Comprehensive Waterfront Plan:
Working Waterfront & Transportation of Goods

December 3, 2019

Max Taffet, AICP
Vice President, PortNYC Planning

mtaffet@edc.nyc | 212-618-5778
NYC Borough Waterways

12 borough waterways have maritime industrial businesses across New York City.

These waterways are connected to the maritime economy by approximately 6 primary channels.
Location of Maritime Organizations In The Harbor

Freight: Cargo & Commodity Terminals  
Recreational/Educational  
Ferry, Charter, & Excursion Services  
Maintenance, Ship Repair, Construction, Waterfront Inspection, & Emergency Response  
Other Maritime Businesses  
Tug & Barge

In conjunction with the survey an extensive desktop research and mapping effort was conducted to identify all the water dependent organizations in the harbor. This database was created by combing through InfoUSA data, combining it with NJDOT, DPR, & DCP databases, as well as mailing lists and directories from the Port Authority, US Coast Guard, and the Tow Boat and Harbor Carriers Association, and reviewing aerial photography taken by NearMap.

Source: 2019 Shared Harbor Survey
Industry Share by # of locations in harbor

757 Locations

- **116** Freight: Cargo & Commodity Terminals
- **353** Recreational & Educational
- **137** Ferry, Charter, & Excursion Services
- **67** Maintenance, Ship Repair, Construction, Waterfront Inspection & Emergency Response
- **52** Other Maritime Businesses
- **32** Tug & Barge

“Location” refers to every water dependent maritime site in the harbor. This encompasses all business locations as well as ferry landings, boat ramps & kayak launches.

Source: 2019 Shared Harbor Survey
2019 SURVEY
110 Responses

Respondents are 19% of all inventoried maritime organizations in Port of NY/NJ

10
Freight: Cargo & Commodity Terminals

40
Recreational & Educational

16
Ferry, Charter, & Excursion Services

11
Maintenance, Ship Repair, Construction, Waterfront Inspection, & Emergency Response

17
Other Maritime Businesses

16
Tug & Barge

Source: 2019 Shared Harbor Survey
Of the 110 responses, 70 are based exclusively in New York. NYCEDC partnered with the New Jersey Department of Transportation (NJDOT) to distribute the survey. All survey respondents were offered a coffee gift card to Starbucks or Dunkin’ Donuts for their participation.

Location of maritime organizations who responded by State

Several maritime organizations and firms indicated locations and operations both in New York and New Jersey, emphasizing the interstate nature of the region’s maritime industry.
Where do people employed in the maritime industry in New York commute from?

On the New York-side, 25 percent of maritime employees commute in from New Jersey, while 14 percent come from elsewhere in New York State, and 5 percent from outside of the Port of NY/NJ. NYC maritime support/freight subsector employees have the highest commuting percentage, with 50 percent of survey respondents’ employees coming from outside New York City. When compared to New Jersey’s recreation subsector, NYC has a much higher rate of commuters, at some 40 percent.

Source: 2019 Shared Harbor Survey
Where do people employed in the maritime industry in New Jersey commute from?

Of the New Jersey maritime firms surveyed, 36 percent of their employees’ commute from New York City, 9 percent from New York State, and 4 percent from outside of the Port of NY/NJ. Support/freight has the highest commuting percentage, with 51 percent of survey respondents’ employees coming from outside New Jersey, while recreation has the lowest with only 15 percent of its employees commuting into New Jersey.

Source: 2019 Shared Harbor Survey
Significant Maritime Industrial Areas (SMIAs)

73 Maritime Freight/Support Locations in SMIAs

43% of NYC maritime support/freight locations are in an SMIA

Source: 2019 Shared Harbor Survey
A Unified Harbor System

NJ
Port Newark
Port Elizabeth
Global Bayonne
Liberty Cruise
North Shore Maritime Support

NY
MCT
Global
Liberty Cruise
North Shore Maritime Support

NY
Newtown terminals
Container Terminal Relative Scale
## Containers

1 TEU = Twenty Ft Equivalent Unit

### Year-to-Date

<table>
<thead>
<tr>
<th>YTD</th>
<th>Import TEUs</th>
<th>Export TEUs</th>
<th>Total TEUs</th>
<th>Total Rail Lifts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Loads</td>
<td>Empties</td>
<td>Loads</td>
<td>Empties</td>
</tr>
<tr>
<td>YTD Oct 2019</td>
<td>3,180,884</td>
<td>14,627</td>
<td>1,230,257</td>
<td>1,860,994</td>
</tr>
<tr>
<td>YTD Oct 2018</td>
<td>3,056,955</td>
<td>13,650</td>
<td>1,245,438</td>
<td>1,670,479</td>
</tr>
<tr>
<td>% Change</td>
<td>4.1%</td>
<td>7.2%</td>
<td>-1.2%</td>
<td>11.4%</td>
</tr>
</tbody>
</table>

*Source: PONYNJ Terminal Operator and Facility Rail Data*
Offshore wind is poised for significant growth

- The federal government (BOEM) is awarding offshore leases to OSW developers

- States are mandating that utilities meet clean energy targets, generating large-scale market demand for OSW
  - First 30 MW of existing OSW online in Block Island (2016)
  - NY, NJ, MA, RI, CT, and MD have released OSW procurements to begin starting 2020

- Technological advancements are increasing cost competitiveness of OSW
  - Turbine sizes doubled in past few years; will triple by 2020s

Source: Forbes
Thank You