



## Emerging Directions

### Global Gateways

- Future east-west rail capacity, constraints, and port-rail connections
- Preservation and/or enlargement of rail yards in metro regions: Seattle, Spokane, Tacoma and Vancouver WA
- Capacity and constraints throughout the north-south I-5 corridor, including congestion from Everett to Olympia, missing highway links such as Highway 509 and Highway 167, and the Columbia River Bridge
- I-90 Snoqualmie Pass improvements
- Local road connections to ports
- Maintaining the Columbia-Snake River barge system (dredging and lock maintenance)
- Washington - Canadian border delays, congestion and security issues
- Ground access for air cargo: SR 518
- Grade separations at high-impact locations
- Operational improvements: complete statewide Weigh-In-Motion system, communications/ITS, truck rest stops

### Washington Producers and Manufacturers

Our state's regions have built strong and distinct economies based on industry and agriculture. Regional manufacturing, agriculture, construction, and forestry depend on an effective and efficient freight transportation system.

Agriculture is big business in our state and supports the family farm as well as agri-business. In 2002, Washington State farmers and ranchers produced \$5.6 billion in food and agricultural products. Transportation is especially important for Washington agriculture because the state produces about three times as much food – and for some commodities up to twenty times as much – as it consumes, and is separated by long distances from the majority of the nation's consumers.

Manufacturing is rebounding in Washington State. In 2003, manufacturing Gross Business Revenues were \$88.3 billion, 21.3 percent of the total State Gross Business Income. The sector employed more than 265,000 workers (13 percent of all jobs) and paid 16 percent of total wages in Washington.

## Regional Economies Rely on Washington's Freight System



### Southeast Washington Sells Wheat to the World

Nationally, Washington ranked third in wheat production with 130 million bushels grown on 2.7 million acres in 2002. Eighty-five percent of Washington State wheat is sold to export markets, primarily Asia.

Only 50 percent of wheat growers are highly satisfied with the current performance of the state freight system. Maintenance and preservation of the Columbia River and the Snake River channels and locks are critical as 92 percent of southeast Washington wheat is shipped to Columbia River ports. Wheat growers say that getting their grain to the port on time, transportation costs, and adequate grain storage at the right locations are their big issues. Southeast Washington farmers shipping other foods to Central Puget Sound need improvements on I-90 at Snoqualmie Pass to prevent winter weather closures. All growers surveyed cite the need for a core all-weather county road system.

### The Columbia Basin and North Central Washington: Agricultural Growing and Processing Center

87,500 jobs in the Columbia Basin and North Central Washington are directly dependent on our freight system. Washington is the second largest potato producing state in the country, and 90 percent of Washington potatoes are shipped to the U.S. market. Washington State ranked number one nationally in apple production, with a value of \$1.02 billion in 2002; 70 percent of apples are sold in the United States. Apples and potatoes must be shipped in refrigerated truck or rail cars; 90 percent is trucked. Continued refrigerated truck shortages are likely due to seasonal peak demands, and an ongoing pull from other U.S. regions for refrigerated capacity.

Timber sales from tribal lands such as those owned by the Confederated Tribes of the Colville Reservation and the Yakama Nation have become an important industry in Eastern Washington. Washington's harvest from tribal lands totaled 324 million board-feet in 2001; almost 300 million board-feet of the harvest was in Eastern Washington.



Growers and processors are seeking a solution to reposition refrigerated equipment, and I-90 Snoqualmie Pass improvements to avoid severe weather closures. Growers need a core all-weather county road system, and in the long run are interested in improving Highway 97 south to California markets.

### **Central Puget Sound Manufacturing, Construction, and Maritime Center**

Freight dependent industries employed 484,000 in manufacturing, transportation, construction, and wholesale trade in Central Puget Sound in 2002. The Boeing Company is Washington's largest manufacturer, with \$22.4 billion in revenues in 2003. Boeing's dependence on the freight system will be even greater as it sets new levels of efficiency in the manufacture of the new 7E7 Dreamliner. Another 6,500 mid-market manufacturing companies employed 150,000 in the region, and the maritime industry employed over 22,000 in King County alone.

Shippers and carriers in Central Puget Sound need solutions to I-5 congestion from Olympia to Everett, as there is no practical alternative route to the state's major freight corridor. The majority of Washington State air cargo moves through SeaTac and King County Airports, and I-5 congestion directly impacts reliability and on-time performance of the air cargo system. Industry inventory reduction strategies are driving shorter on-time delivery windows for producers and carriers, and those business needs are also driving demand for a solution to I-405 congestion, completion of major freight corridors such as Highway 509, Highway 167/ I-5 and Highway 18 to I-90, the Alaskan Way Viaduct, port connections, Fast Action Strategy (FAST) projects including SR519/Royal Brougham, the Cross Base Highway, ferry system freight runs, and local truck route programs.

### **Spokane Region Eastside Center of Manufacturing and Commerce**

52,000 jobs in the Spokane region are directly dependent on the freight system, and the regional health care center receives vital supplies via the I-90 corridor. Fifty-six percent of Spokane manufacturers identified on-time delivery as the most important freight service, while 26 percent say price is the most important factor.

Spokane manufacturers and carriers say that meeting those customer needs will require I-90 Snoqualmie Pass improvements to avoid winter weather closures, as well as solutions to mainline congestion in Puget Sound and I-90 pavement rutting. They support a local truck route program and grade separations at high-impact crossings.

### **Vancouver: Southwest Washington Metropolitan Area**

48,000 jobs in the Vancouver metro region directly depend on the freight system, in manufacturing, construction, trade and transportation. Clark County's economy is integrally linked with that of the larger Vancouver/Portland metropolitan area. The Vancouver/Portland metro region is connected by two bridges over the Columbia River on I-5 and I-205, while comparable cities such as Kansas City has 10 bridges and Cincinnati has seven. East Clark County's high-tech industries value speed of transit to ship high-value parts on I-205, the fast route to Portland International Airport.

Vancouver manufacturers and carriers ship product to Central Puget Sound, Portland, and California and require a solution to I-5 congestion from Olympia to Everett and on the Columbia River Bridge. They also support Columbia River channel maintenance, deepening and barge access, improving I-90 Snoqualmie Pass to avoid winter weather closures, and local truck route programs.

### **Northwest Washington**

31,000 jobs in Whatcom and Skagit Counties rely on freight. The region's manufacturing sector's customers are predominately to the south and ship via the I-5 corridor. Their first priority is I-5 congestion from Olympia to Everett that delays fast truck service to California and Washington markets, airfreight to and from Sea-Tac International Airport, and container moves to the Ports of Seattle and Tacoma. Border delays caused by multiple federal databases regulating freight transport are an issue, as is the need for all-weather local roads, and improved east-west connections between I-5 and the Guide Meridian and Highway 9.

### **Coastal Counties**

16,000 jobs in Clallam, Grays Harbor, Mason, Pacific and Wahkiakum Counties are in freight-dependent industries such as manufacturing and forestry. The forest industry in Washington is the second largest in the nation, behind Oregon, with about 10 percent of U.S. forestry employment. Over 90 percent of Pacific and Grays Harbor Counties are in forestland, and privately owned forests account for more than 80 percent of timber harvested in Washington. \$2.95 billion total products were shipped in 170,000 truckloads on Highways 12, 8, and 101 from the coast to the I-5 corridor in 2003. Thirty-six percent of that \$1.06 billion were logs and finished wood, and paper products. \$840 million, 28 percent, was machinery.