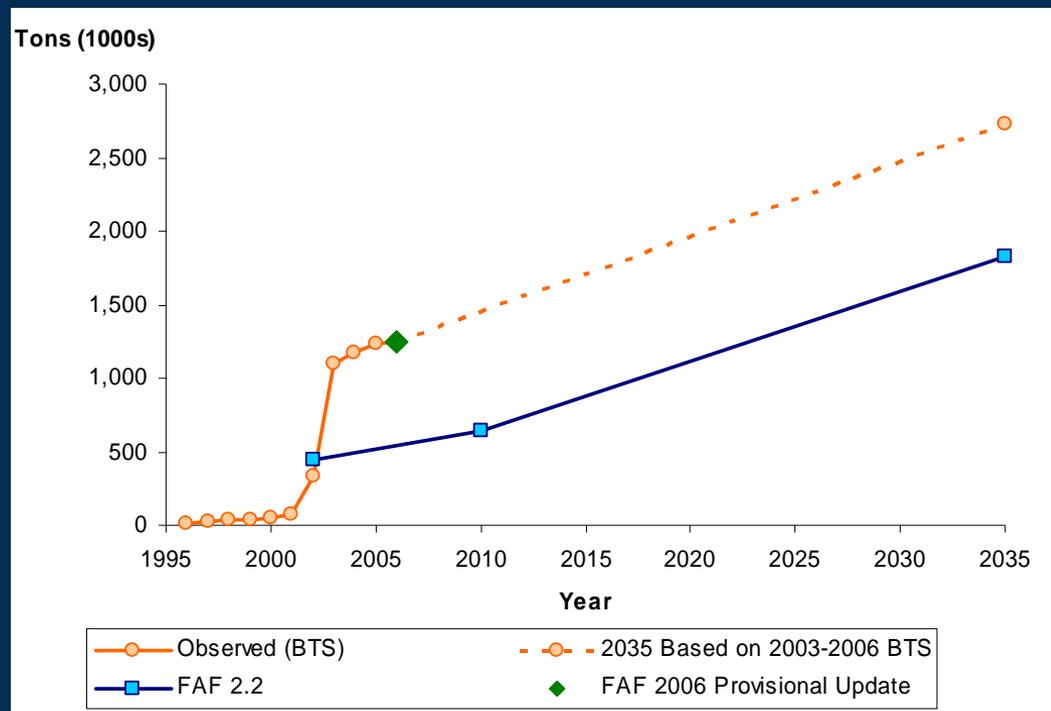


Air Cargo in Indiana

Commercial and G.A. Airports with Freight Activity in 2005 or 2006



Indiana's Air Cargo Forecasts

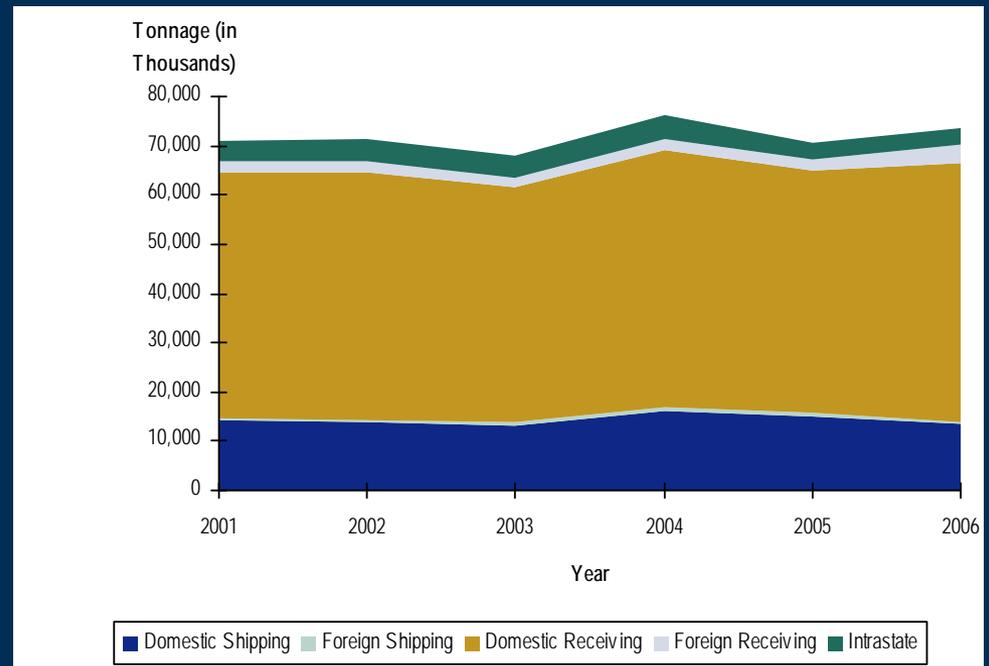


Marine Cargo in Indiana

Indiana's Marine Port Facilities



Indiana's Waterborne Freight Flows (2001-2006)

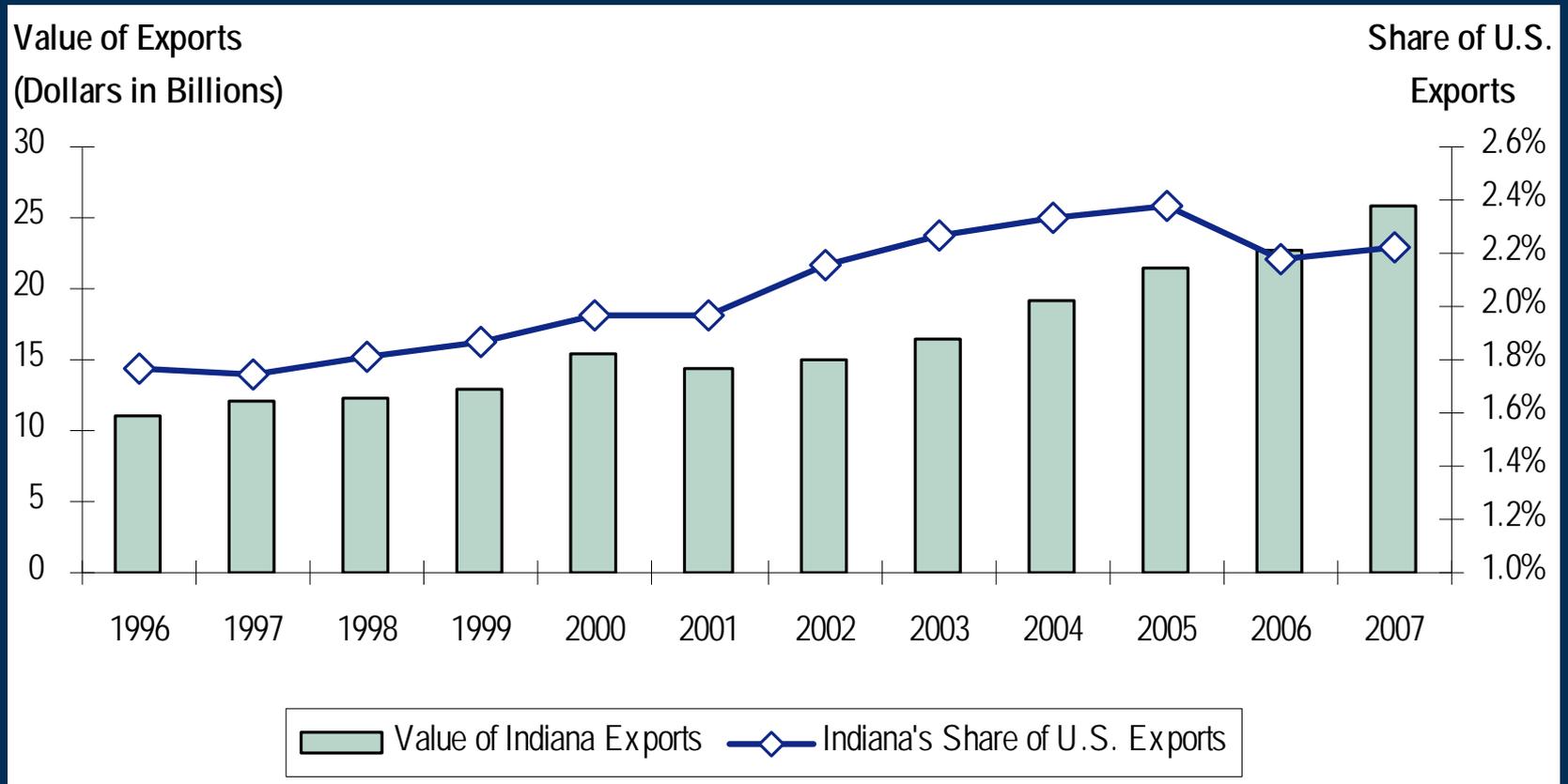


Indiana Goods Movement Industry Gross Product and Employment Growth

Industry	% of Indiana Goods Movement Related Industries (2005 Gross Product)	Gross Product Growth (1997-2005)	Employment Growth (1997-2006)
Wholesale Trade	70.0%	37.2%	3.8%
Air Transportation	1.8%	-5.1%	-7.6%
Rail Transportation	4.4%	57.5%	-11.3%
Water Transportation	1.2%	29.3%	N/A
Truck Transportation	18.2%	39.8%	3.8%
Warehousing and Storage	4.4%	95.6%	61.8%
All Goods Movement-Related Industries	100%	39.0%	11.3%



Value of Indiana's Exports



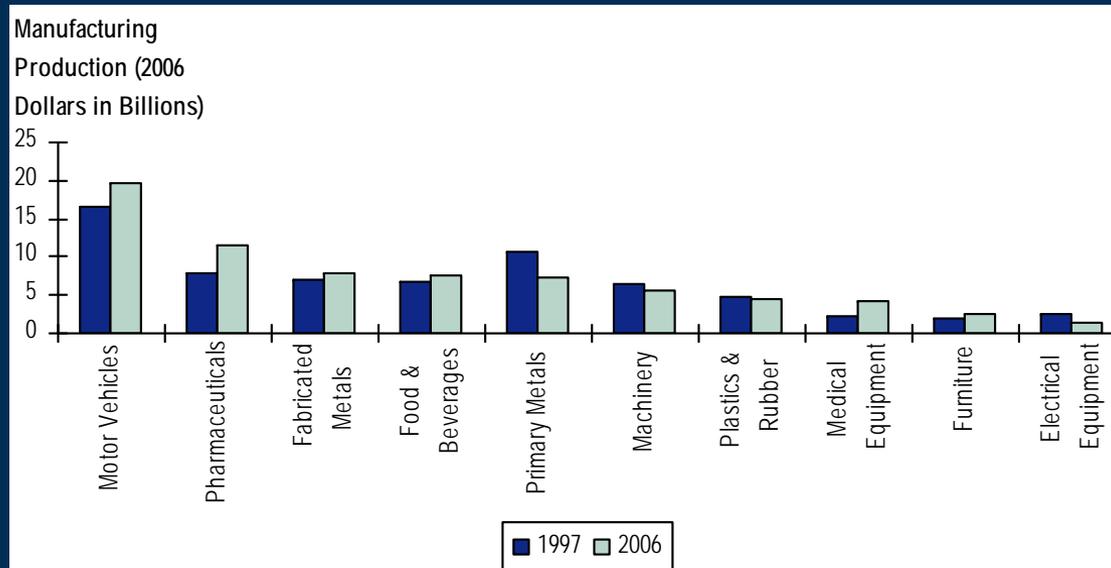
Source: U.S. Census Bureau and World Institute for Strategic Economic Research (WISER).



Indiana's Manufacturing Industry

- Manufacturing industry represents:
 - 18% of Indiana's jobs, compared to 10% nationwide
 - 28% of the Gross State Product, compared to 12% of U.S. Gross Domestic Product

Value of Indiana Manufacturing Production by Industry (1997-2006) *In 2006 Dollars*



Agriculture Industry

● Indiana Ranks:

- 9th in value of crops sold
- 5th in corn production
- 14th in value of food products output

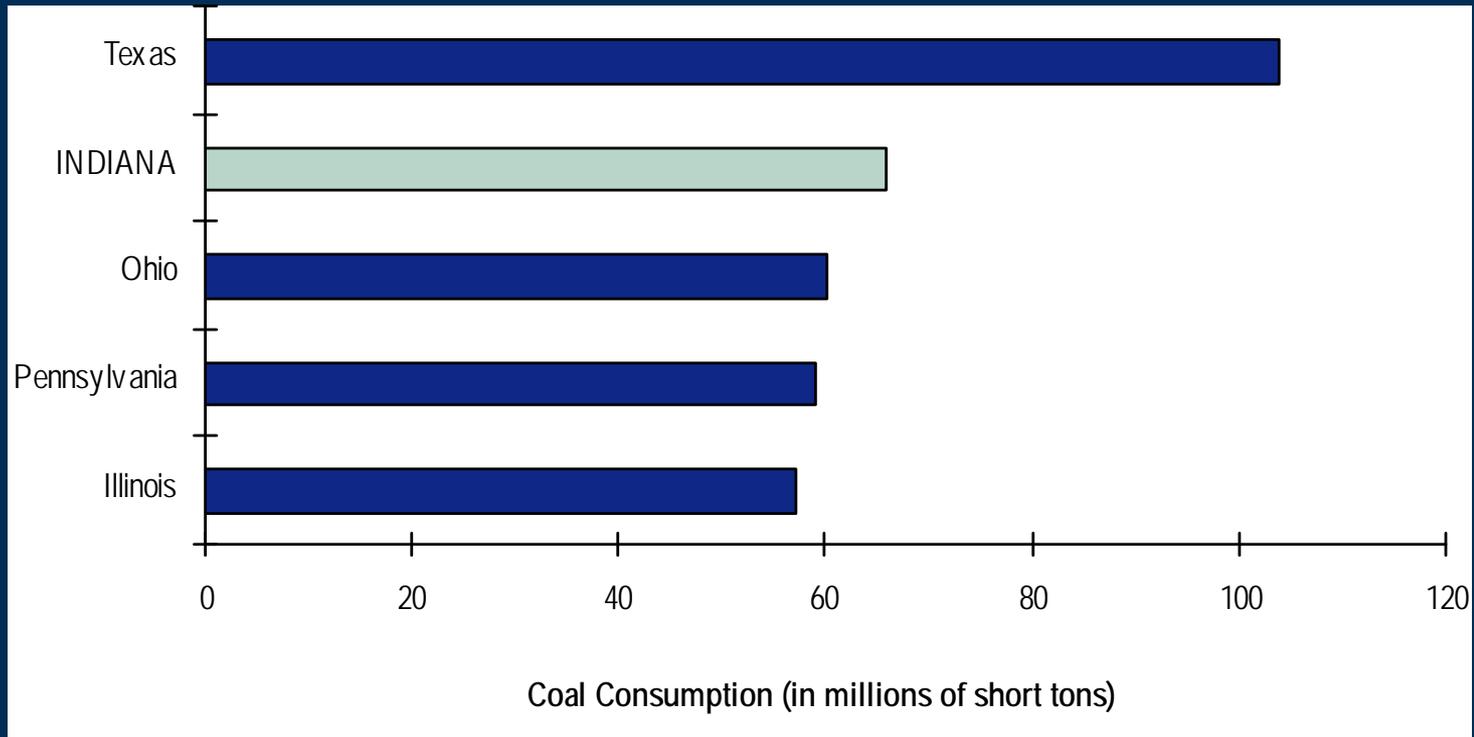
Market Value of Crops Sold, Top 10 States, 2006

	Value (In Billions of Dollars)	Share of United States
California	23.7	20.1%
Illinois	7.2	6.1%
Iowa	6.9	5.9%
Florida	5.7	4.8%
Texas	5.2	4.4%
Minnesota	5.0	4.2%
Washington	4.5	3.8%
Nebraska	4.2	3.5%
INDIANA	3.9	3.3%
Ohio	3.5	3.0%
<i>United States</i>	<i>118.0</i>	<i>100.0%</i>



Indiana's Energy Industry

Top Coal Consuming States (2006)



Source: National Mining Association and U.S. Energy Information Administration, 2006



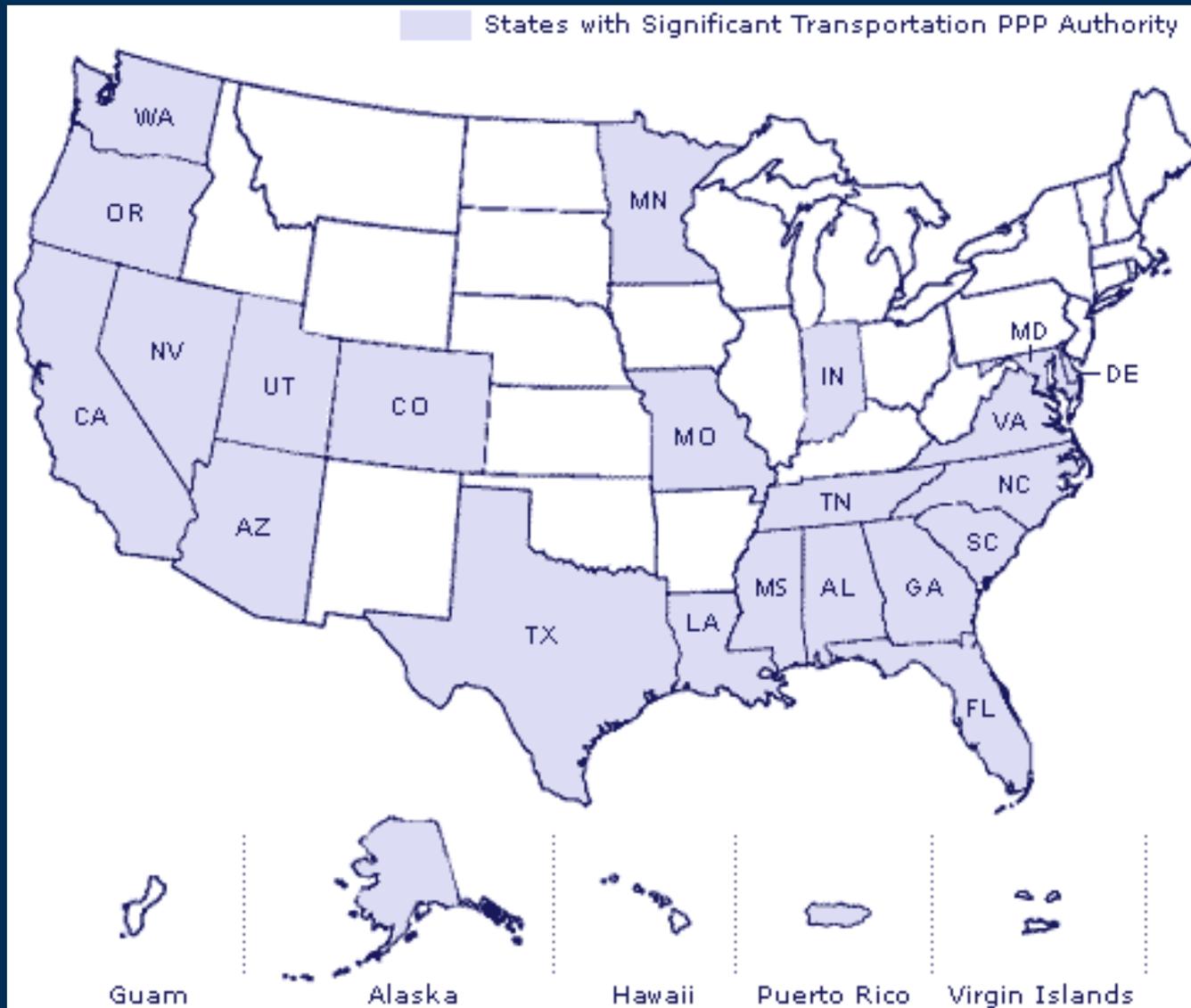


Freight Related Policy

- Existing Freight Planning Activities
- Roles of the MPOs
- Funding
- Private Sector Involvement
- Legislation



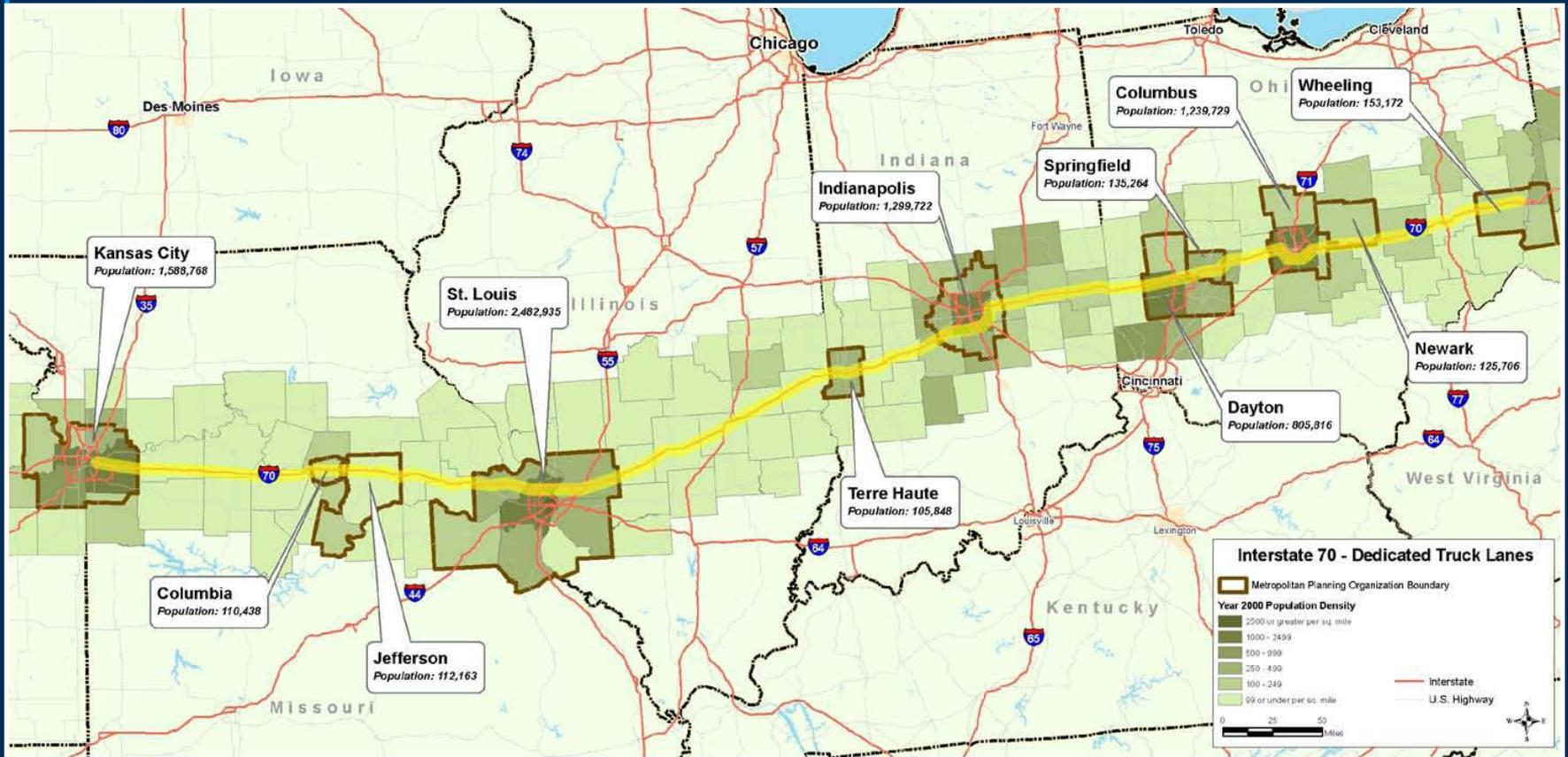
Public / Private Partnerships



Illiana Expressway



I-70 Dedicated Truck Lanes





Additional Legislative Issues

- **Corridor Protection**
- **Truck Size & Weight**
- **Truck Routes**
- **Hazardous Material Restrictions**
- **Truck Parking**
- **Delivery Time Restrictions**



Gaps & Needs Matrix (under development)

	Highway	Rail	Air	Marine	Pipeline
Infrastructure	<ul style="list-style-type: none">••••				
Industry	<ul style="list-style-type: none">••••				
Policy	<ul style="list-style-type: none">••••				



Prioritization Methodology

← Evaluation Criteria →

Freight
Corridor

Existing/Future
Volumes

Economic
Development
Potential

Safety/Security
Enhancement

Intermodal
Connector

Etc....

Recommended
Improvements

	Freight Corridor	Existing/Future Volumes	Economic Development Potential	Safety/Security Enhancement	Intermodal Connector	Etc....





Initial Findings

- + Indiana's Freight dependent industries are healthy and growing (representing a larger % of GSP than the national average)**
- + Due to its strategic location, proximity to large consumer markets, and excellent transportation network, Indiana is well poised for economic growth**
- + Indiana's air and marine freight industries are vibrant with capacity to expand**
- Indiana lacks efficient rail service to/from the West, as well as north-south linkages for bulk commodities**
- Indiana's distribution potential is limited due to rail service limitations**
- Indiana's lack of intermodal facilities limits its ability to benefit from commodities moving "through" the state**
- Lack of east-west roadways in the northern portion of the state results in delays in the movement of freight around the Chicago metropolitan area**
- Indiana's urban areas are beginning to experience congestion, which can be expected to worsen in the future without infrastructure improvements**
- Lack of Ohio River crossings limits access to Southern Indiana, hindering industry/port development**





What This Means for Indiana

- Trucks are competing with passenger vehicles for capacity on Indiana's major highways, particularly in urban areas.
- Future congestion on Interstate routes could lead to increased truck volumes on arterials.
- Railroads are operating near capacity, with significant investment needed to maintain market share in the future.
- The result will be increased congestion and delay which affect both passenger transportation and regional commerce.
- Due to limited rail service between IN and the western US, a significant portion of both inbound and outbound rail commodity tonnages are transferred between carriers and modes in Chicago.
- Indiana is well positioned for growth in the sectors that are dependent on freight goods movement. In order for this growth to occur, Indiana's infrastructure must be able to keep pace.



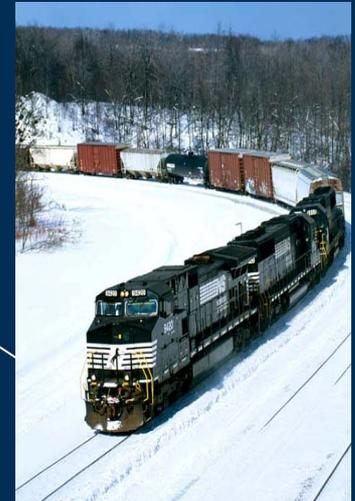


Freight Movement is the Economy in Motion



FREIGHT

MOBILITY



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