

Transportation Systems for Washington's Agricultural Industry of the Future

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Washington State Highway System

Registered Vehicles

6,530,325 Total

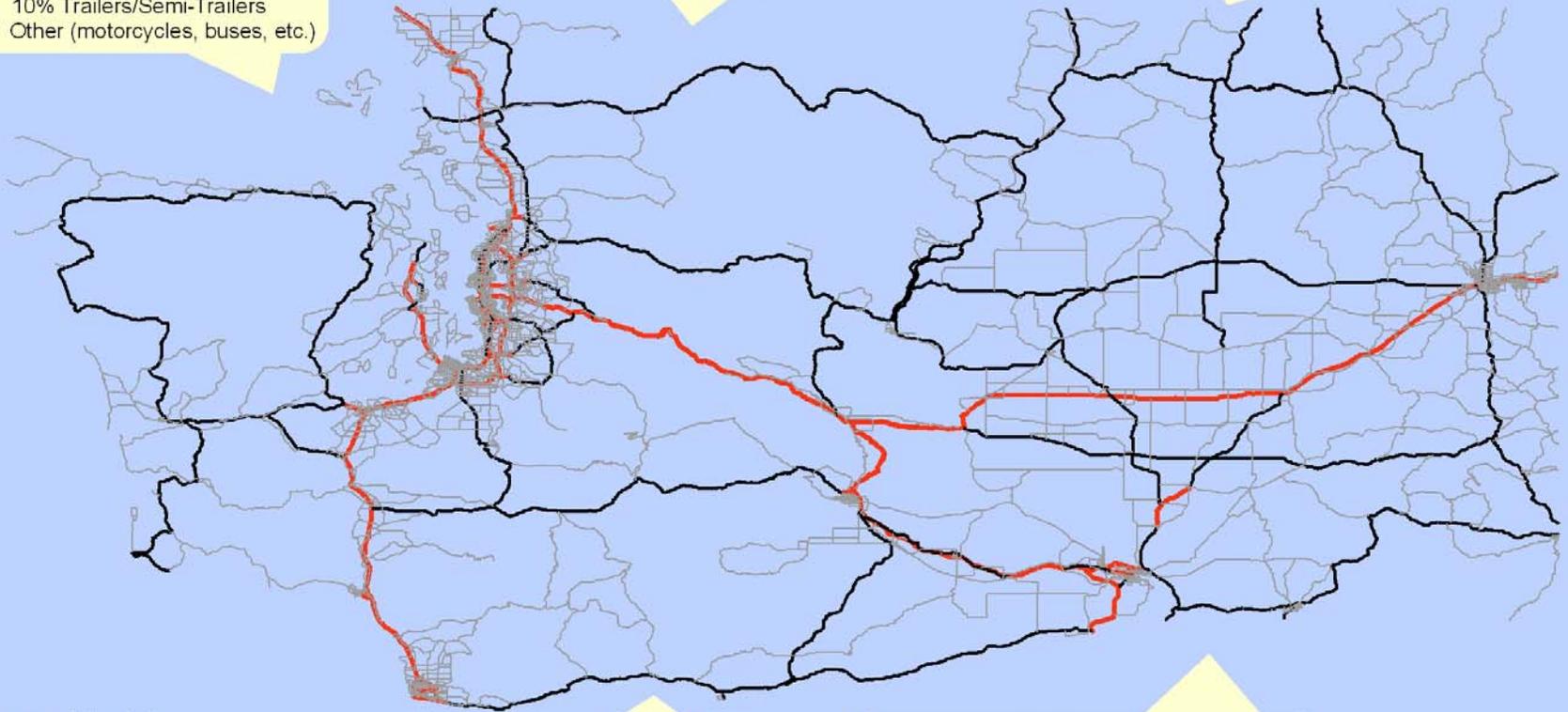
62% Passenger Vehicles
23% Trucks
10% Trailers/Semi-Trailers
5% Other (motorcycles, buses, etc.)

Population and Drivers

Population: 6,375,600
Driving Population: 5,011,356
Current Licensed Drivers: 4,790,864

Annual Average Miles Traveled and Fuel Consumed

Miles Traveled = 56 billion
Gallons Consumed Per Vehicle = 563
Miles Per Vehicle = 9,601
Miles Per Gallon = 17.06



— Interstate
— State Highway
— Local Roads

Lane Miles of Washington Highway System

174,019 Miles

State Highways = 11%
County Roads = 46%
City Streets = 20%
Other Public Roads = 23%

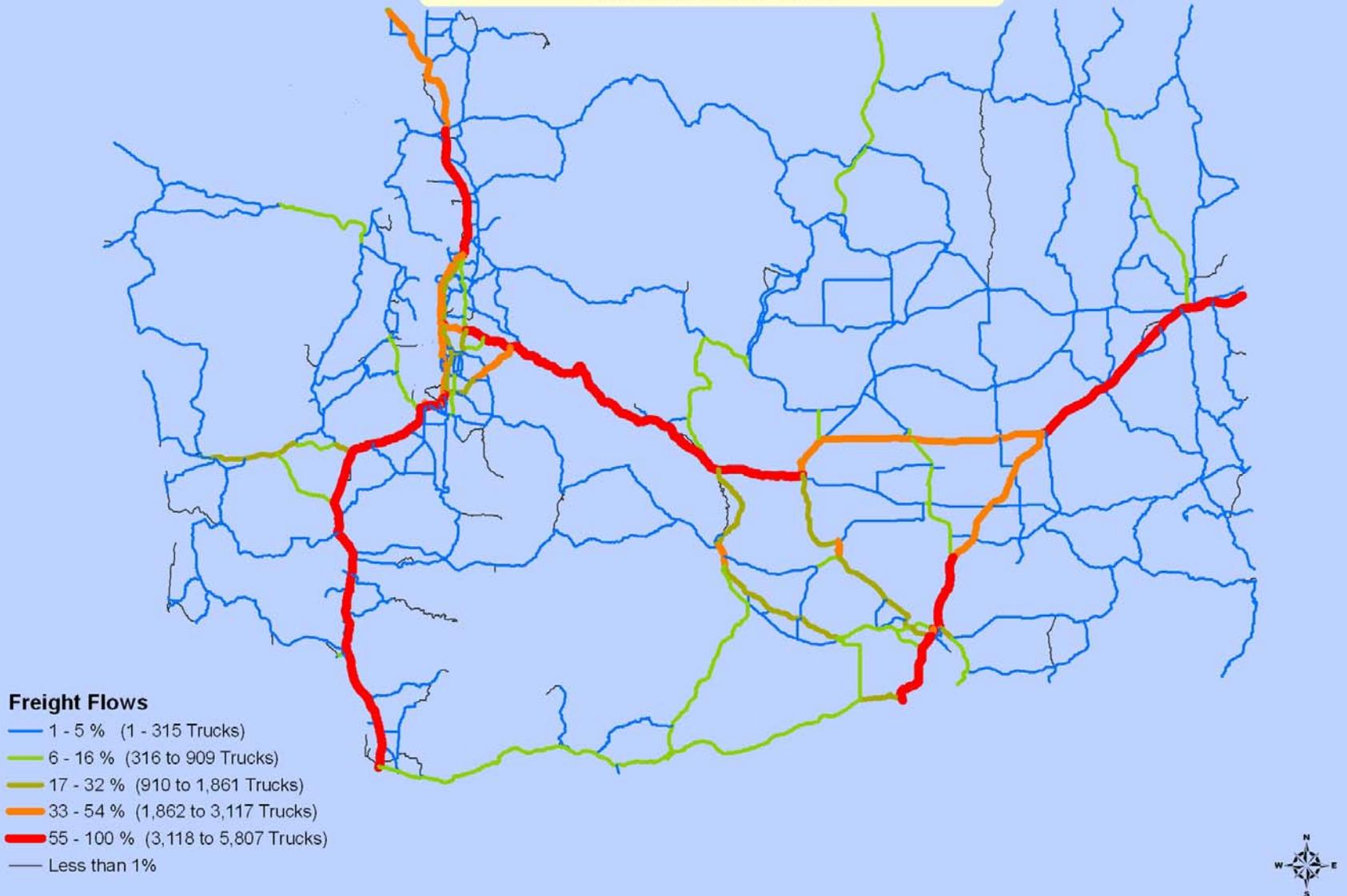
Amount of Traffic Carried on System

154,881,874 Total Daily Vehicle Miles Traveled
State Highways = 56%
County Roads = 16.4%
City Streets = 26%
Other Public Roads = 1.3%

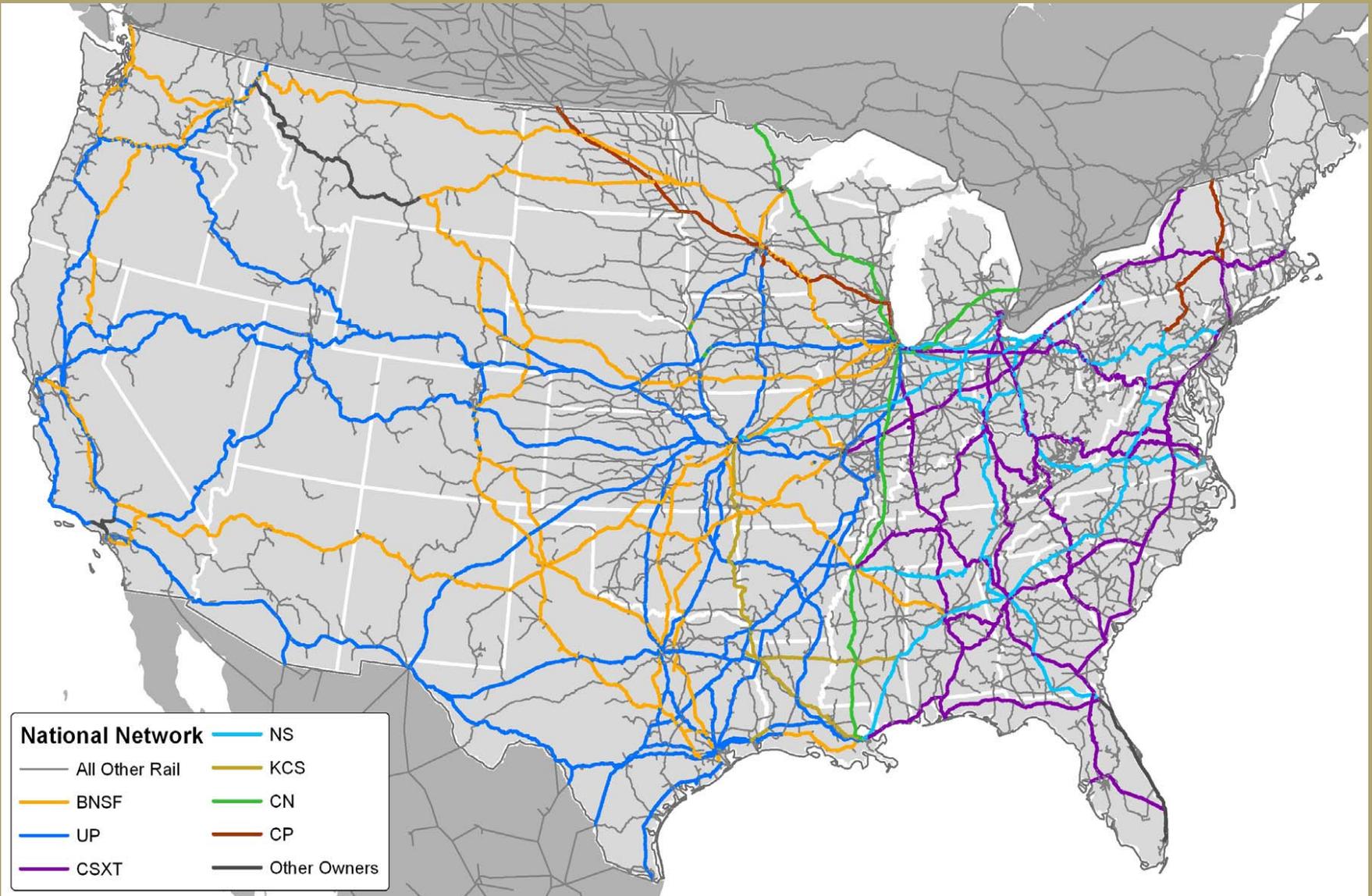


Intensity of Overall Freight Flows On Highway System

- Traffic density often creates congestion
- Congestion occurs and impacts both eastern and western Washington
- Highways tie the state together



National Rail System



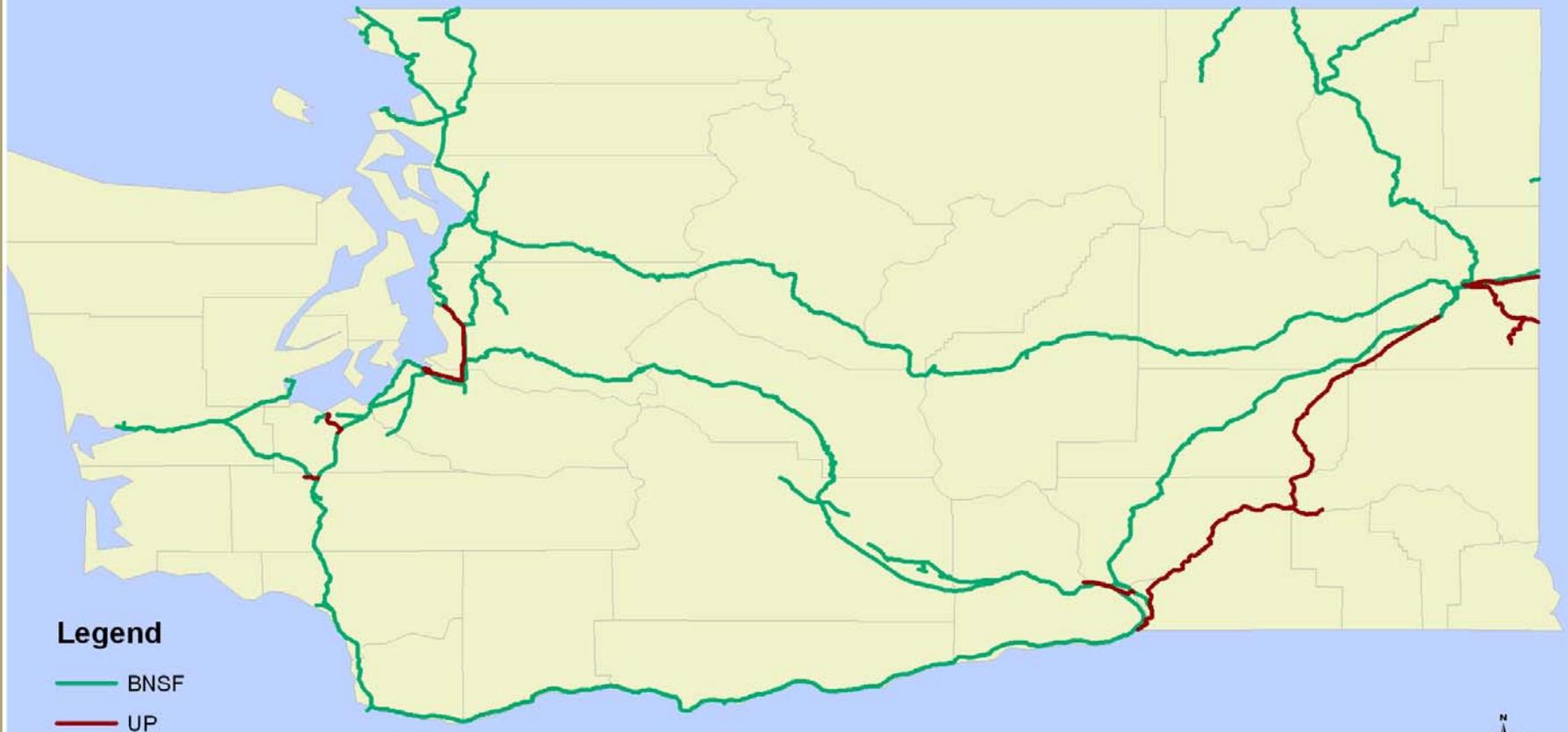
Washington State Class I Railroads

Class I Railroad's business model is increasingly "hook and haul" which means large volumes (unit trains) shipped long distances.

Increasingly, additional capacity (rail cars) are being provided by shippers.

This business plan transfers the cost to shippers and is often challenging to movement of agricultural products which are seasonal and may not generate unit train volumes for each shipment.

Mainline capacity is almost full, some rail lines are at capacity.



Legend

- BNSF
- UP



Washington State Class I and Shortline/Regional Railroads

Rail Information

Freight Railroad = 21
 Rail Miles Operated = 3,666
 Rail Carloads Carried = 2,700,637
 Total Tons Carried = 109,040,121

Commodities Originating In the State (by Tons)

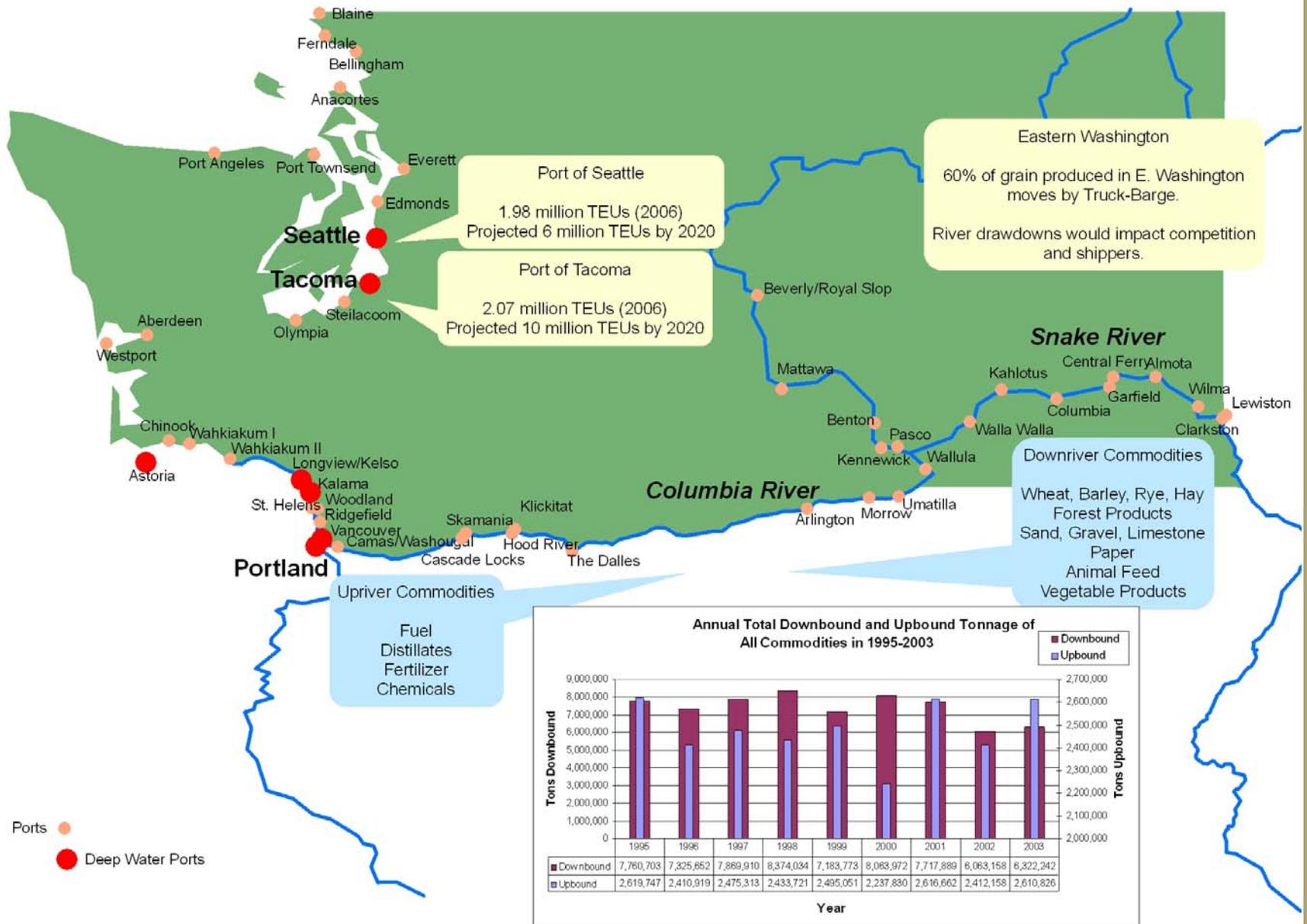
Mixed Freight = 29%
 Lumber/Wood Products = 19%
 Waste and Scrap = 14%
 Farm Products = 6%
 Pulp/Paper = 6%
 All Other = 26%

Commodities Terminating In the State (by Tons)

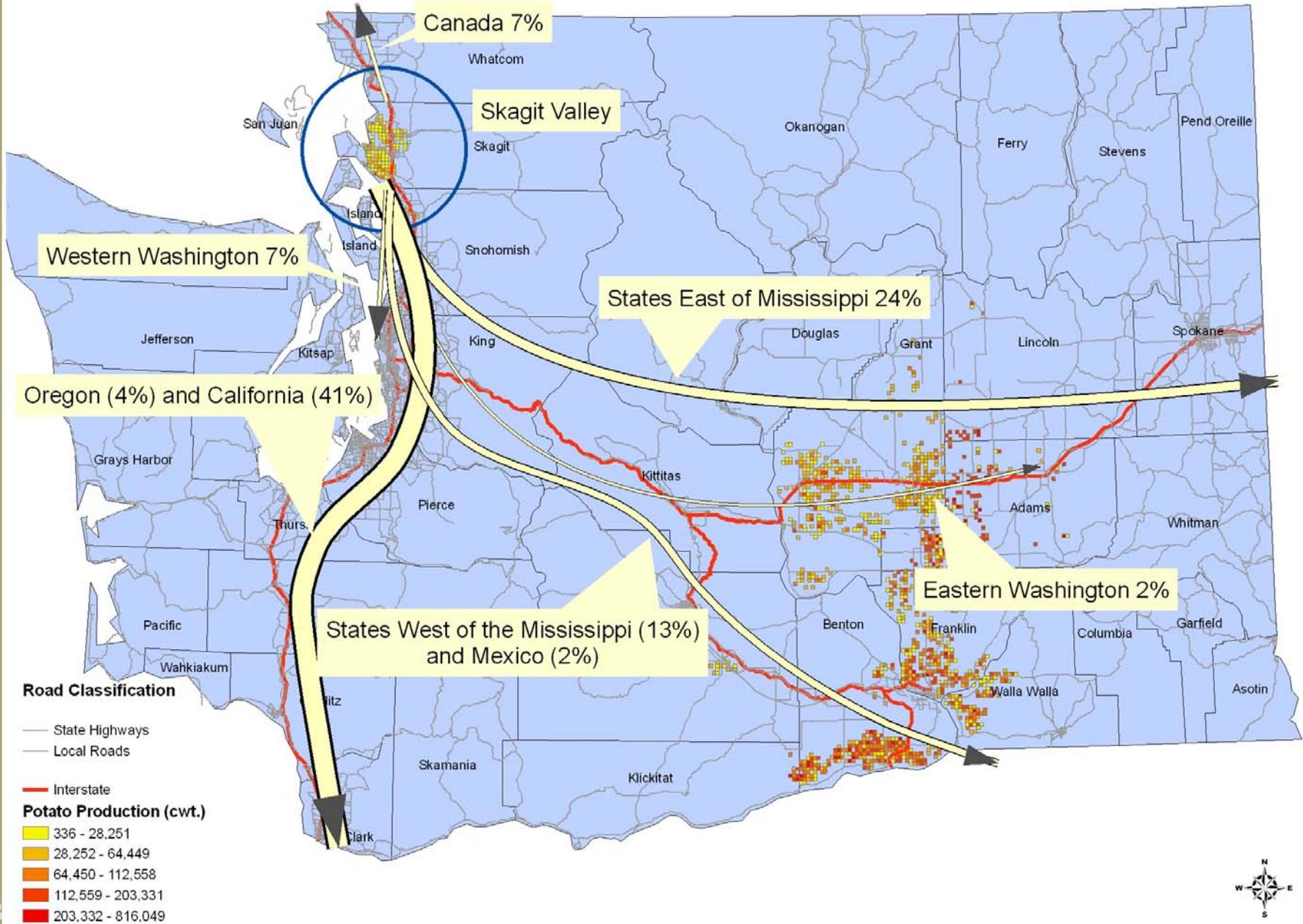
Farm Products = 52%
 Mixed Freight = 8%
 Food Products = 6%
 Waste and Scrap = 5%
 Chemicals = 5%
 All Other = 23%



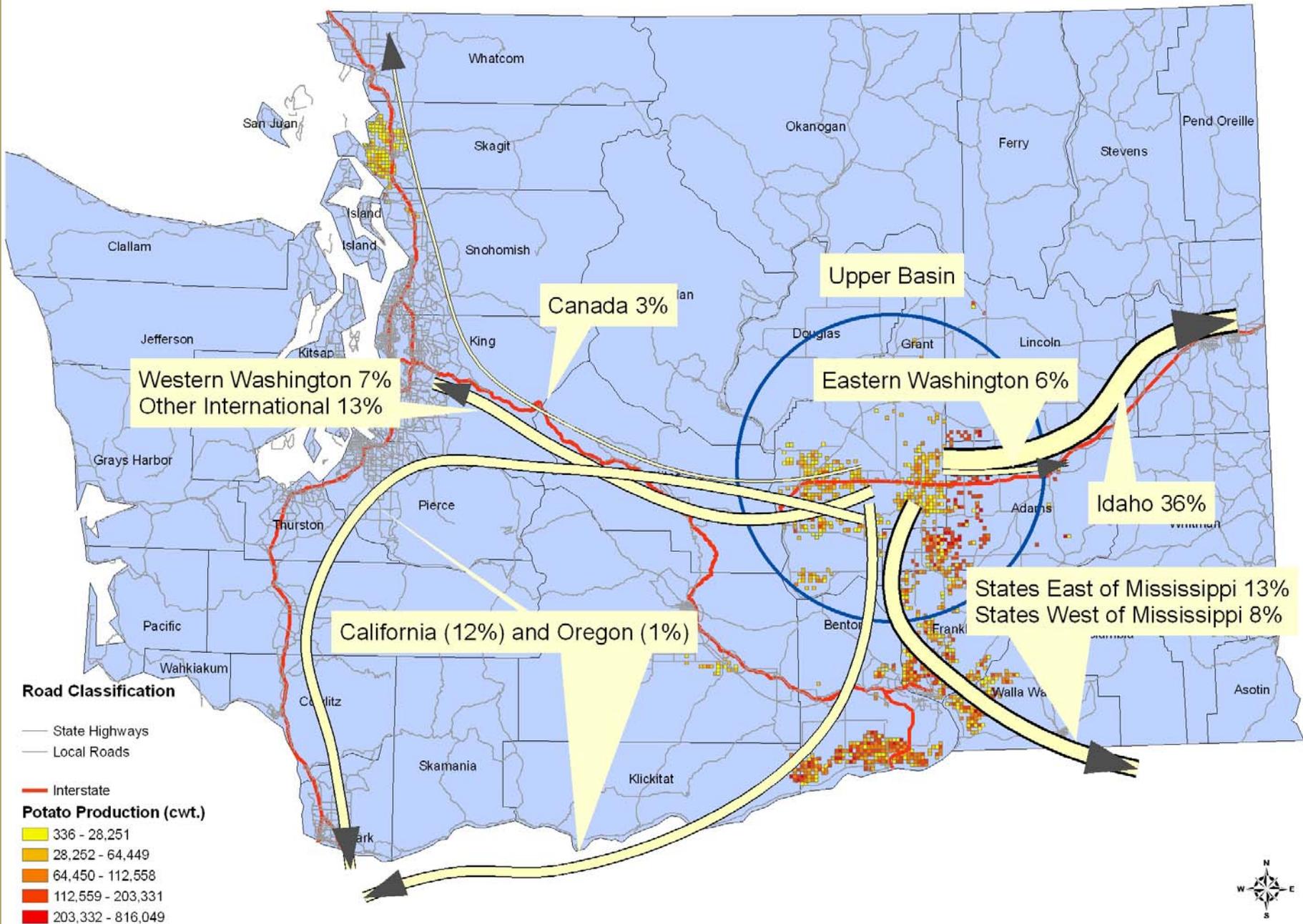
Washington Waterways and Ports



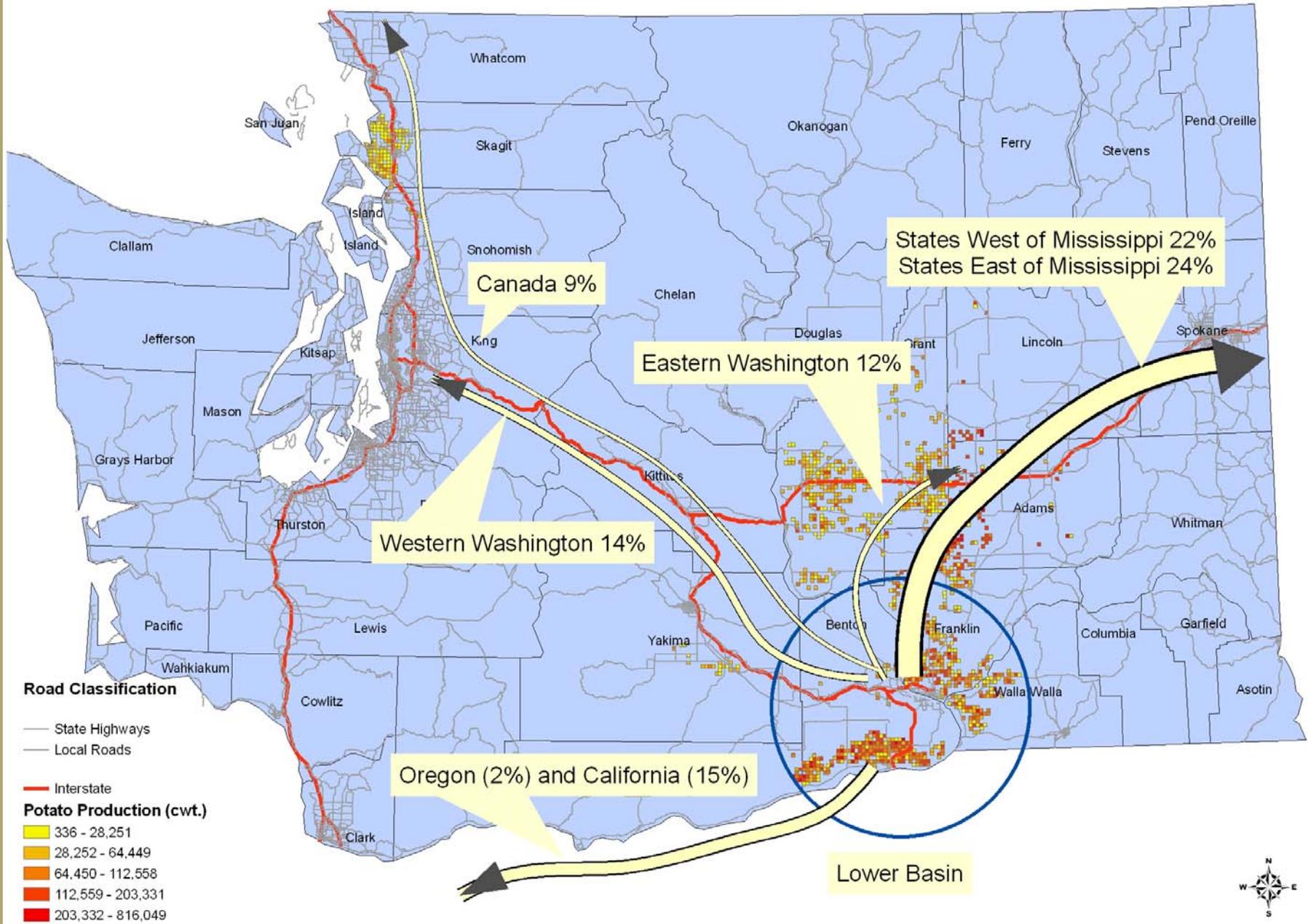
Shipment Destinations for Skagit Valley Potato Production



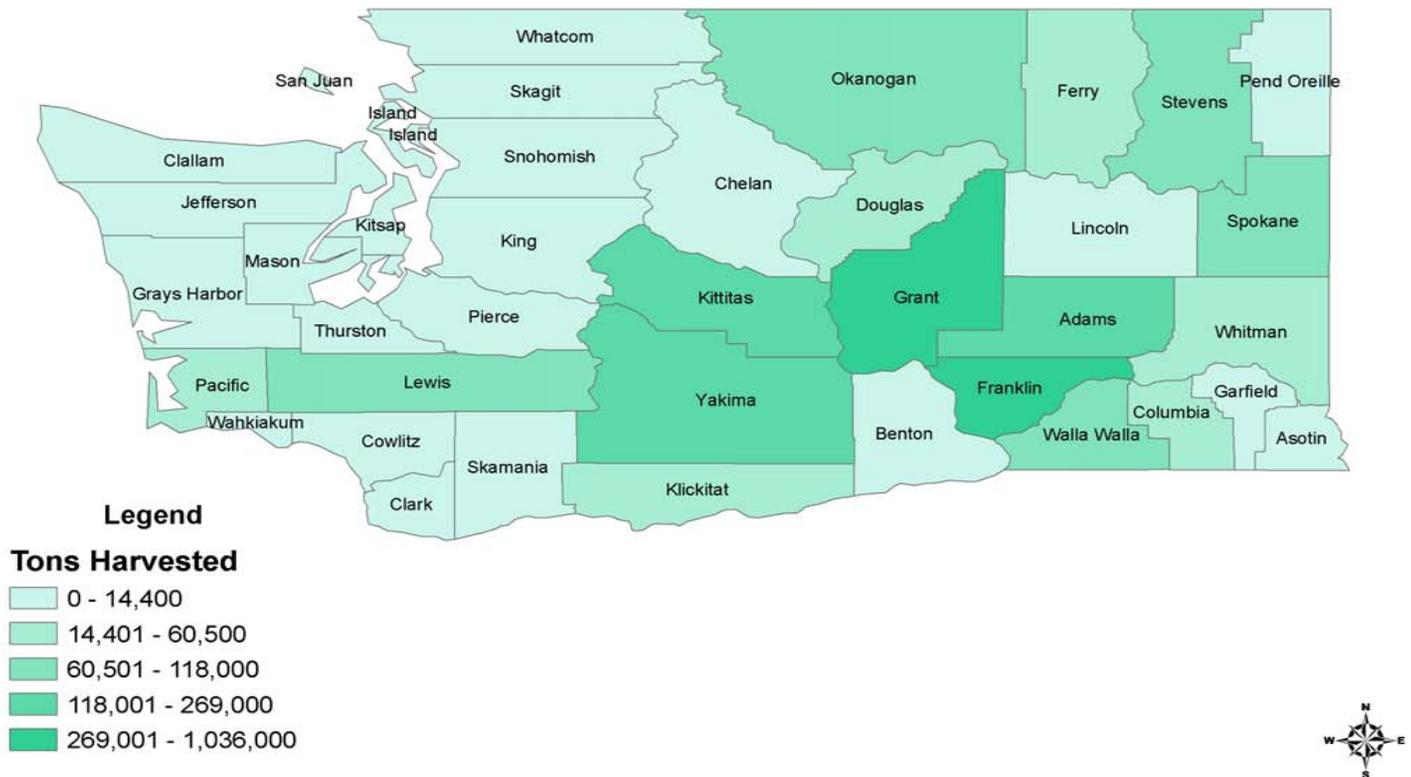
Shipment Destinations for Upper Basin Potato Production



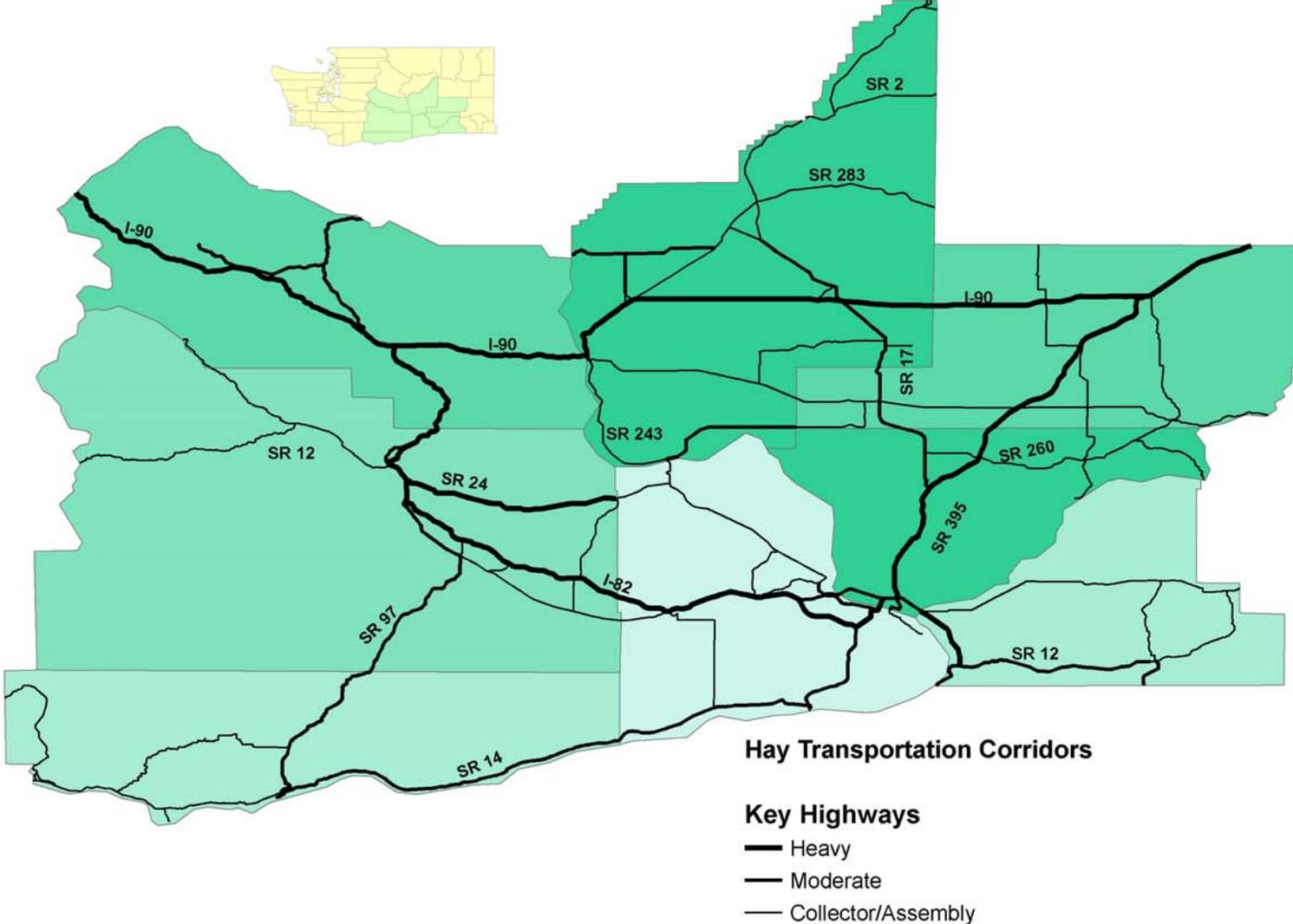
Shipment Destinations for Lower Basin Potato Production



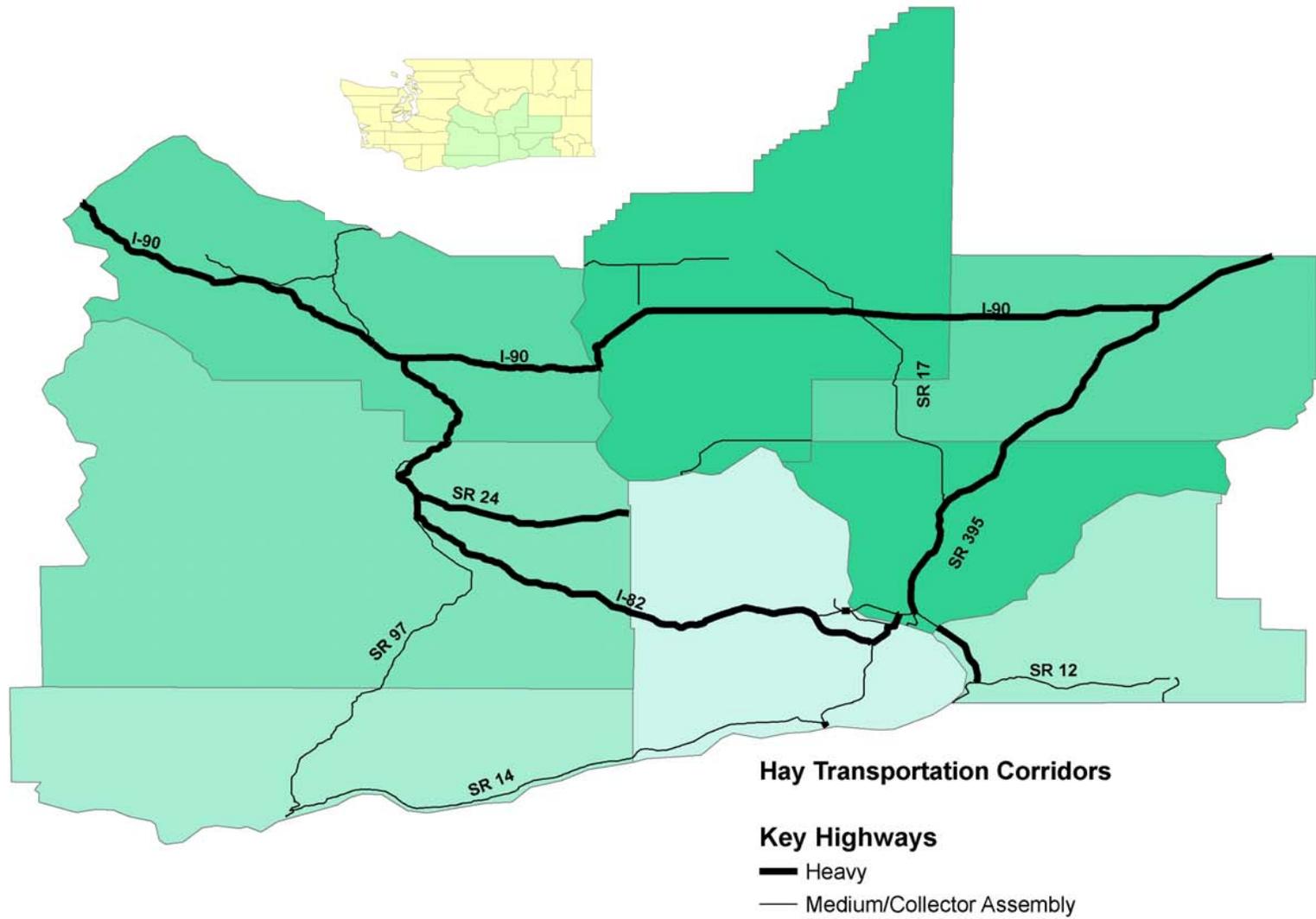
Total Tons Hay Production, by County, 2003



Key Highways Supporting Hay Producer to Processor Shipments



Key Highways Supporting Hay Shipments from Processor to Final Market



Hay Transportation Corridors

Key Highways

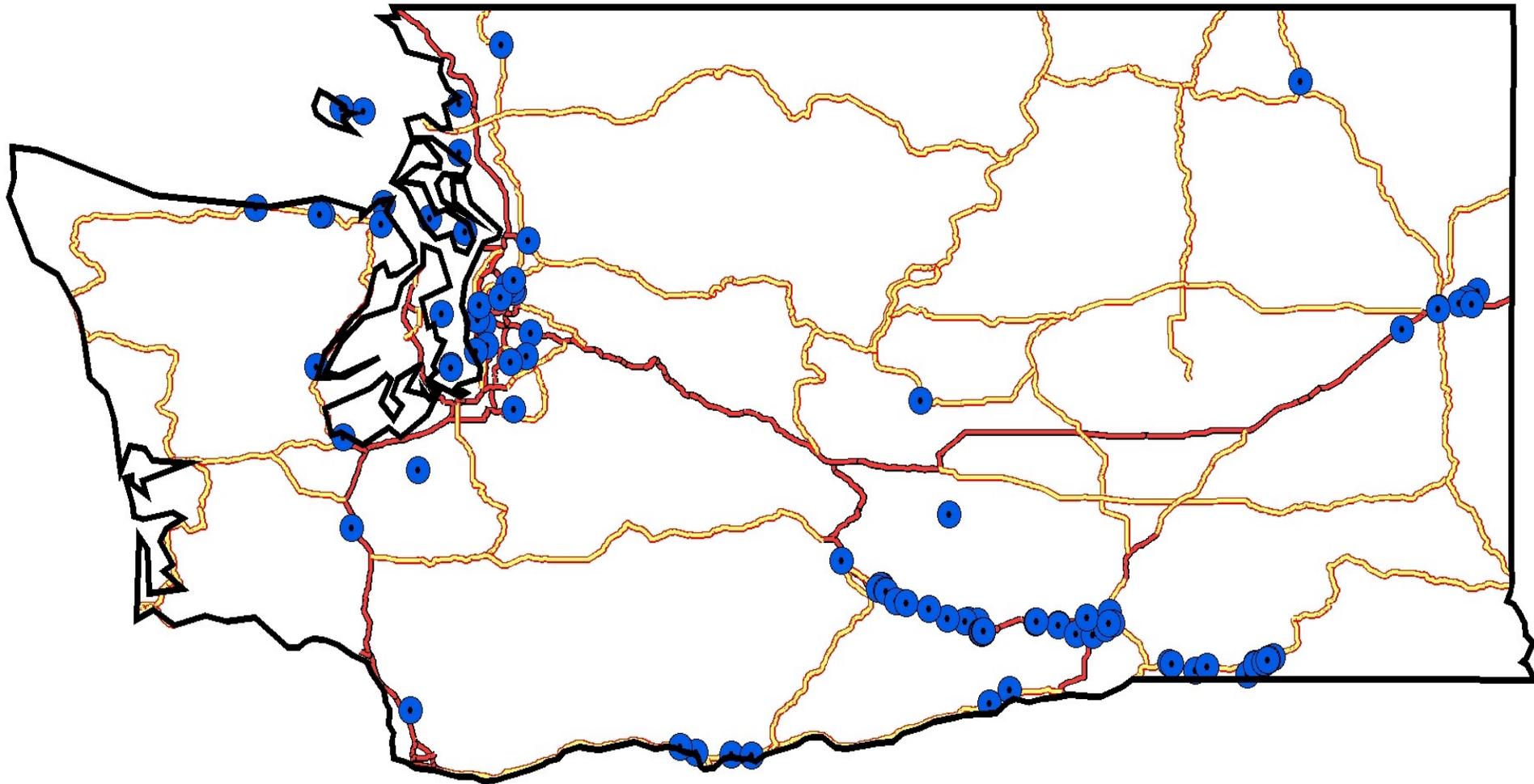
- Heavy
- Medium/Collector Assembly



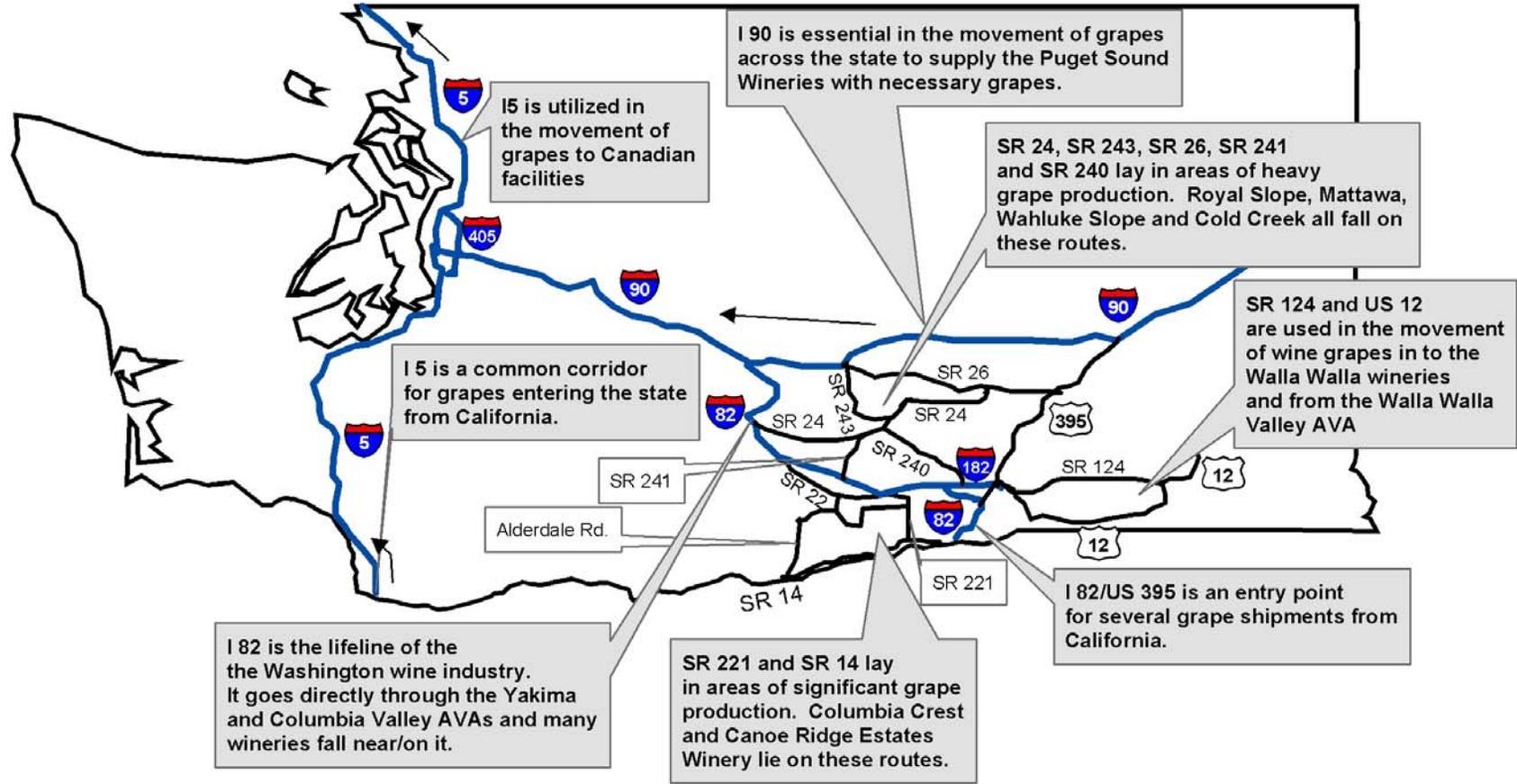
Key Washington State Highways Supporting Livestock Shipments



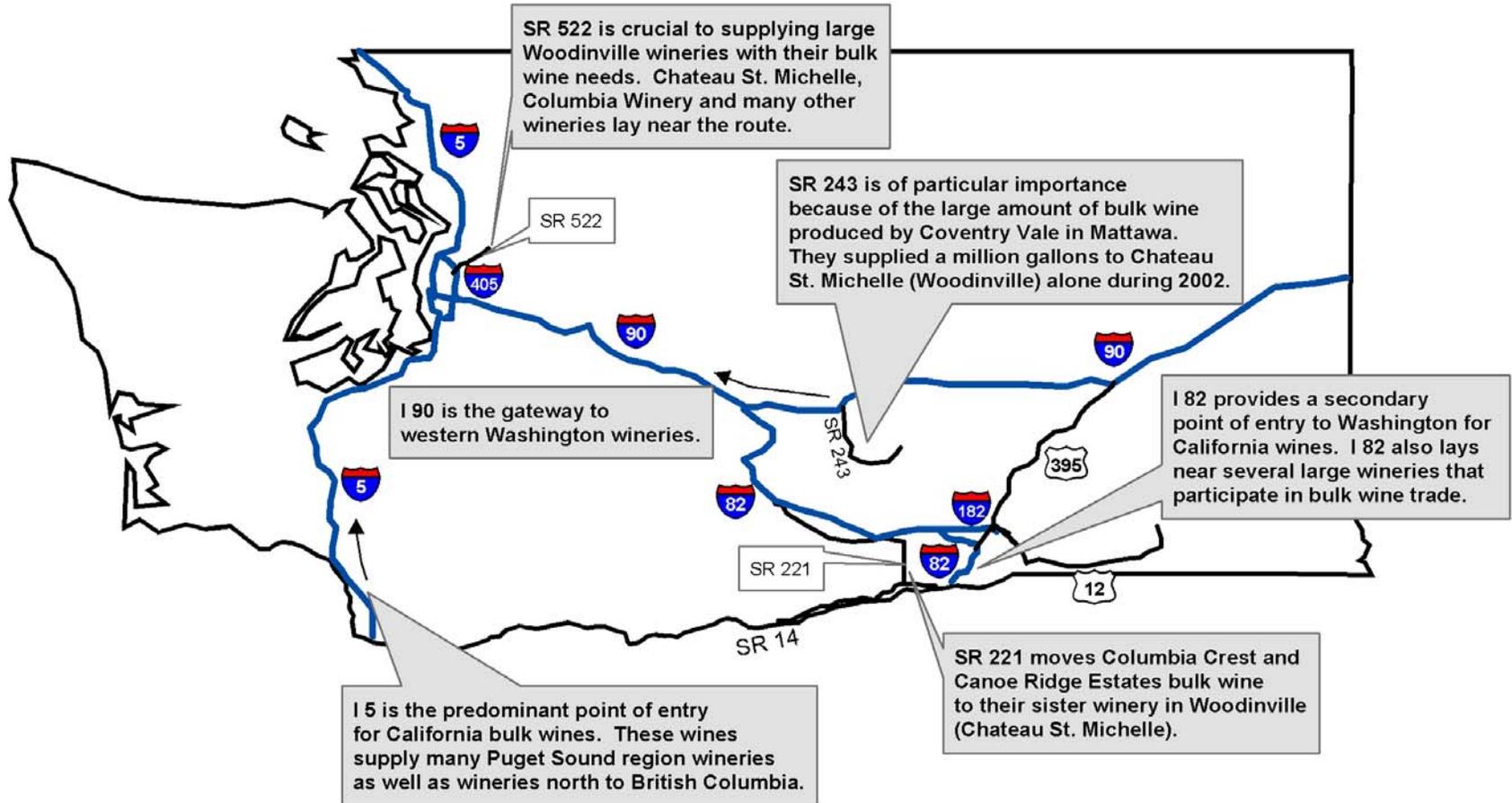
Location of Washington Wineries



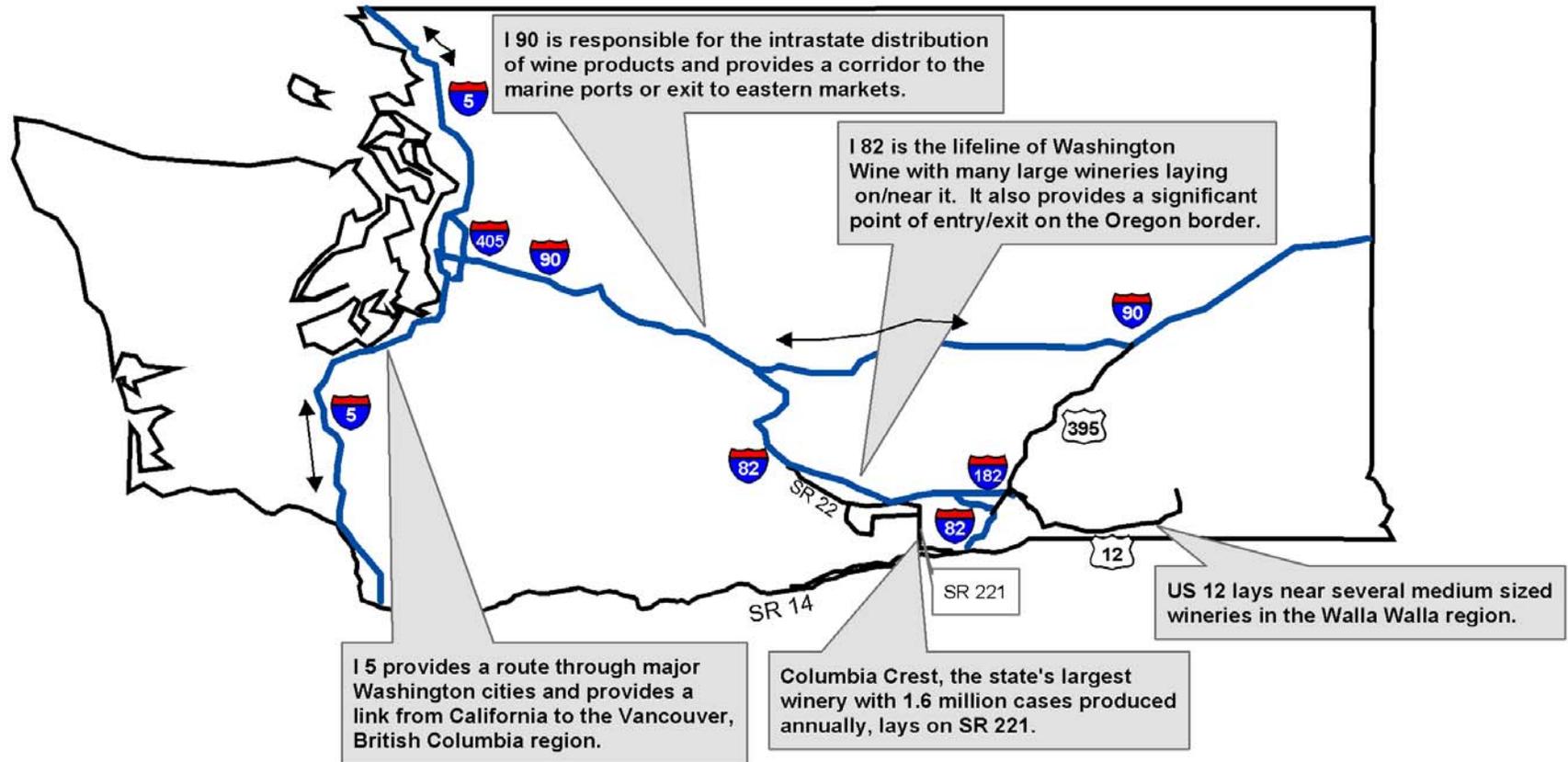
Grape Movements



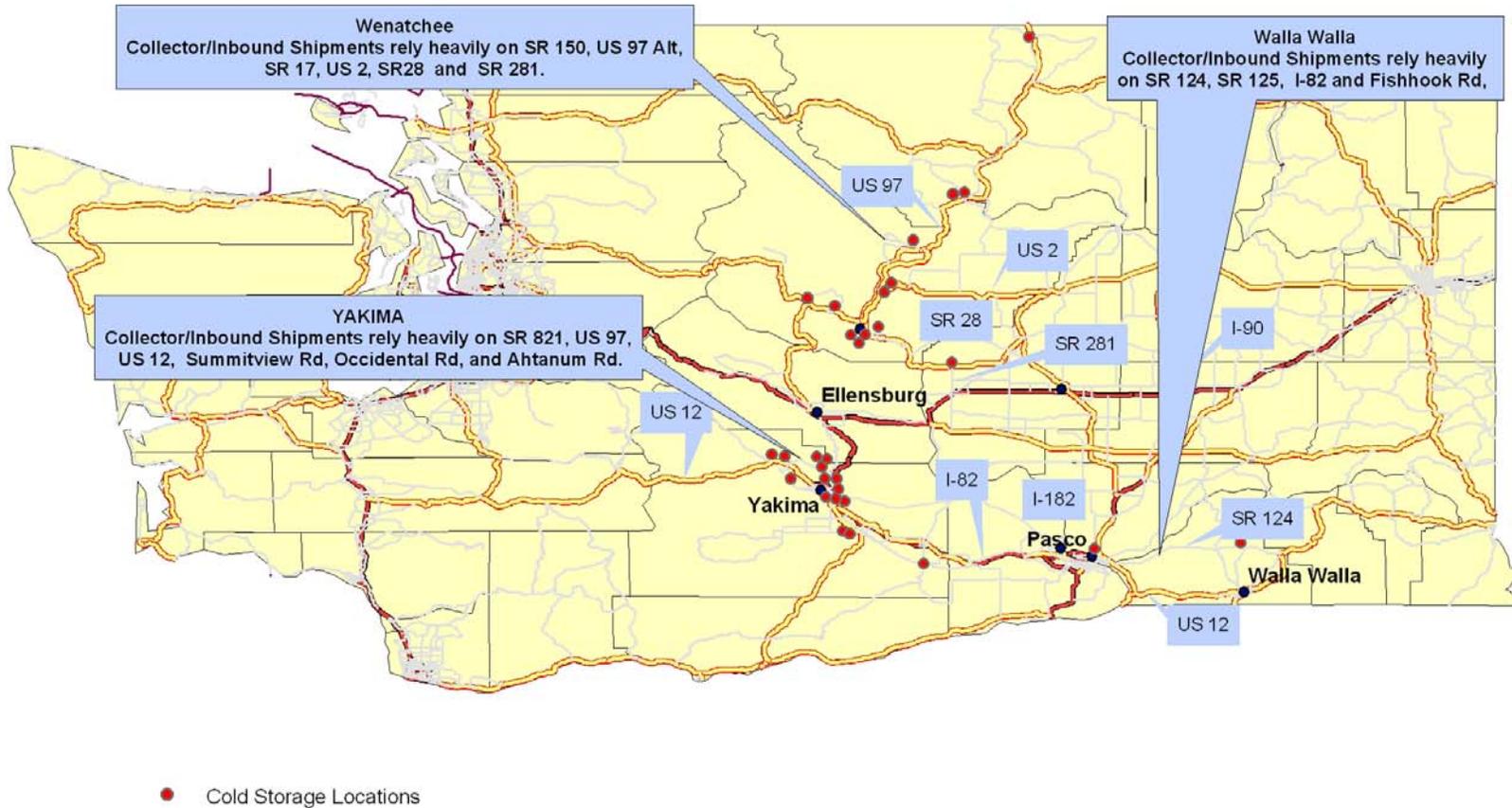
Bulk Wine Movements



Finished Wine Movements



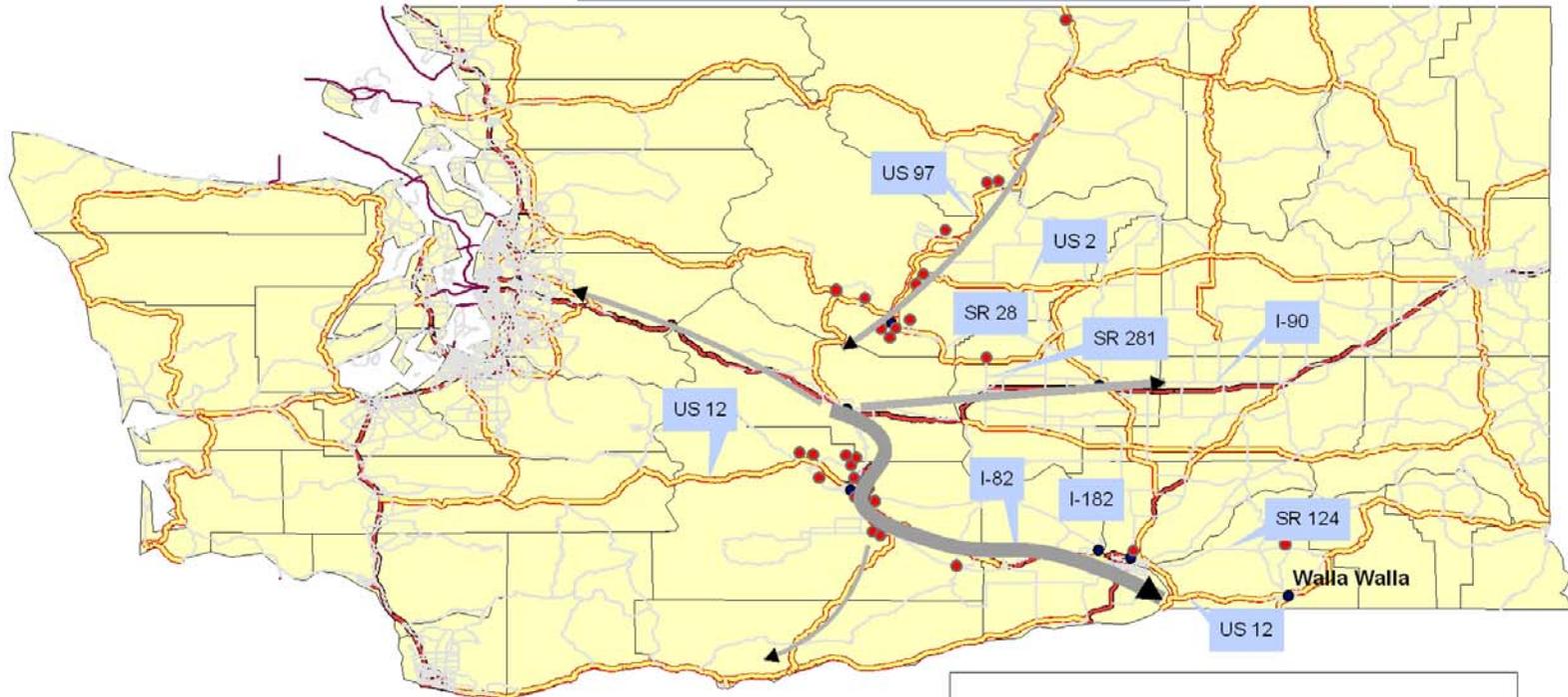
Key Highways for Inbound Apple Shipments



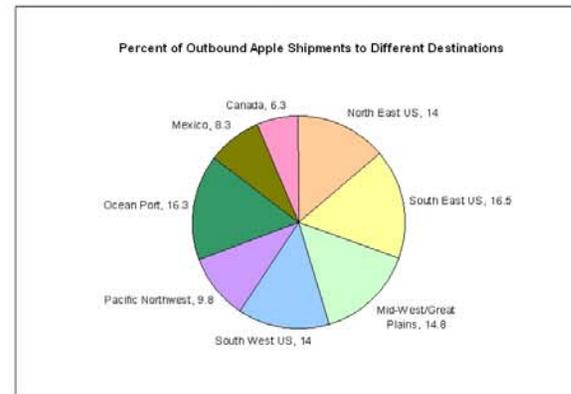
* Inbound refers to shipments from field to cold storage.

Key Highways for Outbound Apple Shipments

Outbound apple shipments are almost entirely truck, but the RailEx services out of Wallula has resulted in significant volumes moving to the east coast by rail.



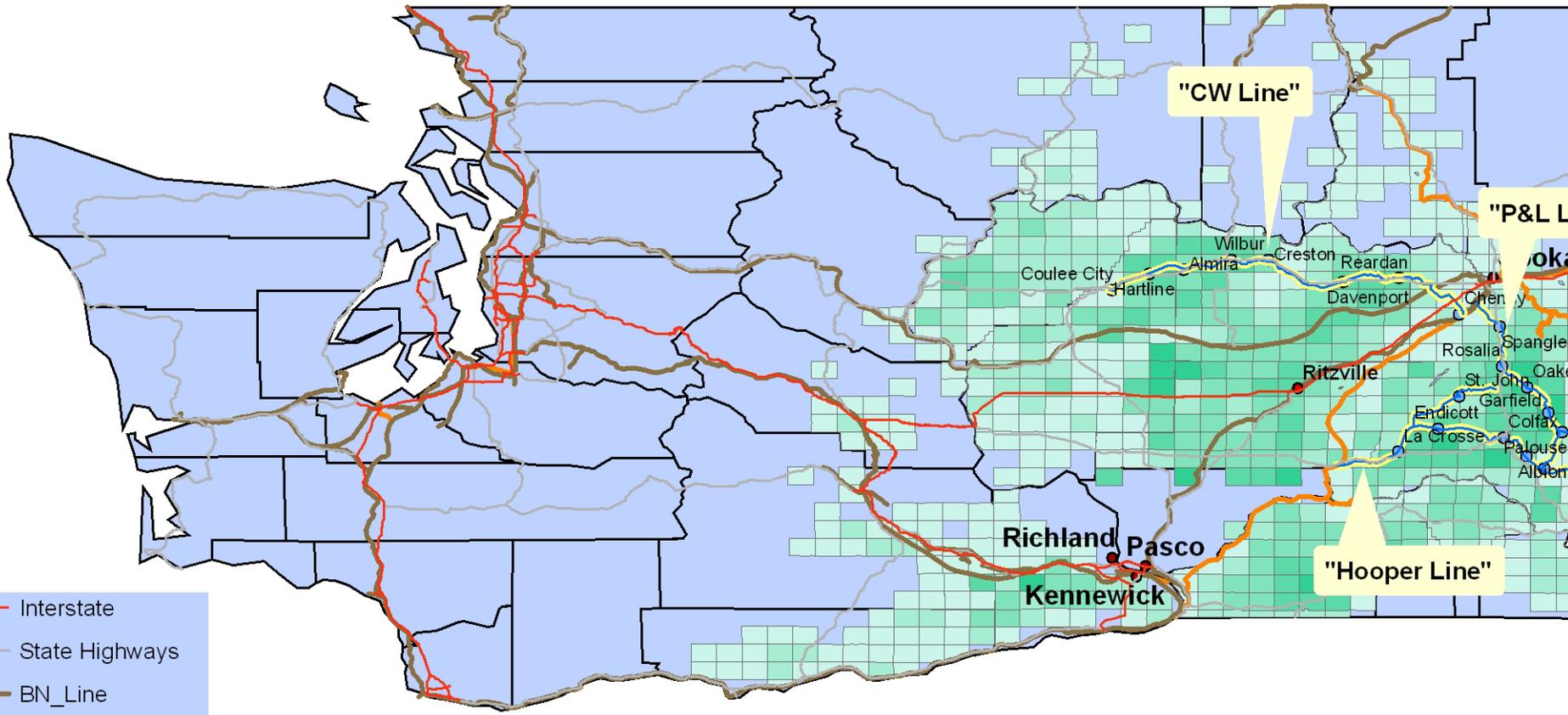
● Cold Storage Locations



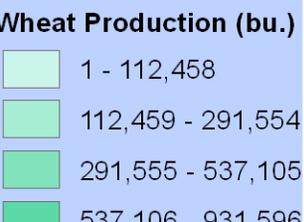
* Outbound refers to shipments leaving cold storage facilities.

Washington State Grain Production and Transportation System

- Ritzville rail may shape regional grain movements.
- Other unit train grain facilities are being considered.
- Shortline railroads are adapting to industry changes.
- Local county roads may experience heavier truck traffic.



- Interstate
- State Highways
- BN_Line
- UP_Line
- PCC Rail Line



- Multimodal transportation system (truck, rail, water) improves regional competitiveness.
- Washington Wheat Industry moving toward greater degree of quality differentiation and product segmentation.

