

Marketing and Economic Development Analysis for the Maysville-Mason County Port Authority



Image: William H. Harsha Bridge Maysville, Kentucky

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Research Report

**Marketing and Economic Development Analysis for the Maysville-Mason
County Port Authority**

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Executive Summary

An anticipated increase in Ohio River traffic signals the need for development of multimodal infrastructure to expedite the movement of goods. The proposed Maysville-Mason County Port presents opportunities for economic growth in the Buffalo Trace Area Development District (BTADD). Due to untapped commercial development, the region is well-poised to meet the demands of additional industries. Developing a port facility is expected to create jobs, stimulate supplier support industries, and generate additional tax revenues to the surrounding five counties— Bracken, Lewis, Robertson, Fleming, and Mason.

This report provides an overview of the BTADD: economic characteristics, demographics, and transportation infrastructural assets. The Kentucky Transportation Center (KTC) examined existing industrial properties that could accommodate a port, and they analyzed current shipping trends on the Ohio River. The ideal location for a port has been identified: the Charleston Bottom site. It has easy rail and highway access, is partially cleared, and lies near the 500 year floodplain.

KTC reviewed the organizational and operating frameworks for other ports that could provide a template for the proposed Maysville port. Each model had a different balance of public and private responsibilities, and this report outlines how the Maysville-Mason County Port might adopt different aspects of these models. The port could leverage a variety of organizational structures and government incentive programs to help with funding, and in turn those would assist with the port's development.

While the Charleston Bottom land is currently owned by CSX, the company is willing to work with the Maysville-Mason County Port Authority to facilitate its transfer. A survey was administered to businesses in the BTADD regarding their current shipping methods and level of interest in using a port facility. Nine out of eleven respondents indicated they would consider using a multimodal rail and port facility in the area if one existed. Products currently being shipped in the BTADD include automotive parts, fertilizer, building materials, and fabricated steel.

Building the proposed port facility will require the tapping into funding sources, such as a TIGER grant. Construction would likely proceed in several phases, beginning with the property transfer and with undergoing the National Environmental Policy Act (NEPA) process. Later phases would consist of capital improvements: site clearing, putting loading facilities in place, and constructing paved roads to the site. To facilitate the construction process, the port authority may need to fund a full time position dedicated to port development.

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I. Introduction

The Maysville-Mason County Port Authority was formed in March of 1978, “To establish, maintain, operate and expand necessary and proper riverport and river navigation facilities; to acquire and develop property within the economic environs of the riverport; and to attract directly or indirectly river-oriented industry.” Today, the proposed Maysville-Mason County Port along the Ohio River presents new opportunities for economic growth in the Buffalo Trace Area Development District (BTADD). The BTADD includes five counties – Bracken, Lewis, Robertson, Fleming, and Mason – near the potential location of the Maysville-Mason County Port. Anticipated increases in national and regional freight traffic signal the need of a port to expedite the movement of goods. Developing a new port facility could create a number of jobs in the BTADD, via supplier support industries and through advantages offered by new shipping opportunities. A number of new jobs in the broader region may generate additional tax revenues that can be used to underwrite future local development.

This report provides an overview of the BTADD. The economic and demographic information serves to contextualize the region, while the descriptions of the infrastructural assets provide an overview of the physical properties that would facilitate the development of the Maysville-Mason County Port. Also discussed is how the port could leverage a variety of organizational structures and government incentive programs to benefit the overall economic development of the region. First, the report highlights workforce availability, median household incomes, and educational training opportunities available through the local community college. Second is an analysis of the region’s multimodal transportation infrastructure, including major rail access points that connect Maysville to multiple markets, as well as state highways conducive to surface transportation. Third is a description of industrial properties that could accommodate a new port. Fourth, the report examines current shipping trends on the Ohio River, and how the Maysville-Mason County Port could take advantage of already-existing freight flows to encourage its development. Included is a description of how nearby businesses in Kentucky could leverage a new port to accelerate their expansion. The report examines a range of organizational and operating frameworks for ports. Each has a different balance of public and private responsibilities. KTC suggests how the Maysville-Mason County Port might adopt different aspects of these models. Finally, the report outlines funding opportunities that would assist in the port’s development.

II. Economic & Demographic Trends in the Buffalo Trace Area Development District

Demographically, the Buffalo Trace Area Development District is well-poised to meet the demands of additional industrial development in a variety of sectors. Table 1 summarizes the demographic characteristics of the BTADD using the most recent data across each area of analysis. In 2014, 60 percent of the population in the BTADD was between the ages of 18 and 65 – the range traditionally considered to be working age. In 2013, approximately 40 percent of working age adults had a high school diploma, and 25 percent of adults had completed some college or held an associate’s degree. Thirteen percent of adults in the BTADD possessed a bachelor’s degree or higher. The median household income for the counties in the BTADD ranged from \$30,443 to \$43,222, with an average of \$37,909. With 60 percent of the population between the ages of 18 and 65, and workforce availability, new or expanding industries that may locate in the BTADD could readily tap into the slack that exists in the labor market.

Table 1: Demographic Data of the BTADD

Population	(as of 2014)
Total Population	56,194
Percent of Population 18-65 years old	60 percent
Education	(as of 2013)
High School Diploma	40 percent
Associate Degree	25 percent
Bachelor’s Degree	13 percent
Household Economic Indicators	(as of 2013)
Median Household Income	\$37,909
Per Capita Income	\$19,468
Workforce	(as of August 2015)
Civilian Labor Force	22,589
Employed Labor Force	21,229
Unemployment Rate	6 percent

Source: Compiled from data from the United States Census Bureau.

Like many other areas of the U.S., the BTADD has suffered from a decline in the manufacturing base. From 2001 to 2013, employment in manufacturing fell from 20 percent of private, non-farm employment to under 10 percent in the BTADD. The deterioration of manufacturing in the BTADD over the last 12 years has resulted in the availability of a large pool of skilled industrial labor, although approximately 4,000 people are still employed in industrial or industrial-related work. Table 2 captures employment trends in the BTADD from 2001 to 2013. In 2001, employment in farm-related activities accounted for 16.4 percent of employment in the BTADD, although by 2013 this had fallen to 12.8 percent. Over the same time period, the share for non-farm employment increased to 87.2 percent. Despite the increases in non-farm employment, these gains did not occur in the sectors that typically support industrial activity.

Table 2: BTADD Employment Trends, 2001-2013

Employment	2001	2013
Farm Employment	16.4 percent	12.8 percent
Non-Farm Employment	83.6 percent	87.2 percent
Non-Farm Employment		
Manufacturing	19.7 percent	9.5 percent
Transportation and Warehousing	1.4 percent	1.4 percent
Construction	2 percent	6.2 percent
Professional, Scientific, and Technical Services	0.6 percent	1.2 percent
Retail Trade	12.7 percent	12.1 percent

Source: Compiled from data from the Bureau of Economic Analysis.

Education

Important to the demographic picture of the BTADD is the education of its workforce. As noted, many in the workforce have either a high school diploma or an advanced degree. Businesses deciding whether to locate in the BTADD may be interested in the education levels of the workforce and the potential for the workforce to obtain additional training and education. The Maysville Community and Technical College (MCTC), which is part of the Kentucky Community and Technical College System (KCTCS), has served the area since 1968. As of the fall semester of 2014, over 3,400 students were enrolled in programs at the community college, which offers training in a range of skills, with certifications and degree programs in areas such as Applied Engineering Technology, Computerized Manufacturing and Machining, Manufacturing Industrial Technology and Welding Technology, among others. MCTC also offers numerous short-course programs oriented toward people already working in industrial professions through its Workforce Solutions program. In addition to the programs geared toward manufacturing and technology mentioned above, MCTC could also offer a variety of marine transportation programs if there were demand for this type of training.

III. Transportation Access to the Buffalo Trace Area Development District

Multimodal transportation access can facilitate economic growth, particularly for port facilities that load and off-load various commodities such as automotive parts, fertilizer, coal, building materials, and fabricated steel. The BTADD has transportation infrastructure in place that could help meet the demand generated by a port facility. Maysville's pool location along the Ohio River is first highlighted, then highway and rail access are discussed.

Pool Location

Maysville is located at the balance point of the Meldahl Pool in the Ohio River. Here, river flow during high discharge events is much slower than at other points along the river. The balance point is the natural location at which flow-generating forces balance out, so Maysville is situated at an ideal location — any port built there will still be operational during high-flow water events. When the river dips to lower stages near Maysville, there is still a 9-foot draft for tows, longer than any other location in the pool. Further, Maysville and the broader BTADD are served by a variety of other transportation modes that would enable further port expansion.

Highway Access

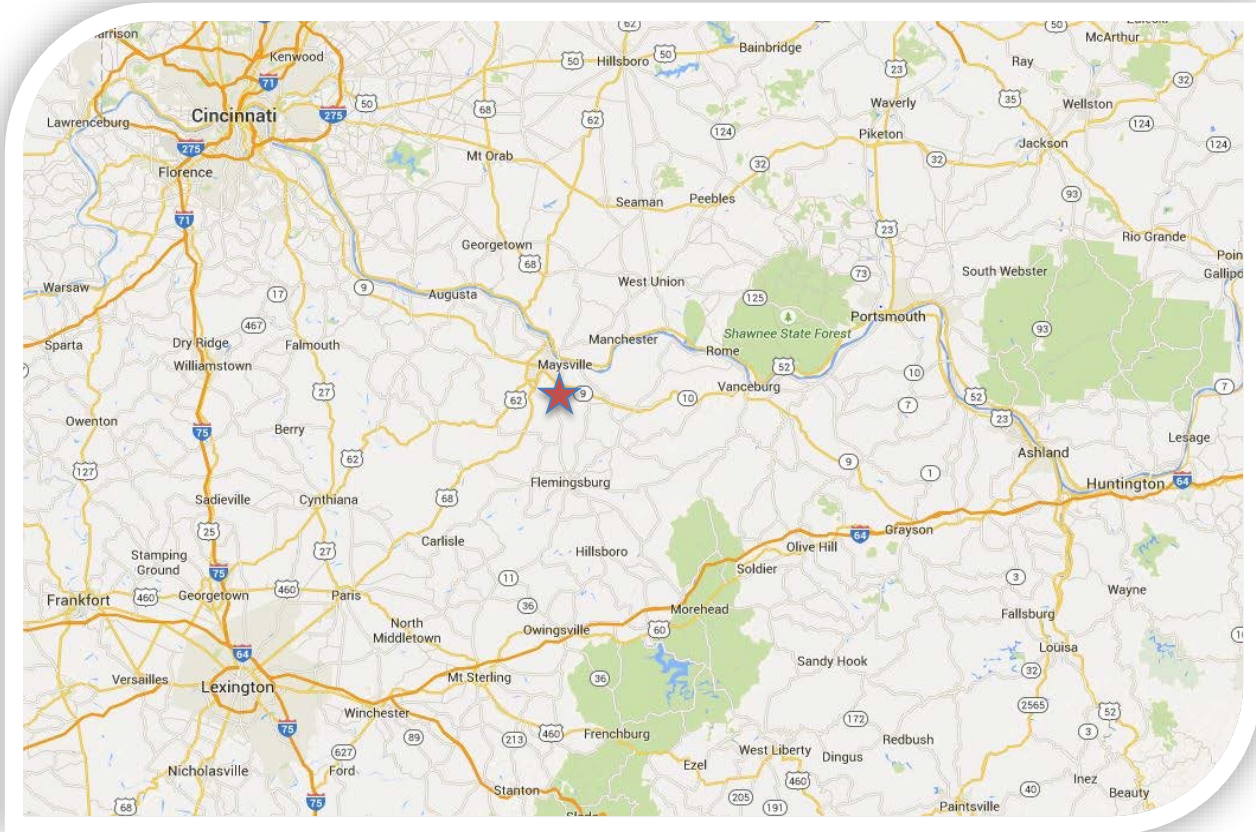
There are a number of highway access points that connect Maysville and the BTADD to several metropolitan areas, including Cincinnati, Ohio; Lexington; and Louisville, Kentucky. U.S. Highway 68 links central Kentucky to Maysville, providing four-lane access from Lexington, Kentucky to Paris, Kentucky. The Kentucky Transportation Cabinet is also improving the highway infrastructure that connects Paris to Maysville. The state has invested \$38.3 million to construct the four-lane Millersburg Bypass on U.S. 68. KYTC expects to fund an additional \$47 million of work for this project in the coming years, according to the 2014-2020 Six Year Highway Plan.

Other key highway access points include U.S. Highway 62, which connects to Georgetown, Kentucky, and to Interstates 75 and 64. East and west connections are via Kentucky Highways 9 and 10, the AA Highway. Highway 9 provides access to Cincinnati, Ohio and to Interstates 75 and 71. Highway 9/10 provides access to Interstate 64, just north of Grayson, Kentucky.

Maysville also has a direct link to Aberdeen, Ohio via the Simon Kenton Memorial Bridge and the William H. Harsha Bridge. The next closest bridge crossing between Kentucky and Ohio is located to the east at Portsmouth, Ohio and South Portsmouth, Kentucky – approximately 52 miles away. The closest river crossing west of Maysville is the Combs-Hehl Bridge in Newport, Kentucky – 55 miles away. The bridges provide critical connection points for the regions in Kentucky and Ohio near the Ohio River and they offer additional access points to industries that would potentially use a port in the Maysville-

Mason County area. Highway access and the surrounding communities are shown in Figure 1.

Figure 1: Highway Access



TTI/CSX Rail Line from Paris to Maysville

One key piece of multimodal transportation infrastructure serving the potential Maysville-Mason County Port is the rail line from Paris to Maysville, operated by the Transkentucky Transportation Railroad (TTI). TTI is a wholly-owned subsidiary of CSX. The line is directly linked to the primary CSX line running east-west between Cincinnati and Ashland-Russell. Figure 2 depicts the primary east-west oriented CSX line at the William H. Harsha Bridge, which carries U.S. Highway 68 over the Ohio River. The rail line is also adjacent to a potential port location at Charleston Bottom, which is discussed in more detail in the next section.

Figure 2: Primary CSX Line



Currently, the TTI-operated line between Paris and Maysville runs well below capacity, as much of its business — primarily devoted to shipping coal — has recently declined. While there continues to be some use of the line for local businesses, (such as shipping fertilizers), the line remains underutilized. Figures 3 and 4 show the coal off-loading facility and dock currently used by TTI/CSX. Because this facility is on leased property, there is it could potentially be relocated to a new port location.

Early planning studies for the Maysville-Mason County Port indicated that improvements to the rail line between Paris and Maysville following its purchase by TTI were viewed as “essential to the feasibility of the future riverport and industrial development.” Given the developments on the TTI line over the past 35 years and its good state-of-repair, the line’s integration with other rail infrastructure in the region has improved. That would be of particular benefit to the potential development of the port.

Figure 3: Coal Off-loading Facility



Figure 4: Coal Dock Facility



General Aviation Airports

The Maysville area is also served by the Fleming-Mason Airport, a general aviation airport located in the southeastern portion of Mason County. The airport has a runway measuring 5,001 by 100 feet. As of July 2013, the airport averaged 47 aircraft operations (i.e., take-offs and landings) per day. It is located seven miles north of the town of Flemingsburg and ten miles south of Maysville, both of which have relatively easy access via Kentucky Highway 11. The airport is approximately 30 miles from Vanceburg, the county seat of Lewis County; 35 miles from Mount Olivet, the county seat of Robertson County; and 37 miles from Brooksville, the county seat of Bracken County.

IV. Potential Port Locations

The Maysville-Mason County Port Authority has identified several potential port locations in the BTADD. The Charleston Bottom site has several attributes (identified below) that are ideally suited for the development of a port. The site, owned by CSX, encompasses approximately 142 acres. The site has river frontage and extends up to one mile away from the river. The average river stage in the stretch adjacent to the Charleston Bottom property is 33 feet, with the ability to load barges at up to a 52 foot depth. Despite its nearness to the Ohio River, the Charleston Bottom parcel is adequately elevated, sitting close to the 500-year floodplain. The CSX rail line that borders the Charleston Bottom property is situated on the 500-year floodplain and provides direct rail access to the property. The site also has direct highway access to U.S. Highway 62/68 and east-west connectivity via Kentucky Highway 8.

Access to three modes of transportation infrastructure is not the only positive attribute of the Charleston Bottom property. Part of the parcel is used as farmland, and thus is already cleared. The parcel is wide enough to accommodate a 150-car rail track turnaround. Several utilities (sewer, electric, and water) are installed on the property. The only utility not in place is natural gas, which would cost an estimated \$6 million to install.

Perhaps the most attractive aspect of the Charleston Bottom property is the willingness of the property owner, CSX, to provide the land to the Maysville-Mason County River Port Authority, contingent on its development. Figures 5 and 6 show aerial photos that were taken of the site on March 19, 2015. Figure 5 captures the Spurlock Power Station to the northwest, while Figure 6 includes the William H. Harsha Bridge and U.S. Highway 62/68 to the southeast, indicating the close proximity of the potential port site to a major highway.

Figure 5: Charleston Bottom Aerial Photo



While the Charleston Bottom site represents an opportunity for the development of the port infrastructure, two other locations in the region have potential as well. The first is the Dover industrial site, located in northwest Mason County, which offers approximately 876 acres of land for development. However, this site includes a wetland area and contains some potentially significant archaeology. As such, substantial work must be completed to appropriately inventory and address these issues before port development could begin. The second alternative site is the Vanceburg-Lewis County Industrial Park, which encompasses 118.5 acres. Compared to both of the potential sites in Mason County, this site is relatively disconnected from surface road infrastructure. Of the available industrial lands in the BTADD, these are the only two sites with possible rail access to the nearby CSX line and adequate proximity to the Ohio River. These sites might be attractive for other forms of non-port related industrial development.

Figure 6: Charleston Bottom Aerial Photo



In addition to the two locations above, there are a number of sites throughout the area, totaling 753.2 acres of shovel-ready property, available for development. Mason County also has 572,000 square feet of available industrial building space, with another 97,280 square feet available in nearby Fleming County. There are no available industrial buildings in Bracken, Lewis, or Robertson Counties. Tables 3 and 4 describe the Industrial Buildings and land available for development in the BTADD, as of May 2015.

Table 3: Industrial Building Available in BTADD for Sale/Lease

Location	Name	Available Square Footage	Acres
Mason County	Regal Electric Building	210,000	5.1
Mason County	King-Burley Spec Building #1	207,500	12
Mason County	Regal Power Transmission	112,500	6.1
Fleming County	Flemingsburg Manufacturing Facility	97,280	8
Mason County	Wald Warehouse	42,000	1.5

Source: Developed from information from the Kentucky Cabinet for Economic Development.

Table 4: Development Sites Available in BTADD

Location	Name	Total Acres	Largest Possible Tract (Acres)
Mason County	Dover Site 161-005	875.9	347.3
Mason County	Industrial Park IV	163.4	163.4
Mason County	Industrial Park II	78.5	43
Mason County	Industrial Park I	34	34
Mason County	Shugars Commerce Park	25	25
Bracken County	Augusta Site 023-001	218	218
Fleming County	Flemingsburg-Fleming County Industrial Park I	14.8	7.2
Fleming County	Flemingsburg-Fleming County Industrial Park II	191	191
Lewis County	Tollesboro Site 135-003	28.5	23

Source: Developed from information from the Kentucky Cabinet for Economic Development.

The available industrial buildings and properties indicate there is existing infrastructure for further development in the BTADD.

V. Current Shipping Trends on the Ohio River

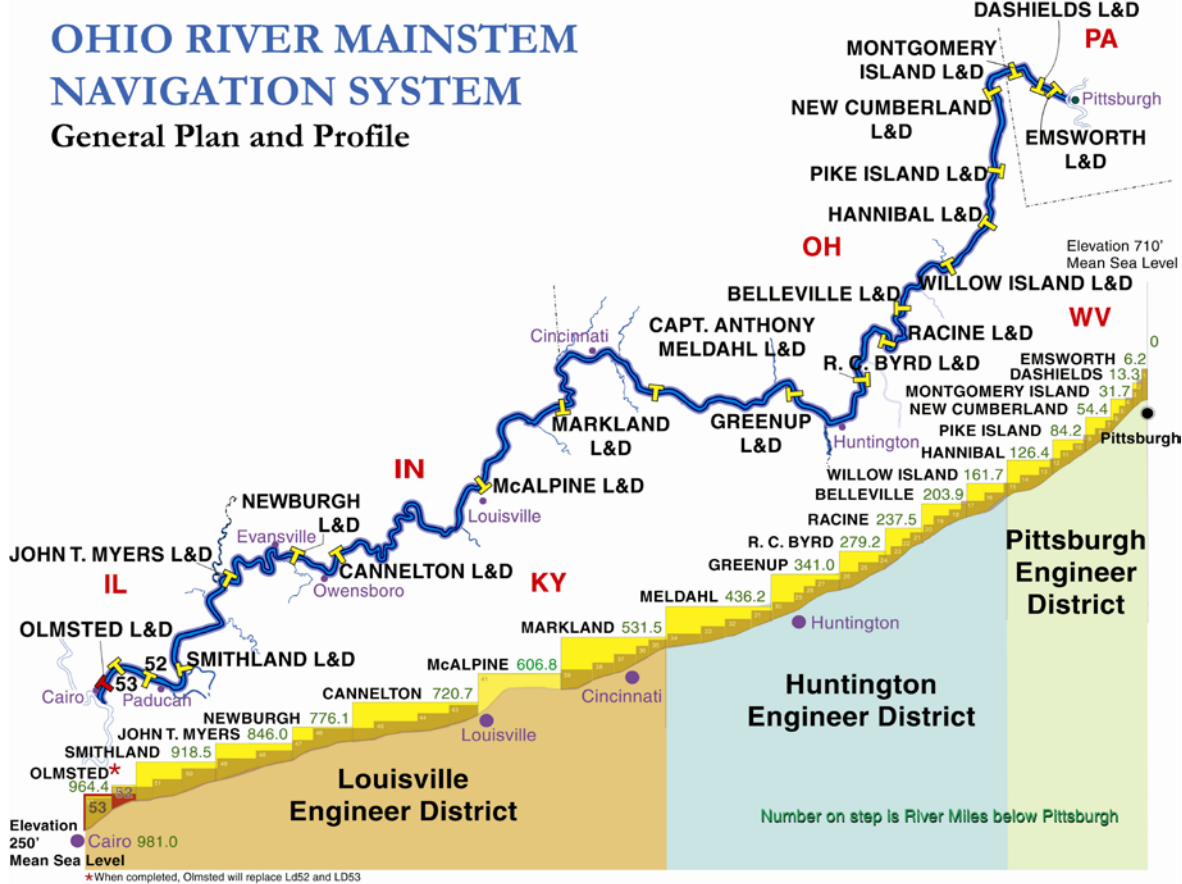
The 12,000 commercially navigable miles of the U.S. inland waterway system constitute a vital cog in the nation's multimodal freight transportation system, carrying over 800 million tons of domestic goods annually, according to the U.S. Army Corps of Engineers (USACE). With increasing fuel costs, environmental problems, and projected increases in freight shipments¹, use of the inland waterway system for freight movements will likely grow. The inland waterway system provides a more fuel-efficient and environmentally friendly way to transport freight when compared to other modes of transportation. According to USACE, one standard 15-barge tow can move as much cargo as 216 rail cars and 6 locomotives or 1,050 tractor trailers. However, the success of freight transportation is dependent on a multimodal approach.

The Ohio River is a critical part of the inland waterway system and plays a significant role in linking together numerous industrial and energy supply chains, specifically, the movement of coal, agricultural goods, and bulk commodities. The Ohio River is 981 miles long, 664 miles of which form part of Kentucky's northern border. Historically, the overwhelming majority of the Ohio River's traffic has involved coal shipments. Each year, over 120 million tons of coal is shipped via the corridor, while non-fuel crude materials account for between 40 and 60 million tons. Although coal is the commodity moved in the largest quantities via barge on the Ohio River, other commodities shipped on the river include bulk dry goods and raw materials for construction companies, steel mills, electric utilities, paper plants, chemical companies, petroleum, and aggregates.² In Kentucky, over 60 million tons of commodities worth approximately \$9.8 billion were shipped on the Ohio River during 2012. One distinguishing feature of the Ohio River is the series of lock and dam facilities that are used to maintain navigable channel depths. Figure 7 shows river elevation changes and the sequence of locks and dams along the river. Maysville is situated between the Greenup Locks and Dam and the Capt. Anthony Meldahl Locks and Dam.

¹ See the Federal Highway Administration's Freight Analysis Framework at http://www.ops.fhwa.dot.gov/freight/freight_analysis/faf/.

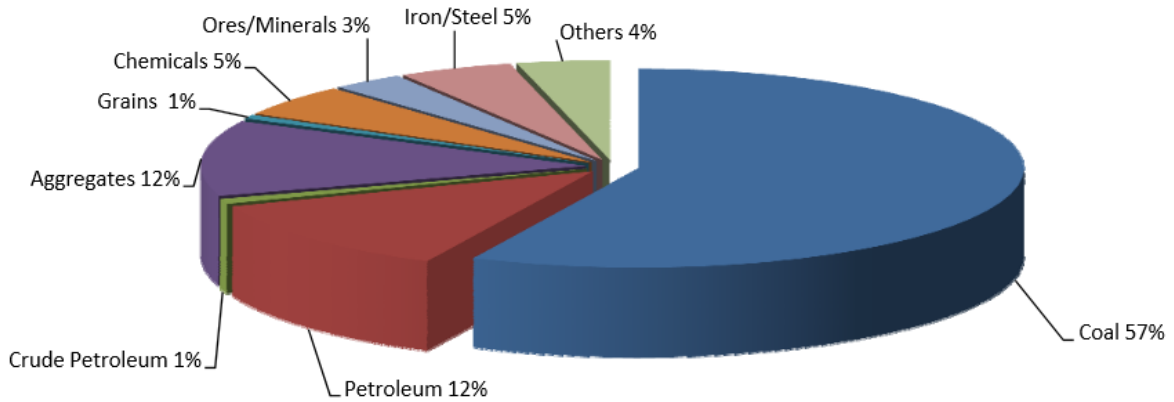
² United States Army Corps of Engineering. (2012). Inland Waterways and Export Opportunities. Retrieved from http://www.lrd.usace.army.mil/Portals/73/docs/Navigation/PCXIN/Inland_Waterways_and_Export_Opportunities-FINAL_2013-01-03.pdf

Figure 7: Ohio River Navigation (Source U.S. Army Corps of Engineers)



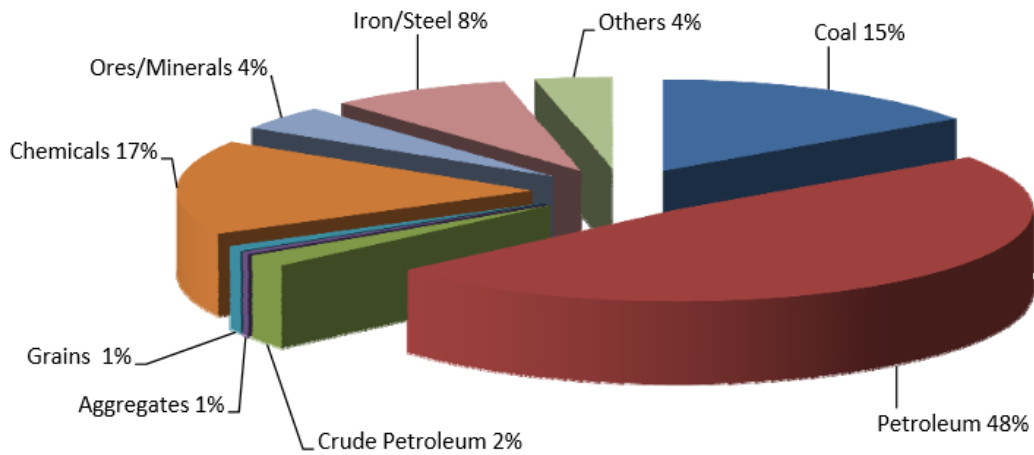
Locks and dams enable barges to safely traverse the river and, as a result, enable ports to be critical multimodal transfer points along the river. The Meldahl Locks and Dam commodity distribution in 2012 is shown in Figure 8, while Figure 9 shows the distribution based on the value of those commodities. The value of the commodities passing through Meldahl in 2012 was nearly \$12.2 billion. Over 51 million tons of goods passed through the facility that year and accommodated 4,307 commercial lockages. Figure 10 illustrates the commodity distribution in 2012 for the Greenup Locks and Dam, while Figure 11 partitions distributions based commodity value. Greenup Locks and Dam handled over 50 million tons of cargo in 2012 with 5,259 lockages. The value of the commodities passing through Greenup was \$12.9 billion. As noted in the figures, both Meldahl and Greenup handle a similar commodity profile. Coal accounts for nearly half of the tonnage, followed by petroleum. However, petroleum was the most valued commodity.

Figure 8: Commodities Passing Through Meldahl Locks and Dam in 2012



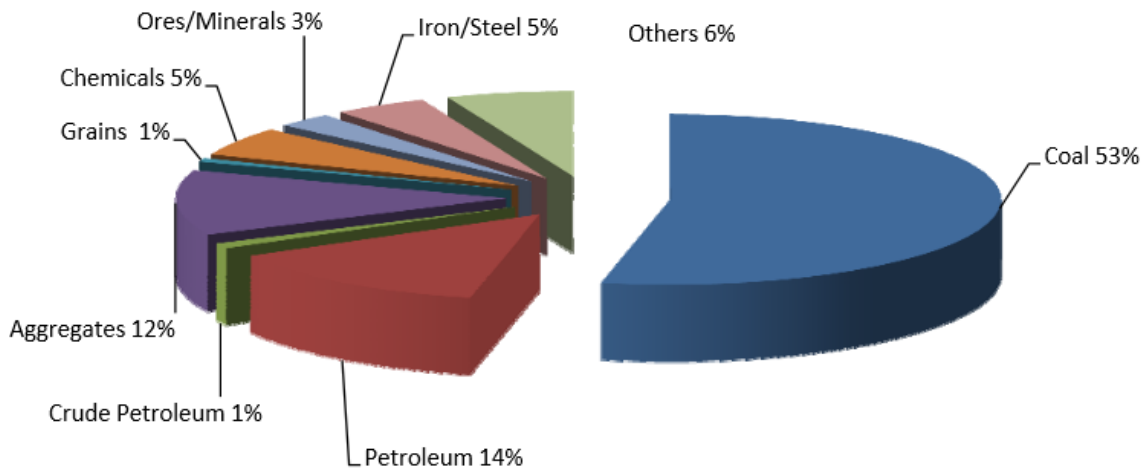
Source: http://outreach.lrh.usace.army.mil/Locks/Ohio_River_Basin/Meldahl/Meldahl_2012.pdf

Figure 9: Distribution of Value of Commodities Passing Through Meldahl Locks and Dam in 2012



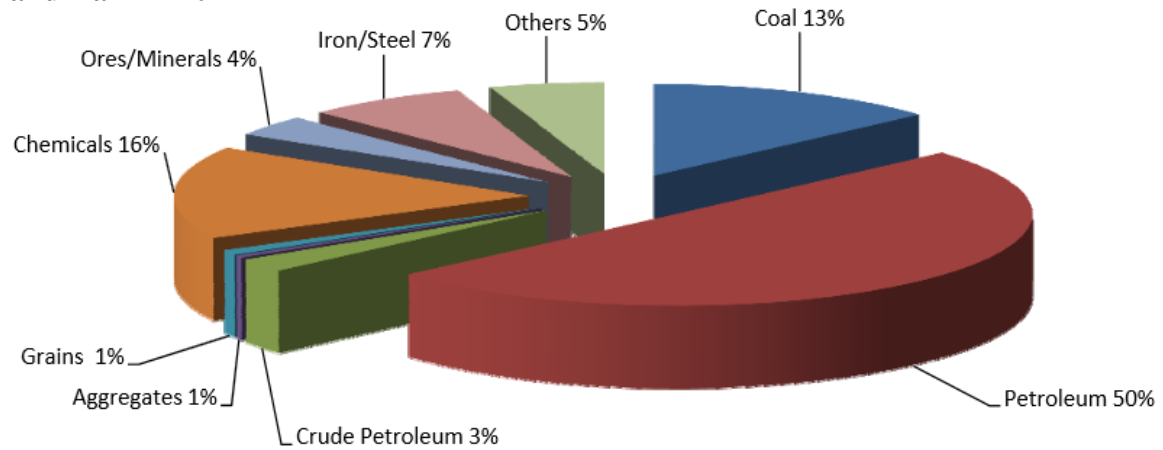
Source: http://outreach.lrh.usace.army.mil/Locks/Ohio_River_Basin/Meldahl/Meldahl_2012.pdf

Figure 10: Commodities Passing Through Greenup Locks and Dam in 2012



Source: http://outreach.lrh.usace.army.mil/Locks/Ohio_River_Basin/Greenup/Greenup_2013.pdf

Figure 11: Distribution of Value of Commodities Passing Through Greenup Locks and Dam in 2012



Source: http://outreach.lrh.usace.army.mil/Locks/Ohio_River_Basin/Greenup/Greenup_2013.pdf

VI. Opportunities for Industries and Commodities in the Buffalo Trace Development District to Utilize Water Transport

There are many commodities produced in the BTADD that could be shipped on the inland waterway system. Several industries operating in the BTADD and in the agricultural sector could potentially benefit from barge shipments. Approximately 49 percent of the market value of goods sold in the BTADD stem from crop sales (as opposed to livestock sales), with an estimated value of \$111 million in 2012. The top five crops by acre are presented in Table 5 below.

Table 5: Top Five Crops by Acreage in the BTADD

Commodity	Crop Acres
Forage-land used for all Hay and Haylage, Grass Silage, and Greenchop	115,334
Soybeans for Beans	29,572
Corn for Grain	16,997
Tobacco	6,437
Wheat for Grain	1,856

The agricultural commodity with the greatest production by acreage is *Hay, Grass Silage and Greenchop*. The USDA estimated that in 2012 the commodity group “other crops and hay” was valued at \$11.1 million. The *Grains, Oilseeds, Dry Beans, and Peas* commodity group was valued at approximately \$24.5 million and *Tobacco* was worth \$17.2 million. Previous research has shown that bulkier agricultural commodities, such as those already being produced in the BTADD, can be efficiently shipped on the waterways.³

Members of the BTADD raised the possibility of exporting timber via the Ohio River. Although the Census of Agriculture has not previously identified lumber or timber as a top commodity produced in the BTADD, timber is quickly emerging as a significant agricultural export for Kentucky. In 2014, statewide exports of forest products totaled \$235,082,000. Forest products exports comprised 15.7 percent of Kentucky’s agricultural exports in 2014, with the top export markets being the United Kingdom, China, and Canada.⁴ As one of Kentucky’s fastest growing agricultural exports, the BTADD has a prime opportunity to consult with local producers to determine if a port facility could enhance and/or provide additional business opportunities to the timber industry.

Access to waterway transportation can also benefit companies that are considering locating in the BTADD. Although there is no guarantee that a new public port will lure businesses to the BTADD, having multiple shipping options for industries, combined with the previously discussed economic factors, should improve the BTADD’s competitiveness. There are economic opportunities that could emerge in response to port development – such as barge cleaning services, ship repair, vessel maintenance, and fuel service.

³ Bray, L., Murphree, M., & Dager, C. (2011). *Toward a Full Accounting of the Beneficiaries of Navigable Waterways*. Prepared for The Nick J. Rahall Appalachian Transportation Institute.

⁴ Kentucky Department of Agriculture

VII. Port Structure

Deciding what type of port structure to adopt is an important decision. Ports can be public, private, or have an operating model that falls between purely public or private. The port structure impacts responsibilities related to ownership, administration, nautical management, infrastructure, cargo handling, pilotage, towage, mooring, and dredging, among others.

Public and Private Roles in Port Management

There are four port management models that differ according to the combination of responsibilities delegated to public and private sector actors. These include: (1) public operator ports, (2) quasi-public operator ports, (3) landlord ports, and (4) private ports. The four port management models are discussed in more detail below.

Each of the port models have different characteristics regarding the ownership of infrastructure, equipment, terminal operation, and who provides port services such as pilotage and towage. Models have different orientations toward the best strategies to achieve the stated goals of a port, whether they be “public interest” oriented, are geared toward the market and maximizing shareholder profits, or somewhere in between, as is the case with landlord ports.

These operating structures carry a range of advantages and disadvantages in terms of port administration, and different kinds of ports tend to adopt different forms of management structures. Many large coastal ports are public operating ports – though the landlord model is becoming increasingly dominant – while it is more common for inland ports to function as private operator ports.

1) Public operator port

Public operator ports have a port authority that performs a range of port-related services, including ownership of the port infrastructure. Public operator ports are commonly a branch of a government cabinet or ministry, and most, if not all, of their employees are civil servants. However, some ancillary services can be outsourced to private companies. While the number of public operator ports has fallen due to the model’s inefficiencies, it remains a common management model for large coastal ports.

A key advantage of public operator ports is their ability to make decisions about large-scale infrastructure changes in-house. As such, they can implement policy changes without negotiating with all port tenants. Because of the close involvement and support of the government, decisions are driven by a desire to maximize the public interest rather than by profit margins. But this orientation can often lead to inefficient resource use. Other disadvantages of this model include inflexibility in resolving labor disputes and limited access to private funding. In Kentucky, the Port of Paducah qualifies as a public operator port, while some larger ports in the coastal U. S., such as the Port of Houston (Texas) and the Port of Savannah (Georgia) are major public operator ports.

2) Quasi-public operator port

Quasi-public operator ports share functional characteristics of public operator and landlord ports. One example of a quasi-public operator port is the so-called “tool port”, in which only cargo operations are handled by a private company, while other operations — including the ownership of terminal equipment and infrastructure — remain in the hands of the public port authority. While quasi-public operator ports are not necessarily more responsive to market demands than public operator ports, they are functionally simpler and have more streamlined operations than landlord ports. Even though the public port may own the equipment being used, any decision making cannot be unilateral, and thus may force the port to put private interests ahead of public interests. The Port of Norfolk (Virginia) is an example of a quasi-public operator port.

3) Landlord port (public and private)

Landlord ports, which can be both public and private, are the operational model most commonly used in the U.S. At landlord ports, port authorities lease infrastructure — especially terminal infrastructure — to private companies, with the port authority retaining ownership of the land. The most common form of lease is a concession agreement where a private company obtains a long-term lease in exchange for rent. Rents are calculated based on the size of the facility and on the investment required to build, renovate, or expand the terminal. Lessees are responsible for providing terminal equipment so that port operating standards are maintained. While a key advantage of the landlord model is that it minimizes expenditures on the part of the public port authority, this is counteracted by the port authority’s relinquish of control over port operations to the lessee. For example, were any upgrades desired or deemed necessary by the port authority officials, they would have to persuade their tenants to make those upgrades, rather than doing it themselves. The Port of Louisville is a nearby landlord port, while the Ports of Memphis (Tennessee), New Orleans (Louisiana) and New York are other examples from around the U.S. The much larger international Ports of Singapore, Antwerp, and Rotterdam are also landlord ports.

An intermediate form of port management is the corporatized port, which is not entirely privatized, insofar as the public remains a majority shareholder. The port authority essentially behaves as a private enterprise. This is the only management model under which ownership and control of the port are separated, lessening the public interest pressures faced by some landlord ports while minimizing the shareholder value pressures faced by private ports.

4) Private port (operator and landlord)

The private operator port is the most common management structure among U.S. inland waterway ports. The fully-privatized port places almost all aspects of ownership and operation under private control, with the public sector retaining only a standard level of regulatory oversight. However, under the private operator port model, public authorities can be shareholders in order to orient the port toward desired policies or strategies that are compatible with the public interest.

There are some further distinctions to be made among different kinds of private operator ports. They can function either as wholly private organizations developed in response to specific business opportunities, or as subsidiaries of larger corporations that ship large quantities of goods via the inland waterways transportation system. Under these circumstances, it is financially prudent to own and have access to a port facility that is entirely dedicated to a particular company's needs. For example, of the over 300 ports along the Ohio River, only a small proportion are public. Coal-fired power plants, which have coal shipped directly to them via barge, rank among the largest users of the inland waterway system. Some private ports, such as Cinbulk Terminals Inc., located in Cincinnati, have stepped in to provide corporations with direct access to coal on a just-in-time basis. And while Cinbulk has been largely successful in this venture, the declining market for coal has led Cinbulk to deal in a variety of other products. By increasing its handling of alternative break bulk and aggregate commodities and leveraging their competitive advantage as a private port, they save customers the time and expense that come from having commodities pass through multiple handlers before reaching their destinations.

Compared to other port operating frameworks, there are advantages and disadvantages to the private port model. Private ports can cater to market imperatives rapidly, as has been the case with Cinbulk, which results in high levels of flexibility. This places the ports in a better position to fortify their economic sustainability. Yet, because market concerns drive port operations, decisions are made to maximize returns on investment— in the interest of the financial bottom line.

Port of Cincinnati

Along the 100-mile stretch between the Ports of Cincinnati and Northern Kentucky and the Port of Portsmouth, there are no public riverports. Although Maysville is designated as part of the Ports of Cincinnati and Northern Kentucky – which expanded in 2015 to include 200 miles along the Ohio and Licking Rivers – it is located 50 miles to the east, midway between Cincinnati and Portsmouth. The expansion of the Ports of Cincinnati and Northern Kentucky includes the portion of the river from the Greenup-Boyd County Port to the east of Cincinnati to the Port of Louisville in the west, thus including the potential Maysville-Mason County Port. Accounting for its new boundaries, the Ports of Cincinnati and Northern Kentucky move approximately 48 million tons of cargo per year, ranking it 15th among all U.S. ports and second among U.S. inland ports.⁵ It is unclear how this re-designation may impact efforts to establish a port in the Maysville area, although more intensive marketing efforts by the Ports of Cincinnati and Northern Kentucky may help increase the visibility of water transport.

⁵ <http://www.cincinnatiport.org/ohio-kentucky-leaders-convene-to-tout-ohio-river-commerce/>

VIII. Funding Opportunities for Port Development

Funding opportunities to support development of the Maysville-Mason County River Port include: (1) federal and state government grants, (2) various forms of tax incentives, and (3) low-interest loans to finance projects that would contribute to regional economic development. These opportunities, outlined in the list below, will guide the Port Authority in its efforts to secure funding for port development.

1) Transportation Investment Generating Economic Recovery (TIGER) Grants

The purpose of the Transportation Investment Generating Economic Recovery (TIGER) Discretionary Grant program is to provide an opportunity for the U.S. Department of Transportation (USDOT) to invest in road, rail, transit, and port projects that are likely to achieve critical national objectives. In 2015, Congress appropriated \$500 million for national infrastructure investment. TIGER funds are awarded on a competitive basis. Successful projects will “leverage resources, encourage partnership, catalyze investments and growth, fill a critical void in the transportation system, or provide a substantial benefit to the nation, region, or metropolitan area in which the project is located.”⁶ Projects eligible for TIGER funding for FY 2015 are capital projects. In previous years, TIGER grants have been eligible for planning studies. In the future, if planning studies are included and funded by TIGER grants, the Maysville-Mason County Port could benefit from submitting an application.

The Maysville-Mason County Port Authority is well-positioned to apply for any grant money that is allocated to rural locations. In previous years, the USDOT required that no less than \$120 million (or 20 percent of the total \$600 million available) be devoted to projects in rural areas. For the purposes of the TIGER grant, the USDOT defines an area as rural if it is not a part of a Census-defined Urbanized Area (population > 50,000). Based on this classification⁷, Maysville qualifies, and thus would be eligible for some portion of funds earmarked for rural areas in future grant competitions.

2) Foreign Trade Zone Designation

A Foreign Trade Zone (FTZ) is an area located within or adjacent to a U.S. Port of Entry. In FTZs, commercial merchandise – of either domestic or foreign origin – is treated by U.S. Customs *as if* it were outside the commerce of the U.S. Merchandise held in an FTZ is not subject to duties and other ad valorem taxes. It can enter the FTZ without: 1) formal customs entry, 2) the payment of customs duties, or 3) the payment of federal excise tax. The purpose of eliminating tariffs and taxes is to reduce the costs of U.S.-based operations who participate in international trade. This gives ports a chance to create new employment and to take advantage of capital investment opportunities that result from being designated as an FTZ. Consequently, ports that double as FTZs enjoy significant economic benefits that enhance their financial sustainability.

⁶ <http://www.transportation.gov/tiger/faq>

⁷ http://www2.census.gov/geo/ua/ua_st_list_uc.txt

The certification required to qualify for a FTZ costs approximately \$150,000, which is a steep cost for some inland river ports. From a sustainability perspective, being designated a FTZ increases the likelihood that a port can support some form of niche container-on-barge service. Although the FTZ designation is expensive, several parts of the Ohio River have this designation. In Cincinnati and Northern Kentucky there are two active FTZs. FTZs 46 and 47 are located in Boone, Kenton, and Campbell Counties in Kentucky and in Hamilton, Butler, Clermont, Brown, and Warren Counties in Ohio, respectively.⁸ The main advantage of being designated an FTZ is the cost advantages for companies engaged in business internationally, which can reduce production and supply chain costs. Although lacking this designation may hinder potential opportunities for the proposed Port of Maysville-Mason County, it is possible that because nearby ports are already FTZs, that no additional international business would be attracted from being an FTZ.

3) Marine Highway Designation and Funding

The original purpose of the U.S. Marine Highway system was to have waterways “[s]erve as extensions of the surface transportation system.”⁹ However, the Coast Guard and Maritime Transportation Act of 2012 expanded the scope of the program to include “efforts that generate public benefits by increasing the utilization or efficiency of domestic freight or passenger transportation on Marine Highway Routes between U.S. ports.”¹⁰ Given that the proposed Maysville-Mason County Port is located along the Ohio River, which has already been designated a U.S. Marine Highway (M-70), the port would be eligible for a number of funding opportunities. Chief among these is the Marine Highway Projects Open Season Grant Opportunity¹¹, which will remain open until September 30, 2016. The purpose of the current grant opportunity is to seek eligible Marine Highway projects that establish new or enhance existing Marine Highway services. It is intended that Marine Highway Program designated projects can improve safety and system resilience and reduce transportation air emissions, transportation costs for shippers, energy consumption, and the cost of landside transportation infrastructure.

4) Matching Grants from the Commonwealth of Kentucky

Some funding is available from Kentucky state government in the form of matching grants for active public riverports. A total of \$2 million was appropriated from FY 2012-2015, at \$500,000 per year (through HB 236¹²). Funding for active public riverports is currently available through HB 236, which is the transportation budget bill through FY 2016. Active public riverports were appropriated \$500,000 in non-recurring funds for each year through FY 16. The funds have already been distributed for FY 15 through the Water Transportation Advisory Board’s (WTAB) based on a recommendation issued to the Secretary of Transportation in late 2014. The duties of the WTAB are detailed in KRS

⁸ <http://www.cincinnatiport.org/tools-regional-international-trade-ftzs-46-47/>

⁹ http://www.marad.dot.gov/documents/AMH_Fact_Sheet_V11.pdf

¹⁰ http://www.marad.dot.gov/ships_shipping_landing_page/mhi_home/mhi_home.htm

¹¹ http://www.marad.dot.gov/documents/79_FR_31404_Open_Season_Announcement.pdf

¹² <http://www.lrc.ky.gov/record/14RS/hb236.htm>

174.205. Appendix A includes the relevant text regarding the WTAB and other potential state level support.

5) State Incentives for Economic Development

Financial incentives are available through Kentucky state government for both small and large businesses, making investing in the BTADD easier and more attractive. Though the state has a range of tax incentives and other financing programs available to businesses, of particular interest for the potential development of the Maysville-Mason County Port are those incentives focusing on the development of manufacturing and agribusiness activities. These industries would be more likely to use the inland waterway transportation system.

Grant programs such as Kentucky Business Investment Program, Kentucky Enterprise Initiative Act, Kentucky Reinvestment Act, and Kentucky Industrial Revitalization Act all provide tax-based incentives for new and existing businesses, provided they meet certain guidelines for private investment (ranging from as little as \$100,000 to as much as \$2.5 million) and prevailing wages. Each of the five counties in the Buffalo Trace Area Development District are classified by the Cabinet for Economic Development as “enhanced incentive” counties, which are targeted for investment due to their comparatively high levels of economic disinvestment and job loss. Because of this classification, businesses receiving tax incentives in these counties operate using relaxed wage standards. Wages need to be only 125 percent of the federal minimum wage, rather than the 150 percent required of businesses receiving tax credits in other counties.

The Cabinet for Economic Development operates a series of low-interest loan programs for business development, such as the Kentucky Economic Development Finance Authority Direct Loan program, which can provide loans as small as \$25,000. There are also programs for Industrial Revenue Bonds and Small Business Direct Loans, and the state disburses Community Development Block Grant funds from the U.S. Department of Housing and Urban Development that can be used for economic development.¹³

Although Kentucky Agricultural Development Funds are not traditionally allocated for port development, in 2014, the Meade County Riverport Authority received a \$2 million grant from the Kentucky Agricultural Development Board to build a regional port facility in Brandenburg, Kentucky. The port’s purpose is to “provide the agricultural community with a more economical way of processing and storing multiple commodities, separating specialty grains for export and loading commodities onto barges.”¹⁴

¹³ <http://thinkkentucky.com/kyedc/kybizince.aspx>

¹⁴ Area Development. 2014. Construction Begins on Brandenburg, Kentucky Regional Port Facility. Available at: <http://www.areadevelopment.com/newsitems/1-2-2014/meade-county-riverport-authority-project892389.shtml>

IV. Recommendations and Conclusion

The anticipated growth in regional and national freight traffic signals the need for continued development of a multimodal infrastructure to expedite the movement of goods. The inland waterways system remains underutilized and can handle additional capacity expected in the coming years. The development of a port in Maysville can spur economic growth, create job opportunities, and situate the town as a key node in a growing national and regional freight network.

There are several recommendations that emerge from this report. The ideal location for a port has been identified: the Charleston Bottom site. It has easy rail and highway access, it is partially cleared, and it lies near the 500 year floodplain. While the land is currently owned by CSX, the company is willing to work with the Maysville-Mason County Port Authority to facilitate its transfer. A survey has been developed and administered to businesses in the BTADD regarding their current shipping methods and level of interest in using a port facility. Appendix B contains a list of the survey questions and responses. Responses to these questions could be a key factor in determining if there is enough interest in water transportation and in developing a facility in Maysville. The responses could justify these initial steps: property acquisition and infrastructure development. Seven out of nine respondents indicated they would consider using a multimodal rail and port facility in the area if one existed. Products currently being shipped in the BTADD include automotive parts, fertilizer, building materials, and fabricated steel. Truck and rail are the current primary means of shipping.

A brochure has also been produced that will be distributed to current and potential clients. It highlights the benefits of the BTADD and describes what economic opportunities a new port would present to the community. Marketing efforts should focus on widely distributing this brochure and aggressively reaching out to current and potential businesses. Further, the port authority would be well-served by developing a website where interested parties can obtain more information about the BTADD and the proposed port. Several Kentucky riverports maintain websites with information about their operations (shown in Table 6).

Table 6: Public Riverport Websites in Kentucky

Greenup-Boyd County Riverport Authority	www.wurtlandriverport.com
Henderson County Riverport Authority	www.hendersonport.com
Hickman-Fulton County Riverport Authority	www.hickmanriverport.com
Jefferson Riverport International	www.jeffersonriverport.com
Owensboro Riverport Authority	www.owensbororiverport.com
Paducah-McCracken County Riverport Authority	www.paducahriverport.org

If stakeholders express sufficient interest in port development, the authority should acquire the Charleston Bottom site and work with CSX to determine the necessary capital investments needed to open a port such that TTI and CSX can begin using the property quickly. Achieving success will require the tapping into funding sources, such as a TIGER grant. Construction would likely proceed in several phases, beginning with the property

transfer and undergoing the National Environmental Policy Act (NEPA) process. Later phases would turn toward capital improvements: site clearing, putting loading facilities in place, and constructing paved roads to the site. To facilitate the construction process, the port authority may need to fund a full time position dedicated to port development.

APPENDIX A: Kentucky Revised Statutes Related to Port Funding

174.205 Duties of Water Transportation Advisory Board.

The Water Transportation Advisory Board shall:

- (1) Advise the Transportation Cabinet, the Cabinet for Economic Development, the Governor's Office, and the General Assembly on matters relating to water transportation;
- (2) Recommend action to enable the Commonwealth to make best use of its waterways and riverports for future economic growth;
- (3) Assist in defining the duties and functions of positions within state government responsible for water transportation;
- (4) Recommend criteria for setting priorities for funding riverport marketing initiatives under the riverport marketing assistance trust fund established in KRS 154.80-140;
- (5) Evaluate applications submitted by riverports for grants under the riverport marketing assistance trust fund and make recommendations to the granting authority on the disbursement of those funds;
- (6) Recommend criteria for setting priorities for funding riverport improvements under the riverport financial assistance trust fund established in KRS 174.210; and
- (7) Evaluate applications submitted by riverports for grants under the riverport financial assistance trust fund and make recommendations to the granting authority on the disbursement of those funds.

HB 236:

Riverport Improvements: Included in the above General Fund appropriation is \$500,000 in each fiscal year to improve public riverports within Kentucky. Improvements shall be limited to dredging and maintenance of access. The Secretary of the Transportation Cabinet, in conjunction with the Kentucky Water Transportation Advisory Board, shall determine how the funds are distributed.

174.210 Riverport financial assistance trust fund – Contributions – Purpose – Grants – Annual report.

- (1) There is created a riverport financial assistance trust fund, to be administered by the Transportation Cabinet.
- (2) The riverport financial assistance trust fund may receive appropriations, federal funds, contributions, gifts, and donations.
- (3) The purpose of the riverport financial assistance trust fund shall be to improve riverport facilities and infrastructure, to capture the economic and trade potential offered by water transportation. To the extent funds are available, the fund shall make grants to riverport authorities for new construction and major replacement or repair projects, including but not limited to improvement of docks, wharves, equipment, port buildings, storage facilities, roads and railroads to facilitate the flow of commerce through the port, other on-site improvements, and related professional services. Eligible projects shall not include routine operations, maintenance, or repair activities.
- (4) Notwithstanding KRS 45.299, moneys remaining in the fund at the close of a fiscal year shall not lapse but shall carry forward into the succeeding fiscal year. Interest earned on any moneys in the fund shall accrue to the fund. Amounts from the fund shall be disbursed and expended in accordance with this section.

- (5) To be eligible for a grant under this section, the applicant shall provide at least a twenty percent (20%) match, which may be obtained from any public or private source.
- (6) (a) Grant applications shall be reviewed and awarded annually.
- (b) The Transportation Cabinet shall submit all applications to the Water Transportation Advisory Board established by KRS 174.200 for evaluation and recommendations prior to awarding any grant funding under this section.
- (c) Priority shall be given to applicants with a riverport master plan, for capital-intensive projects for which permits have been obtained, and for projects for which matching funds have been obtained.
- (7) The Transportation Cabinet shall submit on an annual basis a report detailing all grants awarded under this section to the Water Transportation Advisory Board, the Interim Joint Committee on Transportation, and the Interim Joint Committee on Appropriations and Revenue.

154.80-140 Riverport marketing assistance trust fund – Contributions – Purpose – Grants – Semiannual report.

- (1) There is created the riverport marketing assistance trust fund, to be administered by the Cabinet for Economic Development.
- (2) The riverport marketing assistance trust fund may receive appropriations, federal funds, contributions, gifts, and donations.
- (3) The purpose of the riverport marketing assistance trust fund shall be to promote and market Kentucky's riverport to industrial, business, and commercial prospects, to attract economic development. To the extent funds are available, the fund shall make grants to riverport authorities for marketing activities, including research, advertising, participation in trade shows, and preparation of promotional materials. Grants shall not be used for activities such as salaries, administrative expenses, or internal newsletters.
- (4) Notwithstanding KRS 45.299, moneys remaining in the fund at the close of a fiscal year shall not lapse but shall carry forward into the succeeding fiscal year. Interest earned on any moneys in the fund shall accrue to the fund. Amounts from the fund shall be disbursed and expended in accordance with this section.
- (5) Grants under this section shall not exceed fifteen thousand dollars (\$15,000) per project or thirty thousand dollars (\$30,000) per applicant each year. Projects shall be completed within one (1) year of funding. To receive a grant, an applicant shall provide at least a fifty percent (50%) match, which may be obtained from any public or private source.
- (6) (a) Grants shall be reviewed and awarded semiannually.
- (b) The Cabinet for Economic Development shall submit all applications to the Water Transportation Advisory Board established by KRS 174.200 for evaluation and recommendations prior to awarding any grant funding under this section.
- (c) Higher priority shall be given to applications with a larger share of match money, for those where the match money has already been obtained, and for projects with a detailed riverport marketing plan.
- (7) The Cabinet for Economic Development shall on a semiannual basis submit a report detailing all grants awarded under this section to the Water Transportation Advisory Board, the Interim Joint Committee on Transportation, and the Interim Joint Committee on Appropriations and Revenue.

APPENDIX B: BTADD Survey of Industry and Farm Exports

Survey

The following survey will be used to gauge the level of interest your company may have in shipping products via the inland waterway system if a port was conveniently located to your company.

The price of shipping commodities has continued to increase over the last 20 years. The cost of moving goods on roads and rail has gone up for a variety of reasons, including increased demand for these types of shipping services. As companies look to decrease shipping costs, one opportunity to achieve cost savings is by shipping commodities on the inland waterways. Many commodities are currently shipped on the Ohio River, including bulk dry goods, raw materials for construction companies, steel mills, electric utilities, paper plants, chemical companies, petroleum, coal, and aggregates. Although waterway shipments are not appropriate for all commodities, many of the raw materials produced in the BTADD could be shipped via the inland waterway system.

- 1.) Company Name
- 2.) Please list the top three products your company produces.
- 3.) How many miles do you ship your finished products?
- 4.) Do you import any products/unfinished goods? If so, what form(s) of transportation do you use?
- 5.) What form(s) of transportation do you currently use for shipping?
- 6.) Would your company consider utilizing a multimodal (rail/port) facility in Maysville/Mason County for shipping/receiving?
- 7.) Contact Person

Survey Results

Due to the length of some responses, the results are broken apart, with the company name accompanying responses to the various questions, which are noted in the header of each table.

Company Name	Please list the top three products your company produces.
Maysville-Mason County Convention & Visitors Bureau	Contribute to the local and regional Economic Impact through tourism dollars Bed Tax Contribute to the tourism development for surrounding counties and state
CSXT Terminal	Rail Car Storage Barge loading of Coal Barge Loading Of Stone
Marshall Hauling LLC	We haul bulk fertilizer for local farm supply stores, normally go to Cincinnati or Louisville to get off of the barge.
Fleming-Mason Energy	N/A
Mitsubishi Electric Automotive America, Inc.	Automotive parts: ignition coils

	electronic power steering modules video entertainment systems
Stober Drives	Speed reducers (gearbox)
JSB Industrial Solutions, INC	Laser cut parts from flat steel Pallet Manufacturing Machinery Fabricated parts
Ranger Industrial Services	Customized steel fabrication
International Paper	Paper (liner and medium) used for making cardboard boxes

Company Name	Do you import any products/unfinished goods? If so, what form(s) of transportation do you use?	How many miles do you ship your finished products?
Maysville-Mason County Convention & Visitors Bureau	Not applicable	151+
CSXTTerminal	Rail, Water	151+
Marshall Hauling LLC	Not applicable	101-150
Fleming-Mason Energy	Not applicable	
Mitsubishi Electric Automotive America, Inc.	Truck, Rail, Other	1-50, 51-100, 101-150, 151+
Stober Drives	Truck	151+
JSB Industrial Solutions, INC	Not applicable	151+
Ranger Industrial Services	Truck	1-50, 51-100, 101-150, 151+
International Paper	Truck, Rail	1-50, 51-100, 101-150, 151+

Company Name	Would your company consider utilizing a multimodal (rail/port) facility in Maysville/Mason County for shipping/receiving?	Contact person
Maysville-Mason County Convention & Visitors Bureau	Yes	suziepratt@maysvilleky.net
CSXTTerminal	Yes	kendall_gulley@csx.com
Marshall Hauling LLC	Yes	Joseph Marshall
Fleming-Mason Energy		
Mitsubishi Electric Automotive America, Inc.	Yes	Chris Spiller cspiller@meaa.meaa.com 606-759-4504
Stober Drives	Yes	
JSB Industrial Solutions, INC	Yes	Shane Wallingford 606 798 5724 shane@economyballmill.com
Ranger Industrial Services	Yes	David Orme 606.564.9521
International Paper	No	Steve Braun Steven.Braun@ipaper.com

Additional notes were left by the following respondents:

Company Name	Notes
Marshall Hauling LLC	It could really help if there was a terminal 15-20 mins away.