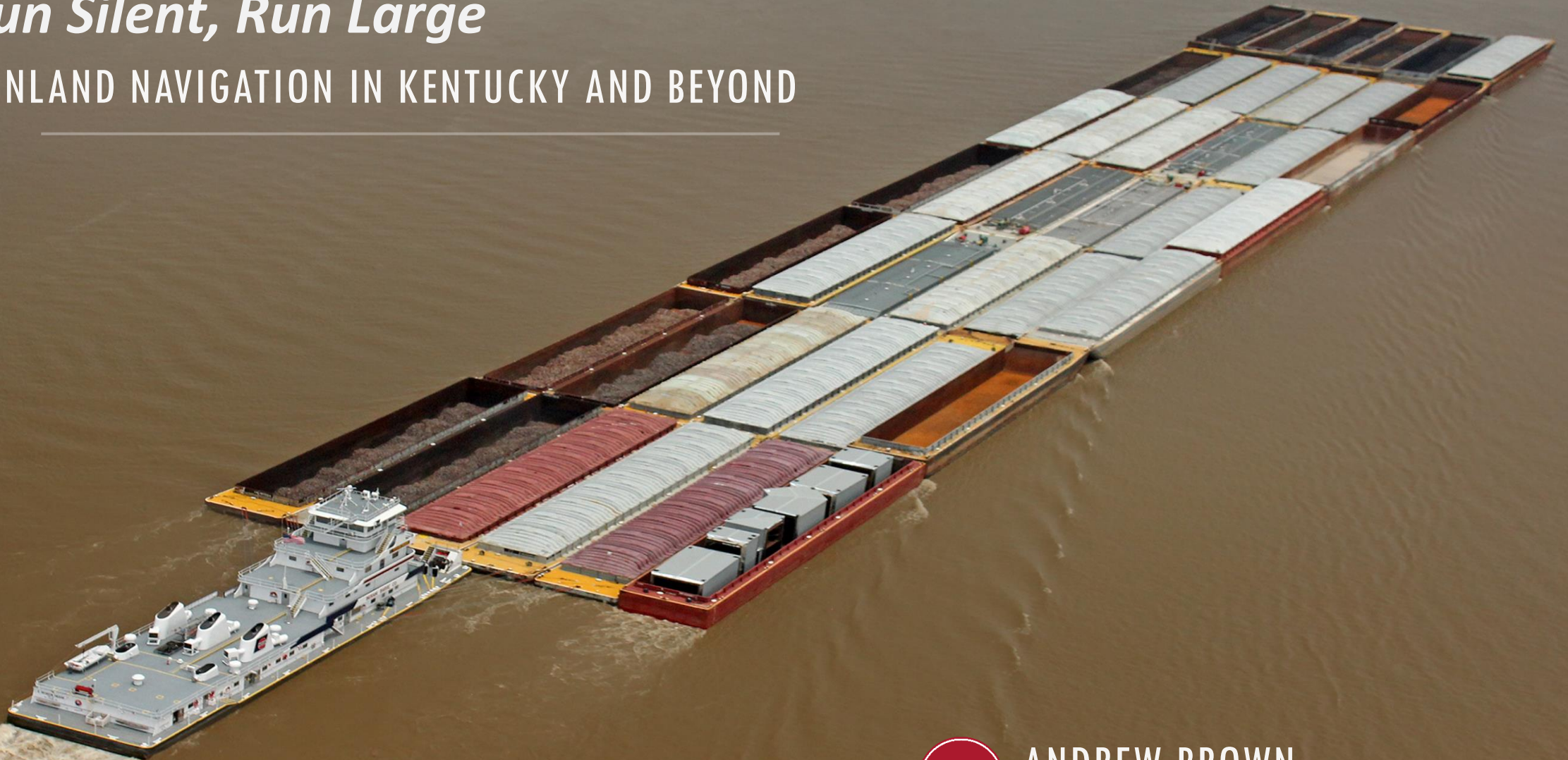


Run Silent, Run Large

INLAND NAVIGATION IN KENTUCKY AND BEYOND



ANDREW BROWN
SENIOR VICE PRESIDENT & GENERAL COUNSEL

ECONOMIC IMPACT OF KENTUCKY'S INLAND WATERWAYS



IN 2018, KENTUCKY'S PORTS, INLAND WATERWAYS,
AND INLAND WATERWAYS-DEPENDENT INDUSTRIES SUPPORTED

Nearly **110,000 jobs**

\$5.9 billion in personal income

\$12.0 billion in Gross State Product

\$30.7 billion in total output

...Giving rise
to more than
\$1.2 billion
in state & local
tax revenue

Kentucky has

**1,590
MILES**

of navigable inland
waterways, ranking it

4th in the
nation

INLAND WATERWAYS SUPPORT KENTUCKY'S KEY INDUSTRIES

Industry Sub-Category	Percent of Goods Shipped by Water (Tons)	Direct Kentucky Jobs
Utilities	37.4% of inbound	6,820
Mining (except oil & gas)	27.4% of outbound	7,750
Crop production	20.0% of outbound	3,270*
Chemical manufacturing	17.3% of inbound	12,560
Nonmetallic mineral prod. mfg.	15.8% of outbound	7,470

*Total for Agriculture, Forestry, Fishing, and Hunting sector (NAICS 1)

KENTUCKY'S INLAND WATERWAY ASSETS AT A GLANCE

Mississippi,
Tennessee and
Ohio Rivers

11 public
ports

TOP INLAND WATERWAYS COMMODITIES BY WEIGHT (comprising 79% of total tonnage)

Coal, lignite,
and coal coke
**41.4
million
tons**

Sand, gravel,
shells, clay, salt,
& slag
**35.8
million
tons**

Petroleum
products
**8.7
million
tons**

TOP INLAND WATERWAYS COMMODITIES BY VALUE (comprising 54% of total value)

Basic chemicals used
in consumer products,
including appliances,
toys, and cosmetics
**\$2.6
billion**

Gasoline
**\$2.0
billion**

Coal
**\$1.8
billion**

In 2018,
108M tons of
freight

valued at
\$11.9 BILLION

moved on Kentucky's
inland waterways, which
is equivalent to

2.7 MILLION TRUCKS

Avoided trucks translates into
**reduced congestion,
emissions, and crashes,**
lessening impacts on highway
infrastructure



BRANDED ENTRY INTO BARGE BUSINESS

1946



OWNED &
OPERATED BY
FAMILY

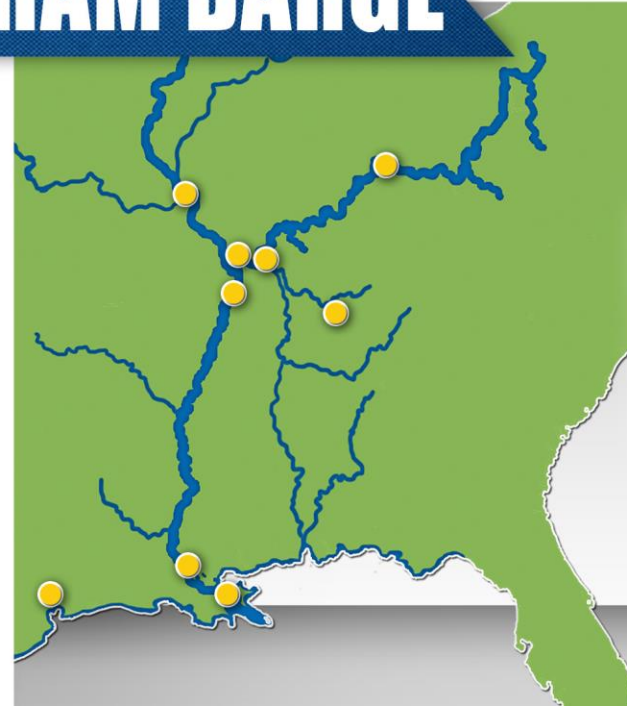
JOHN INGRAM
CHAIRMAN OF THE BOARD, III

ORRIN INGRAM
PRESIDENT & CEO, III

ABOUT INGRAM BARGE



**NEARLY 2,200
ASSOCIATES**



LOCATIONS
STRATEGICALLY LOCATED
ALONG RIVER SYSTEM

We operate on over 6,000 miles
of river in 18 states



Ingram Towboat Profile

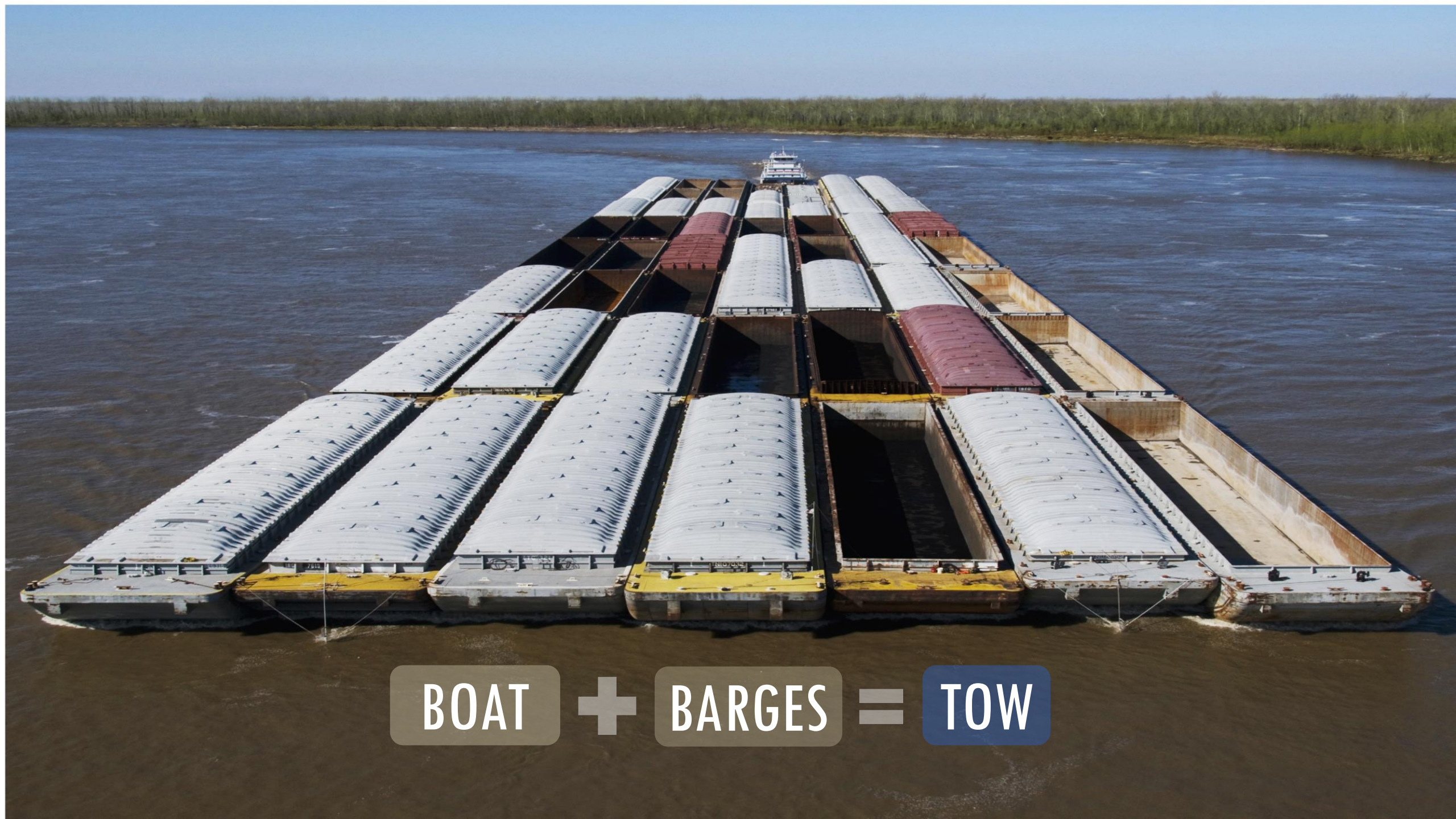
16 9000-10500HP

12 7000HP

34 6000HP

21 4000-5000HP

57 800-3000HP



BOAT + **BARGES** = **TOW**



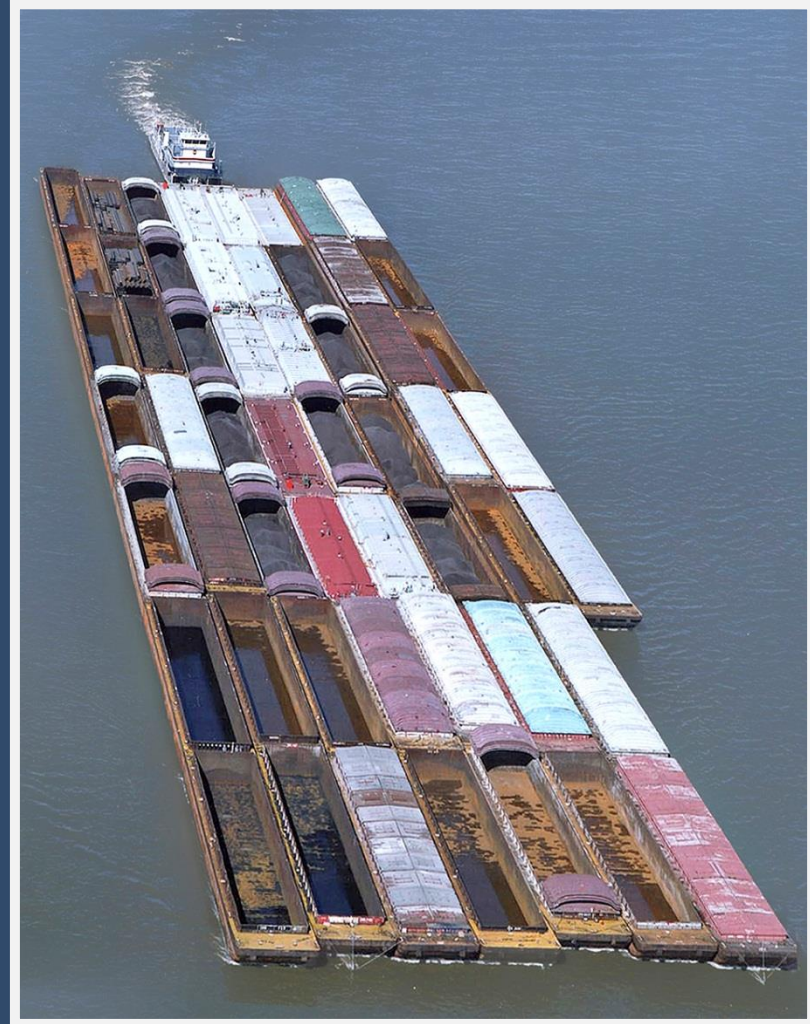
1,250'
Empire State



1,454'
Willis Tower
(formerly Sears Tower)



1,568'
Lower Mississippi Tow Length





Ingram has built over 1,700 new barges since 2007



CAPACITY COMPARISON

Barges & Trucks

AVERAGE BARGE

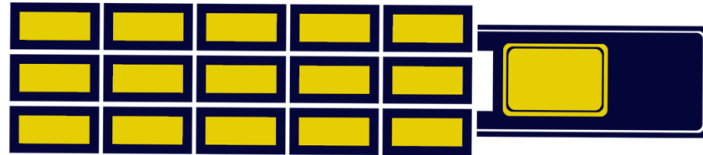


AVERAGE TRUCK TRAILER

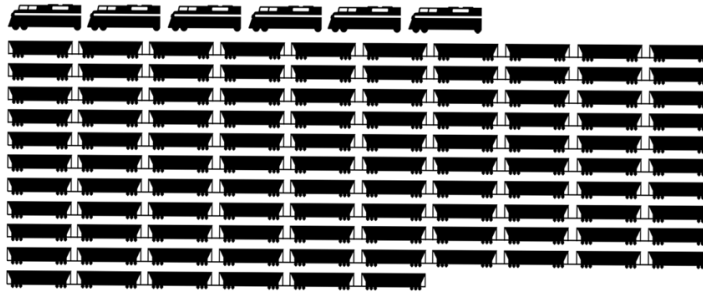


ECONOMIES OF SCALE

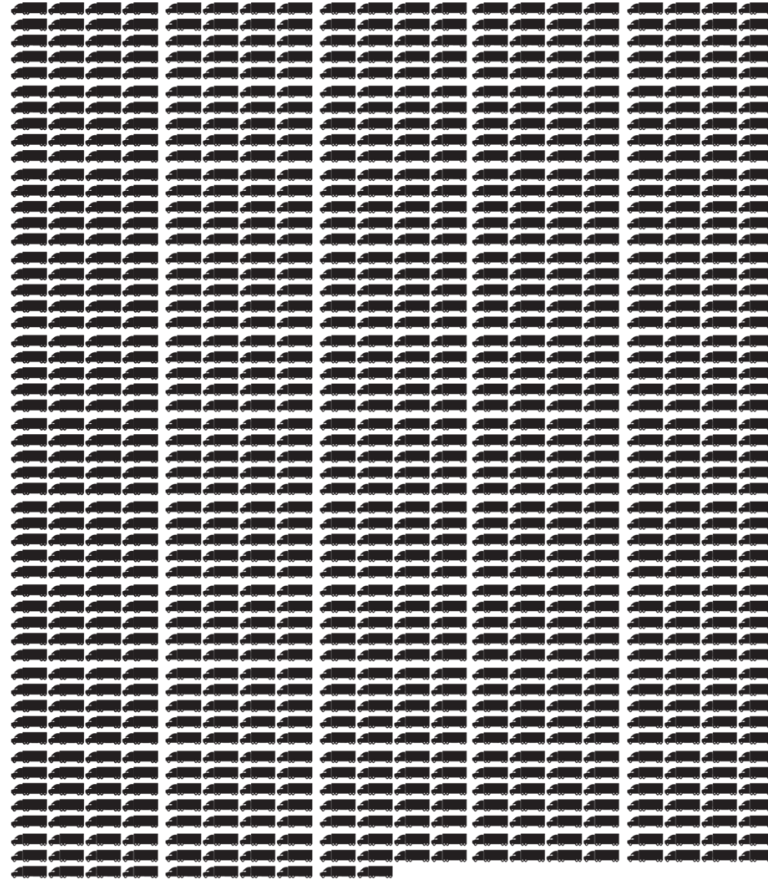
1 15-BARGE TOW 



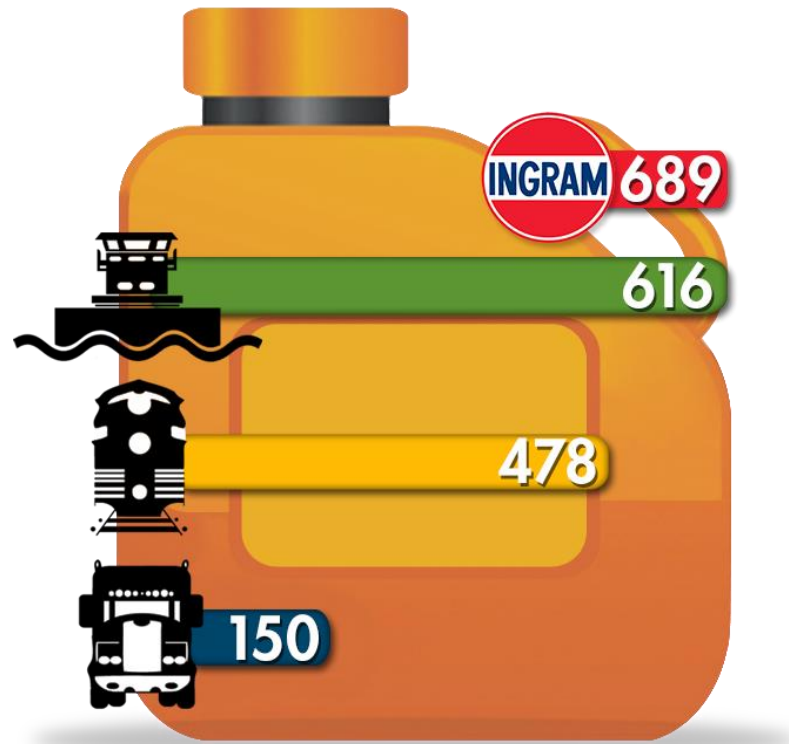
216 RAIL CARS + 6 LOCOMOTIVES 



1,050 LARGE SEMI TRACTOR-TRAILERS 



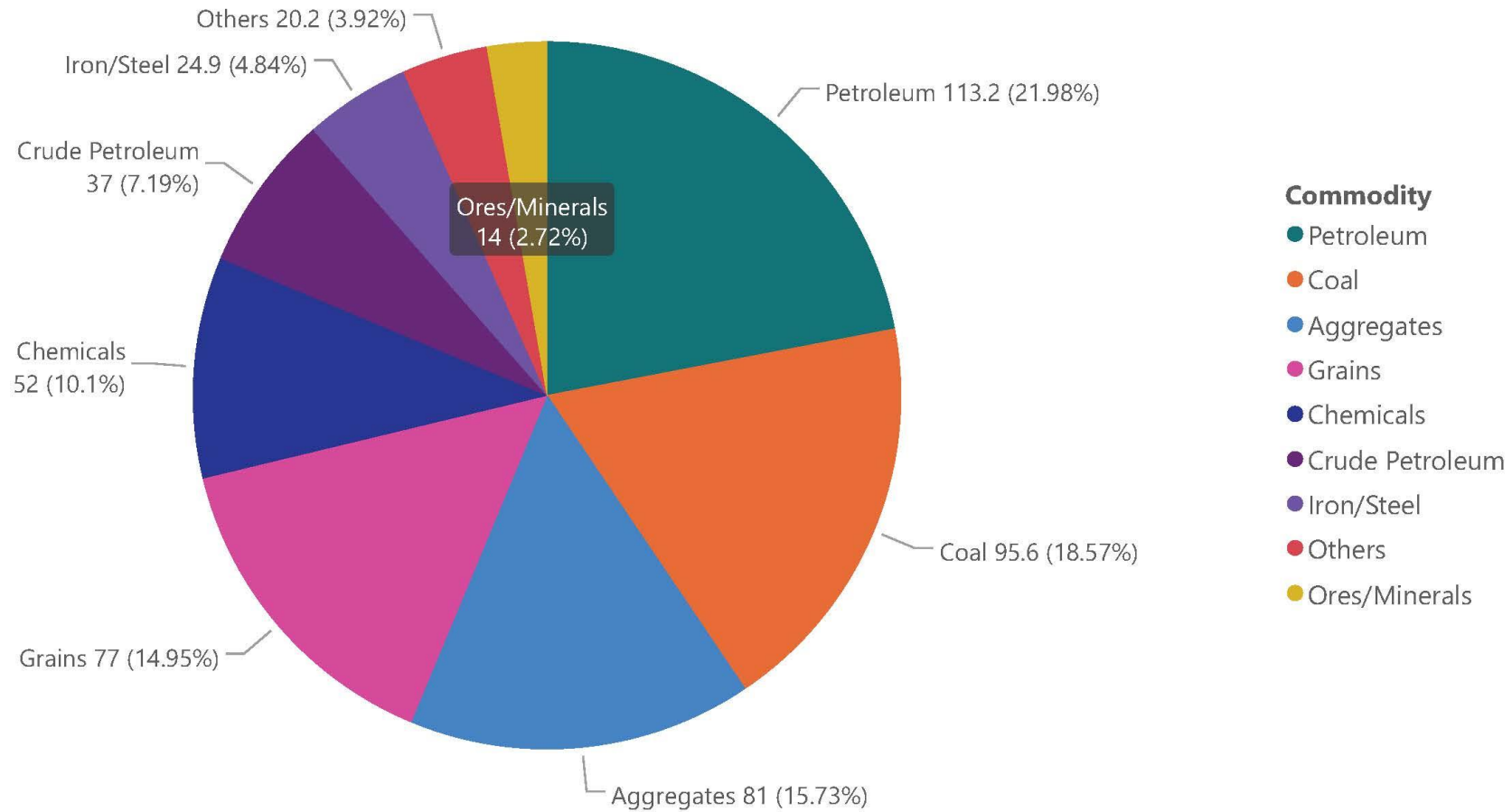
Fuel Efficiency Comparison



Ton-miles Traveled per Gallon of Fuel

2019 Inland System Commodity Tons

Total Tons: 514.9M



Source: Waterborne Commerce Statistics



LOCAL EXITS
WEST
I-40
Jimmy Carter Blvd
1/2 MILE

Pass ONLY
EXPRESS LANE
ENTRANCE
1/2 MILE

EXPRESS LANE
Pass ONLY
To Peachtree Road \$1.00
To Skidaway Road \$1.00

EXPRESS LANE
EXIT
Jimmy Carter Boulevard Exit

LEFT

McDonald's
Burger King

Blue sign with logos

Capacity to Scale

50% more freight tonnage with
a modest increase in
investment



IIJA = \$2.5 Billion for Upgrades



Project Title	Location	Remaining Cost (\$M)
Kentucky Lock Addition	Tennessee River	\$332
Three Rivers	MKARNS	\$0
Montgomery Locks and Dam	Upper Ohio River	\$200
NESP Lock 25	Mississippi River	\$0
T.J. O'Brien Lock and Dam Major Rehabilitation	Illinois Waterway	\$0
Emsworth Lock	Upper Ohio River	\$1,008
MKARNS 12ft Channel	MKARNS	\$274



World-Class Inland River Access:

Nearly **12,000** Miles
of Navigable Inland
Waterways



OHIO RIVER

PADUCAH

**CUMBERLAND RIVER /
BARKLEY LAKE**

**TENNESSEE RIVER /
KENTUCKY LAKE**

CAIRO

MISSISSIPPI RIVER

The Jones Act





KENTUCKY RANKS #5 AMONG ALL AMERICAN STATES IN PER CAPITA DOMESTIC MARITIME JOBS AND #7 IN ECONOMIC IMPACT

Kentucky is an important domestic maritime state according to several recent studies. The American domestic maritime industry includes vessel operators, marine terminals, shipyards, and workers engaged in the movement of cargo exclusively within the United States.

- Overall, the State of Kentucky ranks #5 among all states for per capita American domestic maritime industry jobs with 20,730 jobs and a \$5.1 billion annual contribution to the Kentucky economy. Related worker income in the state is \$1.25 billion annually.
- A recent study of *shipbuilding* by the U.S. Maritime Administration, covering both commercial and military ship construction, found over \$291 million annual shipyard economic impact in Kentucky. More than \$187 million in worker income is attributable to the shipyard industry in the state. (Shipyard jobs pay approximately 45% above the national average for private sector employment.)
- A recent *U.S. tugboat, towboat, and barge industry* economic study by the U.S. Maritime Administration and The American Waterways Operators ranked Kentucky #3 among states for jobs (3,320 direct jobs), economic contributions, and employee compensation (over \$293 million).
- Nationally, the domestic maritime industry supports 648,220 jobs and a gross economic output of \$154 billion annually. Labor income nationally is \$41.6 billion annually with a \$16.8 billion tax impact. There are approximately 40,000 vessels in the American domestic fleet.

Sources: Economic information about the American domestic maritime industry for this paper is taken from “Contributions of the Jones Act Shipping Industry to the U.S. Economy in 2016,” prepared by PricewaterhouseCoopers for the Transportation Institute (private study). Shipyard information comes from “The Economic Importance of the U.S. Shipbuilding and Repairing Industry,” by the U.S. Maritime Administration of the U.S. Department of Transportation (2015). Tugboat, towboat, and barge information comes from “Economic Contribution of the US Tugboat, Towboat, and Barge Industry,” prepared for the American Waterways Operators and U.S. Maritime Administration by PricewaterhouseCoopers (May 10, 2017).

Inland Intermodal Port Development





Container-Terminal Base

swissterminal

ROTTERDAM

BIGER

MAE
SEA

MAERSK

CHANG

PERA

SWISS

SWISS

swissterminal



MISSISSIPPI RIVER

CAIRO

PADUCAH

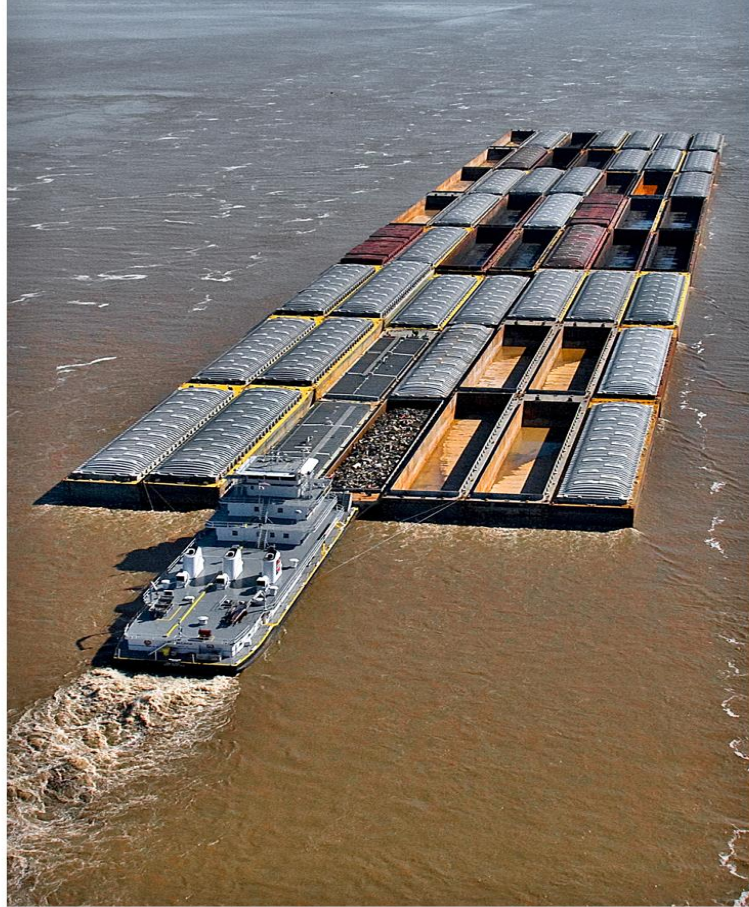
OHIO RIVER

**TENNESSEE RIVER /
KENTUCKY LAKE**

**CUMBERLAND RIVER /
BARKLEY LAKE**







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