

# **Oregon Trade and Logistics Initiative**

## **Stakeholder Engagement Report**

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## **Key Takeaways from Oregon Trade & Logistics Initiative Workshops**

As part of the Governor's Trade and Logistics Initiative launched in April 2015, eight stakeholder sessions were held across the state to engage shippers and transportation providers in identifying freight logistic challenges, potential solutions, and long-term improvements needed to the trade transportation system. Over 300 attended Oregon forums in Portland, Redmond, Hermiston, Ontario, Albany, Medford, Grand Ronde and Wilsonville during the summer and fall of 2015. Oregon exporters and importers were the primary participants in these workshops. Others attending included: brokers, freight forwarders, railroads, barge companies, trucking companies, agency representatives, and elected officials.

The stakeholder sessions underscored that each region's transportation challenges and needs are different, and solutions must be tailored to those needs. There were several themes that were consistent across Oregon:

- Increased transportation costs and transit time impact Oregon shippers' competitiveness and put customer relationships and product markets at risk.
- Terminal 6 ocean container services at the Port of Portland are critical for managing costs and maintaining competitiveness of Oregon businesses.
- Loss of the Terminal 6 container barge service reduces cost-competitive access to markets for agricultural producers along the Columbia River.
- Roadway and port congestion is increasing with significant impacts on the port trucking industry.
- These impacts are compounded by truck driver, trailer and heavy-weight chassis shortages, as well as federal Hours of Service restrictions on truckers.
- There are imbalances of container availability that limit shipper access to markets.
- Increased access to rail is desired.
- Export disruption also impacts domestic businesses, highlighting the importance of a system-wide focus on the transportation network.

This outreach informed the Trade and Logistics' Steering Committee and consultant team in developing and analyzing specific transportation actions that could improve Oregon competitiveness. Following are summaries of each of the stakeholder workshops and the transportation and logistics issues raised by participants.

### **Statewide Forums**

#### **Portland Kick-Off Session**

The kick-off session provided an opportunity to understand the diversity of Oregon interests that are impacted by loss of container service into the Columbia River. Both exporters and importers participated: wine importers, furniture distributors, manufacturer lumber products exporters, and seed and hay exporters. Virtually every sector of the Oregon economy is concerned about unsustainable additional costs for transportation, and loss of competitive standing vis-à-vis producers or vendors of similar products elsewhere.

The session was introduced by the directors of four state agencies partnering on the Trade and Logistics' Initiative: Sean Robbins, Director of the Oregon Business Development Department; Curtis Robinhold, Deputy Executive Director of the Port of Portland; Katy Coba, Director of the

Oregon Department of Agriculture; and Matthew Garrett, Director of the Oregon Department of Transportation. An overview of the changing dynamics of international ocean transportation, domestic trucking, and port productivity, as they impact Pacific Northwest exporters and importers, and an update by the Port of Portland on efforts to restore weekly container service at Terminal 6 followed. The balance of the session focused on interim "work-arounds" or alternative means by which Oregon exporters and importers can most affordably and efficiently transport goods to and from the Puget Sound gateway ports.

The challenges and solutions set forth at the Portland kick-off session were echoed in various forms, in the subsequent workshop discussions around the state. All exporters are grappling with the increasing price of the dollar, the truck driver shortage and cost of regulatory limitations on driving hours, and the ongoing congestion and delay at the terminals at the Puget Sound ports. Ideas for "work-arounds" floated at the initial forum were embraced, where applicable, at subsequent regional discussions. They included trucking efficiency enhancements to allow trucks to move cargo up Interstate 5 to and from Puget Sound ports during less congested night hours, providing terminal and road data to truckers to help plan routes, reducing trucking distance by establishing inland truck-to rail load points, and increased barge utilization. Stakeholders reinforced that while "work-arounds" are essential in the interim for shippers, the preferred solution is reinstatement of weekly vessel calls at the Port of Portland's Terminal 6.

## **Redmond**

The Redmond forum demonstrated that even in geographically distant rural areas of the state, a diversity of Oregon's vital economic interests require access to global markets. Specifically, without container service at Terminal 6, Central Oregon shippers must overcome the significant distance and expense to truck cargo up to the ports of Seattle and Tacoma, and to retrieve empty containers from those terminals. Dependence on trucking and the lack of rail service for Central Oregon area makes Central Oregon shippers particularly sensitive to factors that impact trucking costs.

Availability of adequate and affordable transport services, both for domestic and international distribution or sourcing, remains a fundamental challenge and concern. These include grappling with the national truck driver shortage and truck driver Hours of Service limitations.

## **Hermiston**

The Hermiston meeting provided the large volume agriculture export sector in Eastern Oregon, onion growers and seed producers, a forum to describe the scope of their production challenges and needs, particularly for competitive access to global markets. Due to the distance from gateway ports at Portland or Puget Sound, and the West-bound rail service, accessing gateway export ports via the Columbia River system is vital.

Trucking (or barge service for Idaho exports from Lewiston, Idaho) to Boardman and from there by rail to Portland or Puget Sound is currently the most viable option. The suspension of the container barge service all the way to Portland (following the departure of weekly liner carriers) is forcing many of these shippers to employ hundreds of trucks to carry cargo to Puget Sound ports, with additional transportation costs and environmental impacts on the Columbia Gorge, raising questions about how long trucking will be viable for eastern Oregon and Idaho exporters.

## **Ontario**

Participants at the Ontario session, primarily onion growers, were impressed by the participation and the discussion which included Oregon Senator Betsy Johnson and Representative Cliff Bentz. While this area does export fresh onions into international markets such as Korea, China and Japan, discussion focused on challenges associated with the domestic distribution of onions to the East Coast and Midwest population centers by rail, including the lengthy duration of East-bound rail transport, and the unique handling requirements for fresh onions.

## **Albany**

Participants at this session expressed concern over being dramatically impacted by the recent loss of the Portland Terminal 6 container service, and highlighted a need for affordable international transportation to Asian markets. The region is a hub for Oregon's hay, straw and seed commodities - high-volume, comparatively lower margin cargoes that demand a cost effective means of access to foreign markets.

In lieu of Terminal 6 service, shippers from this area either truck their products to Northwest Container Service's facility at Portland for loading on rail to Puget Sound, or truck all the way to the ports of Seattle and Tacoma. Federal restrictions on truck driver Hours of Service is a significant concern. There is strong interest in finding a way to load these heavy-weight products onto rail destined for Puget Sound ports, closer to the origins of the Willamette Valley and Southern Oregon cargo, in addition to re-establishing larger volume container service into Portland's Terminal 6.

Load matching (aka "street turns") have been explored in the Willamette Valley to eliminate "dead-heading," essentially cutting the cost of trucking in half. The challenge is matching import containers on "regular" chassis, with Oregon's typically heavy agriculture and forest product export cargo requiring containers on "heavy-weight tri-axle" chassis.

Another option of interest is to establish truck-to-rail transload facilities in the Mid-Willamette Valley functioning like an "inland port," and avoiding long truck hauls to Seattle/Tacoma ports, which often exceed the allowable hours for truckers under the Federal Hours of Service regulations.

## **Medford**

Attendees at this session were shippers representing high volume exports and focused on products originating in or destined to southern Oregon.

Potatoes are a major Oregon high-volume export, facing extreme international sourcing competition, and requiring handling in ways that are more demanding than other Oregon exports such as forage, pulp, and lumber.

The discussions provided insight into the transportation needs of Oregon's rural manufacturing base, which requires both imports and exports. Participants were equally eager for restoration of container liner service at Terminal 6 on the Columbia River, or development of some alternative other than trucking to Puget Sound ports. The more distant the location of the importer/exporter from Portland, the stronger the interest in establishing a truck-to-rail load point in the Mid-Willamette Valley.

## **Grand Ronde**

The Oregon Coast Economic Summit in August 2015 provided an opportunity for a Trade and Logistics panel comprised of representatives from the Governor's office, the Port of Portland, Business Oregon, the Department of Agriculture and consultant Peter Friedmann to discuss with Coastal Caucus legislators and Oregon coastal communities the challenges Oregon shippers face with the loss of Terminal 6 service.

Representative David Gomberg moderated the panel discussion that highlighted why global trade matters to Oregon, the long term impacts of global marine industry trends toward larger vessels and repositioning of cargo movements through the Panama Canal, the significance of lost container service on agricultural producers' market share and customer relationships, as well as efforts to recruit new container service to Terminal 6 by the Port of Portland.

## **Wilsonville**

The final forum, held in November 2015, provided an opportunity to summarize feedback from all of the regional sessions, the results of the research and business case analysis, and to solicit input on the preliminary conclusions and recommendations. It served to align stakeholders (exporters, importers and transportation providers) and Trade and Logistics' Initiative agencies following the other regional discussions.

The foundation of this listening session was the presentation by the Trade and Logistics' consultants, Dan Smith from The Tioga Group and Peter Friedman from Lindsay Hart, on the initial findings regarding shipper preferences and potential short and long term solutions to improve Oregon's freight mobility. This session was a means to gain more stakeholder input and validation of the conclusions and recommendations that were being developed into the final report of the Governor's Trade and Logistics' Initiative.

# Stakeholder Outreach Sessions

<b>Workshop</b>	<b>Date</b>	<b>Total Participants</b>	<b>Oregon Business Sectors</b>	<b>Government Agencies</b>	<b>Service Providers</b>
<b>Portland Kick Off</b>	July 24, 2015; 9am-12pm Sheraton Portland Airport Hotel	<b>122</b>	Furniture, home goods, manufacturing components, metals, paper products, potatoes, seafood, seed, nuts, wine	Business Oregon, City of Portland, Department of Commerce, Economic development organizations, Office of Congresswoman Bonamici, Office of Senator Cantwell, Office of the Governor, Oregon Department of Agriculture, Oregon Department of Transportation, Oregon State Legislature	Barge/transload facilities, freight forwarders, ICTSI (terminal operator), Port of Portland, Railroad Lines, trucking, Westwood Shipping Lines;  Press: Portland Tribune and Oregonian
<b>Redmond</b>	July 28, 2015; 4:30- 6:00 pm Redmond Technology Education Center, Central Oregon Community College	<b>27</b>	Automobiles, organic packaged foods, seed	Business Oregon, Economic development organizations, Lake County Government, Oregon Department of Agriculture, Oregon Department of Transportation	Economic development associations, freight forwarding, logistics and strategy groups Port of Portland, trucking,
<b>Hermiston</b>	July 29, 2015; 6:30-8:00 pm Hermiston Conference Center	<b>25</b>	Mint, onions, seed	Business Oregon, City of Hermiston, Hermiston Chamber of Commerce, Oregon Department of Agriculture, Oregon Department of Transportation	Freight forwarding, ICTSI (terminal operator), Lewiston, Morrow, Ports of Portland, telecommunications, trucking, warehousing
<b>Ontario</b>	August 10, 2015; 6:30-8pm Treasure Valley Community College	<b>35</b>	Fruits and vegetables, paper products, onions	Business Oregon, Economic development organizations, Idaho Department of Agriculture, Oregon Department of Agriculture, Oregon Department of	Freight forwarding, NW Container, Port of Portland, Westwood Shipping Lines  Press

				Transportation, Oregon State University, Representative Cliff Bentz, Senator Betsy Johnson	
<b>Albany</b>	August 11, 2015; 6:30-8pm Linn County Fair and Expo Center	<b>63</b>	Hay and forage, industrial components, paper products, onions, seed, wine	Business Oregon, City of Albany, Economic development organizations, Office of Representative Caddy McKeown, Oregon Department of Agriculture, Oregon Department of Transportation, Port of Newport, Representative Andy Olson	Barge/transload, freight forwarding, ICTSI (terminal operator), NW Container, Port of Portland, railroad interests, trucking, Westwood Shipping Lines
<b>Medford</b>	August 12, 2015; 4:30-6pm Inn at the Commons, Medford OR	<b>16</b>	Industrial film production, potatoes	Business Oregon, City of Ashland, Office of Senator Merkley, Oregon Department of Agriculture, Port of Coos Bay	Freight forwarder, ocean carrier, Port of Portland, Press
<b>Wilsonville Wrap Up</b>	November 13, 2015; 8:45-11:30 am Holiday Inn-Portland South	<b>71</b>	Food and beverage distribution, hay and forage, industrial components, military manufacturing, paper products, seed, wine	Business Oregon, City of Albany, Economic development organizations, METRO, Office of Senator Lee Beyer, Office of the Governor, Oregon Department of Agriculture, Oregon Department of Transportation	Freight forwarding, ICTSI (terminal operator), NW Container, Port of Portland, railroad interests, trucking, warehousing, Westwood Shipping Lines

## **Transportation and Logistics Issues**

### **I. Macro Challenges**

- Increasing price of the dollar impacts all Oregon exports. Agricultural goods, the largest volume Oregon export, generally with low profit margins, face fierce foreign price competition. Transport costs to get agriculture products to the gateway ports are a large competitiveness factor.
- Trend towards larger vessels that exceed the depth of the Columbia River.
- Global repositioning of cargo due to trade agreements will move production to Southeast Asia and more cargo moving through Suez Canal to U.S. East Coast which is where greater population and distribution centers are located. Containers will accumulate on the East Coast. Fewer West Coast calls mean fewer containers available for Pacific Northwest exports.
- Alliances among carriers which constrain individual carriers from independently serving smaller niche markets like Portland Terminal 6.
- A lack of large volume container vessel service at the Port of Portland's Terminal 6 and the resulting suspension of container barge service, means that shippers are now generally depending upon the Puget Sound ports (Northwest Seaport Alliance), a challenge made more difficult by the national trucking shortage.
- Lack of Portland weekly container service resulting in dependence on truck and rail to/from Puget Sound. Continued congestion and delay at Seattle/Tacoma jeopardizes the ability of shippers to deliver to customers by promised deadlines.
- Seattle, Tacoma, and Oakland ports have not fully recovered from the West Coast port disruption which accompanied the International Labor Workers Union (ILWU)-Pacific Maritime Association longshore labor contract negotiation on the West Coast. This means delays and long wait times at alternate ports.
- Domestic container supply disruption when ships quit calling in Portland. Previously, domestic companies had agreements with steamship lines to move containers into the area. Moving containers cross country into Portland became a strategic disadvantage with the loss of service.
- Direct ocean carrier service in the Columbia River is critical in order for carriers that only call on Puget Sound ports to 'equalize' freight rates to Portland destinations/origins. Without competition from carriers serving the Columbia River, the Puget Sound-only carriers have no incentive to offer the same rates for Portland origin/destination as are offered for Seattle/Tacoma origins/destinations.
- A balance of imports and exports is key to return of Terminal 6 container service.

### **II. TRUCKING:**

#### **A. Trucking Challenges**



- Driver shortages, high turnover of drivers, regulatory constraints on truck and driver utilization, including Hours of Service rules. (Redmond, Hermiston, Ontario, Albany)
- The national truck driver shortage is hitting Oregon shippers very hard. Trucking availability is limited and expensive. The trucking/driver shortage is exacerbated by the requirement that a truck driver be at least 23 years old, eliminating all 18 –22 year olds from the industry. (Redmond, Medford, Albany, Hermiston, Ontario)
- No national heavy-weight truck framework. No heavy trucks/chassis are allowed in California, impacting those seeking to access Oakland. Oregon truck weight limits are the same as Washington and Idaho, higher than California. This allows Oregon cargo to move on ‘heavy’ tri-axle chassis all the way to Puget Sound; but prevents Oregon ‘heavy cargo’ from moving to Oakland or other California ports. This limits options for shippers in Klamath Falls, Medford, etc. (Ontario, Redmond, Albany, Hermiston, Medford)
- Increased costs of trucking goods have inflationary effect on cost of living, economy. (Portland)
- Lack of chassis availability (especially super chassis or heavy-weight). (Redmond)
- Delays in the supply chain, waiting for containers to unload in Seattle/Tacoma and move to Portland. (Portland)
- Drivers are paid by the mile. They can’t afford to sit at port gates for hours waiting to get in due to trucker Hours of Service limitations. It de-incentivizes drayage trucking as a profession. (Redmond)
- Eastern Oregon onion growers are limited in ability to deliver to domestic customers, and access Puget Sound ports in order to sell into the foreign markets by the lack of truck capacity serving eastern Oregon. Trucks that would ordinarily be available to take the onions west to the ports are currently in demand to run up and down Interstate 5 shuttling Oregon cargo to and from Seattle/Tacoma. (Ontario)
- It is virtually impossible to do a truck turn from Hermiston area to Puget Sound in one shift. (Hermiston)
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## **B. Trucking “Work-Arounds”**

- Drop-pick program where customers receive containers in the middle of the night, which they can load in the morning and deliver to the port. (Portland, Albany)
- Remote Drop-off Yards (Peel Off Yards aka Off-Dock Container Yards allow for full container staging and efficient delivery to export terminals. Relieves congestion at the terminals. Los Angeles implemented this model in 2002; Oakland exploring this. (Portland).
- Load matching (aka “Street Turns”) offers the most immediate, cost effective means of reducing trucking costs. Instead of a truck picking up a loaded container, then delivering it

and returning to the port 'empty', the truck delivers, and then goes to another shipper to pick up a load going to the port. This eliminates 'dead-heading', more efficiently uses scarce trucking capacity, and can cut the cost of trucking in half. Trucking 'street turns' are most feasible and commonly used in urban locations where there are many shippers in close proximity, but is being explored in the rural areas, where there are larger importers (e.g., WalMart, Lowes). In many instances, but not all, it is not possible to match import containers on 'regular' chassis, with Oregon's typically heavy agriculture and forest products export cargo requiring containers on "heavy-weight tri axle" chassis. Efforts to make this work are underway. (Portland, Albany, Medford, Redmond, Hermiston)

- Assuring heavy-weight chassis for the export (agriculture and forest products) loads heading northbound to Puget Sound, when the import (southbound) cargo is on the regular chassis. (Portland)

### **III. RAIL:**

#### **A. Rail Challenges**

- Rail service going west to the Puget Sound ports would benefit eastern Oregon and Washington shippers. (Redmond, Ontario)
- An increase in rail service by Union Pacific (UP) to eastern U.S. customers would benefit Oregon onion growers requiring shorter transit times. (Ontario)

#### **B. Rail "Work-Arounds"**

- The Federal Congressional Delegation and our State elected officials should persuade UP and Burlington Northern Santa Fe (BNSF) to provide the service that Oregon shippers require, including the services described in the "Integrated Solutions" section. (Albany, Ontario, Medford)
- Oregon has an extensive network of short-line railroad services, as well as both Western Class One railroads, which collectively cover most all parts of the state. Bottom line, the physical component for an Oregon rail network already exists. (Albany, Medford)
- The 'common wisdom' and current practice is to bring Oregon export cargo north to Puget Sound ports, by truck or rail due to transit times. But it is worth considering the benefits of moving the southern Oregon shippers southbound to Oakland or Los Angeles/Long Beach, which have more ocean carrier options, a lack of export cargo to balance the inbound volumes, and lower West-bound rates than Puget Sound. (Medford)

### **IV. BARGE:**

#### **A. Barge Challenges**

- Without adequate international container vessel service at Portland's Terminal 6, barge service for containers has been suspended. (Portland)

- No existing barge can transit the upper Columbia-Snake system through the locks and continue out the mouth of the Columbia and up to Puget Sound ports or down to Oakland due to the U.S. Jones Act (regulating maritime commerce in U.S. waters and between U.S. ports). Proposals to design and build such barges have emerged in the past, but none have moved beyond the concept stage. As a result any cargo moving by barge will have to be offloaded at some point in order to access Puget Sound ports, either by rail or truck. (Hermiston)
- The alternative to barging is a dramatic increase in trucking to Puget Sound ports, which creates detrimental environmental impacts. (Hermiston)

#### **B. Barge “Work-Arounds”**

- Ramping up barge service on the Columbia/Snake River system. (Hermiston)
- An efficient means of serving Idaho cargo that has traditionally used the barge service from Lewiston to Portland’s Terminal 6, is to barge down the Columbia River to Boardman, then to load on rail which could travel to Portland (and can be off-loaded to be loaded onto a ship – currently the Westwood ship), or continue on by rail to Puget Sound ports. (Hermiston)
- West Coast barge service originating at Seattle/Tacoma, with port stops all the way down the West Coast including Portland, Newport, and Los Angeles/Long Beach for loading on international container vessels. This requires a Jones Act compliant barge service. Barge service would need to compete with trucking on a cost basis. (Hermiston)

### **V. INTEGRATED SOLUTIONS:**

#### **A. Restore Columbia River Container Service**

- The shipper community continues to support Port of Portland recruitment of new carriers at Terminal 6. Need 5 to 7 importers to anchor a new service.
- Resolution of labor-management issues and demonstration of dependable and efficient vessel loadings (e.g., Westwood, new service). (Portland, Redmond, Ontario, Albany)

#### **B. Rail Load Centers**

- Major ports around the country have established inland load points, or “inland ports”: Norfolk, Savannah for example, with similar being pursued for Los Angeles/Long Beach, Oakland. These were established with the full cooperation and support of the Class One railroads which bring the cargo into the ports via “on dock” rail. (Portland, Albany, Medford, Hermiston)
- Inland load points (or Container Yards) currently exist in Portland and Boardman (both operated by Northwest Container Services), allowing cargo to be trucked to/from those points and loaded on rail (or, in the case of imports unloaded from rail). As the rail goes directly ‘on dock’, there is no need for trucking at the Tacoma/Seattle end of the rail connection. These services currently provide an essential means for Oregon exports and imports to access gateway ports in Puget Sound. (Portland, Hermiston)

- There is interest in the need for an inland rail load point somewhere in the Willamette Valley, to provide a means to load Oregon exports onto rail, closer to the origins of those exports. This will allow heavy agricultural and forest products to be loaded on rail, and avoid long truck hauls to Seattle/Tacoma, which often exceed the allowable hours for truckers under the Federal Hours of Service regulations. (Albany, Hermiston, Medford, Ontario, Redmond)
- ConnectOregon funds could be used to expand the two existing truck-to-rail transload facilities in Boardman and Portland, and to establishing the same in the mid-Willamette Valley. (Albany, Medford)
- The inland rail load points in Boardman and Portland, operated by Northwest Container Services, would benefit from more rail capacity from the UP. They could handle much more cargo, and provide an alternative to trucking to Puget Sound, if UP would provide additional trains at both locations. (Hermiston, Albany, Portland)

### **C. Truck Transfer Centers**

- Load center that can accommodate barge, truck and rail, at the Port of Morrow, in Boardman, with rail service direct to the Puget Sound ports (already provided by Northwest Container Services). (Hermiston)
- An alternative to rail inland load points, necessary to reduce the long haul trucking to Puget Sound, are inland truck points. Such an arrangement has been established in Eastern Washington, and is utilized by Clearwater and others in Lewiston, Idaho. Trucks shuttle containers from the Lewiston to the inland point, drop off the container and chassis, pick up an empty container/chassis and return to Lewiston. This is a much shorter haul than all the way to Tacoma or Seattle and back, and avoids, at least for this first leg from Lewiston to the inland truck location, waiting at the congested terminals in Puget Sound. Then a truck picks up the container/chassis at Quincy, Washington and heads to the terminals at the ports of Tacoma/Seattle, enters gates, drops loaded container, picks up an empty container/chassis, and heads back to the Quincy yard. (Hermiston)
- Truck shuttle is more efficient than a single long-haul from Lewiston to Puget Sound, which cannot be accomplished economically— Federal Hours of Service rules do not allow a driver to drive the number of hours required for such a long round trip from Idaho to Puget Sound and back. This arrangement can be considered by Oregon exporters in Eastern Washington, depending upon their distance from Quincy, Washington. The rail load option in Boardman is more feasible/efficient/affordable. (Ontario)
- While efforts to develop a rail load point in the Willamette Valley are underway, such a trucking load point might serve Oregon importers and exporters in Southern Oregon and the South Coast. (Hermiston, Medford)
- Shippers from Idaho currently shuttle exports by truck to load center in eastern Washington. Then other trucks shuttle from that load center to the Puget Sound ports. (Hermiston)

### **D. Miscellaneous “Work-Arounds”**

- Break-bulk shipping out of Longview and Vancouver, Washington are being used by a couple of Oregon exporters as a stop-gap alternative to container shipping, when trucking

capacity to haul to Puget Sound ports is not available. However, this option is limited, as many foreign customers only want to receive commodities in containers, and break-bulk is considerably more expensive than container transport. (Albany)

- Customers located in California and elsewhere taking delivery direct from carrier via Los Angeles/ Long Beach, rather than via the Portland area warehouse. (Medford)
- Coordination of accurate information between port, carriers, terminals, state Departments of Transportation, and truckers (clearinghouse of container availability, terminal congestion/flow, hours of operation. (Portland)