

# WELCOME



## JAMES M. DWYER

Director of Planning, MDOT Port Administration



# Maryland Port Administration Port of Baltimore

## Overview:

1. Historical perspective
2. Port Today – Private & Public Terminals
3. Working with Local Government & Communities
4. The Panama Canal and the Big Ship Era

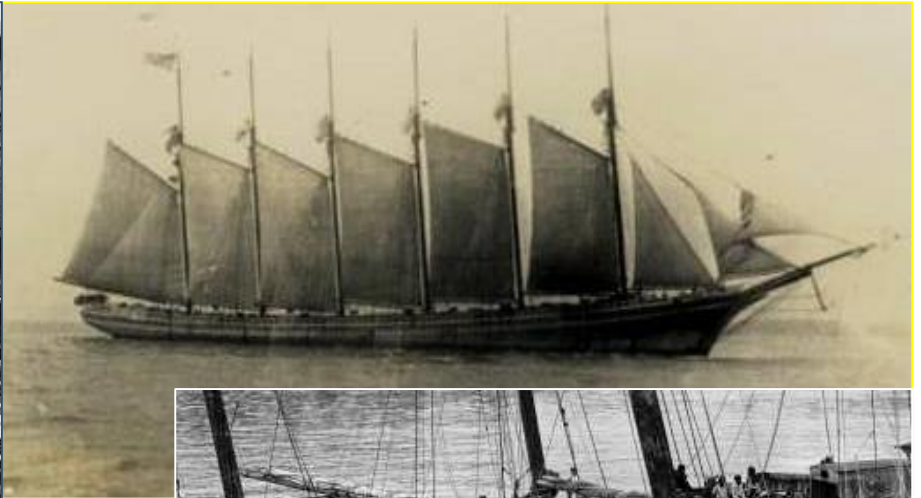
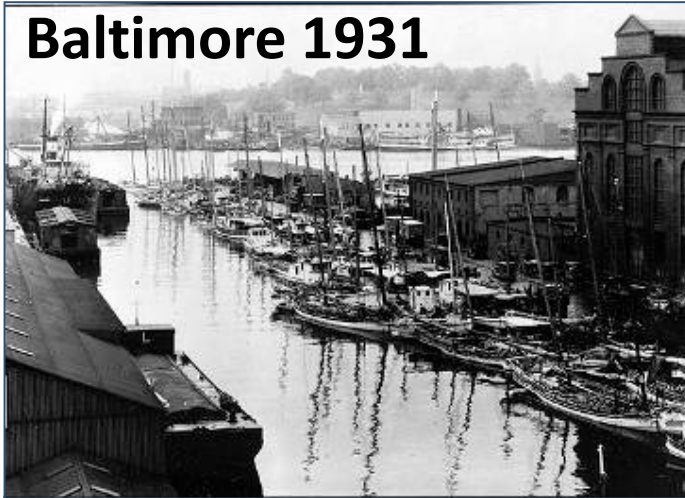
Freight = Economy in motion

[Freight does not vote.]



Waterborne transportation has always been an efficient and practical way to move goods, both international and domestic.

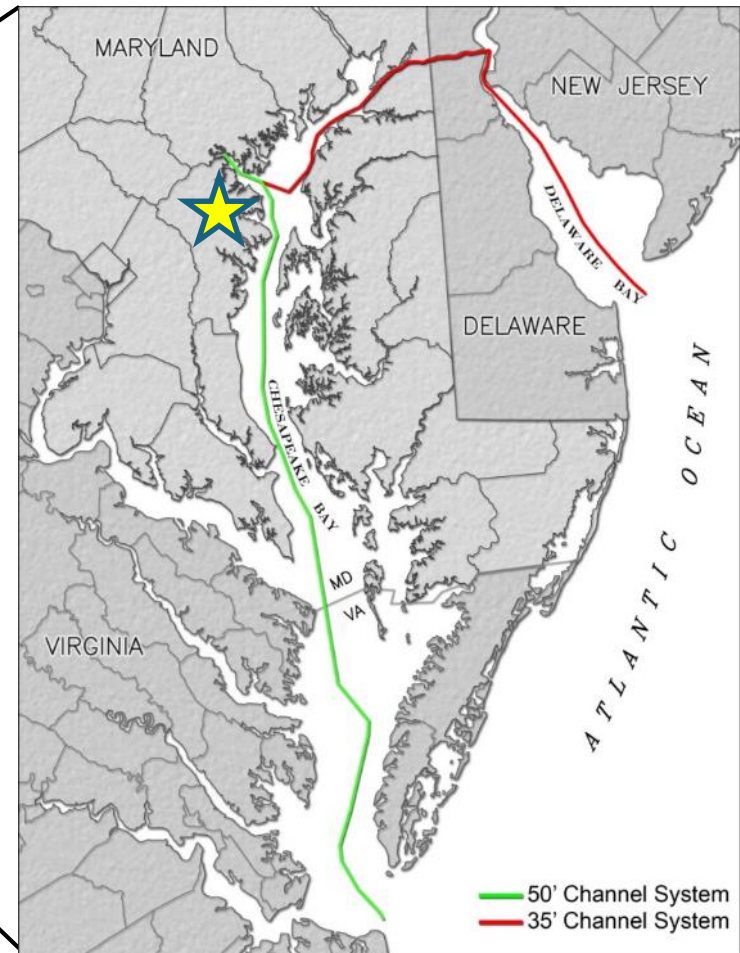
**Baltimore 1931**







Baltimore City has great maritime history due to its inland location. Being the western most Mid-Atlantic Port requires 136 miles of dredged channels.





Formed over 300 years ago, the Port of Baltimore is older than the City itself.



The City grew up around the Port, and terminal activities shifted south for larger areas of land to accommodate larger ships, opening up the Inner Harbor for redevelopment.



In the past 2,000 years, there have been three paradigm shifts in ship design and cargo movement.

1. Mechanical Propulsion - early 1800s
2. Steel shipbuilding - late 1800s
3. Containerized cargo – 1956

(With each progression, larger terminals were needed)

In 1956, the first container ship carried 58 containers. Today, the world's largest container ship can carry over 20,000 TEUs.







Before containerization... 14 men worked to move one small pallet.





Railroads led the way in terminal development, but lost their incentive after WWII when trucking became a viable transportation option.







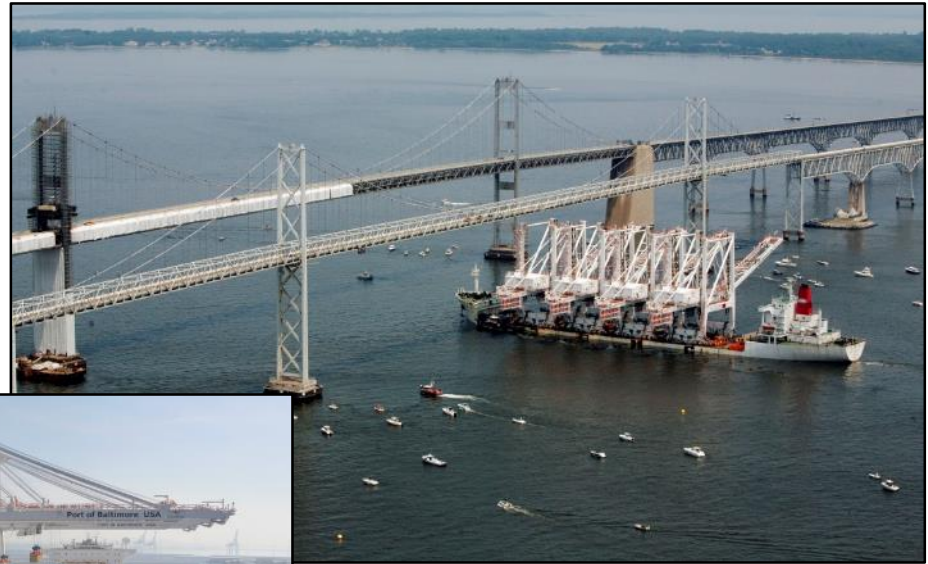
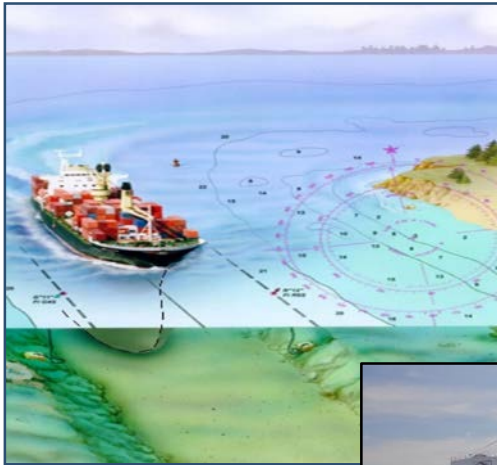
Maryland Port Administration was established because of neglected port facilities.

MPA's Purpose: "To increase the flow of waterborne commerce through the State of Maryland in a manner that provides benefit to the citizens of the State."





Larger ships facilitate global trade, but require deeper channels – With its 50 foot channels, Baltimore is one of only 4 Ports on the US East Coast *currently* capable of handling larger “post-Panamax” ships.

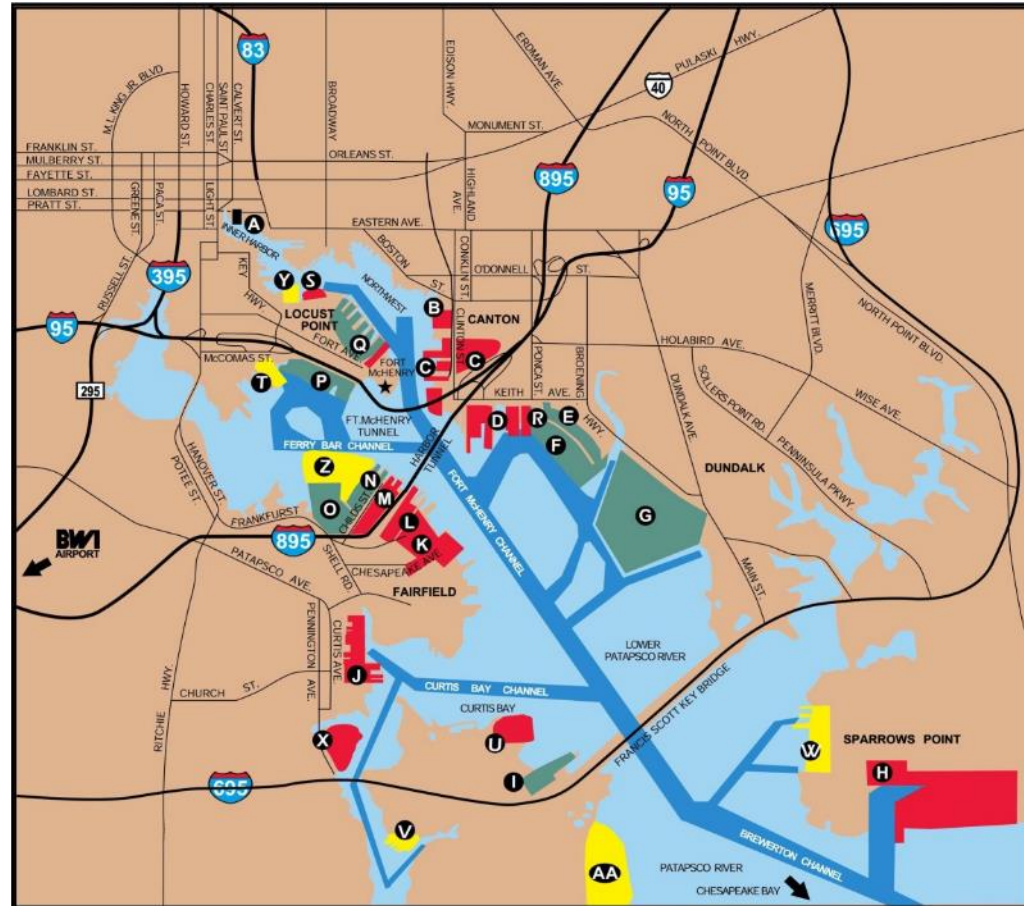






## The Port of Baltimore is a complex mix of Private and Public terminals....

- 45 miles of waterfront facilities and industries.
- 23 private facilities handle nearly all of the bulk commodities.
- Six MPA public cargo terminals handle over 90% of the general cargo.
- Requires active relationships with public & private sector entities, on local, regional, state, national and international levels.







# The Port of Baltimore handles a diverse range of bulk & general cargoes



Forest Products



Sugar



Agriculture, Mining,  
& Construction  
Equipment



Salt & Fertilizers



Containers



Coal



Autos

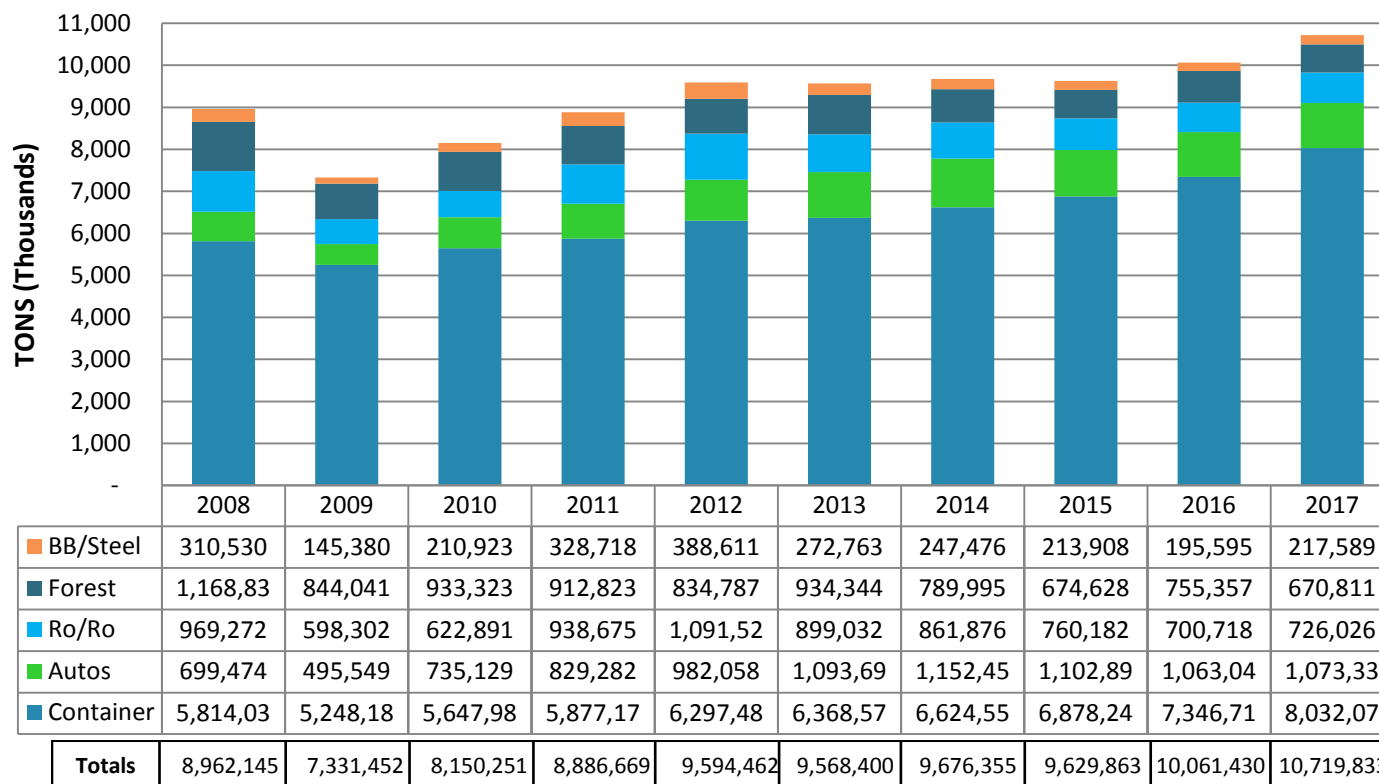


Project Cargo



MPA had steady cargo growth before and after the recession, volumes have since recovered, and 2017 was another record breaking year, led by containers & autos.

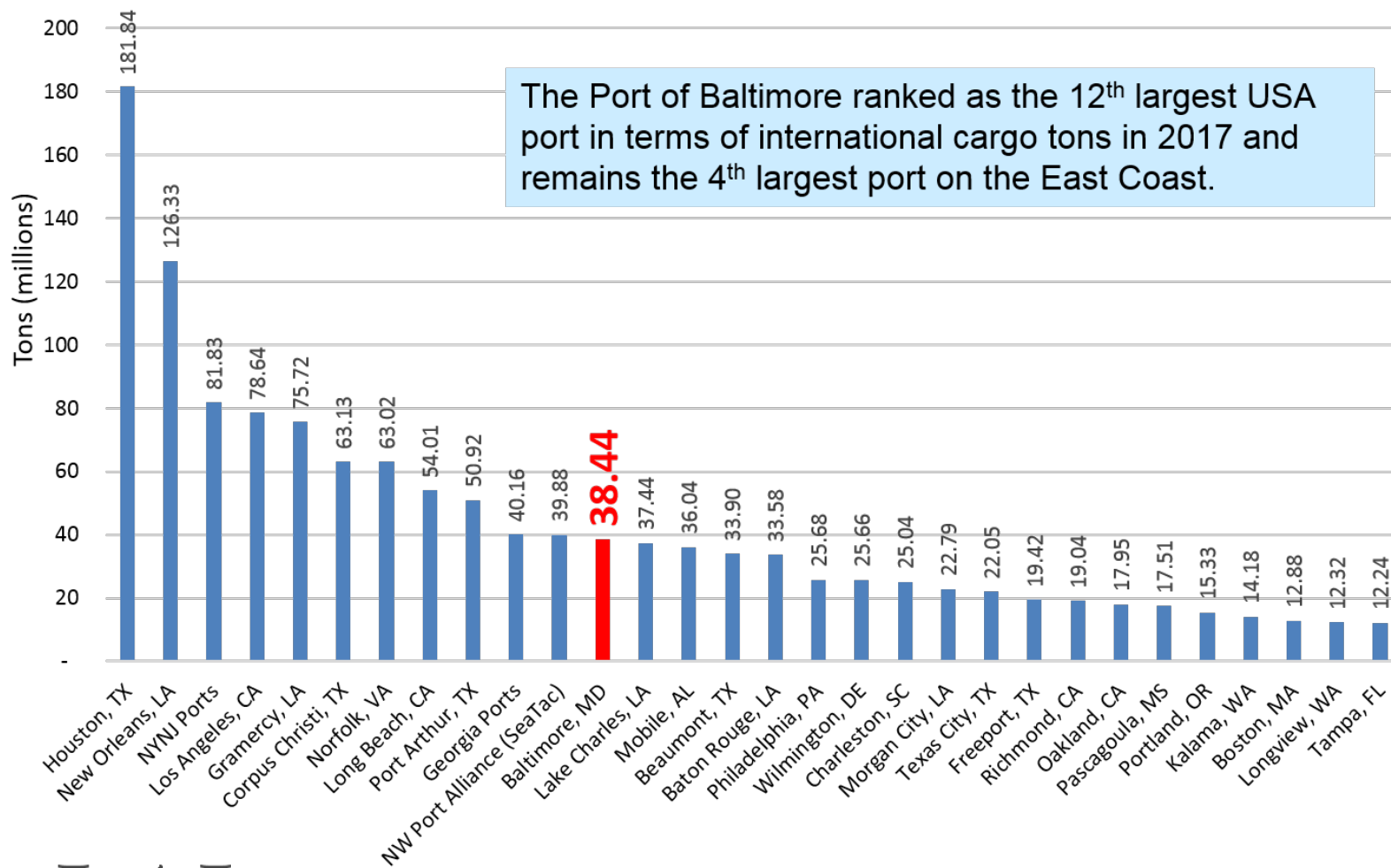
### MPA General Cargo Tons



\*10.7 million tons in 2017 was most in MPA History for a calendar year.



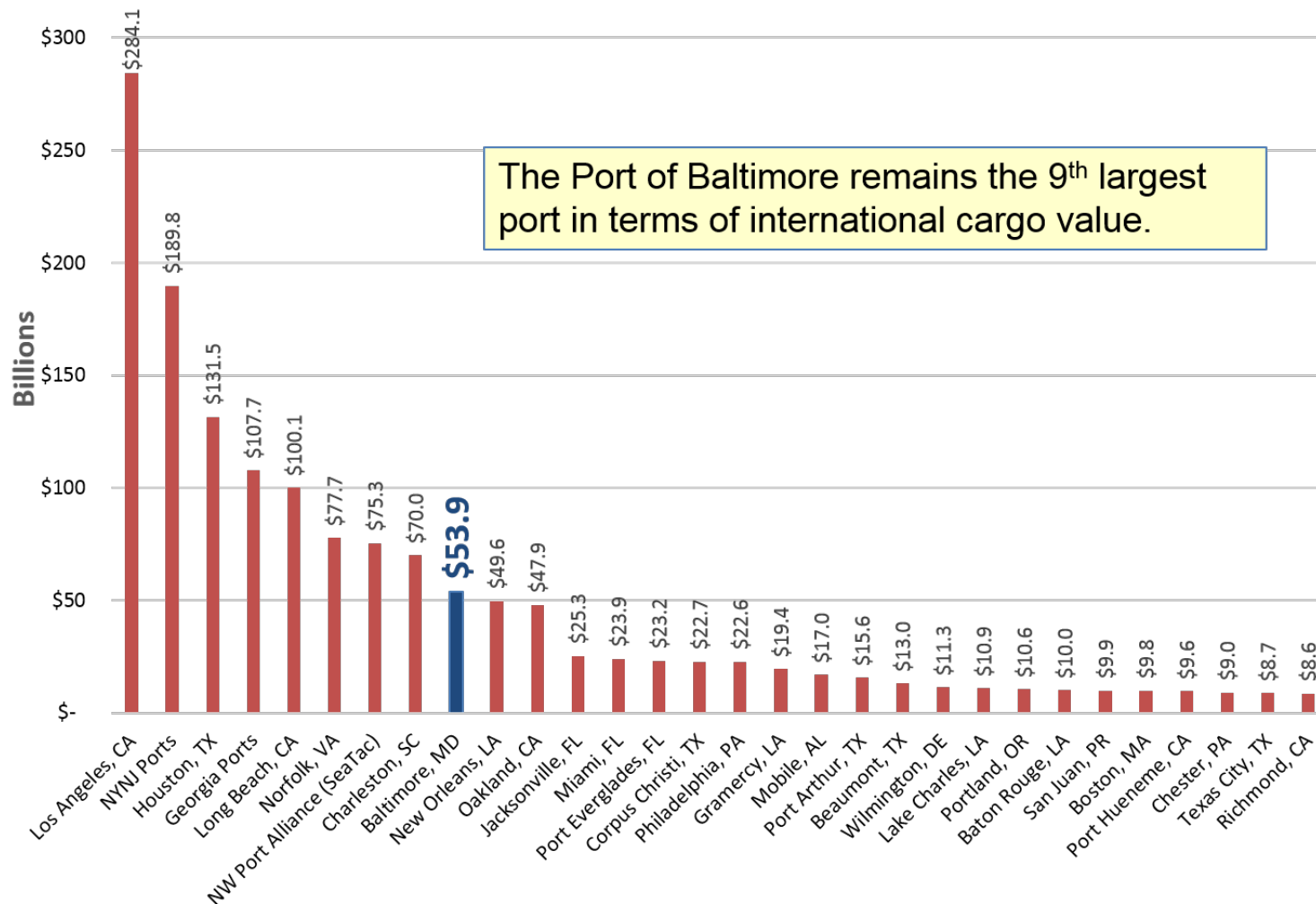
## 2017 POB Ranking (tons) vs. Top U.S.A. Ports







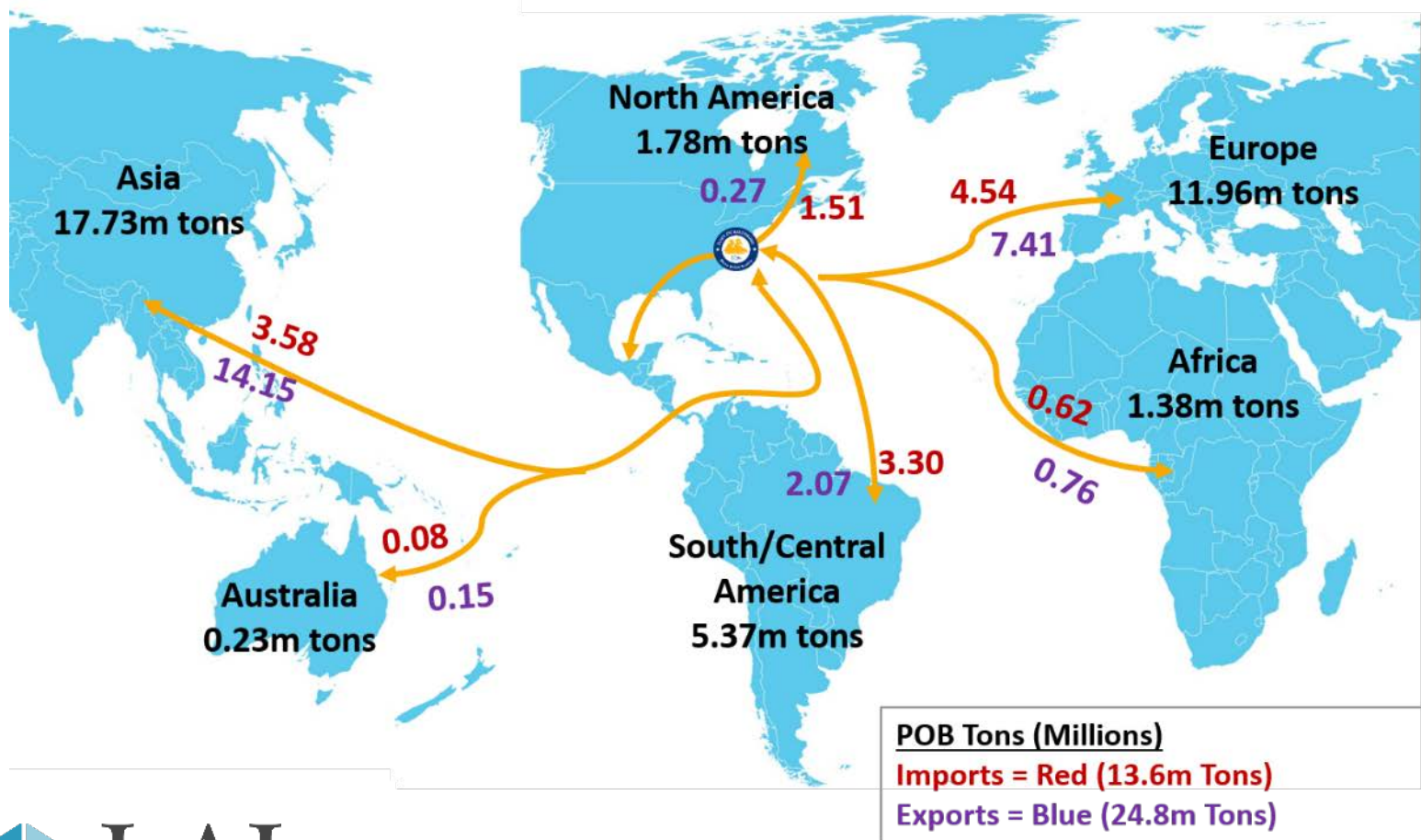
## 2017 POB Ranking (value) vs. Top U.S.A. Ports





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

### Port of Baltimore's International Cargo Flows - 2017





# Automotive Manufacturers Exporting through the Port of Baltimore

In 2017, over 165,000 cars and trucks were exported through Baltimore, including:

- Ford
- Fiat Chrysler (FCA)
- GM
- Honda
- Toyota
- Mercedes Benz







# POB Exporters of Construction and Agricultural Equipment

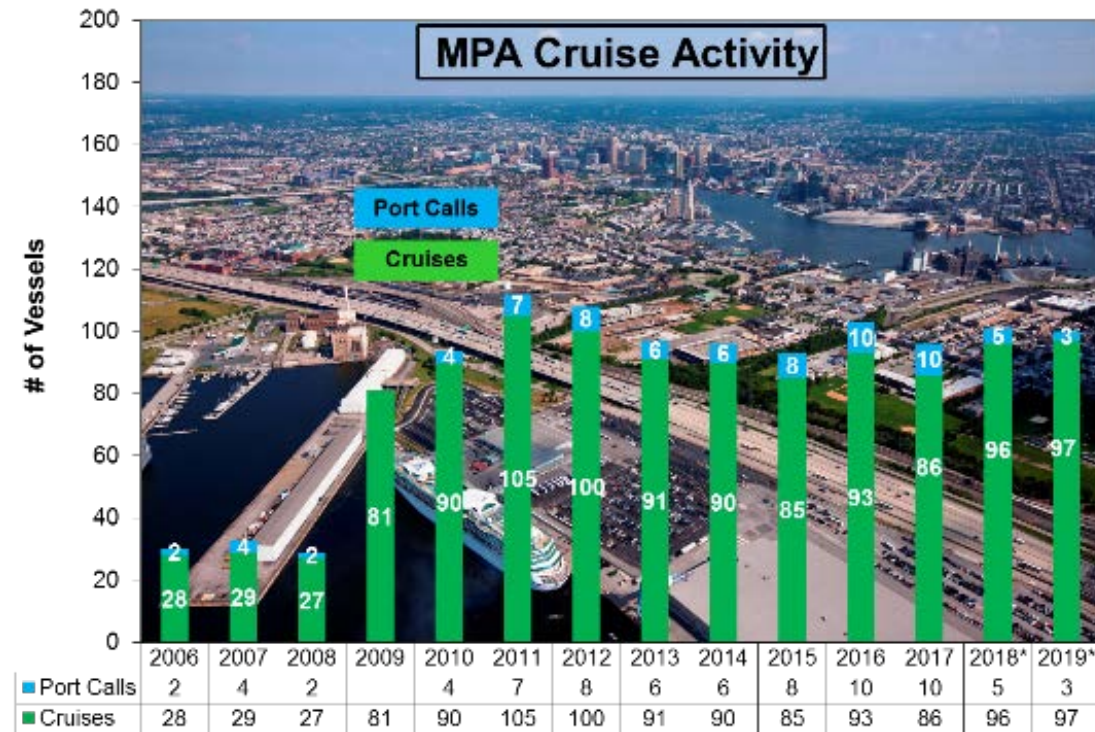
The Port of Baltimore is the largest Port in the Nation for the export of construction and agricultural machinery:

- Deere
- Caterpillar
- Case New Holland
- AGCO, Mack, Volvo
- Komatsu, JLG, Oshkosh
- Vermeer, Manitowoc, Terex





The Port's Cruise business increased with the new terminal adjacent to I-95, and will stabilize at nearly 100 Cruises per year.







Challenges: Finding room to grow in a region where industrial land supply is shrinking, despite high demand driving up costs, in a state with a shrinking transportation trust fund.







## Challenges: Working to preserve City's Industrial land and freight corridors to avoid future conflicts.

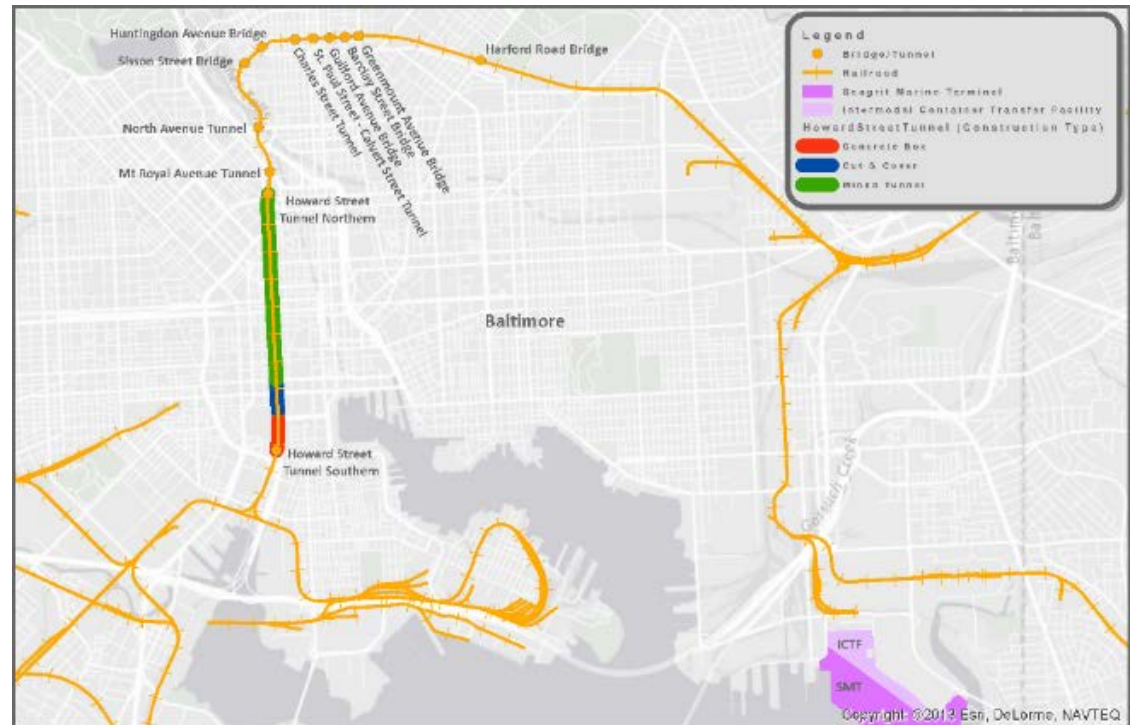
- Residential development along Freight Corridors - especially between two freight rail lines the truck route leading to the Port's terminals will invite conflicts.
- Potentially damaging to Port businesses
- Need to limit future conflicts by preserving industrial land and freight routes.





# Challenges: Howard Street Tunnel

- 120-year old Howard St. Tunnel is freight bottleneck - double stack containers.
- Total \$445M for Tunnel improvements & 9 overpasses, including three (3) City bridges that need to be raised.
- Hopeful that all parties will come back to the negotiating table to develop solution.





Port of Baltimore remains healthy, and is a nationally significant port.

- Ranks #1 in Autos and Light Trucks.
- Ranks #1 in Roll-on Roll-off Heavy Equipment.
- Ranks #1 in imported: Sugar and Gypsum.
- Ranks #2 in exported Coal.
- 9th in Overall Foreign Cargo Value (\$53.9 billion)
- 12th in Overall Foreign Cargo Tonnage (38.4 million tons)

The Port generates over 33,900 jobs:

- 13,650 direct, 15,890 induced, 4,380 indirect jobs,
- \$2.9 billion in wages and salaries annually, and
- \$310 million in state and local tax revenues annually.
- Average income for a Port direct job (\$61,877) is 16% better than the average Maryland salary.





## Port's Bottom line:

1. Cargo and Cruise forecasts are positive, but not without challenges.
2. The Port links Maryland and the Mid-Atlantic region to the global marketplace.
3. The Port is an economic engine with a long record of sustaining jobs in Maryland for all skill levels.



# THANK YOU

## | CONTACT



James M. Dwyer  
Maryland Port Administration Planning

jdwyer@MarylandPorts.com  
(410) 385-4469