



PORT TAMPA BAY

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Now *this* is how you serve Florida's largest and fastest growing market.

70\* million  
customers

Port Tampa Bay

\*8 million residents and more than 62 million visitors annually.  
Census and 2013 Visit Florida tourism estimates.

May 2016



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# Overview – Port Tampa Bay

- Florida's largest port in cargo tonnage and area
- 37 million tons cargo/year and encompassing 5000 acres
- Diverse mix of bulk, break-bulk and container traffic
- Huge and expanding local market
- Energy products gateway for Central Florida
- Major fertilizer export port
- Shipyard/ship repair center
- Major cruise homeport
- Expanding container gateway/distribution center gateway
- Diverse lines of business = solid financial performance
- Over \$15B in economic impact supporting more than 80,000 jobs



Energy



Fertilizer



Building Materials



Cruise



Containers<sub>2</sub>



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# Liquid & Dry Bulk

## Major Liquid Bulk Commodities:

- Petroleum
- Ammonia
- Liquid Sulphur
- Sulphuric Acid
- Juice

## Major Dry Bulk Commodities

- Fertilizer
- Coal
- Aggregates
- Cement
- Citrus Pellets
- Salt







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# General Cargo & Containers

## Major Commodities:

- Containerized
- Steel
- Roll on/roll off
- Vehicles
- Construction Equipment







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# Shipbuilding & Repair







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# Cruise

- Homeport for Carnival Cruise Line, Holland America Line, Royal Caribbean International, Norwegian Cruise Line & Aida port of call



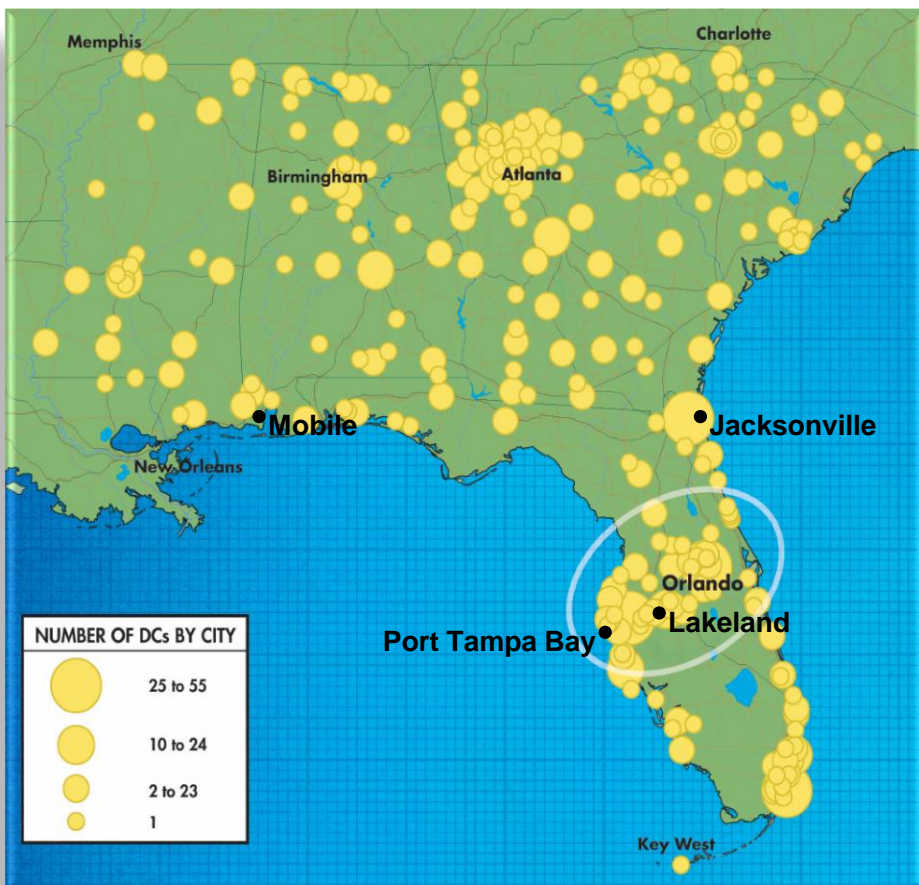


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# Distribution and Demographics

**Tampa Bay/Orlando I-4 Corridor – largest concentration of DC's in Florida**



Distribution Center Density in the Southeast U.S.  
(Source: Chain Store Guide)

**Population Growth Projections – Fastest Growing Region in One of Fastest Growing States**

**Central Florida's population is forecasted to grow at twice the rate of South Florida by 2020**

With over 20 million residents, Florida has overtaken NY as the 3<sup>rd</sup> most populous state!

Hernando County	35,611
Hillsborough County	211,716
Lake County	61,257
Manatee County	51,634
Orange County	251,699
Osceola County	116,424
Pasco County	48,072
Pinellas County	26,480
Polk County	99,006
Sarasota County	86,843
Sumter County	64,679
<b>Tampa Bay/Central Florida</b>	<b>1,053,421</b>

Broward County	83,766
Miami-Dade County	255,755
Palm Beach County	155,107
<b>Miami/South Florida</b>	<b>494,628</b>







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# Tampa Bay/I-4 Corridor: Florida's Distribution Gateway for: Consumer Products and Food & Beverage



## Huge Local Market

With a population of 9 million people, plus over 70 million tourist visitors/year, the Tampa/Orlando region is a huge consumer market.

## 10<sup>th</sup> Largest Economy in the U.S.

Central Florida (Tampa /Orlando I-4 corridor), has the 10<sup>th</sup> largest economy in the U.S., with a GDP of more than \$325 billion.

## Population Growth Projections

Central Florida's growth forecast will more than double that of South Florida by 2020

## Executive Shippers' Council

Association of local BCOs (exporters and importers) eager to support carriers that choose to call Tampa direct.

## Reduced Transportation Costs

Serving the Central Florida market through the Port of Tampa results in significant truck cost savings versus using more distant and congested ports.

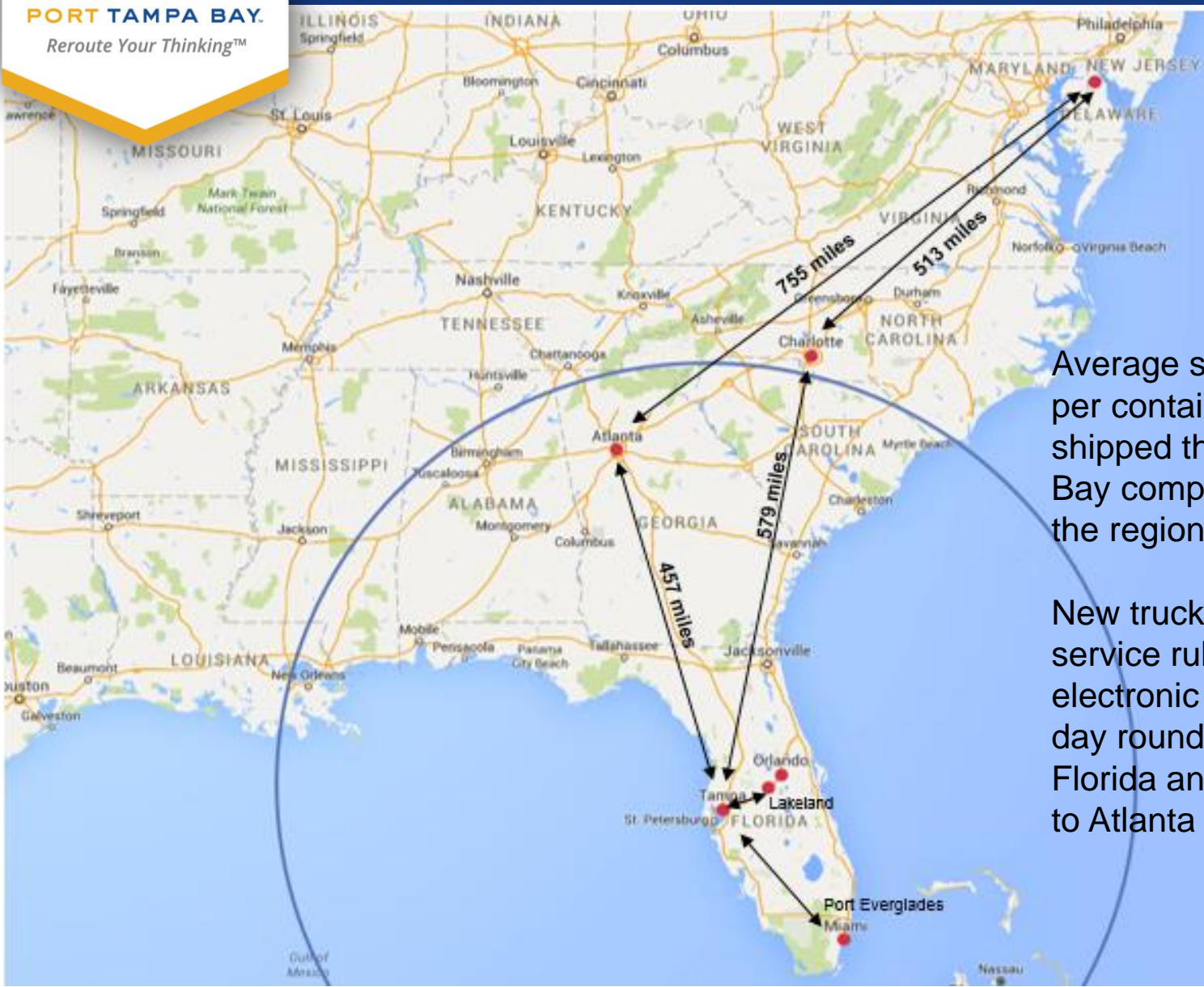




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# Inland trucking cost savings via Tampa



Average savings of over \$700 per container transport when shipped through Port Tampa Bay compared to other ports in the region.

New truck driver hours of service rules and pending electronic log allow for same day round trip deliveries within Florida and same day delivery to Atlanta and Charlotte.





# I-4 Connector to Port Tampa Bay

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***New dedicated truck  
ramp to/from Port  
Tampa Bay & Interstate***







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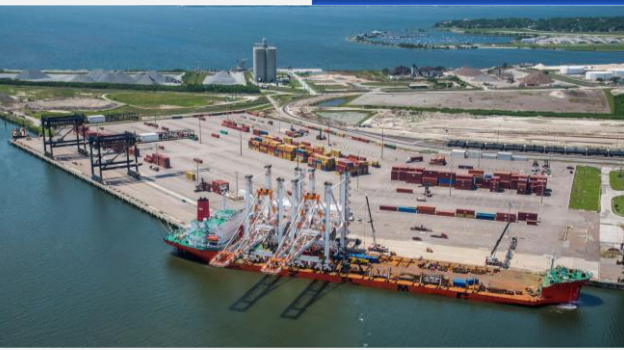
# Port Tampa Bay Container Terminal Expansion

## Currently:

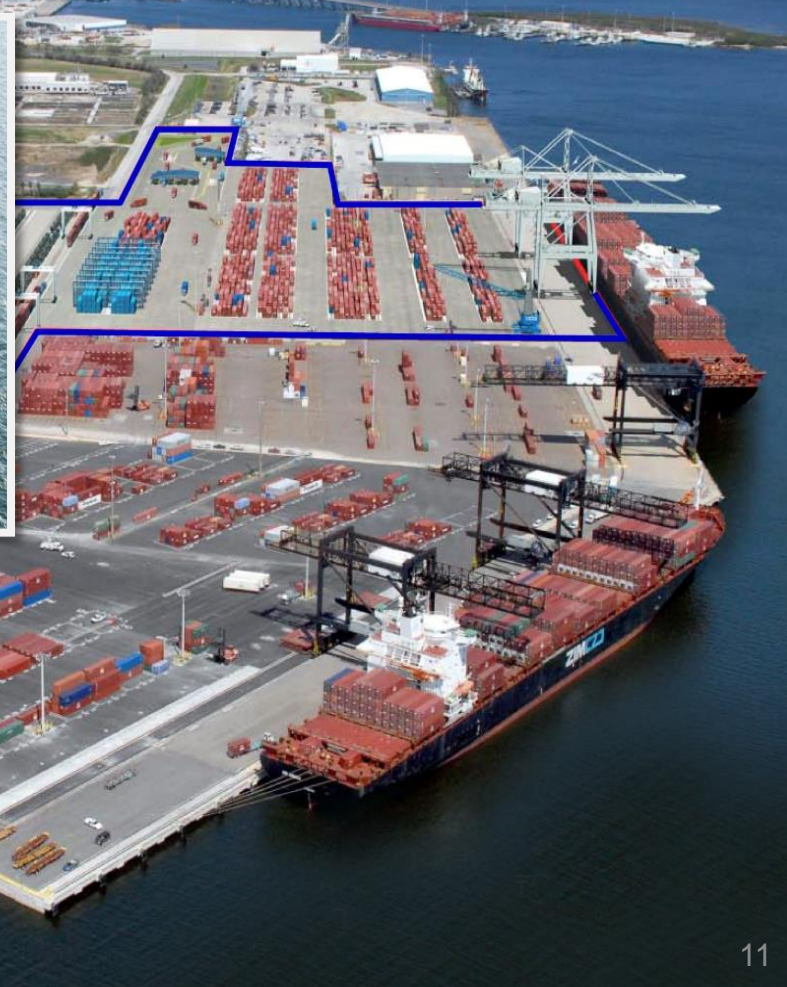
- 43 foot (13.2 meters) deep water berth
- 5 gantry cranes/mobile harbor crane
- 2800 feet (855 meters) of berth
- 40 acre (16 hectares)

## Expansion:

- 2 ZPMC post-Panamax gantry cranes arrived April 1, provide capability to handle 8-9,000 TEU vessels
- Together with Ports America, PTB has a phased build out plan to quadruple the size of the terminal to 160 acres (64 hectares) and add an additional 1000 foot deepwater berth.



  
**PORTS AMERICA**







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# Port Tampa Bay Container Services

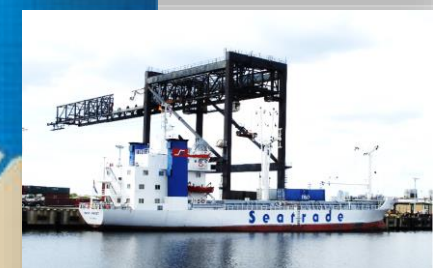


**Europe,  
Mediterranean,  
Middle East**

**China/Asia  
Transpacific**

**Central/South America  
& Caribbean**

**Additional new services  
coming soon!**





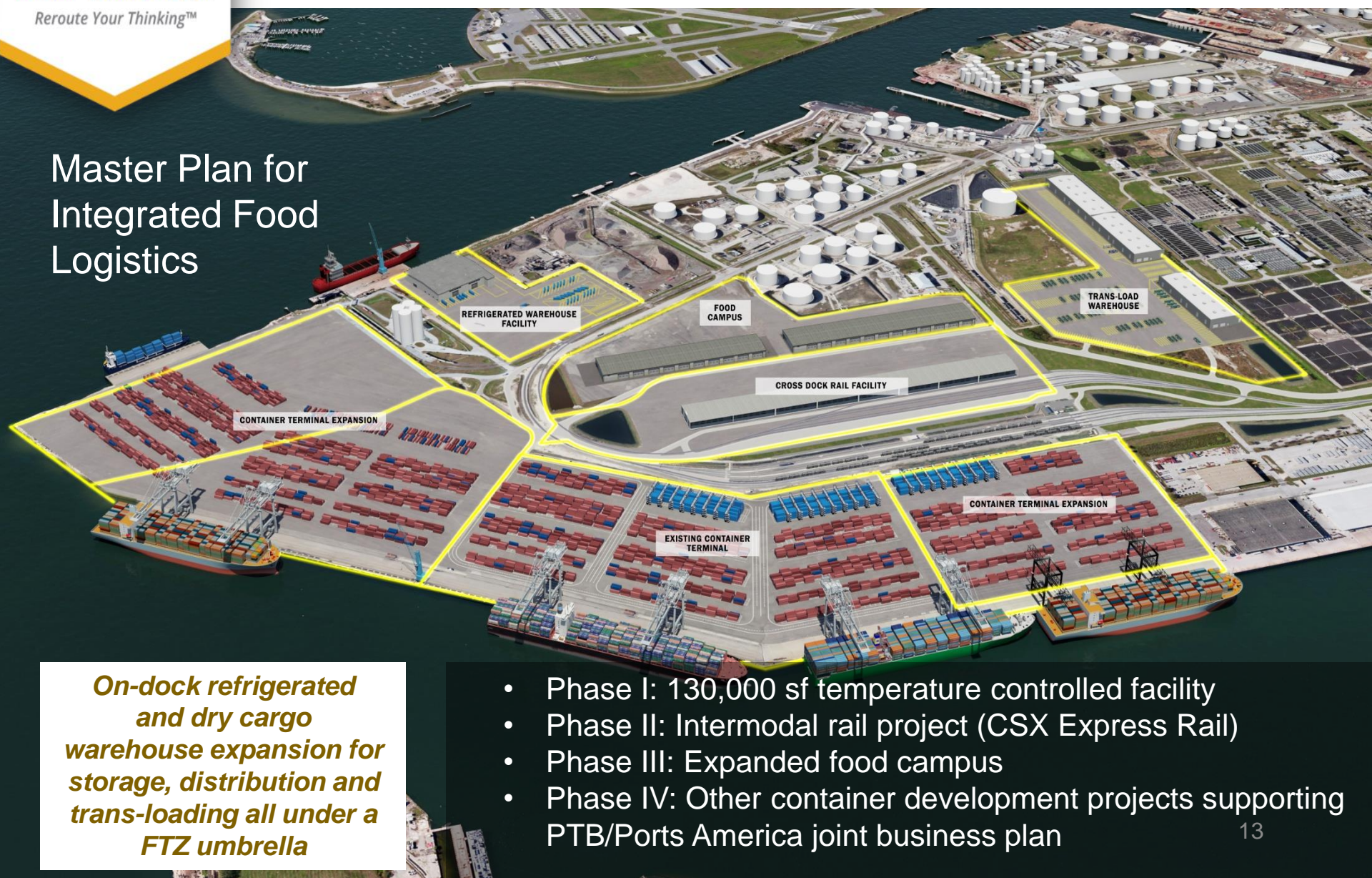


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# Hookers Point – Integrated Long Term Plan for Expanding Distribution and Terminal Capacity

## Master Plan for Integrated Food Logistics



***On-dock refrigerated and dry cargo warehouse expansion for storage, distribution and trans-loading all under a FTZ umbrella***

- Phase I: 130,000 sf temperature controlled facility
- Phase II: Intermodal rail project (CSX Express Rail)
- Phase III: Expanded food campus
- Phase IV: Other container development projects supporting PTB/Ports America joint business plan



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# Perishable Market Opportunities

**Costa Rica, Chile, Colombia, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama and Peru**

## Imports

- Avocados
- Bananas & Plantains
- Citrus juices and concentrates
- Fruit, Misc
- Lemons
- Mandarins
- Fresh & frozen meat
- Papaya
- Pineapples
- Seafood
- Vegetables

## Exports

- Citrus & concentrated juices
- Cheese
- Fresh citrus
- Fruit, misc
- Meat, fresh/frozen
- Milk
- Eggs & chicken, fresh/frozen
- Fresh & frozen vegetables
- Seafood
- Vegetables







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# Intermodal Expansion

Chicago/Midwest

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REFRIGERATED  
WAREHOUSE

- New on-dock ICTF now under construction, with plans for new Tampa-Chicago Refrigerated Express rail service
- 'Virtual on-dock' pricing available now where Port Tampa Bay and Ports America absorb 6 mile dray transfer cost from port to existing CSX Intermodal ramp.



# Foreign Trade Zone No. 79

## Tampa Bay I-4 Corridor

- **Streamlines the process and minimizes costs for qualified importing, exporting, manufacturing & distribution activities**
- **Companies can defer, reduce or eliminate Customs duties on imported merchandise.**
- **Alternative Site Framework status recently awarded**
- **Expedited processing of applications**
- **Expanded geographic scope to include all of Hillsborough and Polk Counties**
- **Program managed by Port Tampa Bay**





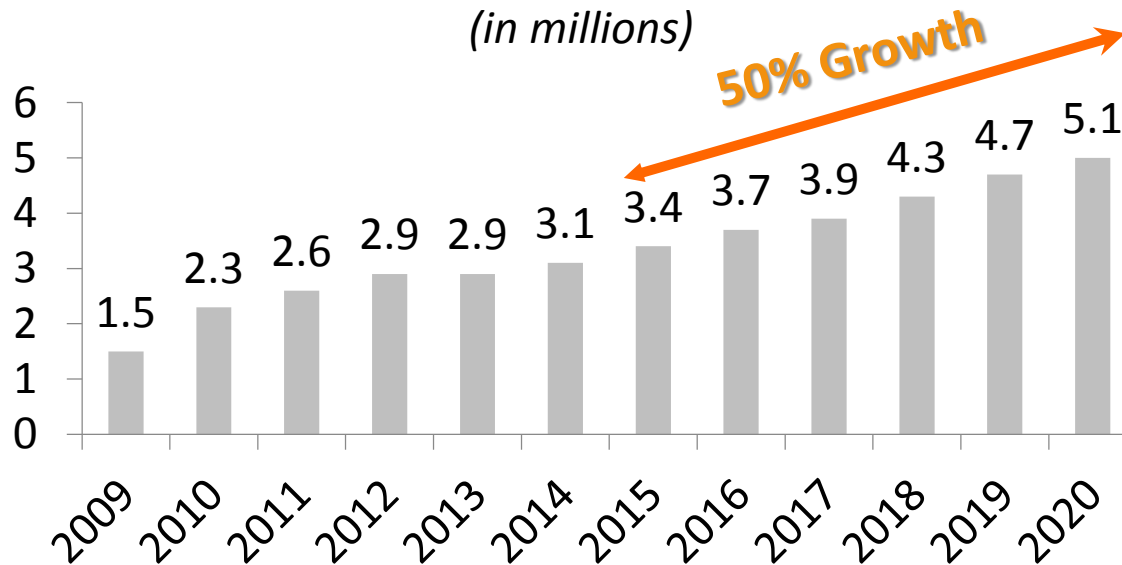
# Automobile Distribution and Ro-Ro

Port Tampa Bay has significant potential as a “short sea” shipping gateway for automotive plant expansion underway in Mexico

- Port Tampa Bay is in close proximity to Mexico’s Gulf Coast ports (Veracruz and Altamira)
- Tampa is well positioned as a gateway for exports to Latin America, including from the major POV and heavy equipment auctions in Florida

## Mexico Light Vehicle Production

(in millions)





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# Port Tampa Bay – Redwing & South Bay

270 acres available for new industrial and manufacturing projects with access to deep water, rail, highway and competitive energy costs







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# Port Tampa Bay Channel District Vision Plan





# Thank You

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