

NH State Rail Plan Technical Advisory Committee

June 15, 2011



TAC Agenda

- Introductions
- Summary of work to date
 - Commodity data
 - Stakeholder interviews
- Discussion of findings
 - Business and planning interests
 - Freight
 - Passenger
- Future activities
 - Draft recommendations
 - Public meetings

Introductions

Welcome and Introduction

- Kit Morgan – NHDOT
- Lou Barker – NHDOT

- Ron O' Blenis, HDR, Project Manager
- Pam Yonkin, HDR
- Jim Stoetzel, Transit Safety Management
- Dick Flynn, CTC Group
- Carol Morris, Morris Communications
- Ben Ettelman, Morris Communications

- TAC Committee introductions

Summary of Work to Date

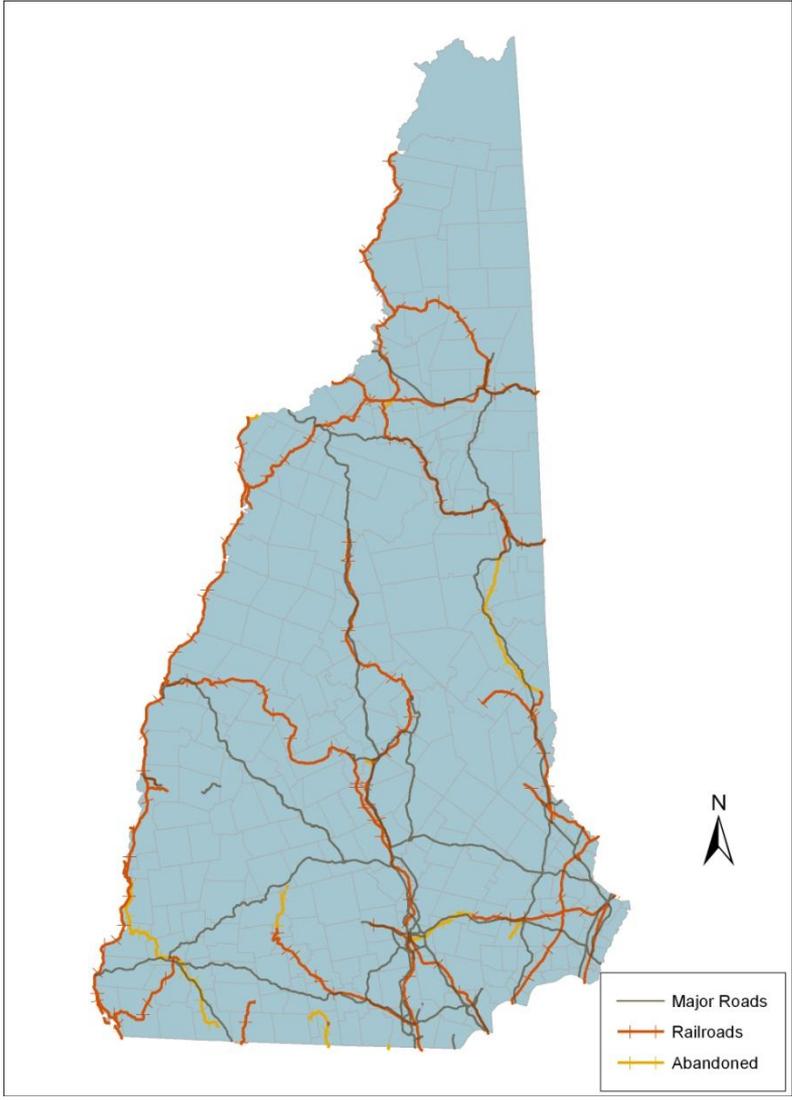
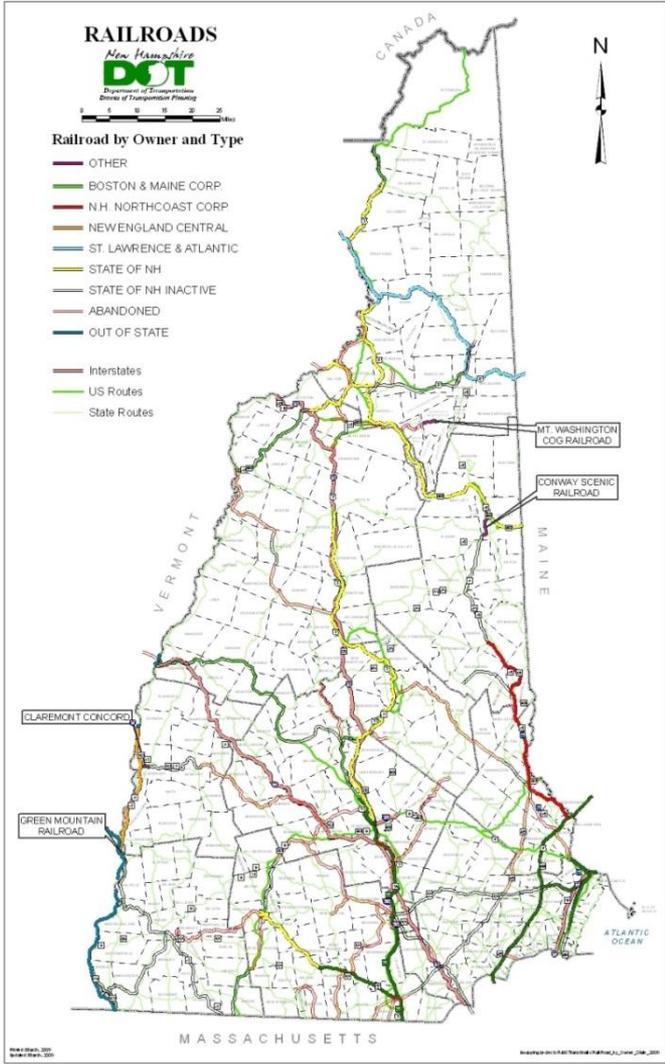
NH State Rail Plan Vision

revised based on TAC input

“Provides an efficiently utilized and well-maintained railroad system, expanded as appropriate to accommodate increases in freight and passenger demand for rail services.

It is a system that is fully integrated with the national, regional and statewide transportation system, connecting the state’s urban and rural communities, maximizing the opportunities for economic growth, promoting energy efficiency, and providing safe, secure and reliable transportation of people and goods.”

New Hampshire Railroads



Source: NH DOT

HDR Engineering and NHDOT



Miles of Railroad by Carrier

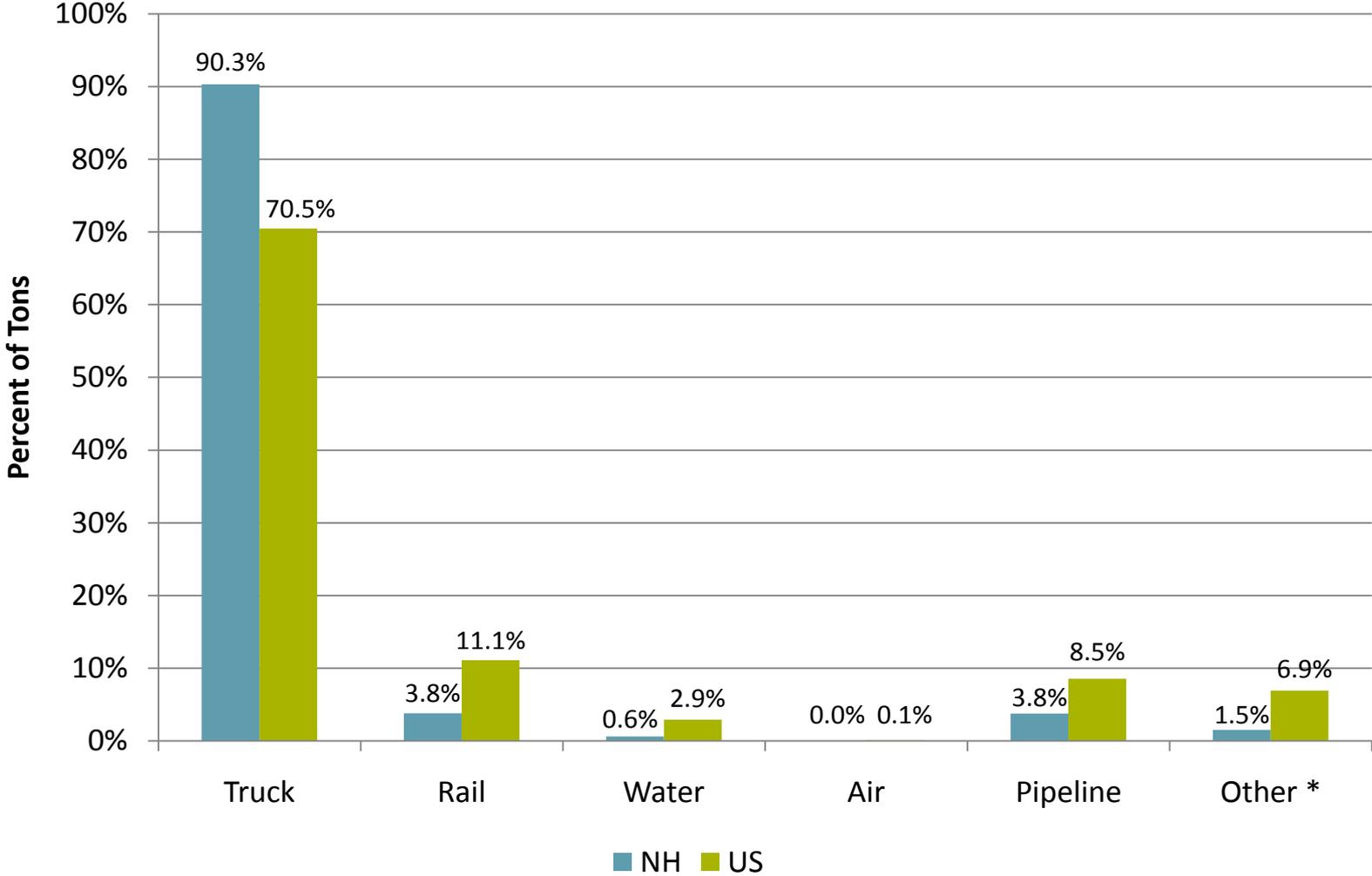
	Miles of Railroad	Percent
Class 1	<i>none</i>	
Regional Railroads		
Pan Am Railways	172.0	44.8%
Local Railroads		
Claremont Concord	5.0	1.3%
Green Mountain	2.0	0.5%
Milford-Bennington	19.0	5.0%
New England Central	26.0	6.8%
New England Southern	21.6	5.6%
New Hampshire Central	45.0	11.7%
New Hampshire Northcoast	41.0	10.7%
St. Lawrence & Atlantic	52.0	13.6%
Total	383.6	

Data Used for Commodity Analysis

- Freight Analysis Framework (FAF)
 - Maintained by the Federal Highway Administration (FHWA)
 - Excludes through traffic
- Surface Transportation Board (STB)
Carload Waybill Sample
 - Based on a sample of confidential waybills filed with the STB
 - Contains commodity, origin, destination and NH through traffic
 - No county level data available for NH
- Commodity Flow Survey (CFS)
 - Shipper-based survey conducted every five years as part of the Economic Census
 - Provides modal picture of national freight flows

Modal Share in NH

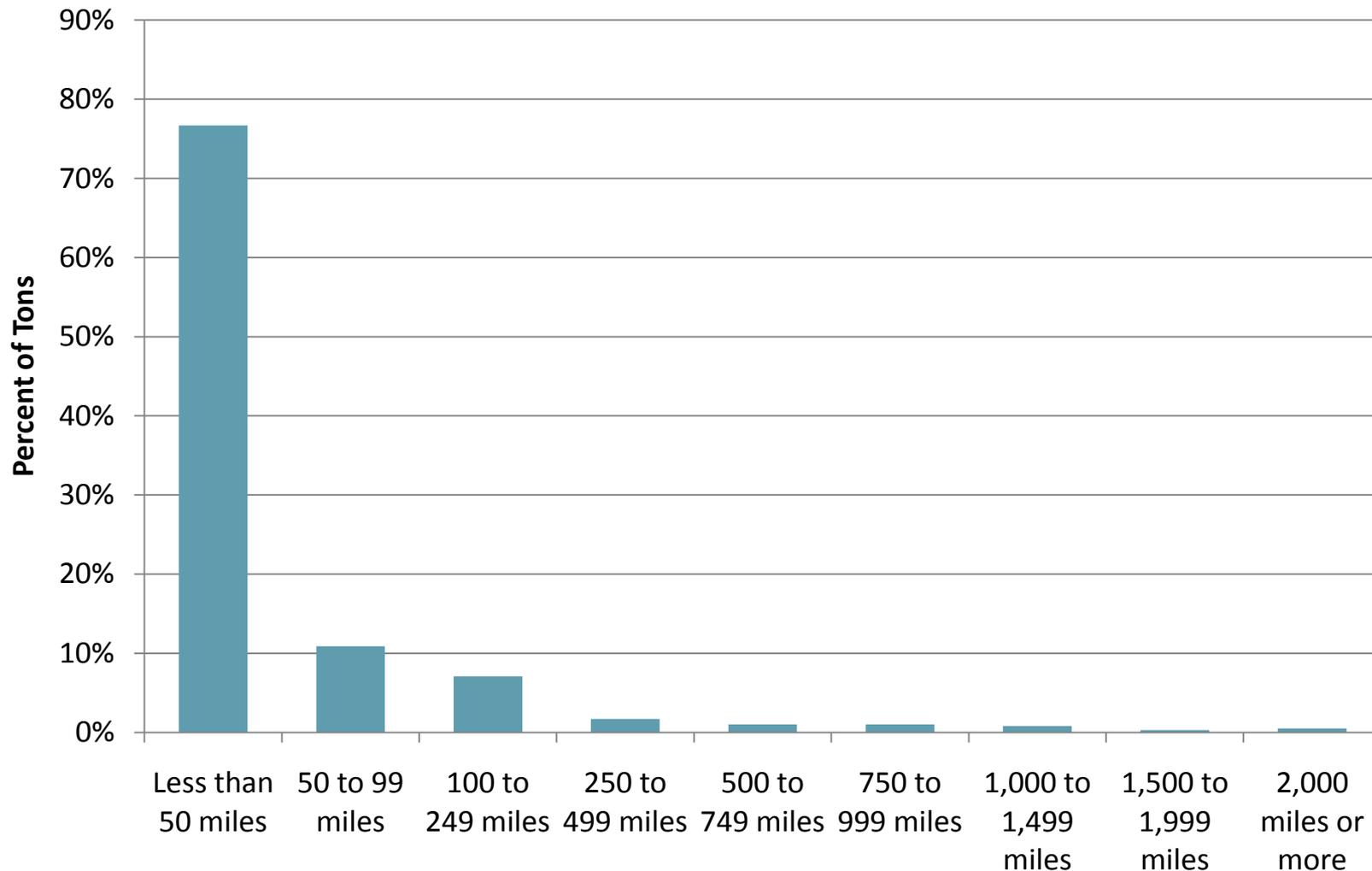
by weight & volume – 2009 FAF



Truck and rail tonnage obtained from FAF3 and adjusted by 2009 STB Waybill Sample data and other sources to account for through traffic not included in FAF3. * Other includes multiple modes, other and unknown.

NH Shipments By Distance

all modes – 2007 Commodity Flow Survey



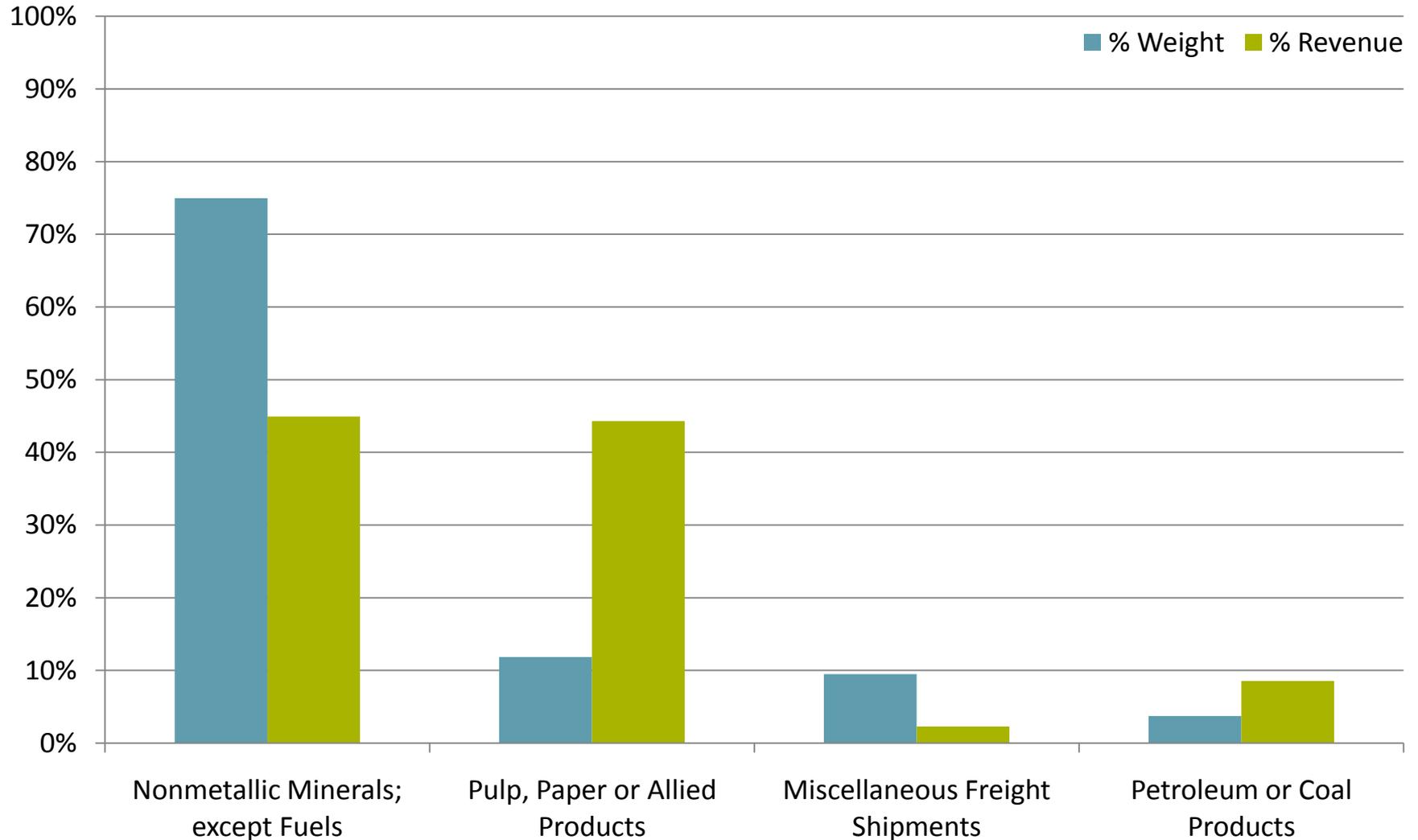
Source: 2007 Commodity Flow Survey

Freight Observations:

- Most freight is handled by trucks in NH
 - Trucks handle more than 90% based on weight
 - Rail handles approximately 3.8% based on weight
- Most freight in NH is short haul
 - 76% by weight moves less than 50 miles
 - 88% by weight moves less than 100 miles
- Rail ships heavier, bulkier commodities
 - Nonmetallic minerals
 - Coal
 - Lumber and paper products
 - Clay, stone, concrete

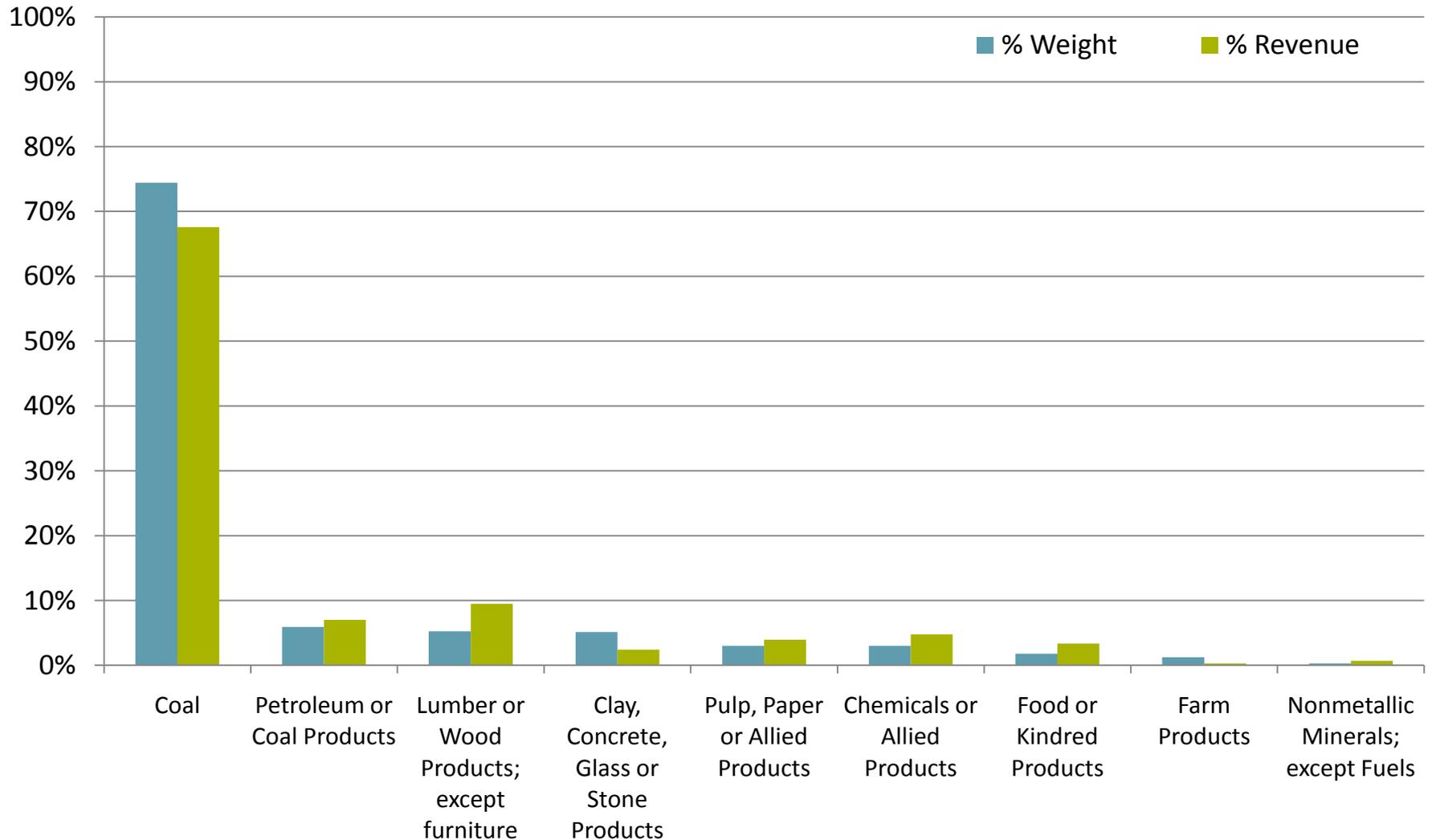
New Hampshire Originating Commodities

by weight & revenue, rail only – 2009 Waybill



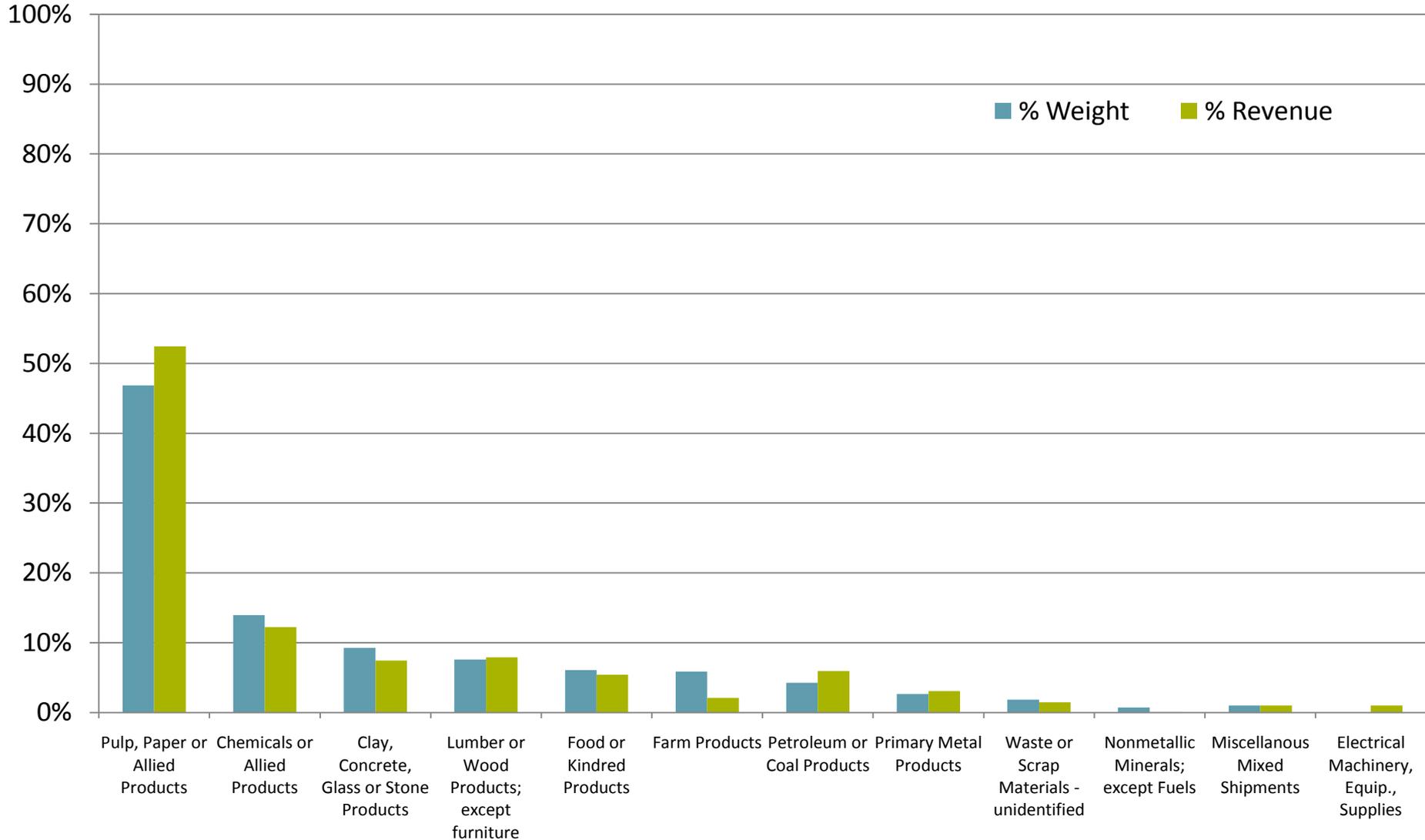
New Hampshire Terminating Commodities

by weight & revenue, rail only – 2009 Waybill

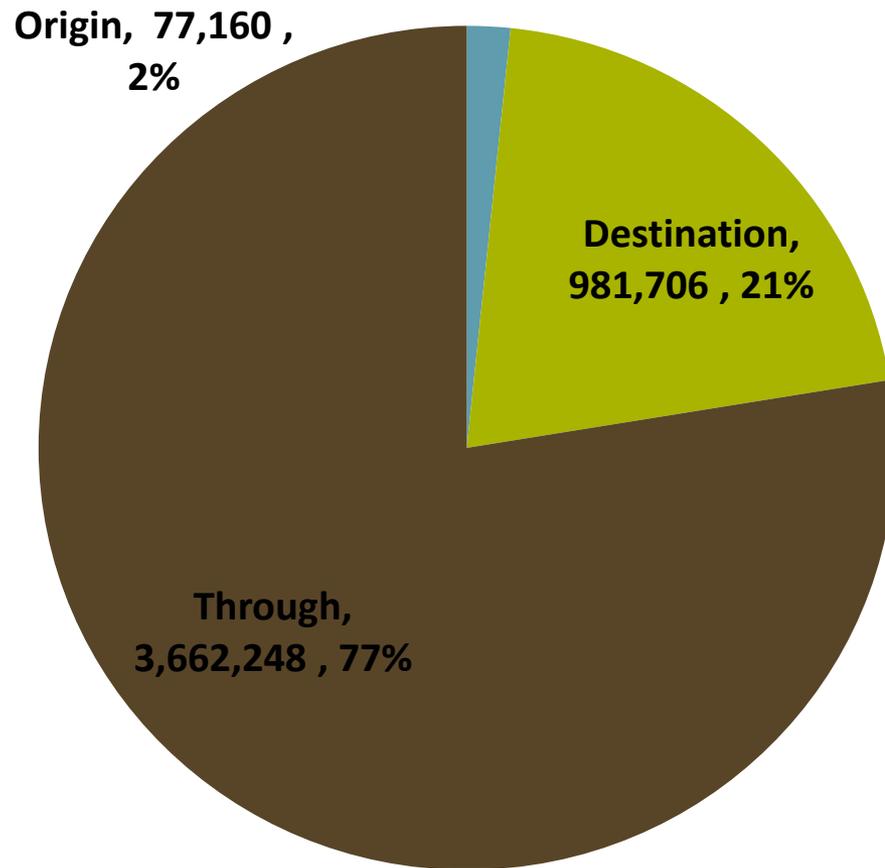


New Hampshire Through Commodities

by weight & revenue, rail only – 2009 Waybill



The Majority of Tons on NH Railroads is Through Traffic – 2009 NH Rail Tons



Source: 2009 Waybill data

Stakeholder Interviews

- Business and planning interests
 - Economic development organizations
 - Chambers of Commerce
 - Regional Planning Commissions
 - NH DRED
 - PSNH
- Freight
 - Diverse Group: 9 Shippers and/or Receivers
 - 3 Railroads – One Regional, Two Short Lines
- Passenger
 - New Hampshire Rail Transit Authority (NHRTA)
 - Tourist railroads
 - Amtrak – Downeaster & Vermonter
 - MBTA

Synopsis of Interviews – Business & Planning Interests

- “Diversity” of understanding regarding rail in NH
- General agreement that transportation, including rail, is important to NH economy
 - Some entities focused on passenger only
 - Other entities familiar with freight
- Discussion related to interconnectedness of passenger and freight rail
 - All passenger rail service runs on freight infrastructure
 - NH has rail capacity for both freight and passenger growth

Synopsis of Interviews - Freight

- Significant number of NH shippers depend on rail
Many support manufacturing jobs in the state
 - Tend to move bulk commodities and specialty products and chemicals
- Trucking is available alternative but not suitable for some shippers
 - Rail can handle heavier, bulkier freight
 - Rail can transport freight at a lower price than trucking can offer
 - Much of the existing rail traffic is not convertible to truck because of weight, cost and distance

Synopsis of Interviews - Freight

- Rail rates not highlighted as significant issue
- Dependability, consistent delivery and available frequency of service critical to ensure:
 - Ability of existing business to expand
 - Establishment of new rail-served business in NH
- If transit is delayed, shippers' inventory and logistics costs increase even with lower freight rates – rail cars not optimally utilized

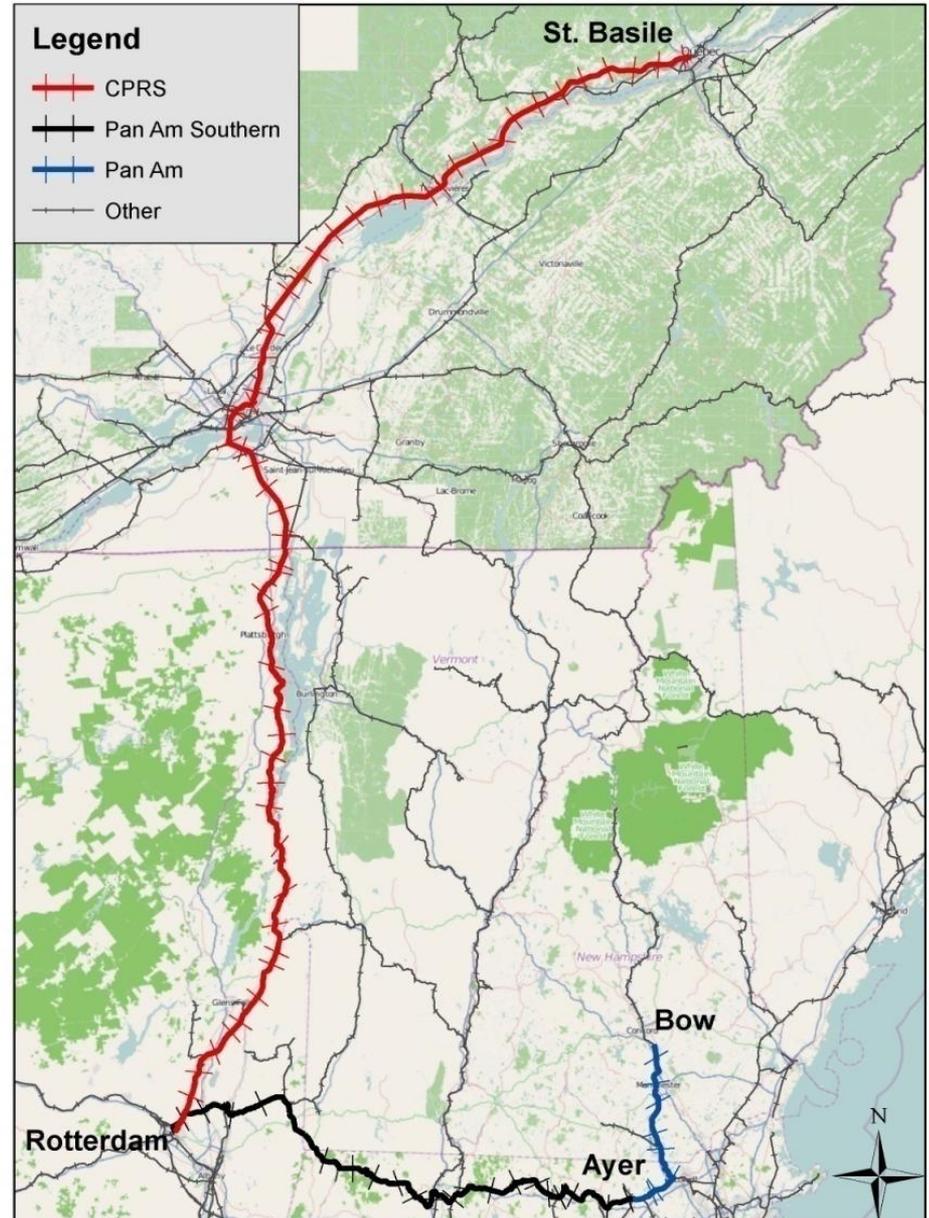
Synopsis of Interviews - Freight

- Could some rail shippers switch to truck transport?
 - Transportation costs likely to be higher
 - Increasing fuel costs have a greater impact on trucking operational costs
 - Higher costs passed on to NH consumers and businesses
- Without rail service, business viability questionable
 - Some shippers may not efficiently compete
 - Leads to reduction or elimination of jobs, loss of revenue to NH

Rail Freight Examples

Cement Inbound to New Hampshire

Source: NH DOT



Rail Freight Examples

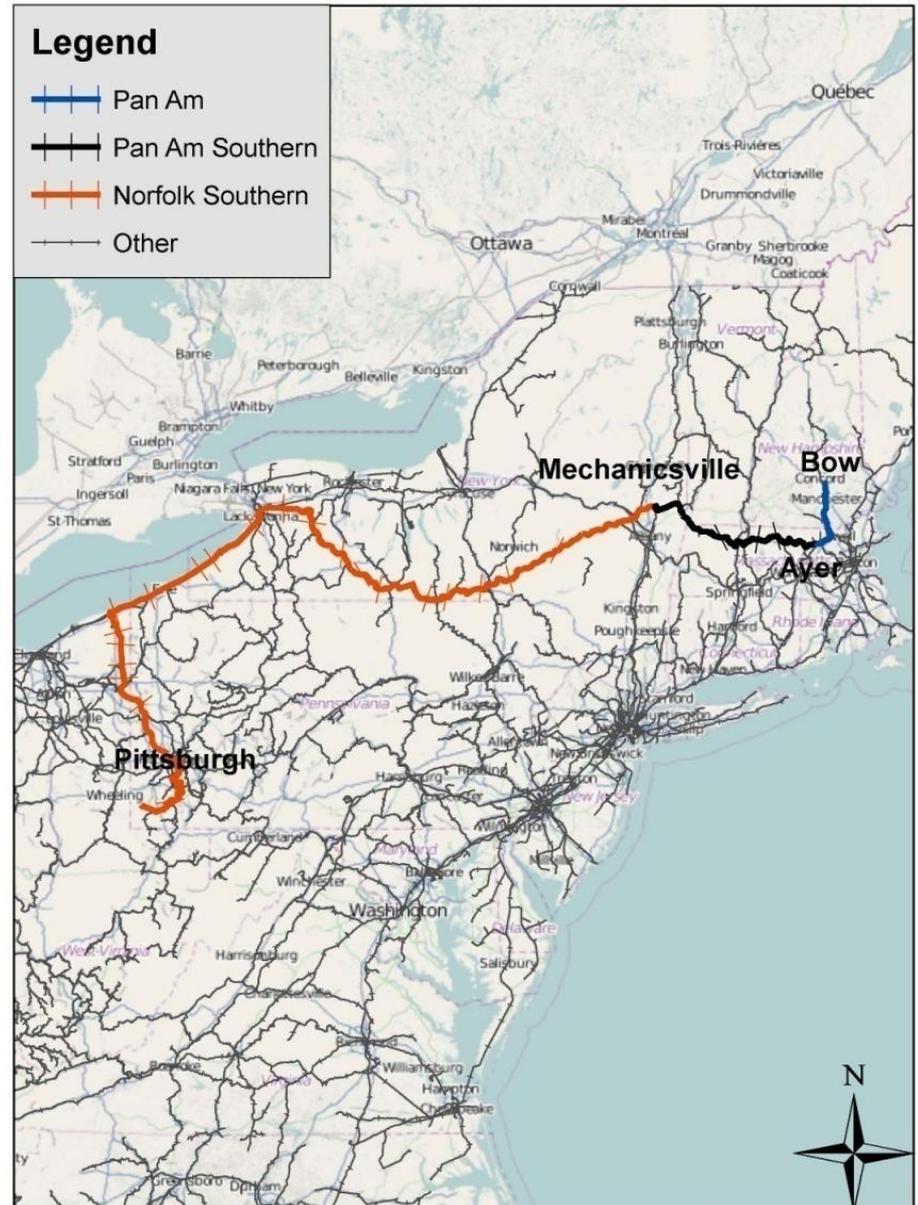
Quarry Sand
Outbound from New
Hampshire

Source: NH DOT



Rail Freight Examples

Coal inbound to New Hampshire

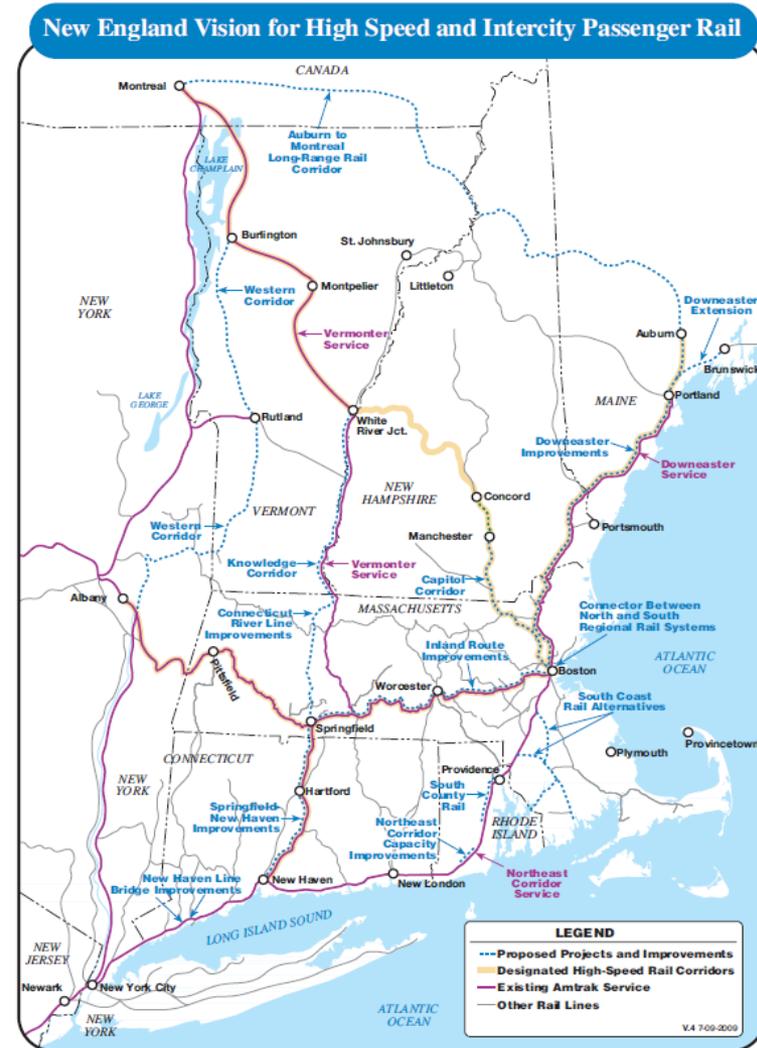
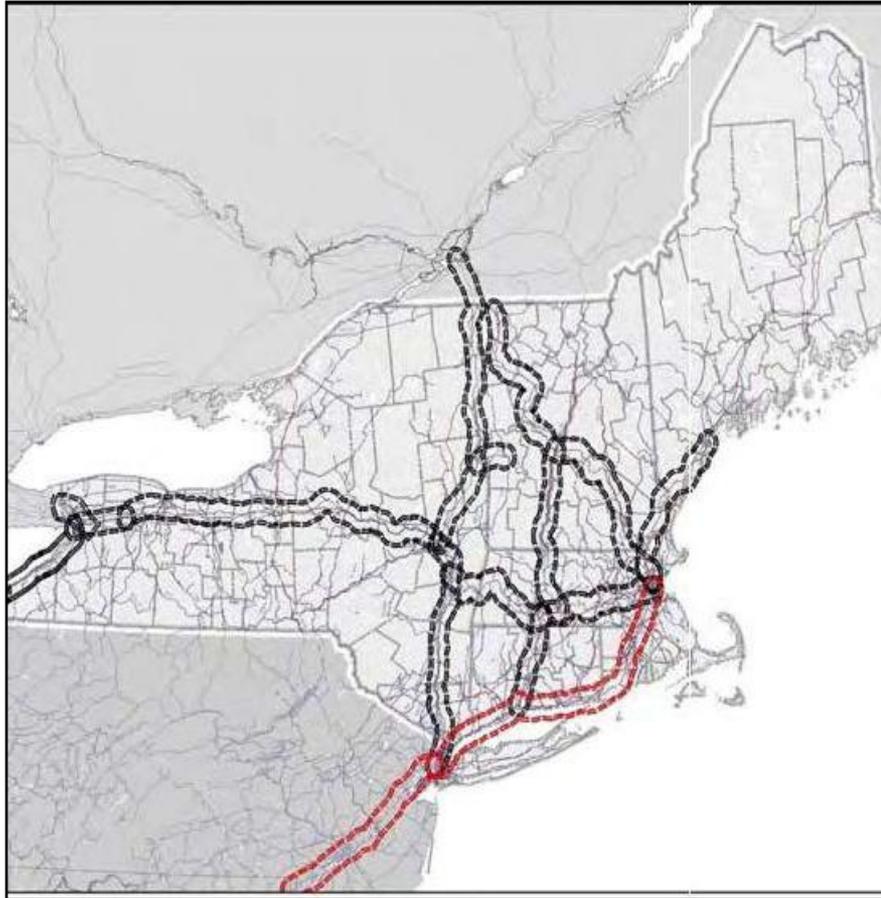


Source: NH DOT

Synopsis of Interviews - Freight

- NH has an opportunity for shared use of passenger and freight rail corridors:
 - Freight railroad owners willing to consider passenger rail service on their lines in NH
 - Opposition to shared use of rail lines occurs in other parts of the country
 - Freight rail infrastructure improvements benefit passenger rail and vice versa – passenger and freight rail complement one another in NH

Regional High Speed & Intercity Passenger Rail



Sources: CONEG, *Vision for the New England High-Speed and Intercity Rail Network* and I-95 Corridor Coalition, *Northeast Rail Operations Study, Phase II, Summary of Potential Rail Improvement Projects*.

Synopsis of Interviews - Passenger

- Passenger rail service is attractive & beneficial to NH
 - Almost 45% of “Downeaster” ridership – more than 200,000 trips per year – over the past three years comes from NH stations
 - Service extremely popular with the UNH community in Durham
 - Dover’s economic development plans are focused around the train station
 - Nearly half of NH ridership comes from Exeter – parking lot is over capacity on a daily basis
- Potential commuter rail service opportunities, Plaistow area, Nashua-Concord “NH Capitol Corridor,” could produce similar result
 - Manchester Airport could benefit from such a service expansion

Synopsis of Interviews - Passenger

- Providing more than one mode of passenger transportation and integrating those modes is critical
- Host railroads recognize potential benefit from passenger service
- Improved infrastructure/increased capacity required for passenger service can enable freight rail operators to provide customers with more reliable/frequent service
- Improved/expanded passenger rail service may offer a viable alternative to driving to many destinations
 - Major tourist attractions
 - “Reverse commute” opportunity for businesses wanting to establish/expand in NH

Amtrak Boardings & Alightings in NH FY 2010

- Amtrak operates two regional services within NH
 - The Downeaster (5 daily round trips Portland-Dover-Boston)
 - The Vermonter (Washington, D.C.-New York-St. Albans, Vt. via Claremont)

City	Boardings & Alightings
<i>Vermonter</i>	
Claremont	1,967
<i>Downeaster</i>	
Dover	57,241
Durham - UNH	54,777
Exeter	90,123
Total NH Station Usage	204,108

Source: Amtrak – Fact Sheets

Rail to Highway Diversion Impacts

- Truck weight increase to 90,000 lbs could divert 19% of rail traffic to highways
- Truck weight increase to 97,000 lbs could divert 21% of rail traffic to highways
- Allowing longer combination vehicles (LCVs) – like long double and triple trailer trucks could divert 28% of rail traffic to highways
- Diversion from rail to heavier trucks could increase the current number of truck trips from 1 to 10%
- Diverted rail traffic would reduce sustainability of many rail operations

Rail to Highway Diversion Impacts

- The diversion of traffic from rail to truck could add 6-12 million truck trips
- Higher congestion would increase with increased truck trips
- The diversion of rail traffic to truck could add 3-5 billion truck-miles to the nation's highways
- Potential increased truck traffic could result in \$2.6 billion in additional pavement maintenance costs (at \$0.52 per truck mile)

Discussion of Findings

Business and planning

1. Transportation identified as important to NH business and economic growth
 - Experts suggest that more information about rail would be useful to their economic development efforts
2. Passenger rail would help some businesses with employee recruitment
3. Important to further educate broad range of people on value of NH's rail network

Why does freight rail matter?

Businesses that use rail:

1. Pay taxes
 - Business Profits Tax
 - Business Enterprise Tax
 - Property Tax
2. Employ NH residents
3. Reduce highway congestion
4. Decrease emissions levels
5. Lessen highway wear and tear
6. Tie NH to the national network

Why does freight rail matter?

- One major existing rail receiver employs 100-249 people and earned \$2.5-\$5 million in annual revenue
- Another employs approximately 60 people and earned \$50-\$100 million in annual revenue
- Yet another employs 125 people
- The freight railways employ 216 in NH

Passenger rail

1. Tourist railroads generate \$8-10 per passenger in tourism dollars for the state – more than \$1.5 million per year
2. NH stations generate almost half of the Downeaster ridership in the Boston-Portland corridor
 - Additional parking at those stations could increase that market share
3. Opportunities for additional passenger rail service in NH currently under close consideration:
 - Alternatives Analysis being undertaken for the Capital Corridor
 - Discussions with MA continue for service to Plaistow

Future Activities

Public Meetings

- Upcoming in September
- Help promote and utilize the NHDOT website
- Provide comments on NH State Rail Plan
- TAC: Promote and attend public meetings
 - We want TAC members to hear what the public thinks about rail – and help further educate

Wrap-up and Next Steps

- Public Meetings in September
- Next TAC Meeting
- Rail System Inventory
- Identify Opportunities