

## MEMORANDUM

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**TO:** Rachel Vandenberg  
**FROM:** Jeff Weisner  
**DATE:** February 1, 2012  
**RE:** Freight Nodes and Facilities

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## IDENTIFICATION OF FREIGHT NODES AND FACILITIES

This technical memorandum identifies primary nodes (origins, destinations, intermodal facilities and transfer points) used in the shipment of goods to and from existing and potential North Carolina State port facilities. These nodes have been identified through a qualitative assessment and review of the infrastructure network, review of recommendations and conclusions presented in the Statewide Logistics Plan and the draft Seven Portals Study, and through targeted stakeholder interviews (see Figure 1).

Stakeholder interviews were conducted by telephone and email with North Carolina Department of Transportation (NCDOT) Rail Division personnel, NCDOT Division Engineers, Global TransPark staff, North Carolina Department of Commerce (DOC) staff, North Carolina Metropolitan Planning Organizations (MPOs) coordinators, North Carolina Trucking Association (NCTA), and the North Carolina Chamber of Commerce (COC). These interviews supported the identification of locations of major freight origins, destinations, intermodal facilities, and transfer points. Interviews indicated that North Carolina freight travels primarily by truck and typically utilizes the Port of Norfolk, Virginia. Interviews did not yield any detailed information concerning primary nodes and facilities that are located outside of North Carolina.

## STAKEHOLDER INTERVIEWS

There were approximately 30 individual interviews conducted to support the identification of freight nodes and facilities within North Carolina. All stakeholder contacts were conducted by telephone or email during the period from mid-July 2011 to mid-September 2011, with the following sources:

- North Carolina Department of Commerce (DOC);
- North Carolina Chamber of Commerce (COC);
- North Carolina Department of Transportation (NCDOT) Operations, Rail Division and State Division Staff;
- North Carolina Trucking Association;
- Global TransPark Authority (GTP);

- State Metropolitan Planning Organizations (MPOs).

These interviews provided information for the identification of locations of major freight origins, destinations, intermodal facilities, Inland Ports and transfer points. Interviews did not yield information on primary nodes and facilities located outside of North Carolina. Interviews were consistent in identifying issues including needed upgrades to the existing rail and highway network and lack of transportation infrastructure funding. Better access to the ports was cited, and direct interstate routes are needed according to sources. Many of the comments received stated that one of the most pressing needs is updating and maintaining old systems. Summaries of these interviews are contained in the appendix.

## **EXISTING NORTH CAROLINA INFRASTRUCTURE**

### **Statewide Highway Network**

Truck routes consist of Interstate Highways, United States Highways and State Highways, as well as four-lane divided roadways. The truck network for this study has been defined based on information presented in the Freight Analysis Framework (FAF) modeling tool developed by the Federal Highway Administration (FHWA). The roadway network in the FAF shows the major routes trucks use and actual traffic volumes and truck volumes in Year 2007, as well as the projected volumes in Year 2040.

The Strategic Highway Network was considered in the identification of major routes using best professional judgment. Review of the highway network serving the State of North Carolina and port facilities in the neighboring states of Virginia, South Carolina, and Georgia identified the following primary nodes, crossroads of major interstate routes and rail lines, and intermodal terminals:

- Triangle Region: Cities of Raleigh, Durham, and Chapel Hill
- City of Charlotte Region
- Triad Region: Cities of Winston-Salem, High Point and Greensboro
- Intersection of Interstate 95 and Interstate 40 near Town of Benson
- Intersection of Interstate 95 and Interstate 74 near City of Lumberton
- Intersection of Interstate 40 and Interstate 77 near City of Statesville
- Intersection of Interstate 40 and Interstate 26 near City of Asheville
- CSX Rail Hub, City of Rocky Mount
- CXS Rail Hub, Town of Hamlet
- Norfolk Southern Rail Hub, Town of Linwood
- Wilmington Container Terminal at Port of Wilmington

Figure 1 illustrates North Carolina's statewide highway networks and nodes.

## Statewide Rail Network

North Carolina has over 3,251 miles of rail trackage operated by 23 railroads, with two companies, CSX Transportation (CSXT) and Norfolk Southern (NS) operating approximately 77 percent of the state’s rail system, according to the Waybill Analysis. Short lines operate the remaining portion of the state rail systems.

The State geographically links the Nation’s northeast and southeast regions, and rail lines in the state with the greatest amount of traffic run in a north-south direction bridging these two regions. The east-west lines serve the Piedmont and mountain regions and connect these regions with the Midwest and the state’s ports.

The related Rail Technical Memorandum discusses rail infrastructure and is currently under preparation.

Use of the State’s rail network for the movement of goods within and through North Carolina is illustrated by the 2006 North Carolina Waybill Analysis Executive Summary, which was provided to the team by the NCDOT Rail Division. The Waybill Summary states the following facts, which were used to identify freight nodes within and around North Carolina:

- Over the period 1999-2003, between 109-188 million tons of rail traffic were shipped within, into, out of, or through North Carolina; however, more rail traffic was shipped into North Carolina than out of it -- over five times as much during the Waybill study period;
- The rail traffic, averaging 43.5 million tons annually, was dominated by north-south movements east of the Mississippi River;
- While some amount of rail freight was shipped to North Carolina from virtually every mainland state, almost 70 percent came from West Virginia, Kentucky, Virginia, Indiana, and Illinois; and
- Rail shipments originating from North Carolina went mainly to the neighboring states of South Carolina, Georgia, Virginia, and Tennessee.

The Waybill Analysis also evaluates freight rail volumes and activity on fifteen of the state’s rail corridors, main and branch lines. Each of these corridors is served by one or both of CSX or NS railroads, and together, the fifteen corridors comprise a total of 1,763 route miles (of the total 2,579 route miles operated by CSX and NS within North Carolina). An overview of these rail corridors is presented below.

**Table 1. North Carolina Freight Rail Corridors**

Corridor	Reach	Railroad	Primary Uses
Corridor 1	Charlotte to Morehead City	NS	Only rail connection to the Port of Morehead City
Corridor 2	Charlotte to Wilmington	CSX	Sole rail access to the Port of Wilmington and Wilmington area industry
Corridor 3	Hamlet to Norlina	CSX	
Corridor 4	Asheville to Salisbury	NS	

Corridor	Reach	Railroad	Primary Uses
Corridor 5	Raleigh to Lee Creek	NS	
Corridor 6	Winston-Salem to VA state line	NS	Serves Winston-Salem area from the north
Corridor 7	Greensboro to VA state line	NS	Intermodal route
Corridor 8	VA state line to SC state line	CSX	Intermodal route through North Carolina
Corridor 9	Charlotte to TN state line	CS	
Corridor 10	Contentnea to Wallace	CSX	Serves the poultry industry
Corridor 11	North and South of Asheville	NS	
Corridor 12	Charlotte to Winston-Salem	NS	
Corridor 13	Winston-Salem to Greensboro	NS	
Corridor 14	Greensboro to Gulf	NS	
Corridor 15	Raleigh to Fayetteville	NS	

Source: NCRR 2006 Waybill Analysis

Based on the 2006 Waybill data, Corridors 1, 2, 7, 8 and 9 support the highest volumes of rail freight within North Carolina. Corridors 1 and 7 combine to form the principal main track for NS in North Carolina and provide the sole access to the Port of Morehead City. Corridors 2, 8 and 9 form the heart of CSX's presence in the State and provide the sole access to the Port of Wilmington. Others to note, Corridor 10 has heavy use due to use by the poultry industry. Corridors 12 and 13 both connect Corridor 1 with Winston-Salem from Charlotte and Greensboro but currently have little on-line traffic. Corridor 6 also serves Winston-Salem from the north and connects with major NS lines in Virginia and has heavy on-line traffic. Figure 2 illustrates the North Carolina railroad infrastructure.

## **CONCURRENT AND RELATED STUDIES**

### **Statewide Logistics Plan**

The 2010 Statewide Logistics Plan addresses the State's long term economic, mobility, and infrastructure needs. The plan recommends future logistics system investments that will be needed to ensure that North Carolina can succeed in the future global economy. The plan conducted an infrastructure needs assessment to address current and long-term freight infrastructure needs.

The study team's identification of existing and potential future freight hubs were further guided by the plan's recommendations for improvements to the state's highway, port, and rail infrastructure, as presented below:

#### Highway Recommendations

- Make Interstate 95 investments to support pass-through traffic
- Create a multi-modal corridor between Charlotte and Wilmington
- Enhance and expand the primary highways of the National Truck Network

#### Port Recommendations

- Support efforts to build the proposed North Carolina International Terminal

#### Rail Recommendations

- Encourage and support investments in the Crescent Corridor, including intermodal hub in Charlotte
- Retain existing rail corridors and support short-line infrastructure improvements
- Create a multi-modal corridor between Charlotte and Wilmington
- Provide rail access to North Carolina State Ports Authority (NCSPA) inland terminals

### **Seven Portals Study**

The Seven Portals Study was initiated for the Governor's Logistics Task Force in December 2010. The study, which has not yet been completed, addresses key demographics, employment statistics and sector information for each of the state's seven economic regions. The draft study provides an assessment of means to improve logistics in North Carolina through investments in inland "logistics villages" within each region. The following potential locations for logistics villages are examined by the study and it's supporting regional reports:

- Southeast: Laurinburg-Maxton Airport (MEB); Fayetteville Regional Airport (FAY); International Logistics Park (ILP); Wilmington International Airport (ILM); and "Virtual Logistics Village" for the Greater Wilmington Area.
- East: Rocky Mount and Kingsboro-Rose Megasite; Global TransPark; Jacksonville Airport; and Port of Morehead City.
- Northeast: Ahoskie; Edenton; Elizabeth City; and Williamston.

- Triangle: Raleigh-Durham International Airport (RDU); Warren (Triangle North); Johnston County (Four Oaks); Sanford-Lee County (adjacent to Executive JetPark); and Triangle North Properties.
- Piedmont Triad: Aerotropolis City (PTI Airport); Winston-Salem Smith Reynold's Airport; Burlington/Alamance; Montgomery County/Heart of NC Mega-Site; and Davidson County.
- Charlotte: Charlotte Douglas International Airport (CLT), including Dixie Berry Hill Area or Steele Creek Area; Monroe (Legacy Park); Salisbury (Summit Corporate Center); Rowan County Airport; and Statesville Airport A
- West: Andrews; Asheville; and Wilkesboro

As input to the Seven Portal Study team, the US 70 Corridor Commission has emphasized the importance of the US 70 Corridor as a Strategic Highway and a major link between Raleigh and Morehead City. US 70 supports the movement of agricultural goods and connects North Carolina's eastern region to GTP and the Port of Morehead City.

**SUMMARY**

**Existing and Planned Freight Nodes and Facilities**

The project team identified primary and secondary nodes used in the shipment of goods to and from existing and potential State port facilities as shown in Table 2 and in Figure 1. These nodes were identified through a qualitative assessment of information provided from stakeholder interviews, reviews of the existing infrastructure network, the draft Seven Portals Study and the 2010 Statewide Logistics Plan. Primary nodes were identified from information provided by the Department of Commerce (DOC) interview and Wisetrade data extracted from US Census Bureau. The five primary nodes have the highest dollar value of imports and exports, and include the state’s two seaports and major metropolitan areas. The five primary nodes also correlate directly to data and information contained with concurrent studies and plans summarized in this memorandum. Secondary nodes have less economic activity compared with primary nodes, but are located on major freight routes and have been identified by at least one stakeholder interview as having strategic priority. Future nodes have been identified by either stakeholder interviews or in the studies cited in this memorandum, and may be currently underdeveloped, undeveloped or proposed sites.

Many of the primary nodes may also contain several logistic facilities, and may be Inland Ports, such as the Charlotte Inland Terminal and the Piedmont Triad Inland Terminal. Inland Ports are more specifically discussed in a separate Technical Memorandum.

**Table 2: Summary of Primary, Secondary and Future Nodes and Facilities**

<b>Primary</b>
City of Charlotte area, Charlotte-Douglas International Airport (CLT) Area, and Charlotte Inland Terminal
City of Wilmington area, NC Port of Wilmington and Wilmington International Airport (ILM) Area
NC Port of Morehead City
Raleigh-Durham International Airport (RDU) and Research Triangle Park (RTP) Area and Cities of Raleigh, Durham and Chapel Hill
Piedmont Triad International Airport (PTI) Area, Piedmont Triad Inland Terminal and Cities of Winston-Salem, High Point and Greensboro
<b>Secondary</b>
Global TransPark (City of Kinston)
U.S. Army Base – Fort Bragg and Pope Airfield (City of Fayetteville)
U.S. Marine Base – Camp Lejeune and Cherry Point Air Station (City of Jacksonville)
Military Ocean Terminal – MOTSU (Town of Southport),
Interstate Connections Near Towns of Benson and Reidsville, Cities of Henderson,

Lumberton, Statesville, and Asheville
Cities of Concord and Fayetteville Regional Airports
CSX Rail Hubs at City of Rocky Mount and Town of Hamlet
FedEx Air Hub (City of Burlington)
<b>Future</b>
Global TransPark (City of Kinston)
City of Monroe Legacy Park, City of Salisbury Summit Corporate Park, City of Statesville Airport Area
International Port Terminal at Town of Southport
Laurinburg/Maxton Airport, International Logistics Park
Cities of Rocky Mount, Ahoskie, Edenton, Elizabeth City, Williamston
Warren County (Triangle North), Johnston County (Four Oaks), Lee County (Executive JetPark)
Montgomery County / Heart of NC Mega Site
Wilkesboro

### Challenges and Priorities for Connecting North Carolina Freight Nodes

The effectiveness and efficiency of freight transportation in the State is a major challenge according to the stakeholder findings. This analysis has determined priorities identified by stakeholders, and they include:

- Improving freight planning, access and mobility
- Supporting sustainability initiatives that promote economic growth
- Efficiently planning and operating the network to meet current and future needs

Some of the challenges identified include; limited rail access, few deep water shipping channels, needed upgrades to the existing rail and highway network and lack of transportation infrastructure funding. Also better access to the ports was cited and more direct interstate routes are needed according to sources. Suitable industrial sites, maintenance and retention of strategic industrial land use, especially those in proximity to freight nodes and rail and roadway infrastructure is a priority. Many comments received stated that new infrastructure was not an issue, rather updating and maintaining old systems is more important.

NORTH CAROLINA

**MARITIME** Strategy

**APPENDIX**

## INDUSTRY STAKEHOLDER MEETING RECORD

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**INDUSTRY GROUP:** NCDOT Rail and Operations Division

**DATE:** August 2011

**LOCATION:** Phone Interviews

**PARTICIPANTS:** NCDOT Maritime Strategy Team  
Pat Simmons – Rail Kim Leight  
Jon Nance – Operations  
Ricky Greene – Operations

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The Maritime Strategy team conducted interviews with NCDOT Rail and Operations in August, 2011. The purpose of the interviews were to identify primary nodes and facilities used in the shipment of goods in and out of the state. Also to determine any stakeholder concerns or issues related to the transportation of goods.

Major topics presented by the NCDOT Rail Division and NCDOT Operations included:

- Rail Division stated import and export information can be found in the 2006 North Carolina Waybill Analysis. The following information was extracted:
  - Over the period 1999-2003 between 109-188 million tons of rail traffic were shipped within, into, out of, or through North Carolina;
  - More rail traffic was shipped into North Carolina than out of it, over five times as much during the study period;
  - The rail traffic, averaging 43.5 million tons annually was dominated by north-south movements east of the Mississippi River;
  - Coal (40%) and farm products (10%) were the largest commodity products overall followed equally by chemicals, nonmetallic minerals, food products, lumber / wood products, and pulp / paper products;
  - While some amount of traffic was shipped to North Carolina from virtually every mainland state in the Union, almost 70 percent came from West Virginia, Kentucky, Virginia, Indiana, and Illinois; and
  - Traffic shipped from North Carolina went mainly to the neighboring states of South Carolina, Georgia, Virginia, and Tennessee.
- NCDOT Operations suggested we contact the Divisions Engineers.

## INDUSTRY STAKEHOLDER MEETING RECORD

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**INDUSTRY GROUP:** NC Metropolitan Planning Organizations (MPOs)

**DATE:** July/August 2011

**LOCATION:** Phone Interviews

**PARTICIPANTS:**

<u>MPOS</u>	<u>Maritime Strategy Team</u>
Mike Nunn – Burlington-Graham	Sarah Wicklund
Phil Conrad – Cabarrus-Rowan	Kurt Neufang
Chris Lukasina – CAMPO	
Felix Nwoko – Durham-Chapel Hill-Carrboro	
Rick Heicksen – Fayetteville	
Steve Nye – Gaston County EDC	
Daryl Vreeland – Greenville Urban Area	
David Hyder – High Point TAC	
Anthony Prinz – Jacksonville (JUMPO)	
Bob Cook – Mecklenburg-Union (MUMPO)	
Bob League – Rocky Mount Urban Area	
John Gessaman – Carolina Gateway Partnership	
John Tippet – Greater Hickory MPO	
Mike Kozlosky – Wilmington Urban Area	
Fredrick Haith – Winston-Salem Urban Area	

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The Maritime Strategy team conducted telephone interviews with the MPOs in July and August, 2011. The purpose of the interviews was to identify primary nodes and facilities used in the shipment of goods in and out of each MPO's area. Also to determine any stakeholder concerns or issues related to the transportation of goods.

Major topics presented by the MPOs included:

- Limited rail access
- Few deep water shipping channels
- Needed upgrades to the existing rail and highway network and lack of transportation infrastructure funding
- Better access to the ports, and direct interstate routes are needed, as well as a deep water port suitable for new deep draft vessels
- Suitable industrial sites, maintenance and retention of strategic industrial land use, especially those in proximity to freight nodes and rail and roadway infrastructure is a priority
- Many comments received stated that new infrastructure was not an issue, rather updating and maintaining old systems is more important

- Identified the primary nodes across the state to be airports (international and regional), military facilities, Norfolk Southern and CSX rail yards, ports, interstates, and various distribution hubs (FedEx, UPS Overnight, Old Dominion, McLane Trucking, MDI) what is MDI?
- Products move through the state mostly by truck and rail, some air; and would mostly likely travel by the same modes in the future
- Furniture, textiles, wood and paper products, chemicals, and food/grocery product were identified as some of the top exports
- Raw materials, textiles, furniture, and retail merchandise were identified as some of the top imports

## INDUSTRY STAKEHOLDER MEETING RECORD

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**INDUSTRY GROUP:** North Carolina Chamber of Commerce (COC)

**DATE:** August 24, 2011

**LOCATION:** Phone Interviews

**PARTICIPANTS:** NC Chamber of Commerce                      Maritime Strategy Team  
Catherine Butler    Cindy Camacho  
Jake Cashion

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The Maritime Strategy staff conducted an interview with the NC Chamber of Commerce (COC) on August, 24, 2011. The purpose of the interview was to identify primary nodes and facilities used in the shipment of goods in and out of the state. Also, to determine any stakeholder concerns or issues related to the transportation of goods.

Major topics presented by the NC Chamber of Commerce (COC) included:

- Identified primary nodes - Charlotte Douglas International Airport, GTP, Selma (Colonial Pipeline), PTI, FedEx - ground service in Kernersville & air at Piedmont Triad International Airport (PTI), Raleigh-Durham International Airport (RDU), Port of Wilmington, Port of Morehead City
- Identified top exports - Agricultural/forestry products, textiles, computer/electronic products, transportation equipment, chemical manufacturing | exporting to locations nationwide, Asia, and European Union
- Identified top imports - Textiles/apparel redistributed nationwide
- Identified main transportation modes for shipping imports/exports - Mostly truck and train, eastern NC on truck to Port of Norfolk, VA
- Identified future exports - Increased agricultural/forestry products, aircraft parts, mining equipmen, medical devices, green technology manufacturing
- Identified future transportation modes for shipping imports/exports - Mostly truck and train, eastern NC on truck to Port of Norfolk, VA
- Identified other transportation needs - Better access to port (direct interstate route from CLT to Wilmington), commuter rail service from eastern NC to the Triangle, availability of affordable direct passenger flights to/from Triad to nation's major business centers, light rail/commuter rail in the Raleigh/Durham/Chapel area (Triangle), and more direct flights to the West Coast of the United States
- Identified number one obstacle to economic development - Improvements and widening of I-85 around Charlotte, improving the Port of Southport - perfect opportunity for public-private partnership, access to the capital from the Winston-Salem/Grensboro/High Point area (Triad), completion of I-74, lack of direct flights to the west coast from RDU - difficult to recruit west coast companies to open offices here if there is no ease of transportation

## INDUSTRY STAKEHOLDER MEETING RECORD

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**INDUSTRY GROUP:** North Carolina Department of Commerce (DOC)

**DATE:** August 2011

**LOCATION:** Phone Interview

**PARTICIPANTS:** NC Department of Commerce      Maritime Strategy Team  
Stephanie McGarrah      Cindy Camacho  
Meihui Bodane

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The Maritime Strategy staff interviewed the NC Department of Commerce (DOC) staff in August, 2011. The purpose of the interview was to identify primary nodes and facilities used in the shipment of goods in and out of the state. Also, to determine any stakeholder concerns or issues related to the transportation of goods. The DOC staff noted the top six major hubs, based on Wisetrade data (Derived from US Census data), as identified below.

Major topics presented by the NC Department of Commerce included:

- Top three export commodities for 2010
  - Pharmaceuticals / medicines
  - Aerospace products and parts
  - Basic chemicals
- Top three import commodities for 2010
  - Apparel
  - Pharmaceuticals / medicines
  - Basic chemicals
- Six major hubs
  - Wilmington
  - RDU
  - Charlotte
  - Morehead
  - Winston-Salem
  - Reidsville

Additional information is attached.

**ATTACHMENT 1**

**US goods exports through NC Ports, Annual 2010**

NC Ports	Total Export Value	Export Value by Air	Exports by Air Wgt (KG)	Export Value by Vessel	Exports by Vessel Wgt (KG)
Wilmington, N.C.	\$2,917,349,984	\$510,772	14,180	\$2,901,618,705	1313390693
Durham, N.C.	\$953,048,405	\$952,874,68	4770984	\$0	0
Charlotte, N.C.	\$603,036,029	\$593,930,41	10,845,409	\$0	0
Morehead-	\$459,619,632	\$62,279	2,590	\$459,557,353	1180479259
Winston-Salem,	\$259,575,311	\$13,860,381	339,461	\$0	0
Reidsville, N.C.	\$309,188	\$309,188	2,081	\$0	0
<b>Total all Ports</b>	<b>\$5,192,938,549</b>	<b>\$1,561,547,</b>	<b>15,974,705</b>	<b>\$3,361,176,058</b>	<b>2493869952</b>

**NC goods exports through NC Ports, Annual 2010**

NC Ports	Total Export Value	Export Value by Air	Exports by Air Wgt (KG)	Export Value by Vessel	Exports by Vessel Wgt (KG)
Wilmington, N.C.	\$1,446,740,816	\$186,422	7,086	\$1,445,919,912	
Durham, N.C.	\$880,166,002	\$880,114,47	3,645,428	\$0	0
Charlotte, N.C.	\$190,373,489	\$188,494,66	4,012,166	\$0	0
Morehead-	\$8,244,376	\$62,279	2,590	\$8,182,097	
Winston-Salem,	\$38,193,371	\$4,193,371	110,989	\$0	0
Reidsville, N.C.	\$239,213	\$239,213	694	\$0	0
<b>Total all Ports</b>	<b>\$2,563,957,267</b>	<b>\$1,073,290,</b>	<b>7,778,953</b>	<b>\$1,454,102,009</b>	<b>948771239</b>

**NC Contribution to All US Port Utilization (NC/All US), Annual 2010**

NC Port	NC Total Value	NC Air Value	NC Air Wgt (KG)	NC Vessel Value	NC Vessel Wgt (KG)
Wilmington, N.C.	49.6%	36.5%	50.0%	49.8%	71.8%
Durham, N.C.	92.4%	92.4%	76.4%	-	-
Charlotte, N.C.	31.6%	31.7%	37.0%	-	-
Morehead- Beaufort, N.C.	1.8%	100.0%	100.0%	1.8%	0.4%
Winston-Salem, N.C.	14.7%	30.3%	32.7%	-	-
Reidsville, N.C.	77.4%	77.4%	33.3%	-	-
<b>Total all Ports</b>	<b>49.4%</b>	<b>68.7%</b>	<b>48.7%</b>	<b>43.3%</b>	<b>38.0%</b>

## INDUSTRY STAKEHOLDER MEETING RECORD

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**INDUSTRY GROUP:** North Carolina Port Authority

**DATE:** August 2011

**LOCATION:** Phone Interview

**PARTICIPANTS:** NC Port Authority Maritime Strategy Team  
Tom Guthrie Kim Leight

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The Maritime Strategy staff interviewed the NC Port Authority in August, 2011. The purpose of the interview was to identify primary nodes and facilities used in the shipment of goods in and out of the state. Also to determine any stakeholder concerns or issues related to the transportation of goods.

Major topics presented by the NC Port Authority included:

- Identified primary nodes in the state - The Charlotte Container Yard (CY) is the most active. Interstates 85, 40 and 77 are also very important highways for trucking traffic. Raleigh, Greensboro are also primary node locations. However, Greensboro has a leased-out freight yard and only has a Norfolk-Southern (NS) piggy back ramp
- Identified top exports - Phosphate, general Merchandise, forest products
- Identified top imports - Sulfur roducts, chemicals and grain
- Identified main transportation modes for shipping imports/exports – Primarily by trucks. Liquid bulk? and wood pulp are moved mostly by rail
- Identified future exports - Approximately 70% of container traffic is going to and from the Far East. Waste paper, lumber and scrap metal are the anticipated major future exports. The European market would encompass 20% of this growth and the Central American markets would include about 10%
- Identified future imports – These markets would include the following companies: QVC, Lowes Home Improvement, Harbor Freight Tools, Roses, Furniture Brands, etc. These will be mostly consumer driven markets and include nodes in Henderson, Wilkesboro and Rocky Mount
- Identified future transportation modes for shipping imports/exports - Mostly working with trucking within a 350 mile radius. It would be helpful to establish an intermodal service through rail
- Identified other transportation needs - Access is a major issue. The roads in and out of Wilmington are good, but a rail connection is needed. The Port of Morehead City has a 45 foot channel and is approximately 4 miles from the sea channel. The Port of Wilmington has a channel depth of 42 feet and is 26 miles from the sea lane. Channels need to be improved to a 50-foot depth to accommodate larger ships. Also, the lack of rail access from Morehead City and Wilmington is an issue
- Identified the biggest obstacle to economic development is lack of rail access

## INDUSTRY STAKEHOLDER INTERVIEW RECORD

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**INDUSTRY GROUP:** Global TransPark (GTP)

**DATE:** August 22, 2011

**LOCATION:** Phone Interview

**PARTICIPANTS:** Global TransPark Maritime Strategy Team  
Darlene Waddell Cindy Camacho

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The Maritime Strategy staff spoke with Global TransPark (GTP) in August, 2011. The purpose of the call was to identify primary nodes and facilities used in the shipment of goods in and out of the Global TransPark area, and also to determine any stakeholder concerns or issues related to the transportation of goods.

Major topics presented by the Global TransPark included:

- Identified primary nodes in GTP - air, rail, highway & port
- Identified top exports - Aircraft parts to France by container ship; agriculture products worldwide by various modes, wood chips to Europe
- Identified top imports - Aircraft parts and composite materials
- Identified main transportation modes for shipping imports/exports – air, rail, highway, ports
- Identified future exports - Pharmaceuticals to Asia/South America
- Identified future imports – Flowers from South America
- Identified future transportation modes for shipping imports/exports - air, rail, highway, ports
- Identified other transportation needs - Air cargo and scheduled air passenger service at the GTP's Kinston Regional Jetport (ISO)
- Identified number one obstacle to economic development - Perception about Eastern North Carolina/GTP - not having all of the infrastructure in place to be 100% successful

## INDUSTRY STAKEHOLDER MEETING RECORD

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**INDUSTRY GROUP:** North Carolina Trucking Association

**DATE:** September 2011

**LOCATION:** Phone Interview

**PARTICIPANTS:** NC Trucking Association                      Maritime Strategy Team  
Crystal Collins    Cindy Camacho

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The Maritime Strategy staff interviewed the NC Trucking Association in September, 2011. The purpose of the interview was to identify primary nodes and facilities used in the shipment of goods in and out of the state. Also, to determine any stakeholder concerns or issues related to the transportation of goods.

Major topics presented by the NC Trucking Association included:

- Identified primary nodes in the state - Greensboro/Winston-Salem/High Point (Triad), Charlotte, Raleigh, Wilmington
- Identified top exports – Agriculture, civilian aircraft engine parts
- Identified top imports - Furniture, apparel, electronics, regions - China, Central America
- Identified main transportation modes for shipping imports/exports – truck, rail, air
- Identified future exports - Clothing, wine, NC Products
- Identified other transportation needs – Road congestion
- Identified number one obstacle to economic development - road congestion, government regulation, qualified drivers for hire, ports as they exist today; these obstacles impact the trucking industry

## INDUSTRY STAKEHOLDER MEETING RECORD

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**INDUSTRY GROUP:** North Carolina Department of Transportation (NCDOT) State Division Engineers; Divisions 1-14

**DATE:** July/August 2011

**LOCATION:** Phone Interviews

**PARTICIPANTS:**

<u>NCDOT Division Engineers</u>	<u>Maritime Strategy Team</u>
Jerry Jennings – Div 1	Kim Leight
Neil Lassiter – Div 2	
Allen Pope – Div 3	
Bobby Lewis – Div 4	
Wally Bowman – Div 5	
Greg Burns – Div 6	
Mike Mills – Div 7	
Tim Johnson – Div 8	
Pat Ivey – Div 9	
Barry Moose – Div 10	
Micheal Pettyjohn – Div 11	
Mike Holder – Div 12	
Jay Swain – Div 13	
Joel Setzer – Div 14	

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The Maritime Strategy team conducted interviews with the NCDOT Division Engineers in July and August, 2011. The purpose of the interviews was to identify primary nodes and facilities used in the shipment of goods in and out of each division's area, and to determine any stakeholder concerns or issues related to the transportation of goods.

Major topics presented by the NCDOT Division Engineers included:

- Need upgrades to the existing rail and highway networks. Funding is lacking to make improvements. Better access to the ports and military bases, direct interstate routes and additional rail lines are needed and improvements/upgrades to local highways
- Better access to areas for tourism
- Expand services to and from local airports
- Products move through the state mostly by truck and rail, would mostly likely travel by the same modes in the future
- Wood chips and paper-pulp products, textiles, agricultural products, pharmaceuticals, and jet engine parts were identified as some of the top exports from the state
- Identified the primary nodes across the state to be airports (international and regional), military facilities, Norfolk Southern (NS) and CSX rail yards, interstates, and various distribution hubs (FedEx, Old Dominion, Meadowview)

NORTH CAROLINA

**MARITIME** Strategy

**FIGURES**



Figure 1 - Primary and Secondary Nodes within North Carolina

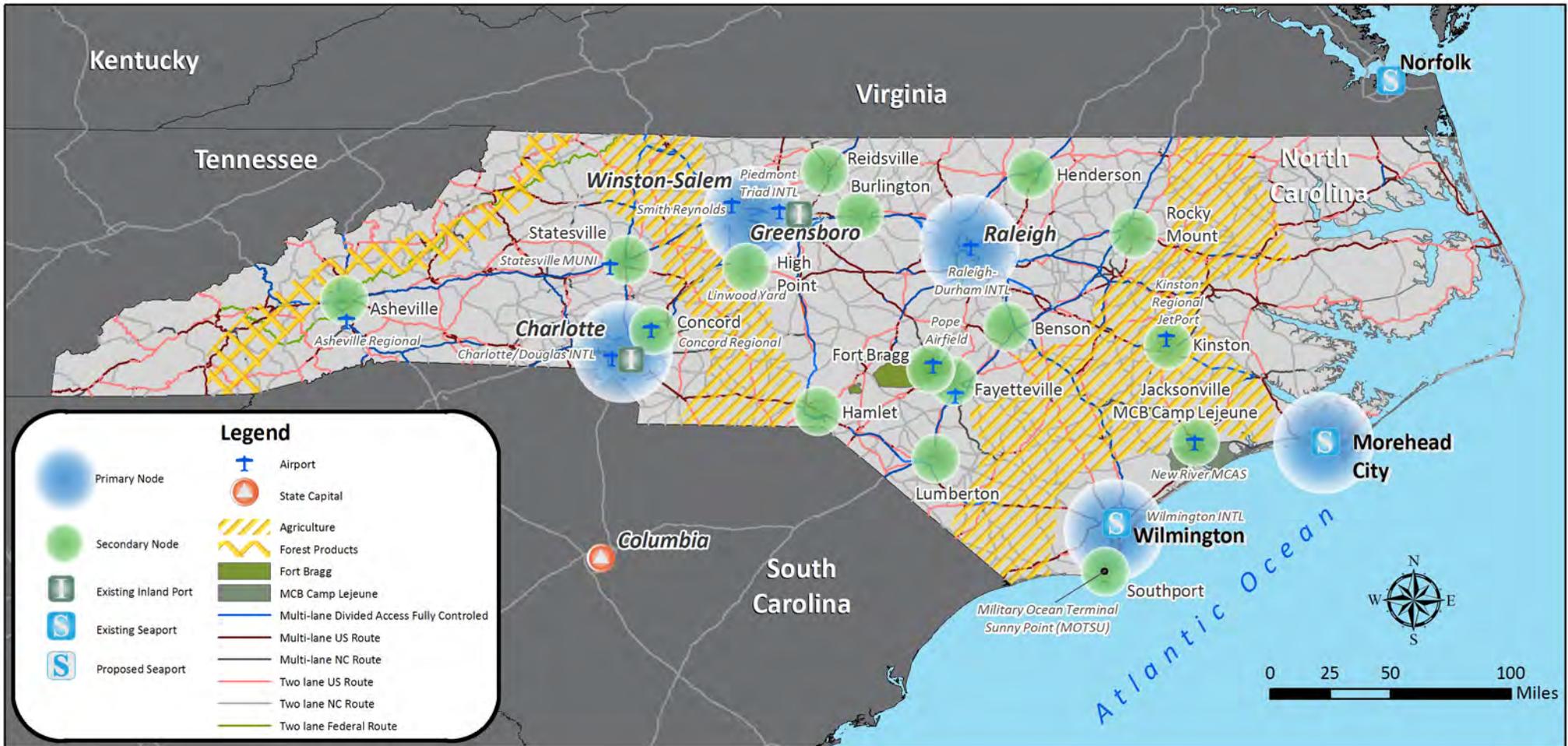


Figure 2 - Railroad Infrastructure within North Carolina

