

Public Port and Infrastructure Project Feasibility Study & Plan

Buckeye Hills Regional Council of Governments
Washington County, Ohio

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SOUTHEASTERN OHIO
PORT AUTHORITY

Prepared for the Southeastern Ohio Port Authority

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Executive Summary

Public ports are economic engines that maintain fixed assets that are accessed by river, road, and rail to move goods nationally and, eventually, internationally as they connect to maritime ports. Inland barges carry approximately 15 percent of American freight at the lowest unit cost and lowest carbon footprint.¹ A barge can transport one ton of goods 514 miles on one gallon of fuel compared to 59 miles and 202 miles for truck and rail, respectively. One 15-barge tow is the equivalent of 1,050 large semi-tractor-trailers, per the National Waterways Foundation. It is also a safer way to transport hazardous materials, as trucks and rail each had over 200% more spill incidents over 1,000 gallons than barges between the years 2001 to 2019.

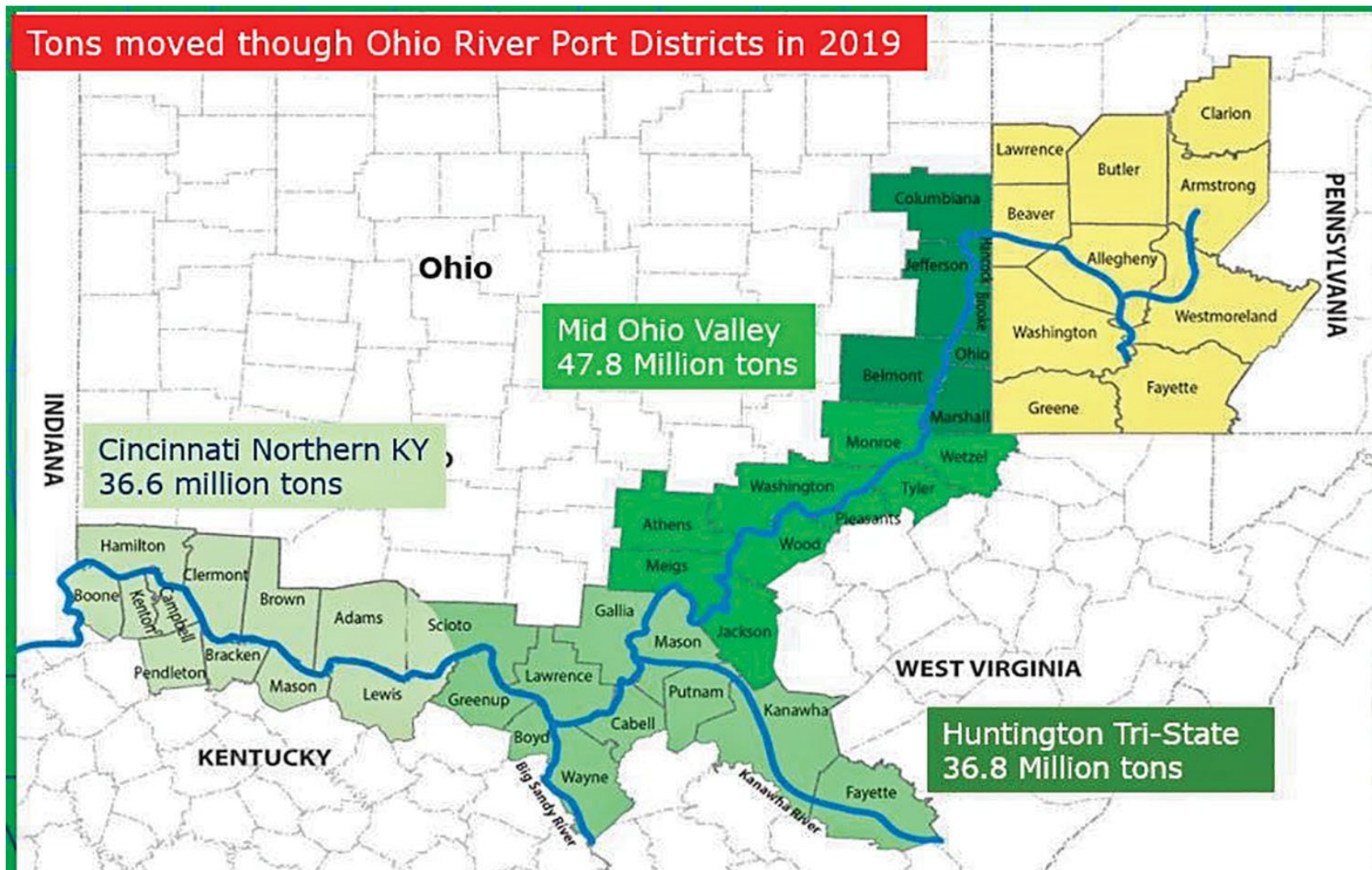
Buckeye Hills has partnered with the Southeastern Ohio Port Authority and American Structurepoint Inc. to conduct a feasibility study and create a preliminary site plan for a public inland port in Washington County, Ohio. The subject site, a former power plant, is located approximately three miles west of the City of Marietta in a hub of industrial development, such as Eramet and Synesgo. The site lies on the Ohio River between mile markers 176 and 177, which connects to the coastal ports of Louisiana via the Mississippi River going south and to the Port of Pittsburgh going north. On-site is a railroad spur of the Belpre Industrial Parkersburg Railroad, which interchanges with the CSX Transportation network and was formerly part of the Baltimore & Ohio Rail System (B&O). Additionally, the site has highway access on State Route 7, which connects to Interstate 77.

Through shift-share, location quotient, and other economic base analyses, it was determined that Washington County is competitive in manufacturing and other industries that would support port function, particularly in the target area of blue fuels. Further comparison was made to operational ports. The proposed site is well-positioned to be an economic engine as a public port.

Two site alternatives were developed for the proposed port. Cost differences between the options were minimal; however, Site Alternative 1 is recommended for its ease of development phasing and material movements on site.

Key implementation steps include permitting, supporting infrastructure development, and project stakeholder engagement.

¹ <https://www.irpt.net/environmental-advantages/>



Source: The Waterways Journal

Introduction

What is an Inland Port?

An inland port is an intermodal facility typically for transferring containers between trucks and rail.² Inland ports connect to maritime ports and receive commodities from them. The feasibility and site requirements for inland ports are based heavily on the market dynamics of the intermodal rail business that supports the port. Unlike traditional rail, intermodal is uniquely point-to-point/market-to-market. Commodities outflow from inland ports is typically end-user direct.

Inland ports are attractive components to intermodal systems as they offer Beneficial Cargo Owners (BCO), owners of the commodity moved, an alternative option if they are not satisfied with the rates or services of other modes offered. Domestic intermodal is very service- and time-sensitive. To retain this flexibility, BCOs often prefer moving commodities by containers, which can be moved fluidly between modes: tractor-trailer, rail, or barge. However, the preference is to move between modes as little as possible, as every cargo manipulation incurs cost. For that reason, an inland port should fit logically within an existing train and road network without major modification or disruption to succeed.

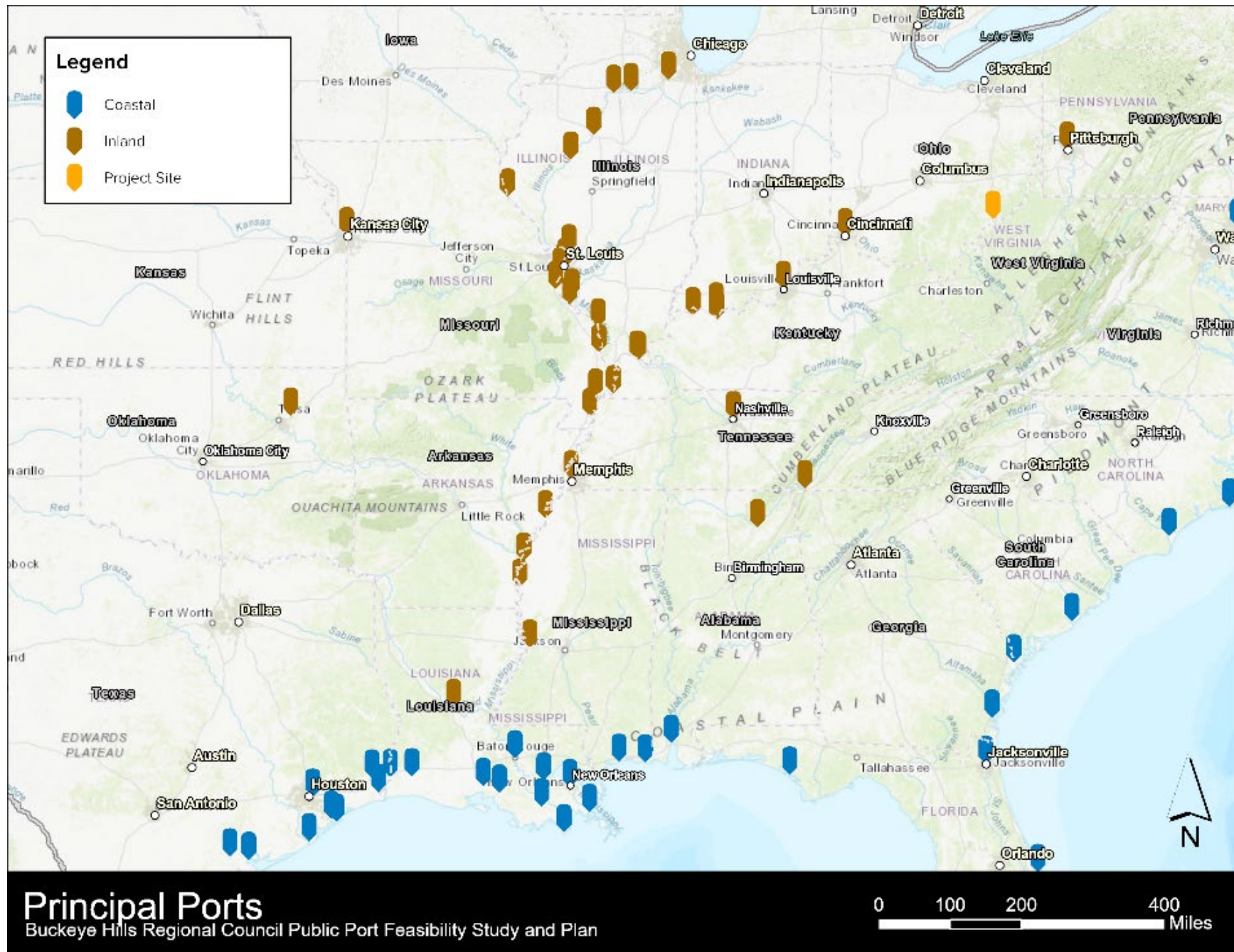
There are three typical arrangements for inland ports:

- Public ports that operate the port;
- Public ports that lease to a private terminal; and
- Private terminals that own the port.

In most cases, ports maintain the dock, fixed handling equipment, roads, rail, pipelines, supporting utilities, technology, insurance, security, and land. Some ports operate transload functions while others lease to a third-party private terminal, in which case the public port will maintain all assets necessary. Regardless of the arrangement, a publicly owned port is expected to meet a positive rate of financial return. Most private terminals own the land they operate, independent of a public port.

Inland ports operate under the regulation of the U.S. Army Corps of Engineers (USACE) and U.S. Coast Guard. USACE operates and maintains the Ohio River and locks as well as performs dredging activities. The Coast Guard provides aid in river navigation and security.

² Inland Port Study: Feasibility analysis of locating an inland port in the Commonwealth



Existing Conditions

Geographical and Environmental Conditions

This section outlines the geographic and environmental characteristics of the site, providing an overview of the natural and modified elements that define the area. Key features include variations in elevation, proximity to water bodies, and the presence of a designated wetland area, each of which plays a crucial role in shaping the potential uses and applicable conservation measures.

Topography

The predominate elevation of the site is 620 feet above sea level, with some areas dropping to 595 feet closer to the riverbank. The northern (northeastern) corner of the site next to Highway 7 also drops to about 600 feet, corresponding to the wetland habitat (below).

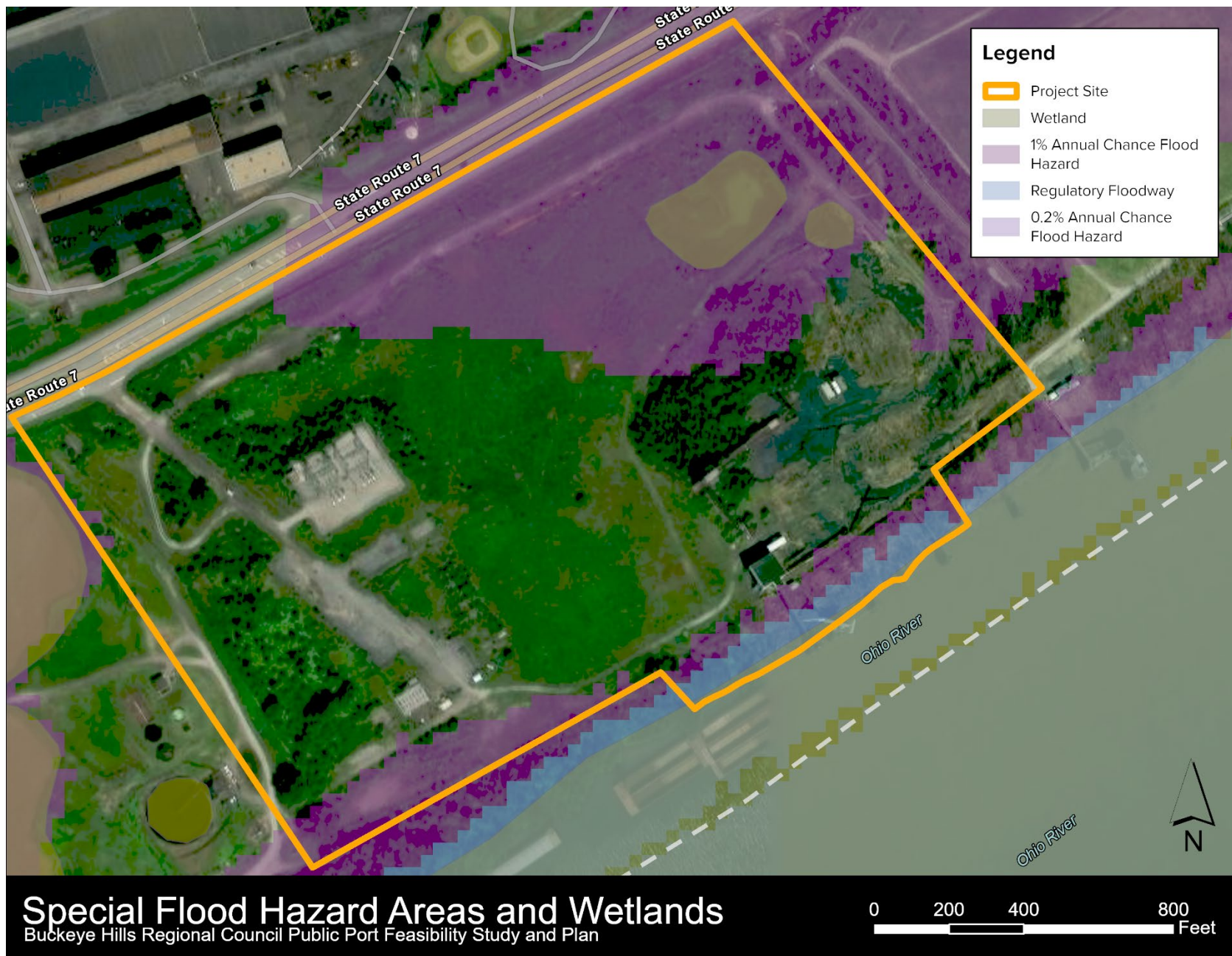
Water Depth and Riverbank Conditions

The nearest USGS station in Marietta, Ohio (USGS 03150700 OHIO RIVER) indicates a normal gage height of about 595 feet above sea level, which with other data, suggests a local gage height for the site of about 590 feet. Under normal conditions, then, there is about a 5-foot drop to the river surface as one approaches the shoreline, mostly during the 15 feet closest to the shore.

The Ohio River contains Muskingum Island, a 1.85-mile river island/islet that currently serves as a wildlife refuge, which reduces the ~3,500-foot shore-to-shore distance to a navigable width of ~1,090 feet. Average bathymetry along the northern channel adjacent to the site is about 15 feet, relative to 12 feet on the southern channel, 20 feet on the upstream approach to the island, and 24 feet on the downstream. The existing quay on the site has an adjacent average depth of ten feet. For comparison purposes, the average draft of a loaded barge is 9 feet.

Environmental Sensitivity

The northeastern corner of the site includes approximately one acre designated as a wetland, classified under the designation "PUBKx," which generally denotes a freshwater pond. This classification encompasses several specific characteristics: The "P" denotes a Palustrine System, which includes non-tidal wetlands typically dominated by trees, shrubs, and various emergent plants, and covers areas with less than 0.5 ppt of ocean-derived salt. These wetlands maintain low salinity. The "UB" class indicates an Unconsolidated Bottom, characterized by a ground cover of small particles and less than 30% vegetation. The "K" Water Regime signifies artificially controlled flooding, such as through pumps and dikes. The special modifier "x" (Excavated) indicates that the wetland area has been mechanically excavated.



Climate and Hydrology

The northeastern corner of the site and the area along the Ohio River are vulnerable to "100-year" floods, which occur with a 0.1% annual chance and reach a base flood elevation (BFE) of approximately 613 feet. The floodway impacts the handling equipment currently on the site. With the site's measured elevations only seven feet above the BFE, it is likely that increased flooding would render the site inoperable.

Portions of State Route 7 are also subject to flooding, which might impact truck traffic to the site from Interstate 77. However, the existing access point to State Route 7 and the rail spur into the site are not impacted. The flooding risk is greatest between March and June.

Infrastructure and Accessibility

Transportation

In 2018, Ohio's freight system transported over one billion tons of goods worth \$1.2 trillion. Below is Ohio tonnage and value of total freight flows by direction from 2018.

Direction	Tons (Millions)	Percentage of Total	Value (\$Billions)	Percentage of Total
<i>Outbound</i>	278	26.8%	466	37.6%
<i>Inbound</i>	319	30.7%	478	38.6%
<i>Within</i>	441	42.5%	296	23.9%
<i>Total</i>	1,038	100.0%	1,240	100.0%

[Source: FHWA FAF 5, Analysis by WSP, 2021](#)

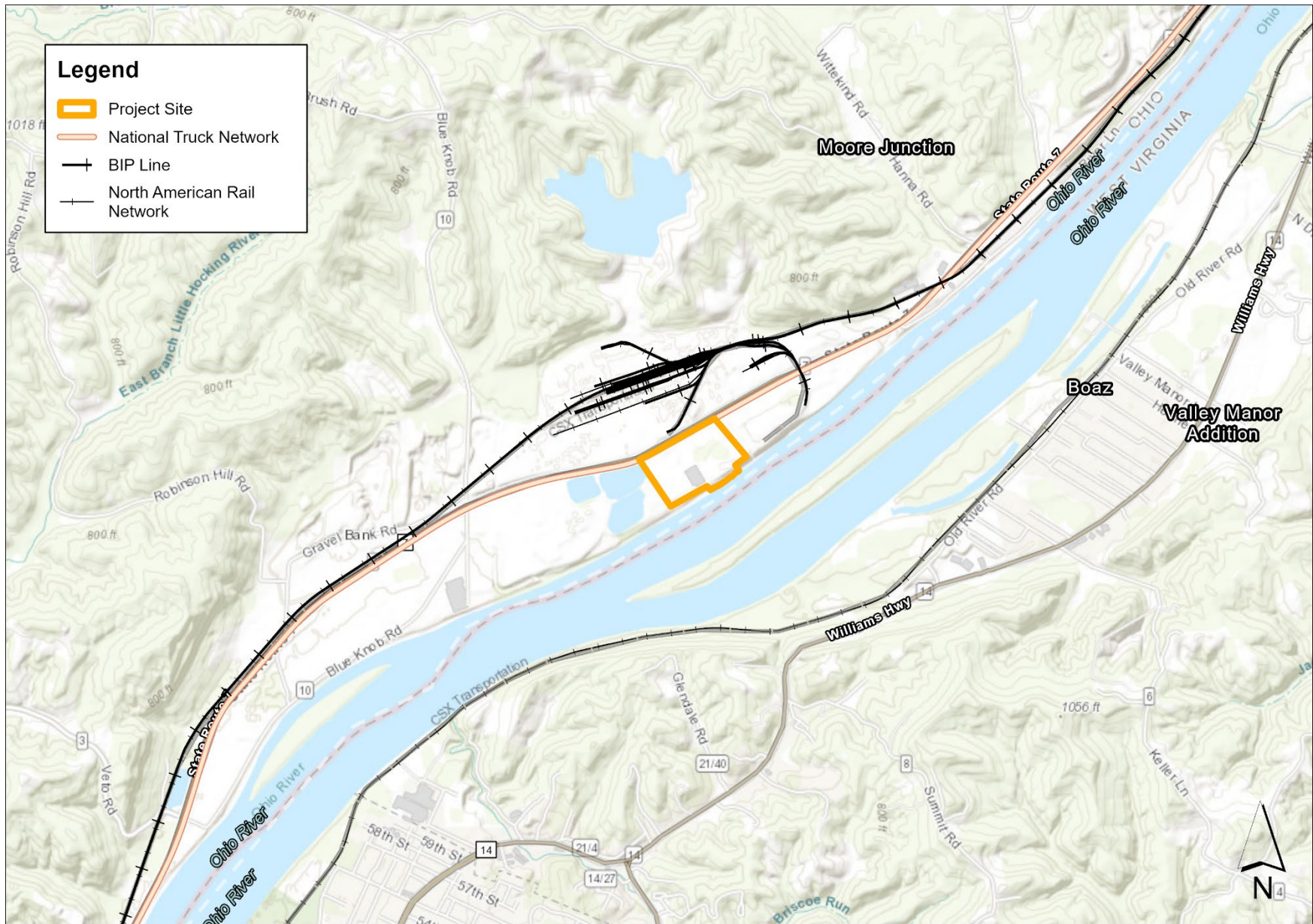
The table below shows the growth rates by tonnage and value for 2018-2045 by mode.

Mode	Tonnage Growth (2018-2045)	Value Growth (2018- 2045)
<i>Truck</i>	33.50%	31.60%
<i>Rail Carload</i>	0.63%	5.35%
<i>Rail Intermodal</i>	53.16%	59.79%
<i>Water</i>	-38.12%	-10.21%
<i>Multiple Modes and Mail</i>	19.32%	33.18%
<i>Air</i>	41.64%	55.97%
<i>Pipeline</i>	32.31%	33.82%

[Source: FHWA FAF 5 and 2045 Forecast, Analysis of WSP, 2021](#)

Highway

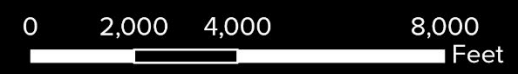
The site has direct access to Ohio State Route 7, which travels 7.75 miles south to Belpre, Ohio, where it intersects US 50 heading west to Athens, Ohio, and has bridge access to Parkersburg, WV, with subsequent access to I-77. Heading east along State Route 7 for seven miles brings one to Marietta, Ohio, with more access to I-77. Traveling 40 miles north of Marietta on I-77, one arrives at I-70, one of the main east-west freight corridors in the Midwest, which starts at Fort Cove, Utah (at I-15) and heads east to Baltimore, Maryland.



Legend

- Project Site
- National Truck Network
- BIP Line
- North American Rail Network

Project Site
Buckeye Hills Regional Council Public Port Feasibility Study and Plan



Air

The closest air services are provided by the Mid-Ohio Valley Airport (PKB) located in Parkersburg, which is subsidized by the U.S. Essential Air Service program. Passenger flights are offered to Charlotte (NC), Washington (DC), Pittsburgh (PA), Indianapolis (IN), Buffalo (NY), and Greensboro (NC); interestingly, no service is offered to Columbus (OH). Passenger service is offered by Contour Airlines, a charter service under contract with American Airlines. There are fewer than two flights per day, with 4,356 passengers served in 2023.

There is not any specific data available on freight movements at the airport, indicating that cargo handling is not a major component of its operations.

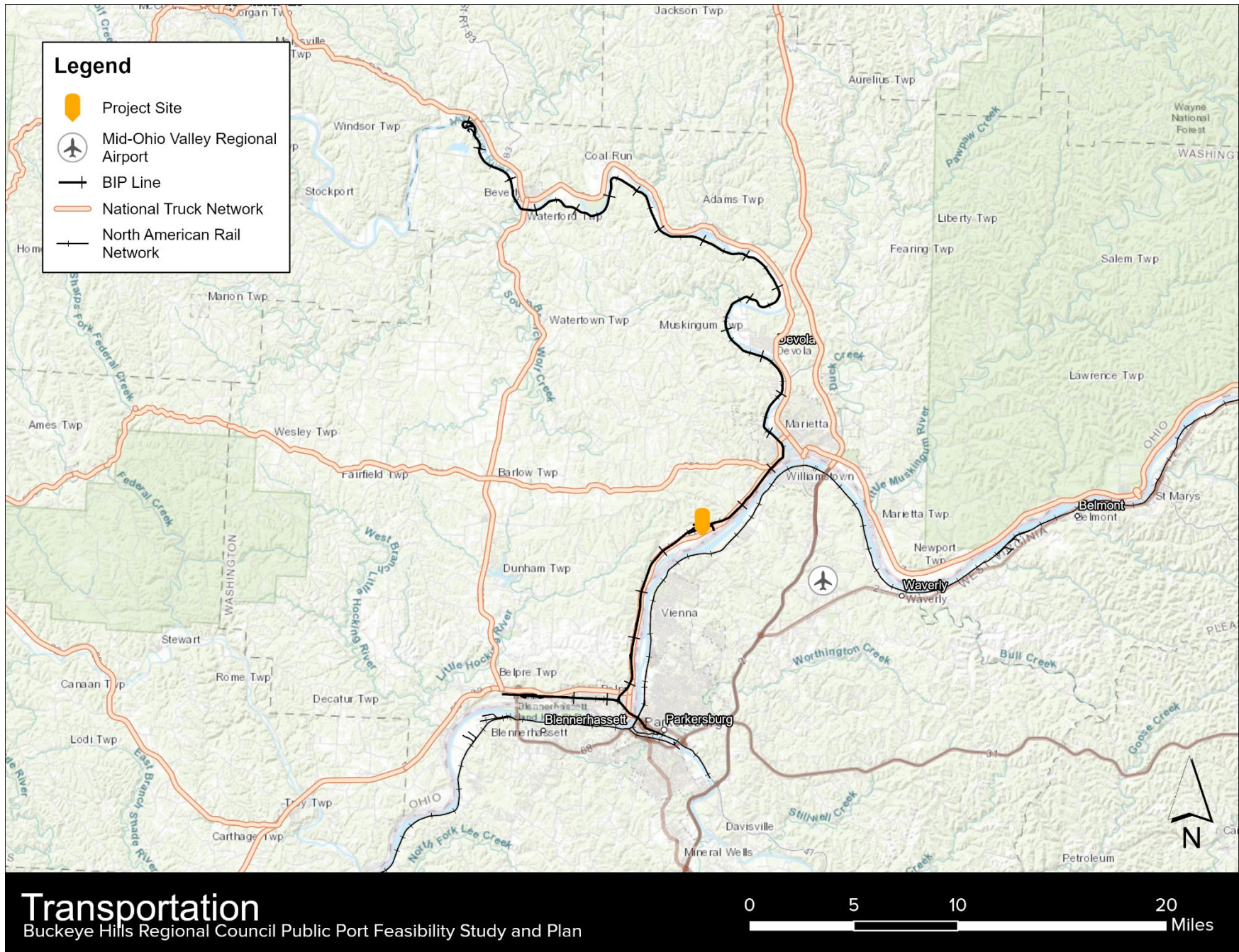
Rail

The site is served by the short-line Belpre Industrial Parkersburg (BIP) Railroad, owned by Cathcart Rail³. It has 48 miles of track serving 13 customers and an interchange with CSX in Parkersburg, West Virginia. The capacity is 286,000 cars and it has railcar storage. Commodities transferred include aggregates, chemicals, coal, construction materials, fertilizers, metals, minerals, petroleum products, plastics, steel, and scrap. Commodities handled are: Gravel, Lignin Liquor, Magnesium Oxide, Phenol, Plastic, Carbon Black, Residual Fuel Oil, Ferro Manganese, Butadiene, Isoprene, Cyclohexane, Cyclopentane, Petroleum, and Hydrochloric Acid. The primary customer on the ex-B&O Ohio Division through Belpre westbound is Kraton Polymers at the end of the line.

Double-stack rail car configuration is prohibited due to BIP's height restrictions.

The site is accessed via a rail spur that crosses State Route 7 east of the site (NBI Structure Number 8400245). The three-span bridge consists of a ballasted bridge deck on ten rolled steel beams supported by reinforced concrete substructures. The available inspection report indicates the overall condition rating is 5 (fair) out of 9, using standard National Bridge Inventory and ODOT nomenclature. The overall condition rating appears to be controlled by the condition of the deck and superstructure, as the substructure is rated 6 (satisfactory).

³ <https://www.cathcart-rail.com/services/rail-operations/belpre-industrial-parkersburg-railroad/>



Water

The presence of the Ohio River is a necessary condition for port operations at the site. Starting from its origins at the confluence of the Allegheny⁴ and Monongahela Rivers in Pittsburgh; the river stretches approximately 981 miles to its confluence with the Mississippi River at Cairo, Illinois. This river serves as a major artery for commercial navigation in the central United States, supporting a significant volume of domestic and international freight. The navigable reach of the Ohio River is facilitated by a series of locks and dams that maintain a navigable depth and assist in flood control, making it one of the busiest inland waterways in the United States in terms of freight traffic. Major commodities transported include coal, petroleum products, chemicals, and agricultural goods, reflecting the river's vital role in supporting regional and national economic activities.

Beyond Pittsburgh, the Ohio River flows through or borders six states, Ohio, West Virginia, Kentucky, Indiana, Illinois, and Pennsylvania, before meeting the Mississippi River and subsequent connections from there. Each segment of the river accommodates varying traffic volumes and types of cargo, adapting to the economic demands of the different regions it traverses.

Historically, the Ohio River has served as a vital commerce route, but it faces modern challenges such as maintaining navigational reliability and managing infrastructure aging. Docks along the Ohio River, predominantly located on the right descending bank, are crucial for the local economy, facilitating the movement and temporary storage of various commodities.

Emerging general issues include the need for the modernization of river infrastructure to continue supporting heavy industrial traffic and ensuring environmental compliance. The re-designation of ports and the creation of statistical port districts have been strategic responses to these challenges, aiding in better data collection and federal funding allocation.

Utilities

AEP Ohio is the electric utility serving the site. AT&T Ohio is the telecom provider. As of 2015, Hope Gas (now Enbridge) provided service to the site and no public sewer was available. The adjacent wastewater treatment facility operated by Eramet previously provided wastewater service to the site, which could be restored.

Existing Facilities and Equipment

- Loading conveyor
- 15-ton E-Crane
- 6 mooring cells
- Quay/dock

⁴ The Allegheny River is also navigable along part of its length, extending the reach of river traffic another 89 miles.

Regulatory and Planning Context

Land Use and Zoning

Washington County does not have countywide zoning, and the site is in Warren Township, which also does not have zoning regulations.

Permitting and Environmental Regulations

Flood Damage Prevention

Flood damage prevention regulations are administered by Washington County Soil and Water in Marietta. A permit will need to be submitted to Soil and Water. A freeboard of two feet above base flood elevation is required.

The USACE regulates construction and development activities within the floodway. Depending on the scope, permits can take approximately a year.

Building Permits

Building permit review is conducted through the Southeast Ohio Building Department. In addition to the building code, the Southeast Ohio Building Department administers the Washington County Subdivision Regulations, which include design and construction standards for curb cuts, easements, utilities, etc.

Wetlands

Any wetlands impacted by the project are subject to permits through the USACE, a permitting process that can take between 12 to 16 months.

Bridge

An in-depth inspection and load rating analysis are recommended prior to reinstating traffic on this structure. The load rating should be according to all applicable AREMA, AASHTO, and ODOT standards and incorporate present-day conditions, including any section loss or other deterioration. A Change of Use permit may also be required for the proposed port use.

Local and Regional Plans

Washington County Comprehensive Plan

Washington County released a new comprehensive plan in 2024.

Buckeye Hills CEDS

Buckeye Hills Regional Council published a Comprehensive Economic Development Strategy (CEDS) in 2020, and the plan was updated in 2022. It covers the eight-county region of Athens, Hocking, Meigs, Monroe, Morgan, Noble, Perry, and Washington Counties. The CEDS SWOT analysis for the region identified two opportunities related to this port project: the chemical sector and maritime capacity.

The region historically has a strong chemical sector. The report notes a cluster of 59 different chemical or chemical-based product establishments, with location quotients of 1.6 and 2.91, respectively. The CEDS predicts future growth in this industrial cluster due to the anticipated ethane cracker plant in adjacent Belmont County, Ohio.

The eastern border of the region is marked by the Ohio River, a largely untapped opportunity for regional development. A 2018 ODOT report noted maritime capacity for cargo and goods movement has a significant economic impact in Ohio and generated a total of \$26.5 billion in economic value. A 2022 Army Corps of Engineers report noted that the Mid-Ohio Valley statistical port, which the project port would belong to, is the 17th most productive port in the US and the #1 most productive inland port.

As part of the Strategic Direction/Action Plan, the CEDS identified five prioritized regional goal areas: broadband development, infrastructure support, asset utilization, workforce, and economic diversification. As an infrastructure objective, Buckeye Hills staff will identify two potential locations for transloading and intermodal cargo transfer on the Ohio River, such as this project site.

Transport Ohio

Transport Ohio is the 2022 Ohio Statewide Freight Plan published by ODOT. Below are a few key takeaways from the plan as they relate to the proposed port project:

- JobsOhio identifies the following industries as freight-reliant: advanced manufacturing, aerospace and aviation, automotive, autonomous mobility, energy and chemicals, food and agribusiness, logistics and distribution.
- One strategy in the plan is to encourage Ohio's regions to develop multimodal freight transportation plans and assessments. This strategy supports all of the plan's and Access Ohio 2045's goals: economic competitiveness, environmental stewardship, quality of life, safety, preservation, efficiency and reliability, and mobility and accessibility.
- In 2028, 42.5 percent of Ohio freight tonnage flow stayed within the state, while 30.7 percent was inbound and 26.8 percent was outbound.
- After truck traffic, multi-modal carry goods with the highest value in 2045, accounting for approximately 13.3 percent of the total value of Ohio-based traffic according to the Freight Analysis Framework. Rail intermodal tonnage is projected to grow 53.16 percent between 2018 and 2045.
- The counties that contribute most to the increase in Chemicals/Pharmaceuticals/Plastics tonnage between 2018 and 2045 are Hamilton, Franklin, Wood, Lucas, Mahoning, and Washington. Washington County is also projected to see increased Food and Agricultural tonnage for the same period.

Market Demand Feasibility Analysis

When establishing an inland port, it is important to consider whether domestic or international cargo will be accommodated. 92 percent of intermodal uses containers as opposed to trailers. Containers for domestic cargo, known as units, are 53 feet long. Containers for international cargo are 20 feet, 40 feet, or 45 feet long; however, the standard measure unit is known as the Twenty Foot Equivalent Unit (TEUs) when discussing international cargo. When international goods arrive at a marine port, they are transferred from the smaller size containers to the larger domestic standard containers for further transportation. Containers are part of the supply chain that supports inland ports, and their ownership needs to be considered. Most containers are owned by steamship lines.

Length of haul and density/volume for supporting rail are key factors for inland port success. Historically, intermodal needs to be 750 miles or less haul on rail between the inland port and the destination terminal to remain competitive against trucking. For density/volume, a near-equilibrium of inbound and outbound containers is needed. Payload pays for freight and transporting empty containers results in cost that someone in the supply chain must bear. Matching the volume of demand to equipment is essential.

As suggested before, much of freight transportation involves third parties, even for domestic transportation. Establishing a new inland port will be challenging because rail services, such as CSX, see the steamship line that owns the containers as their contractual customers, not the port or the BCO. Shifting business to a new inland port will require multiple steps.

Also, the supply of chassis must be considered for operating an inland port, as trucks are essential in draying, providing stop gap transportation between transportation modes in an intermodal system. Without a fluid supply of chassis at the beginning and end points, wait time translates into additional capital costs. A chassis supply should be located locally near the port.

A lift is a standard capacity measure for an inland port; it refers to a container being loaded or unloaded onto rail.

The proposed port would be operated by the Southeast Ohio Port Authority. To assist with market feasibility, coordination with the regional authority, Southeast Ohio/Mid-Ohio Valley, must occur. The site belongs to the Mid-Ohio Valley Port Statistical District of Ohio and West Virginia, which includes the corporate limits of Columbiana, Jefferson, Belmont, Monroe, Washington, Athens, and Meigs, counties in Ohio; and Hancock, Brooke, Ohio, Wetzel, Tyler, Pleasants, Wood and Jackson counties in West Virginia.

Due to labor issues in 2000 and US tariffs against China during the Pandemic creating bottlenecks on the West Coast, East Coast ports continue to modestly grow and gain market share. To meet this demand, Class I Eastern rail carriers such as CSX and Norfolk Southern have expanded further inland.

The following table summarizes the ideal market-driven factors that contribute to a successful inland port by encouraging a railroad to be an interested partner. These conditions are intended for general guidance; not meeting all conditions does not make an inland port infeasible. However, more conditions met will increase the likelihood of feasibility.

Factor	Notable Parameters
Length of Haul	Over 250 miles is required to remain competitive to over-the-road movement
Volume	An inland port must generate a minimum of 20,000 lifts per year to be attractive to a Class I rail service. Fewer lifts generated can also attract this partnership; however, the lifts must be non-domestic. Shippers/BCOs must be willing to formally commit traffic.
Location	Proximity to an interstate and/or rail mainline that already carries intermodal freight to the desired marine port.
Freight Demand	Freight demand should be dense and not geographically dispersed. Initially, it can be concentrated in a small number of shippers and not dispersed among a large number of shippers. Traffic should be balanced between empties and loads. Freight demand can be a function of population or industry-driven demand within the catchment area.
Expansion Opportunity	An inventory of developable land should be near the inland port to accommodate additional demand generation.

Source: [Inland Port Study: Feasibility analysis of location an inland port in the Commonwealth](#)

Cargo and Commodity Flows

The table below describes the link tonnage commodity flow for the Ohio River frontage for the subject site.

2023 Link Tonnage		
Commodity	Up	Down
Coal	3,117,977	17,152,264
Petroleum	2,306,208	1,788,497
Chemicals	1,000,872	97,371
CR Material	6,285,553	322,257
Manufacturing	1,975,413	605,125
Farming	73,824	380,604
Machinery	0	0
Waste	0	0
Unknown	0	0

Source: Freight Analysis Framework (FHWA/BTS)

The proposed port would belong to the Mid-Ohio Valley Port Statistical area, which moved 34,163,285 domestic short tons in 2022. According to the USACE Waterborne Commerce Statistics Center, it did not have any tonnage for import/export.

Economic Base Study

An economic base study was conducted through location quotient and shift-share analyses. Location quotient is an indicator of how Washington County compares to Ohio today using 2022, while shift share is an indicator of how the same examined industry clusters may be in the future by using past performance (2018 to 2022). In combination, these analyses provide a fair indication of the economic base that will support the proposed port.

Location Quotients

Location quotient ratios indicate a higher concentration of an employment industry within a given economy, Washington County, than in a larger economy, such as Ohio. When a local industry’s ratio is 1.0 or higher, the local economy has a competitive advantage regarding those types of businesses. Also, high location quotients can indicate that a local economy has a large workforce trained in these industries, which can be used to attract industry clusters and complementary businesses. Relative to the port development, Washington County has a favorable competitive advantage in the desired industry clusters:

- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing

The site is anticipated to handle “blue fuels” and its accessory commodities. Blue fuels refer to blue hydrogen, a lower-carbon alternative to traditional fossil fuels produced from methane or coal. It is considered a transitional fuel to green hydrogen, which is produced with renewable energy and does not emit CO₂.⁵ The desired industry clusters will support this objective.

NAICS Category	Washington Co to Ohio Location Quotient
<i>Agriculture, Forestry, Fishing and Hunting</i>	0.40
<i>Mining, Quarrying, and Oil and Gas Extraction</i>	9.44
<i>Utilities</i>	1.65
<i>Construction</i>	1.54
<i>Manufacturing</i>	1.24

⁵ <https://www.weforum.org/stories/2021/07/clean-energy-green-hydrogen/>

<i>Wholesale Trade</i>	0.78
<i>Retail Trade</i>	0.90
<i>Transportation and Warehousing</i>	0.65
<i>Information</i>	0.33
<i>Finance and Insurance</i>	0.92
<i>Real Estate and Rental and Leasing</i>	1.03
<i>Professional, Scientific, and Technical Services</i>	0.52
<i>Management of Companies and Enterprises</i>	0.63
<i>Administration & Support, Waste Management and Remediation</i>	0.58
<i>Educational Services</i>	0.99
<i>Health Care and Social Assistance</i>	1.30
<i>Arts, Entertainment, and Recreation</i>	0.35
<i>Accommodation and Food Services</i>	1.17
<i>Other Services (excluding Public Administration)</i>	0.94
<i>Public Administration</i>	0.82

Shift-Share Analysis

The shift-share analysis compares a local economy’s growth over a specified timeframe to a larger economy (Ohio) change over that same period. This type of analysis is typically broken down into these calculations:

- **State Growth for Industry** – The statewide growth for the industry calculation shows the number of local jobs a business category is expected to gain or lose based on that same category’s state performance. In short, it describes how many local jobs were created or lost because of that industry’s rise or decline statewide.
- **Industrial Shift** – This measurement provides insight into whether an industry is growing or shrinking statewide. An industry with a negative industrial shift is declining. It may help a local economy identify if they are reliant on a shrinking sector or where not to focus recruiting efforts.
- **Competitive Share** – A positive competitive share value indicates that a particular industry is growing faster locally than the state economy and may suggest that the local economy has an industry-specific competitive advantage. Negative competitive share values suggest that the local industry is losing jobs faster than the state economy.

- Absolute Change – Absolute change illustrates the total number of jobs gained (positive number) or lost (negative number) in the local economy during the time period used for the shift-share analysis.

Washington County Shift-Share

NAICS Category	State Growth	Industrial Shift	Competitive Share	Absolute Change
<i>Agriculture, Forestry, Fishing and Hunting</i>	2	7	-35	-26
<i>Mining, Quarrying, and Oil and Gas Extraction</i>	23	-287	-35	-299
<i>Utilities</i>	10	-26	-83	-98
<i>Construction</i>	67	340	-682	-276
<i>Manufacturing</i>	123	-122	262	263
<i>Wholesale Trade</i>	33	-20	-130	-117
<i>Retail Trade</i>	88	-183	-253	-348
<i>Transportation and Warehousing</i>	35	458	-709	-216
<i>Information</i>	5	-14	-14	-23
<i>Finance and Insurance</i>	30	75	-1	104
<i>Real Estate and Rental and Leasing</i>	12	12	-60	-36
<i>Professional, Scientific, and Technical Services</i>	25	56	-113	-32
<i>Management of Companies and Enterprises</i>	6	-9	236	233
<i>Administration & Support, Waste Management and Remediation</i>	27	-20	59	66
<i>Educational Services</i>	76	8	-215	-131
<i>Health Care and Social Assistance</i>	176	-151	-194	-168
<i>Arts, Entertainment, and Recreation</i>	4	10	15	29
<i>Accommodation and Food Services</i>	73	-83	241	231
<i>Other Services (excluding Public Administration)</i>	25	-28	-49	-53

Conclusions

In both analyses, Washington County has a competitive advantage in Manufacturing. It also has a high competitive advantage in Mining, Quarrying, and Oil and Gas Extraction, although it has been losing more jobs than the state overall.

Economic Impact Analysis

In August of 2024, an Economic Impact Analysis for the Southeastern Ohio Multimodal Port project was conducted by the Center for Economic Development and Community Resilience at Ohio University⁶. This analysis utilized IMPLAN (Impact Analysis for Planning) software, a widely recognized economic modeling tool, to estimate the direct, indirect, and induced effects of the port's development and operations. The study employed 2022 IMPLAN data and regional economic indicators specific to Washington County, Ohio, incorporating industry-standard methodologies to assess job creation, labor income, business activity, and overall economic output. The findings provide a quantitative foundation for understanding the potential economic benefits of the port, complementing the feasibility study's assessment of infrastructure, operational considerations, and regional market positioning.

The analysis states that the port project is projected to generate significant economic benefits for Washington County, both during its three-year construction phase (assumed to be 2024-2027) and throughout its long-term operations. The project will involve site preparation, infrastructure improvements, and the development of a rail-served dry dock, material handling system, and warehousing facilities at the former AMP-Ohio Gorsuch site. The total estimated direct investment was \$25 million, which in turn would stimulate job creation, increased business activity, and long-term economic growth in the region.

During construction, the project is anticipated to directly support 208 jobs per year, with an additional 20 indirect jobs created through supply chain spending and 44 induced jobs resulting from increased household spending in the local economy. The total aggregate employment impact over the three-year period is 273 jobs, with a total labor income of \$16 million. The construction phase alone is expected to generate \$36.7 million in total economic output, exceeding the initial investment due to multiplier effects that amplify local economic activity.

Once fully operational, the port is expected to directly employ 55 full-time workers, with an additional 17 indirect and induced jobs supported by port-related activities. The facility is projected to generate \$5 million in annual revenue, contributing to an overall economic impact of \$7.8 million per year. The marine cargo handling sector, trucking industry, and local retail and service sectors are expected to see the most substantial benefits from ongoing port operations.

The economic impact analysis estimates that the project will have a construction-phase multiplier of 1.47 and an operational-phase multiplier of 1.57, meaning that every \$1 invested in the project will generate an additional \$0.47 in economic output during construction and an additional \$0.57 annually during operations. These multipliers indicate strong regional economic stimulation, aligning with findings from similar inland port projects across the Midwest⁷.

⁶ Bone, Clara (2024). "The Economic Impact of the Southeastern Ohio Multimodal Port Project in Washington County," August 23, 2024. Center for Economic Development and Community Resilience, Ohio University.

⁷ E.g., Martin Associates (2023). "The Local and Regional Economic Impacts of the Ports of Indiana," September 13, 2023. Prepared for the Ports of Indiana.

Beyond direct employment and revenue generation, the port is expected to have wider economic benefits for Washington County, including increased business-to-business transactions, infrastructure utilization, and potential industrial expansion. Sectors such as real estate, financial services, and healthcare are projected to see indirect gains due to increased demand for housing, commercial development, and workforce-related services. The report also highlights the potential for enhanced regional freight resilience, as the port provides an additional supply chain node in a region with limited existing multimodal infrastructure.

While the economic impact analysis demonstrates strong potential benefits, it does not fully address operational risks, regulatory challenges, or long-term revenue sustainability. Key issues such as competition from other regional ports, workforce availability, and the need for a well-defined business model remain unresolved. Additionally, securing U.S. Army Corps of Engineers (USACE) floodway approvals, rail infrastructure upgrades, and financing for long-term expansion will be critical to ensuring the project's success.

Highlighted Inland Ports

As part of this study, three public ports were examined as precedent studies for the Washington County public port.

1. Columbiana, Ohio – Columbiana County Port Authority
2. Mount Vernon, Indiana – Ports of Indiana-Mount Vernon
3. Crandall, Georgia – Appalachian Regional Port

Columbiana County Port Authority

The Columbiana County Port Authority owns and leases barge/rail/truck cargo transfer facilities in Mahoning and Columbia Counties, including the Port of Ohio at Pier 48 in Wellsville, Ohio, located up the Ohio River and State Route 7 from the subject site.

The Port of Ohio at Pier 48 has access to the Gulf of Mexico via the Ohio, Tennessee, and Mississippi River systems. A 60-ton bridge crane loads cargo.⁸ Materials handled include barite, talc, celestite, jig ore, soybeans, corn, break bulk materials, coils up to 70,000 pounds, and machinery up to 120,000 pounds.

Shift-Share

Because the Columbiana Port is a direct competitor to the proposed Washington County Port, a shift-share analysis was developed for purposes of comparison to Washington County (reported above).

This shift-share analysis examined both counties' job growth from 2014 to 2022. Based on 2023 link tonnages for the Ohio River segment bordering the proposed port site, the following NAICS categories were of particular interest:

⁸ https://members.moodyscre.com/api/images/data/og/media/user_uploads/602167b14eeb80000193dd5a_100_albright_way.pdf

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Manufacturing

While Columbiana County has a positive competitive share for the first two categories compared to Washington County, Washington County shows a positive and relatively high competitive share for Manufacturing.

Columbiana County Shift-Share

NAICS Category	State Growth	Industrial Shift	Competitive Share	Absolute Change
Agriculture, Forestry, Fishing and Hunting	5	16	69	90
Mining, Quarrying, and Oil and Gas Extraction	7	-87	19	-61
Utilities	7	-17	-56	-66
Construction	43	218	-287	-26
Manufacturing	208	-207	-100	-98
Wholesale Trade	39	-24	-127	-112
Retail Trade	137	-283	-309	-456
Transportation and Warehousing	37	487	-455	69
Information	9	-24	-73	-88
Finance and Insurance	18	45	-184	-120
Real Estate and Rental and Leasing	10	10	-81	-61
Professional, Scientific, and Technical Services	18	42	-82	-22
Management of Companies and Enterprises	4	-6	46	44
Administration & Support, Waste Management and Remediation	50	-36	-313	-299
Educational Services	101	10	-115	-4
Health Care and Social Assistance	195	-166	-1112	-1,084
Arts, Entertainment, and Recreation	8	21	-18	11
Accommodation and Food Services	81	-91	-51	-62
Other Services (excluding Public Administration)	34	-39	-2	-7

Ports of Indiana – Mount Vernon⁹

Ports of Indiana – Mount Vernon is part of a three-port system located in southwestern Indiana near the confluence of the Mississippi and Ohio rivers that provides access to the Gulf of Mexico. The site is accessible to I-64, I-69, Indiana 62, and Indiana 69, direct connection to key trade routes stretching from Canada to Mexico. Together, the three ports occupy nearly half of the 1,240 acres dedicated to the port, making it the seventh-largest inland port in the United States. Processing, warehousing, distribution, bulk handling, and grain storage occur on-site.

The Mount Vernon port is a designated foreign trade zone. These zones allow domestic businesses to compete more easily in a global market by allowing companies to use special procedures to reduce, delay, or eliminate duty payments on foreign merchandise.

The primary cargo includes corn, wheat, coal, ethanol, fertilizer, limestone, pig iron, steel coils, salt, soybean products, milo, steel slabs, cement, dried distillers' grain, talc, coke, and heavy lift cargo. Annual traffic is 3,700 barges, 200,000 trucks, and 45,000 rail cars.

In partnership with OmniTRAX, Ports of Indiana operates the Mount Vernon Railroad (MVR), which serves the site. MVR has eight miles of rail on-site. It offers daily interchange services with Evansville Western Railway and connects with Class I railroads CSX, NS, BSNF, and UP.

The Ports of Indiana website reports that Mount Vernon supports 8,200 jobs and \$57 million in local/state tax revenue.

⁹ <https://www.portsofindiana.com/locations/mount-vernon/#1726601856061-7d0ced7e-a2db>



Source: [Ports of Indiana](https://www.portsindiana.com/)

Technical Feasibility

Site Requirements

The following table summarizes the ideal physical and technical conditions that contribute to a successful inland port based on the attributes of a typical facility with a capacity of 50,000 annual lifts. As with ideal market factors previously identified, these conditions are intended for general guidance; not meeting all conditions does not make an inland port infeasible. However, more conditions met will increase the likelihood of success.

Factor	Notable Parameters
Site Orientation	A 100-acre, non-landlocked, and contiguous rectangular site is recommended. Smaller sites should be linear and narrow, with each long edge oriented to a road for surface transportation and rail. Smaller sites may outgrow faster without many expansion opportunities as the port is successful and grows operations.
Rail	9,000 feet length of rail level with the site. Minimal approach and departure grades are ideal. No at-grade crossings should exist as they create conflict between trucks and rail. The rail mainline should have adequate capacity, including rail moving in double-stack configuration.
Grading	Flat land is ideal. However, no site has too much topography. Grading and filling are viable options with funding available. Rail operates most efficiently at 2.5 percent grade or less.
Facility	A 3,000 foot long for switching rail cars is ideal. Facilities located on lower-density mainlines have more flexibility.

Source: [Inland Port Study: Feasibility analysis of location an inland port in the Commonwealth](#)

Site Plan Alternatives

Two site plan alternatives were developed as part of this feasibility study for the 50-acre subject site. Despite differences between site layouts, a number of elements remain common between both alternatives. For example, in both scenarios, existing loading equipment and substation are to remain. Additionally, a 3,000-square-foot operations center and 90,000-square-foot warehousing are proposed.

The cost estimate summary for the site alternatives are below. Both alternatives have an average total of around \$23 million. Key cost differences in cost stem from differences in paved area and rail extension length. Plan 1 has less pavement than Plan 2; however, Plan 1 requires a longer rail extension.

Description	Plan 1		Plan 2	
	Low	High	Low	High
<i>Pavement/Asphalt</i>	\$752,000	\$940,000	\$880,000	\$1,100,000
<i>Grading/Dirt</i>	\$1,000,000	\$2,000,000	\$1,000,000	\$2,000,000
<i>Warehousing</i>	\$13,500,000	\$22,500,000	\$13,500,000	\$22,500,000
<i>Utilities</i>	\$500,000	\$1,000,000	\$500,000	\$1,000,000
<i>Operations Center</i>	\$300,000	\$450,000	\$300,000	\$450,000
<i>Grain Handling Facility</i>	\$1,000,000	\$2,000,000	\$1,000,000	\$2,000,000
<i>Rail Extension</i>	\$675,000	\$1,125,000	\$200,000	\$750,000
Total	\$17,727,000	\$30,015,000	\$17,380,000	\$29,800,000
Average Total	\$23,871,000		\$23,590,000	

Site Alternative 1



Analysis

Site Alternative 1 optimizes the buildable land while minimizing disruptions to environmentally sensitive areas and existing infrastructure. The site's northeastern portion contains designated wetlands and a fixed electric substation, both of which impose significant development constraints. This layout preserves these areas while maintaining operational efficiency.

Rail access is a key feature of this alternative. The design includes 4,000 to 5,000 linear feet of on-site rail extending from the east, with loading operations positioned near the river. This configuration allows for the recommended 3,000 linear feet of parallel track along State Route 7, which supports efficient switching and cargo handling. Additionally, the plan leverages the existing access point along State Route 7, reducing the need for major roadway modifications.

The linear orientation of Site Alternative 1 aligns with best practices for inland ports occupying less than 100 acres. This layout ensures smoother logistics by minimizing internal congestion, enabling efficient transfers between truck, rail, and barge operations. The design also allows for phased expansion, accommodating future growth without requiring significant reconfiguration.

Overall, Site Alternative 1 offers a balanced approach by maximizing operational space, integrating key transportation assets, and minimizing environmental impacts. Its strategic layout makes it the preferred option for a cost-effective and scalable inland port development.

Site Alternative 2



Analysis

Site Alternative 2 maximizes the buildable area and provides greater flexibility for future expansion. Unlike Site Alternative 1, this layout utilizes more of the available land at full buildout, accommodating additional warehousing and storage capacity. However, this comes at the expense of a less efficient rail configuration.

The on-site rail spur in this alternative is shorter and requires a bend to fit within the site constraints. While it achieves the minimum 3,000 linear feet of track required for efficient rail switching, only half of that length runs parallel to State Route 7, reducing its effectiveness for handling multiple rail movements. This deviation from the recommended linear rail configuration could introduce operational inefficiencies, particularly as port activity scales up.

Additionally, the more expansive use of the site means that critical logistics functions—such as surface storage, river access, and warehouses—are spaced farther apart. This separation may introduce inefficiencies in cargo handling and increase internal transportation time between key areas.

Despite these challenges, Site Alternative 2 offers a viable long-term strategy for phased expansion. Its larger footprint allows for additional development opportunities as demand grows. However, the trade-offs in rail efficiency and internal logistics suggest that it may not be as operationally streamlined as Site Alternative 1 in the early phases of development.

Operational Considerations

While this study primarily focuses on site layout and infrastructure, operational considerations are intrinsically linked to the final site plan and the port's long-term viability. This section highlights several critical operational factors that must be addressed to ensure a sustainable and efficient inland port.

First, the operational model has not yet been determined, presenting both challenges and opportunities. While this study assumes some level of public operation, the feasibility of alternative models should be explored. Given the small site footprint and potential limitations in long-term expansion, a public-private partnership with a logistics firm, major shipper, or third-party operator may provide greater stability and operational expertise.

Closely tied to the operational model is the revenue strategy, which remains undefined. A clear business model must be established, considering multiple income sources such as tariffs, long-term leases, or direct port operations. Additionally, revenue strategies should account for short-term operating expenses and long-term capital replacement costs to ensure financial sustainability. A business feasibility study is recommended to evaluate these factors and guide decision-making.

Several potential regulatory issues should be monitored. First, permitting from the U.S. Army Corps of Engineers (USACE) for any construction in the Ohio River floodway should be coordinated. Furthermore, floodplain regulations from Washington County require all development to be two feet above base flood elevation (BFE). Finally, rail operations may require an ODOT Change of Use permit due to increased freight traffic, along with a structural assessment of the bridge crossing Highway 7.

Recommendations and Implementation

Based on the feasibility analysis, **Site Alternative 1** is the recommended layout for the proposed inland port due to its more efficient rail configuration, streamlined cargo handling, and compatibility with industry best practices for smaller inland port facilities. The following steps outline the key actions needed to advance the project from feasibility to implementation.

1. Regulatory Approvals and Compliance

Several regulatory approvals must be obtained before construction can commence:

- **U.S. Army Corps of Engineers (USACE) Permitting**
 - Secure necessary approvals for any development within the Ohio River floodway, including dredging, quay/dock modifications, and shoreline reinforcement.
 - Conduct a wetland delineation study to determine if additional mitigation measures are required.
 - Obtain Section 404 and Section 10 permits for any dredging or filling activities in the river or wetland areas.
- **Washington County and Local Floodplain Management Approvals**
 - Submit a **Flood Damage Prevention Permit** to Washington County Soil and Water for any construction activities within the Ohio River floodplain.
 - Ensure compliance with the county's two-foot freeboard requirement above the base flood elevation (BFE) of 613 feet.

- Engage local emergency management officials to integrate flood mitigation measures into the port’s operational planning.
- **State of Ohio Rail and Transportation Permits**
 - **ODOT Change of Use Permit:** Since the project will involve increasing rail traffic across Ohio State Route 7, a **Change of Use permit** may be required from the Ohio Department of Transportation (ODOT) to assess impacts on existing highway infrastructure.
 - **Rail Safety Compliance:** Work with the Public Utilities Commission of Ohio (PUCO) and CSX Transportation to ensure all proposed rail extensions meet federal and state safety standards.

2. Infrastructure Development and Site Preparation

A phased infrastructure development approach is recommended to ensure cost efficiency while maintaining flexibility for future expansion.

- **Structural Inspection and Rehabilitation of Rail Bridge**
 - Conduct an in-depth structural assessment of the rail bridge over State Route 7 to evaluate its load-bearing capacity and determine necessary reinforcements or repairs.
 - Complete a **load rating analysis** following AREMA, AASHTO, and ODOT standards.
- **Site Grading and Drainage Improvements**
 - Develop a **grading and stormwater management plan** to mitigate flood risks and ensure site stability.
 - Integrate permeable pavement and retention basins where feasible to manage runoff.
- **Utility Upgrades**
 - Coordinate with **AEP Ohio** to ensure adequate electrical capacity for port operations.
 - Work with **Hope Gas** to assess the feasibility of expanding natural gas service to the site.
 - Explore options for wastewater management, including on-site treatment if public sewer access remains unavailable.

3. Transportation and Logistics Enhancements

To maximize intermodal connectivity, the following transportation improvements should be prioritized:

- **Rail Infrastructure Expansion**
 - Extend the on-site **rail spur by 4,000 to 5,000 feet**, ensuring a minimum of 3,000 linear feet of track is available for switching operations.
 - Implement **double-stack intermodal clearance improvements** in coordination with CSX and the Belpre Industrial Parkersburg Railroad (BIP) to accommodate future containerized freight.
- **Roadway Access and Traffic Flow Optimization**
 - Conduct a **traffic impact study** to assess increased truck traffic along State Route 7 and the impact on local road networks.
 - Evaluate the need for roadway modifications, such as turn lanes or signal improvements at the port entrance.
- **Ohio River Dock Upgrades**
 - Assess existing quay conditions and design necessary improvements to support **barge loading/unloading operations**.
 - Develop a **contingency plan for flood-resilient cargo handling**, ensuring port operations remain viable during seasonal river fluctuations.

4. Market Positioning and Stakeholder Engagement

The success of the inland port will depend on aligning with regional and national freight trends, securing partnerships, and attracting cargo volumes.

- **Coordination with the Mid-Ohio Valley Statistical Port**
 - Work with regional stakeholders to integrate the new port into the existing **Mid-Ohio Valley Port Statistical Area**, ensuring alignment with broader maritime and economic development strategies.
 - Establish relationships with logistics providers, rail operators, and barge companies to create efficient supply chain connections.
- **Industry and Cargo Alignment**
 - Prioritize partnerships with industries that align with Washington County’s economic strengths, including **bulk minerals, chemicals, manufacturing, and agribusiness**.
 - Explore potential **foreign trade zone (FTZ) designation** to provide cost-saving benefits for import/export businesses.
- **Marketing and Business Development Strategy**
 - Conduct outreach to **Beneficial Cargo Owners (BCOs)** and third-party logistics providers to secure freight commitments.
 - Position the port as a **lower-cost, lower-carbon alternative** for bulk freight movements compared to trucking.

5. Implementation Timeline and Funding Strategies

A multi-phase implementation plan should be adopted to efficiently allocate resources and minimize risks.

Phase 1: Preliminary Engineering & Regulatory Approvals (0-12 months)

- Secure all necessary permits and conduct required environmental studies.
- Finalize site design, grading plans, and utility coordination.
- Complete a detailed cost-benefit analysis to refine funding requirements.

Phase 2: Infrastructure Development (12-36 months)

- Execute site preparation, grading, and initial rail and dock improvements.
- Upgrade utility infrastructure and roadway connections.
- Construct warehousing and operations center.

Phase 3: Operational Launch & Expansion (36+ months)

- Begin initial freight operations and monitor performance metrics.
- Expand rail and storage capacity based on demand growth.
- Pursue additional cargo partnerships and optimize intermodal efficiencies.

Funding sources may include:

- **Federal Grants:** U.S. DOT’s INFRA, BUILD, or Port Infrastructure Development Program (PIDP)
- **State Grants:** ODOT freight and rail funding programs
- **Public-Private Partnerships (P3s):** Investment from rail operators, logistics firms, and industrial tenants
- **Local Economic Development Incentives:** Tax abatements, workforce training grants, and financing assistance from regional economic development agencies

Preferred Site Alternative and Next Steps

Site Alternative 1 is the recommended layout due to its **greater flexibility for phased growth, efficient linear rail configuration, and optimal use of available land**. This layout ensures seamless multimodal connectivity between **river, rail, and road transport**, which is critical for operational efficiency. Additionally, its **proximity to existing industrial clusters and minimal need for infrastructure modifications** make it the most viable option for long-term success.

While cost differences between Site Alternative 1 and Site Alternative 2 are relatively **insignificant**, the **operational efficiencies and streamlined cargo handling** provided by Site Alternative 1 further justify its selection.

To advance the project toward implementation, the following key actions should be taken:

- **Rail Bridge Structural Inspection** – Conduct a comprehensive **load rating analysis and structural assessment** of the existing rail bridge over Ohio State Route 7 to ensure its suitability for increased freight operations.
- **U.S. Army Corps of Engineers (USACE) Approvals** – Obtain **necessary permits for development activities within the Ohio River floodway**, including dock improvements and potential dredging.
- **Washington County Floodplain Compliance** – Submit applications for **floodplain development permits**, ensuring adherence to local regulations, including the **two-foot freeboard requirement above base flood elevation (BFE)**.
- **ODOT Change of Use Permit for Rail Bridge** – If required, obtain a **Change of Use permit from the Ohio Department of Transportation (ODOT)** to accommodate increased rail traffic and ensure safe highway-rail interaction.
- **Mid-Ohio Valley Statistical Port Coordination** – Work with **regional stakeholders and the U.S. Army Corps of Engineers’ Waterborne Commerce Statistics Center** to integrate the new port into **Mid-Ohio Valley’s freight planning efforts**, ensuring alignment with national and state maritime development strategies.

Conclusion

The Washington County Inland Port presents a strategic opportunity to enhance regional freight capacity and drive economic growth. Several key factors support the rationale for this project:

- **Existing Access to the Ohio River** – The site’s location along the Ohio River provides immediate access to a critical inland waterway, enabling cost-effective and lower-emission freight movement via barge. With a navigable river depth sufficient for commercial operations, the site is well-positioned to serve as a transshipment hub for bulk commodities moving between the Midwest and Gulf Coast.

- **Existing Rail Access** – The site is already served by a rail spur connecting to the **Belpre Industrial Parkersburg Railroad (BIP)**, which interchanges with **CSX Transportation**. This direct rail connection allows for efficient multimodal operations, reducing reliance on long-haul trucking and providing shippers with a competitive alternative for bulk and containerized freight movements.
- **Limited Competition** – There are relatively few competing public ports in the immediate region; this geographic spacing presents an opportunity for Washington County to capture a share of bulk and intermodal traffic that currently lacks a convenient transfer point along this section of the river.
- **Strong Local Workforce in Bulk Mineral Industries** – Washington County has a high proportion of employment in industries such as **mining, quarrying, and bulk material processing**, making it well-suited to support the operational needs of the port. The presence of a skilled workforce can facilitate efficient port operations and attract complementary businesses to the region, strengthening the local economy.
- **Enhancing Bulk Freight Network Resiliency** – The regional freight network is constrained by limited infrastructure, particularly river crossings. The **only rail bridge over the Ohio River in the vicinity is in Parkersburg, WV**, making this port a crucial addition to the freight logistics landscape. By providing an additional modal transfer point, the port can **reduce dependence on congested or overburdened infrastructure**, increasing supply chain reliability for industries reliant on river and rail transport.

Developing this inland port will not only capitalize on existing transportation assets but also **diversify freight options, enhance economic competitiveness, and reduce transportation costs for businesses in the region**. By strengthening the **Mid-Ohio Valley's role as a key logistics hub**, this project will improve the efficiency and resilience of the local bulk freight network while driving long-term economic benefits for Washington County and beyond.