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Intermodal Freight Terminal Volume Feasibility Study

Overview of the study conducted by
WTCBN; Recommended Action Plan



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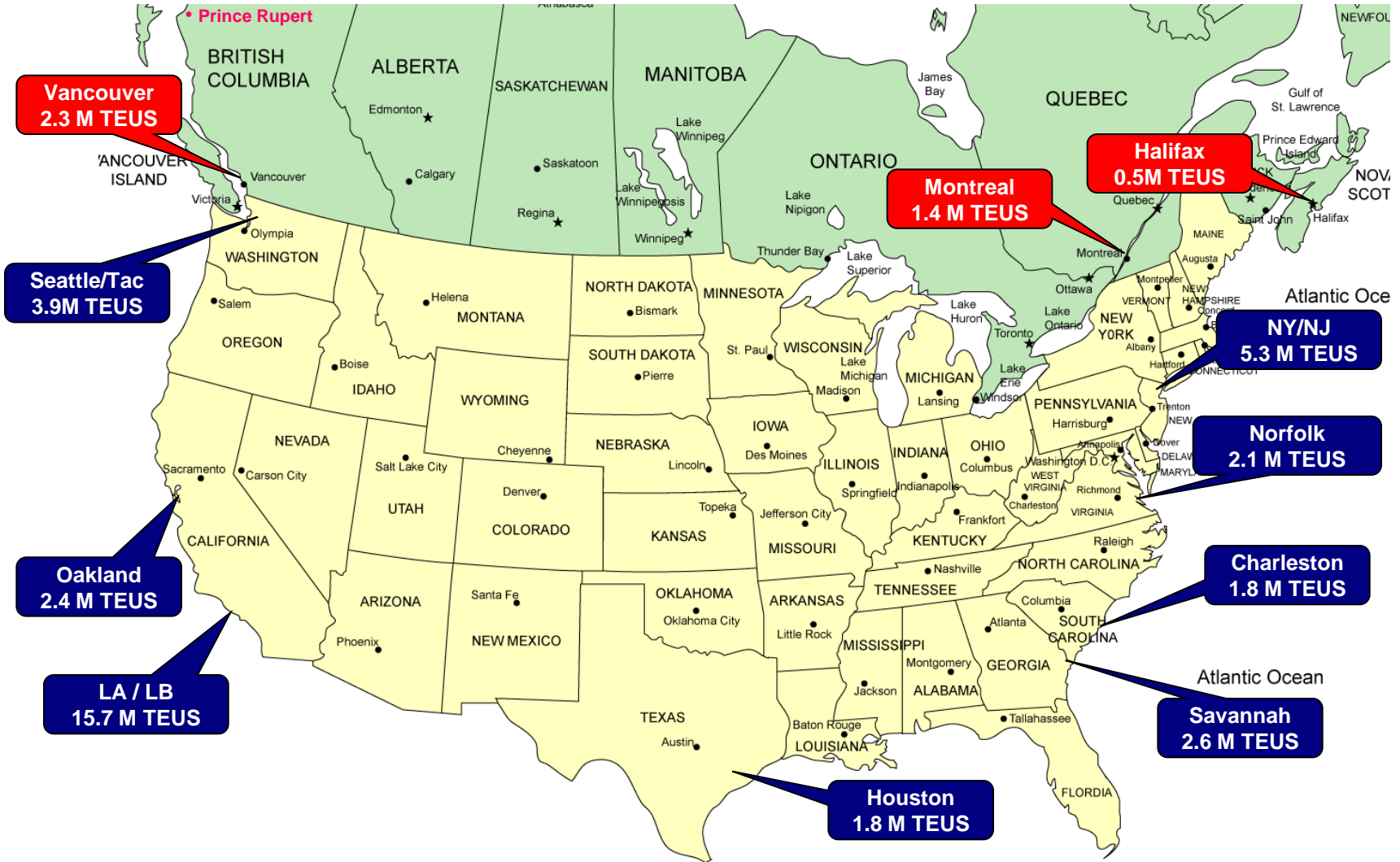
Vision

An intermodal freight terminal in Western New York that makes area businesses more competitive globally while making better use of our heritage rail infrastructure and contributing to job growth, quality of life and environmental sustainability.

Intermodal Freight Terminal Volume Feasibility Study

A study conducted by World Trade Center Buffalo Niagara (WTCBN) to determine the available volumes of international intermodal container traffic to support an intermodal freight terminal at or near Buffalo, New York.

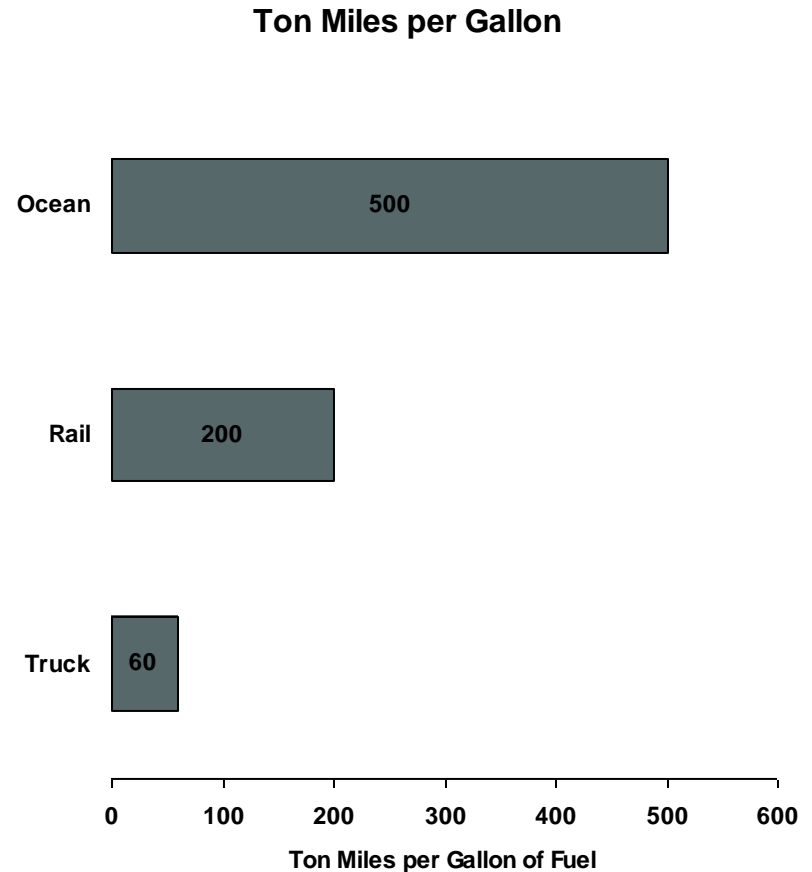
Canadian & U.S. Ports





Port Choice

- Service to destination
 - Frequency
 - Transit time
- Price
- Time & cost to port
 - Via highway
 - Via rail
- Fuel use (as proxy for cost & environmental impact)





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“Buffalo” Volume

TEUS for NY/NJ

WNY: 15,000

Ontario: 50,000+

- Ontario volume goes through Buffalo by truck
- Buffalo is best location for transfer to rail

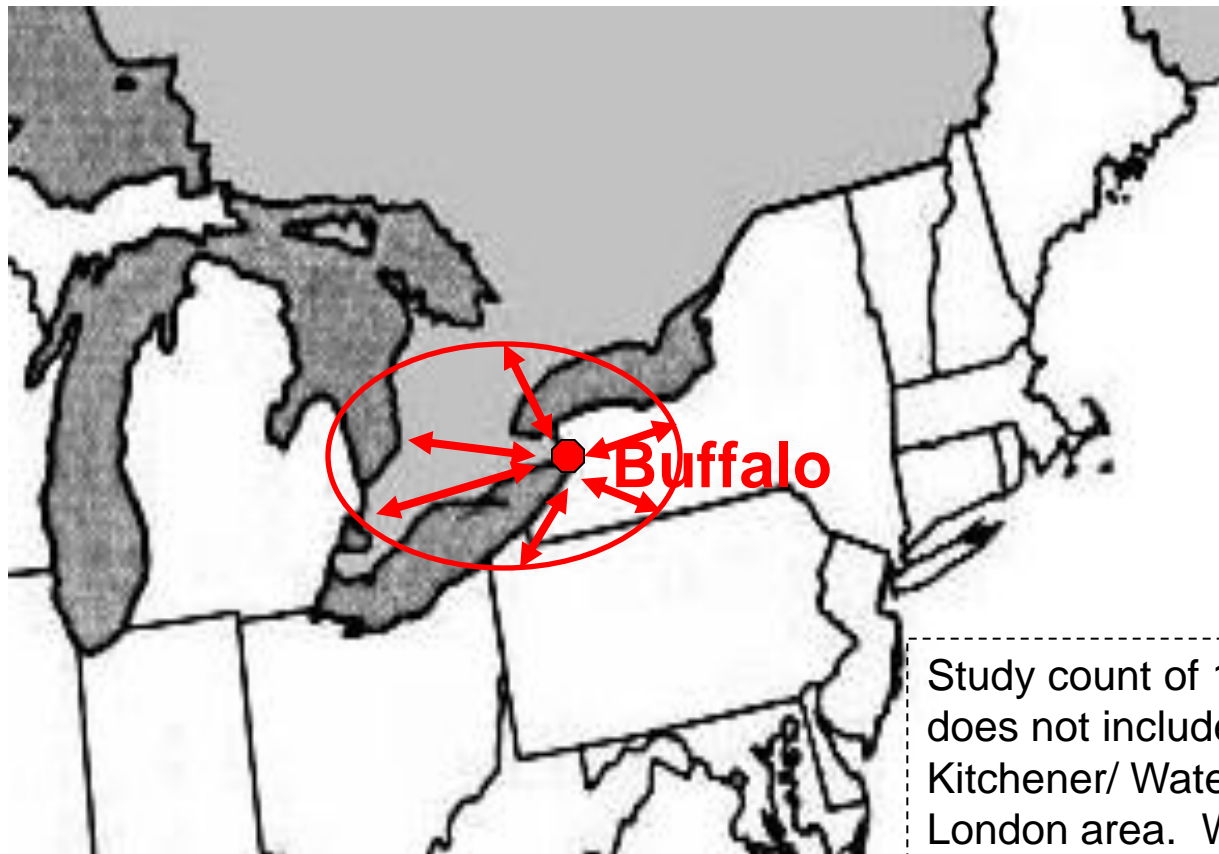




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Truck Collection/Delivery: 153,000 – 250,000 TEUS

- Buffalo is intermodal transfer point truck/rail
- 1 to 4 hour drive time; driver and equipment return same day
- Volume
 - 75% - Ontario
 - 25% - NY/PA



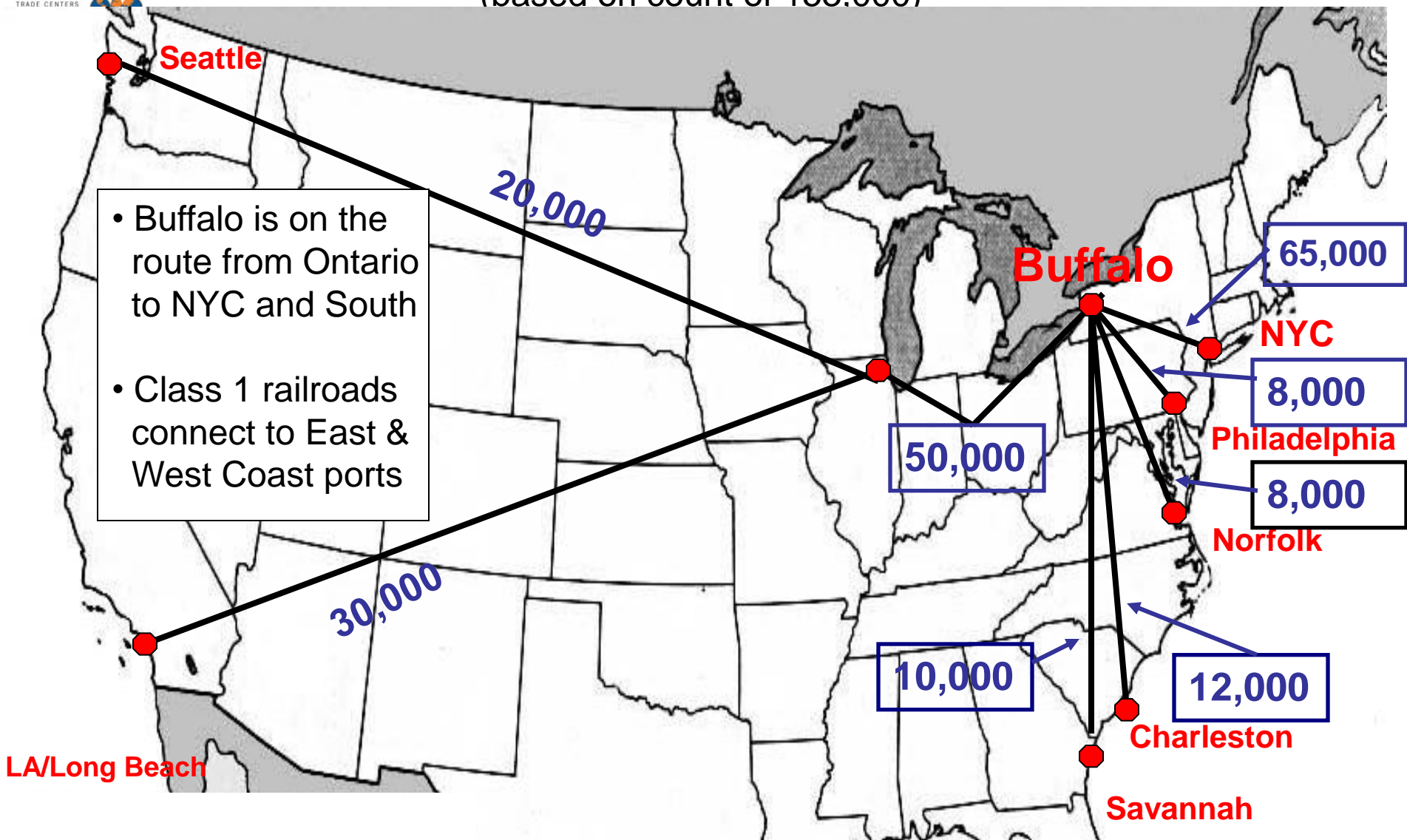
Study count of 153,000 does not include Kitchener/ Waterloo or London area. WTCBN estimates an additional **100,000 TEUS** .



Buffalo TEUS by Port

(based on count of 153,000)

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Economic Impact

Opportunity per 1000 TEU

- 1000 containers (20 foot equivalent = TEU) would require 21,500,000 cubic feet of distribution space
- Create 1,900 warehouse jobs
- Create 900 office, administrative, and marketing headquarters positions
- Create additional railyard, trucking, packaging, insurance, banking, legal, government, maintenance, and construction jobs



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Case Study: Kansas City Logistics Park

- The KC Logistics Park, located in Gardner, Kansas, 25 miles southwest of Kansas City, is estimated to have 1,000 acres of land for an intermodal facility and 7 million square feet of distribution and warehouse facilities
- The intermodal facility has about a 600-acre park (out of 1,000 acres) for distribution and warehouse facilities
- The intermodal complex will create an estimated 13,000 jobs
- Aside from job creation, the intermodal is projected to contribute \$1.7 billion over 20 years to the Kansas economy



Conclusions

- We have the volume: a minimum of **250,000** TEUS/year. Projected growth will bring this to **500,000** by 2017
- We have most of the infrastructure
 - New uses for existing rail infrastructure
 - Added opportunity for area service providers (both public and private)
- Ontario is **75%** of the opportunity
- Truck/rail terminals and ancillary services should be marketed as a
 - Bi-national Logistics Center
 - rail service to East & West coast ports
 - truck delivery in WNY, Ontario, PA & OH
- Industry will benefit from
 - reduced transportation costs (fuel, driver time)
 - Better frequency & transit times
 - Added opportunity for logistics services



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Conclusions

- “Port Authority” function needed
 - Erie & Niagara Counties
+ links to nearby Ontario
 - Funded for its primary functions of
coordinating and marketing
 - Leadership for Action Plan



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Action Plan: Phase 1

- Market & Coordinate existing services: the Niagara Bi-national Logistics Center
 - Intermodal Rail Services
 - Warehousing and Distribution Services
 - U.S. & Canadian Government Services
 - Ancillary Services
- Designate & Fund an organization to carryout the marketing and coordination functions.
 - Public/Private funding
 - Role of a port authority
- Preserve available sites for expansion in Phases 2 & 3
 - Example: Steelfields

Action Plan: Phase 2

- WTCBN to partner with development agencies (BNE, ESD, IDAs) to attract distribution and light manufacturing
 - Unique location for distribution to both U.S. and Canada
- Prepare detailed infrastructure expansion schedule
 - Location(s)
 - Funding
 - Governance
 - Time Line
- Establish metrics



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Action Plan: Phase 3

- Continue marketing of the Niagara Bi-National Logistics Center
- Continue coordination with private service providers
- Continue partnerships with development agencies
- Secure funding and build out logistics infrastructure according to plan and market demand
- Measure results
 - TEUS moved from road to rail
 - Jobs created/retained
 - Transportation cost savings for area businesses



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For further information on the Study please contact:

Christopher T. Johnston, President
World Trade Center Buffalo Niagara
661 Delaware Avenue
Buffalo, New York 14202

716.852.7160
cjohnston@wtcbrn.com