



PhilaPort

THE PORT OF PHILADELPHIA

Prepared for:



PA Chamber[®]

of Business and Industry

2022 INFRASTRUCTURE ROUNDTABLE, PART III: LOGISTICS, PORTS, AND TODAY'S SUPPLY CHAIN

May 12, 2022





PhilaPort Promises

✓ Velocity ✓ Proximity ✓ Flexibility




Cargo Statistics | PhilaPort

December(YTD)

Containers

16%
TEUs



YTD 2020

640,799

YTD 2021

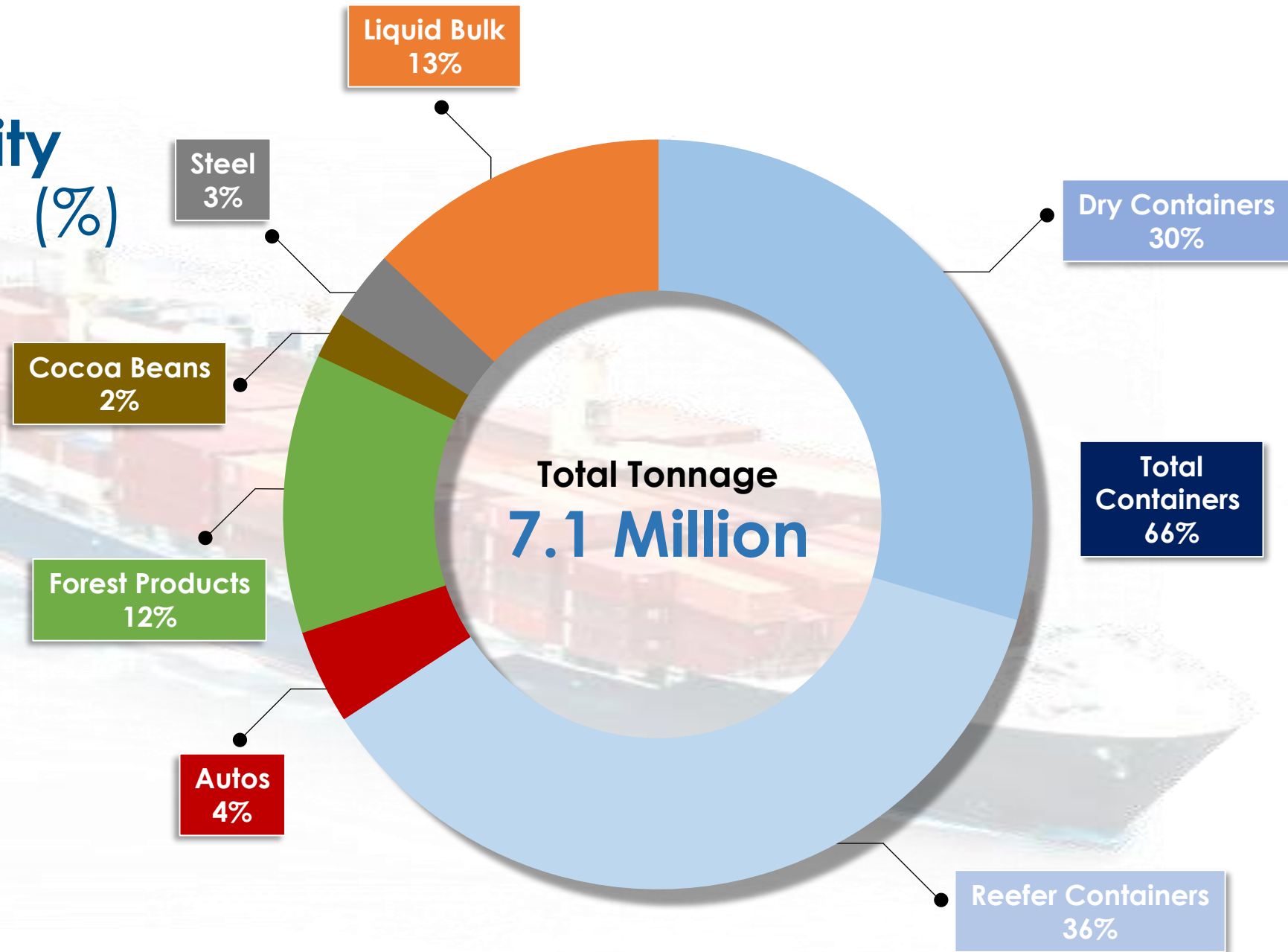
739,323

January – December 2021 U.S. Container Growth (Year End Summary)

US Trade	14%	↑
US East Coast	16%	↑
Baltimore	-2%	↓
Boston	-30%	↓
Charleston	18%	↑
Jacksonville	7%	↑
Norfolk	25%	↑
NY/NJ	19%	↑
Philadelphia	16%	↑
Savannah	20%	↑



PhilaPort Cargo Commodity Tonnage for 2021 (%)



Container tonnage is 66%, compared to other commodity tonnage of 34%.

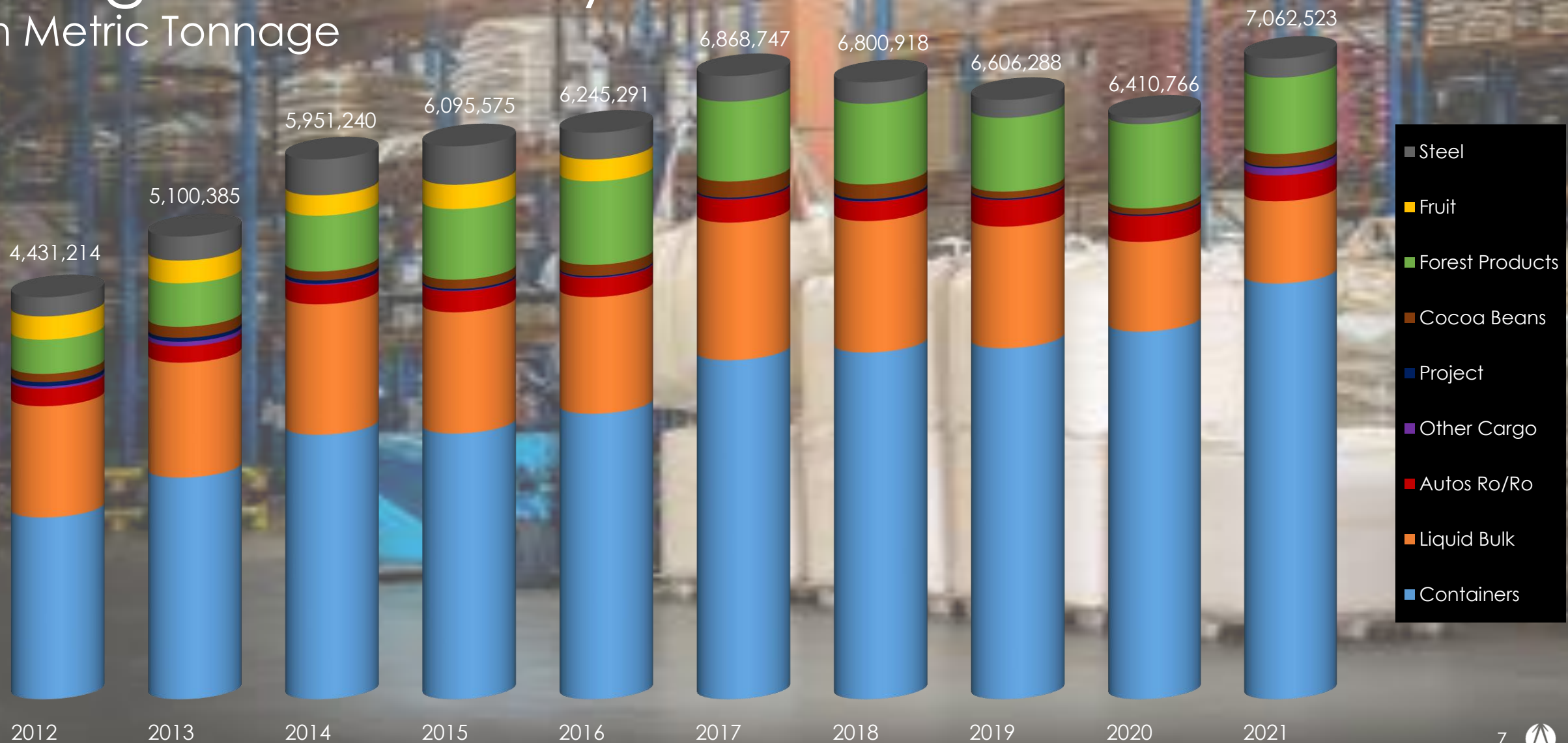


PhilaPort

Cargo Commodity

in Metric Tonnage

Compound Annual Growth Rate is 5% per year.



Compound Annual Growth Rate is 12% per year.

PhilaPort Container Volumes (in TEUs)



Greater Philadelphia Ports

The Global Leader in Food Cargoes

- \$4.1 Billion in fruit imports imported in 2021

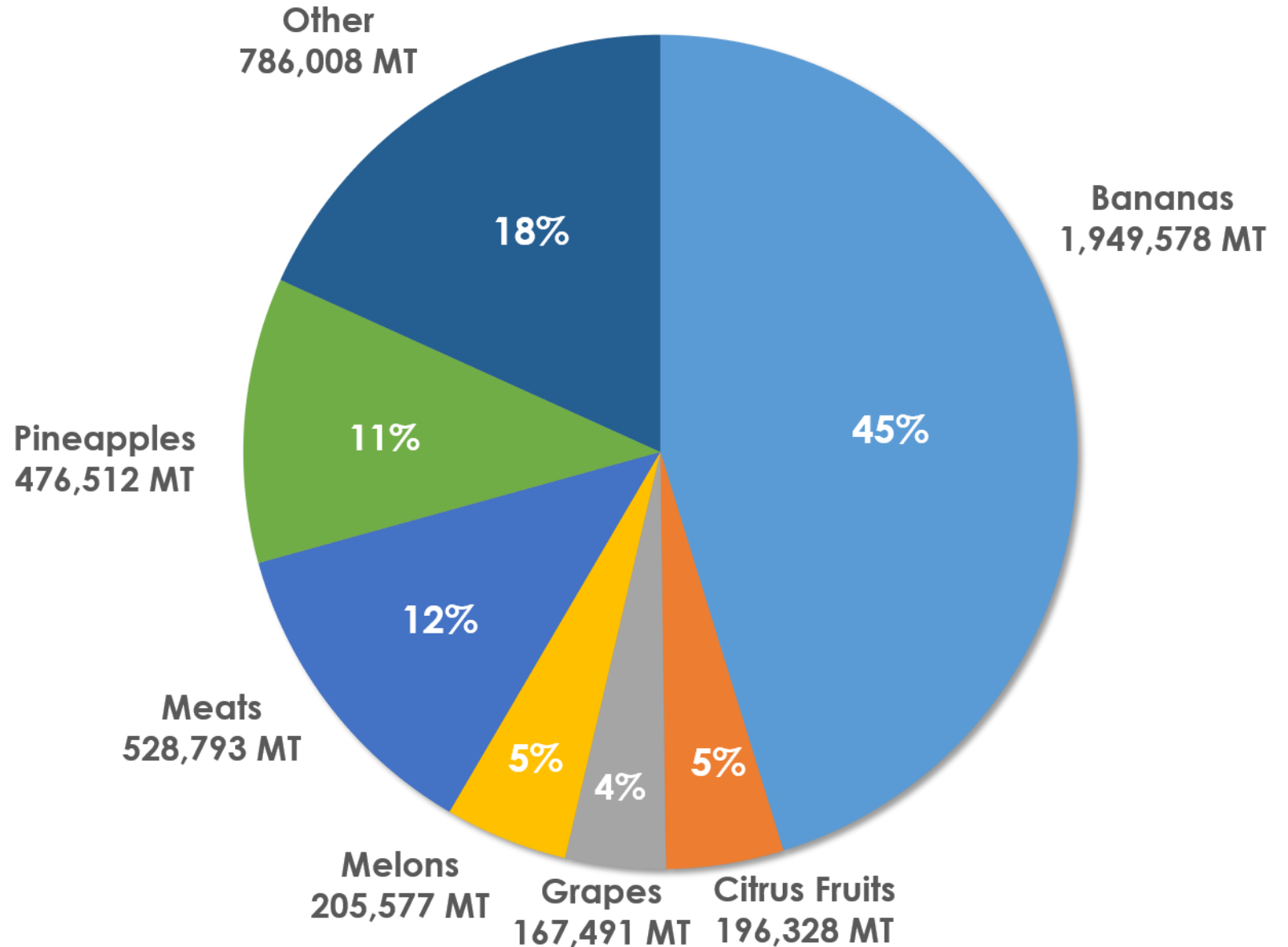
- \$6.6 Billion of food and associated products imported into the USA in 2021



Delaware River Refrigerated Cargoes

4,310,287
Metric Tons

*Refrigerated
containers work well for
chocolate candy!



PROXIMITY

Excellent Position

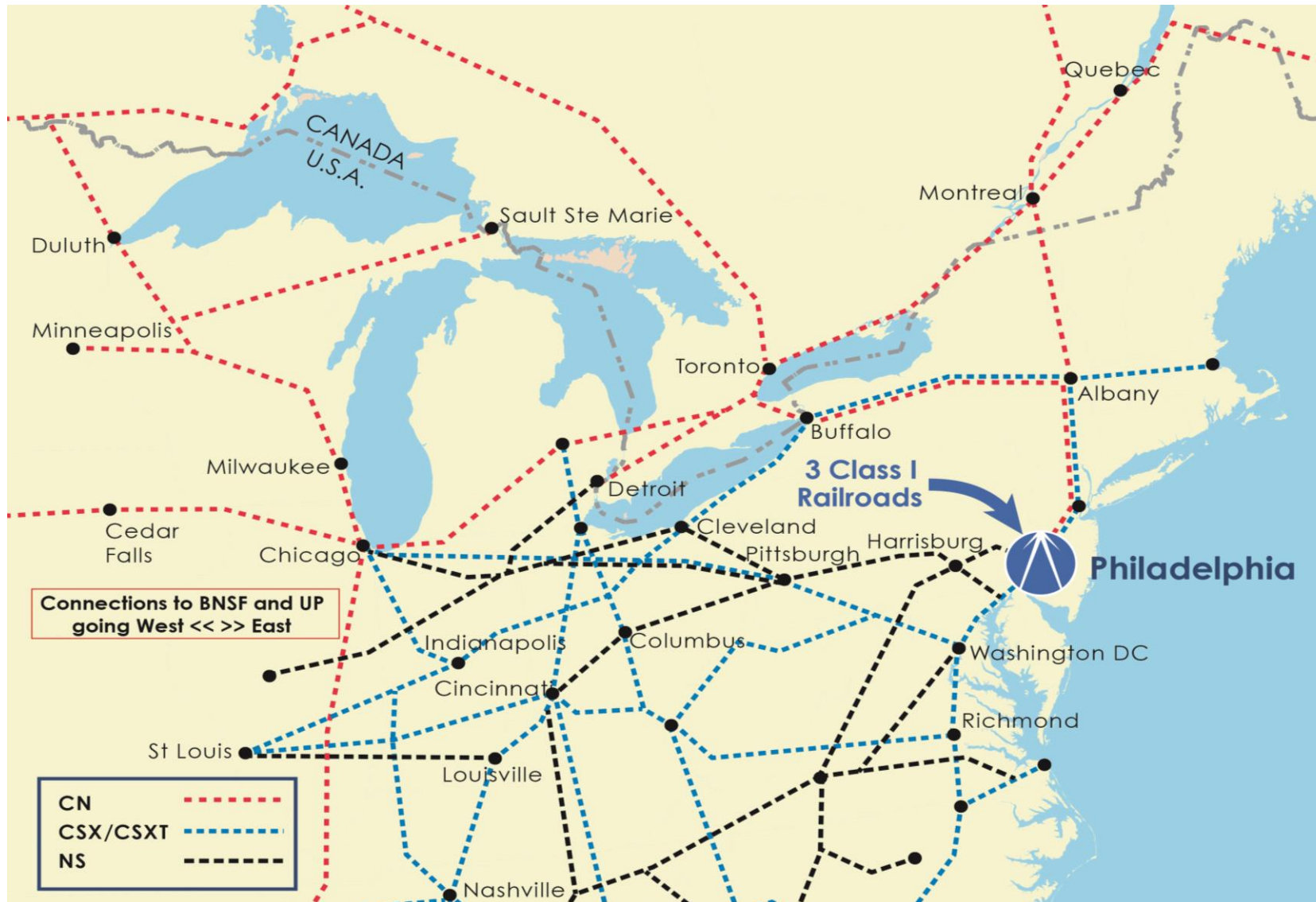
PhilaPort is located in the center of the richest consumer market in the Northeastern U.S.

- The *Northeast Corridor* of the United States, running from Maine to Washington DC
- Population of over 56 million
- GDP of approximately \$5 trillion
- Largest economic region on the planet
- This region has a GDP slightly larger than Germany



VELOCITY

Rail Connections



Served by three
Class I Railroads





Container Facilities

- (1) Packer Avenue Marine Terminal
- (6) Publicker Container Yard
- (14) Tioga Marine Terminal

Ro/Ro Facilities

- (2) Philadelphia Auto Processing Facility
- (3) Southport Marine Terminal Complex
- (5) Pier 122

Breakbulk Facilities

- (7) Pier 96, 98 & 100
- (8) Pier 84
- (9) Pier 82
- (10) Philadelphia Forest Products Center
*Pier 74, Pier 78
- (13) Piers 38 & 40
- (14) Tioga Marine Terminal

Liquid Bulk Facilities

- (4) Pier 124
- (15) Tioga Liquid Bulk Terminal

Other Properties

- (11) PhilaPort Distribution Center
- (12) Conrail Loop Track
- (16) PhilaPort Main Offices
- (17) 3200 Tioga
- (18) Philadelphia Wholesale Produce Market

PhilaPort Map

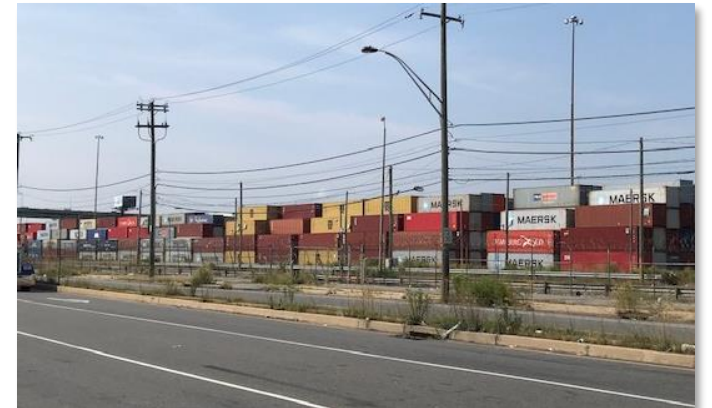
PhilaPort's Response to Global Supply Chain Crisis

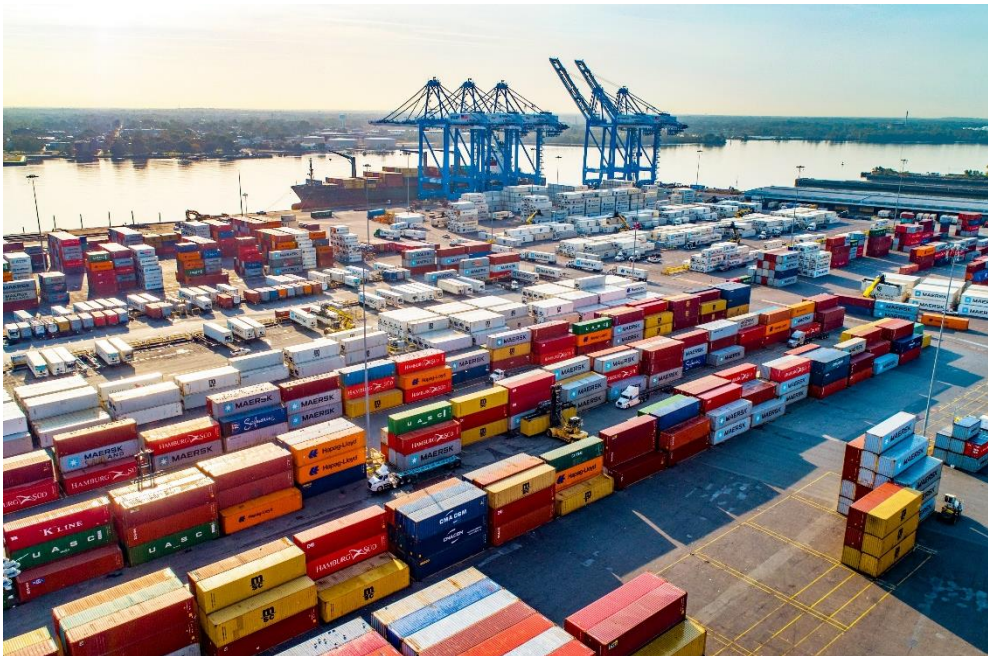
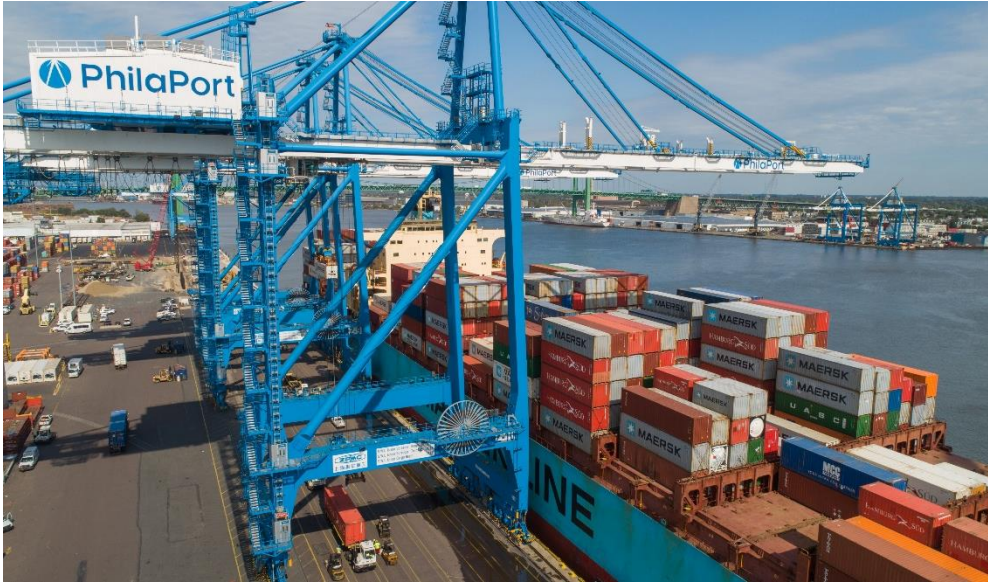
Packer Avenue Marine Terminal – Operator, Greenwich Terminals LLC (Holt)

- Terminal operations new extended gate hours
 - Monday through Friday, 7:30AM-11:30PM & Saturday 7:00AM-4:00PM
- Create (2) satellite container yards at
 - 98 Annex: 20 acres – *PhilaPort initiated sub-lease for use*
 - Pier 82: 13 acres
- CSX Intermodal Initiative
 - Holt provided (2) top picks
 - Additionally, Holt provided labor
- Purchase additional chassis
- Paused all vessel operation for three days; Sept. 8th-10th
 - Delayed (4) vessel arrivals

Current Status of PAMT

- Truck que times much improved as outcome of reset
- CSX Enhanced operations to commence by end of October





Packer Avenue Marine Terminal

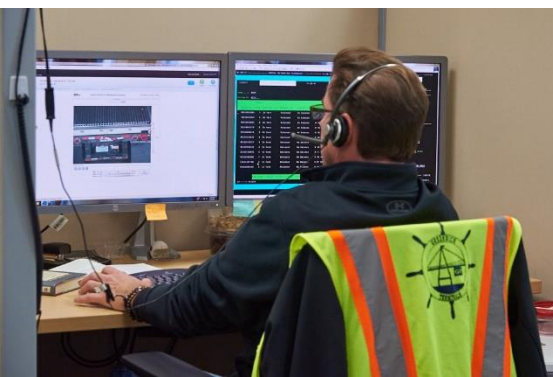
The Packer Avenue Marine Terminal is the premier container handling facility on the Delaware River. Immediate access to two major rail yards and interstate highways ensure inland connections for PAMT's customers. On-dock refrigeration is available.

Terminal Area	<ul style="list-style-type: none"> • 160 acres
Total #/Size Berth(s)	<ul style="list-style-type: none"> • 7 / 4,600 linear ft. (including ro/ro)
Depth at MLW	<ul style="list-style-type: none"> • 45 ft.
Total #/Size Warehousing	<ul style="list-style-type: none"> • 3 / 236,000 sq. ft. (combined - refrigerated/dry)
Road/Rail Connections	<ul style="list-style-type: none"> • Immediate access highways to I-95/I-76 • CSX and Norfolk Southern rail service
# Cranes/Types	<ul style="list-style-type: none"> • (5) Super post-Panamax; (2) Post-Panamax
Other	<ul style="list-style-type: none"> • Cargo types include containers, steel, frozen meat, fruit, heavy lift, project, paper • 2,500 reefer plugs • 8-lane container gate inbound • Separate gate for breakbulk cargo • 6-lane container gate outbound • 52 loading docks • Computerized container tracking system

Packer Avenue Marine Terminal | PhilaPort

Gate

- Usually takes less than a minute to drive through
- Driver normally does NOT get out of truck
- Optical Character Recognition (OCR)
- Radiation Portal Monitoring (RPM)
- Truck turn times of 45 minutes including que time



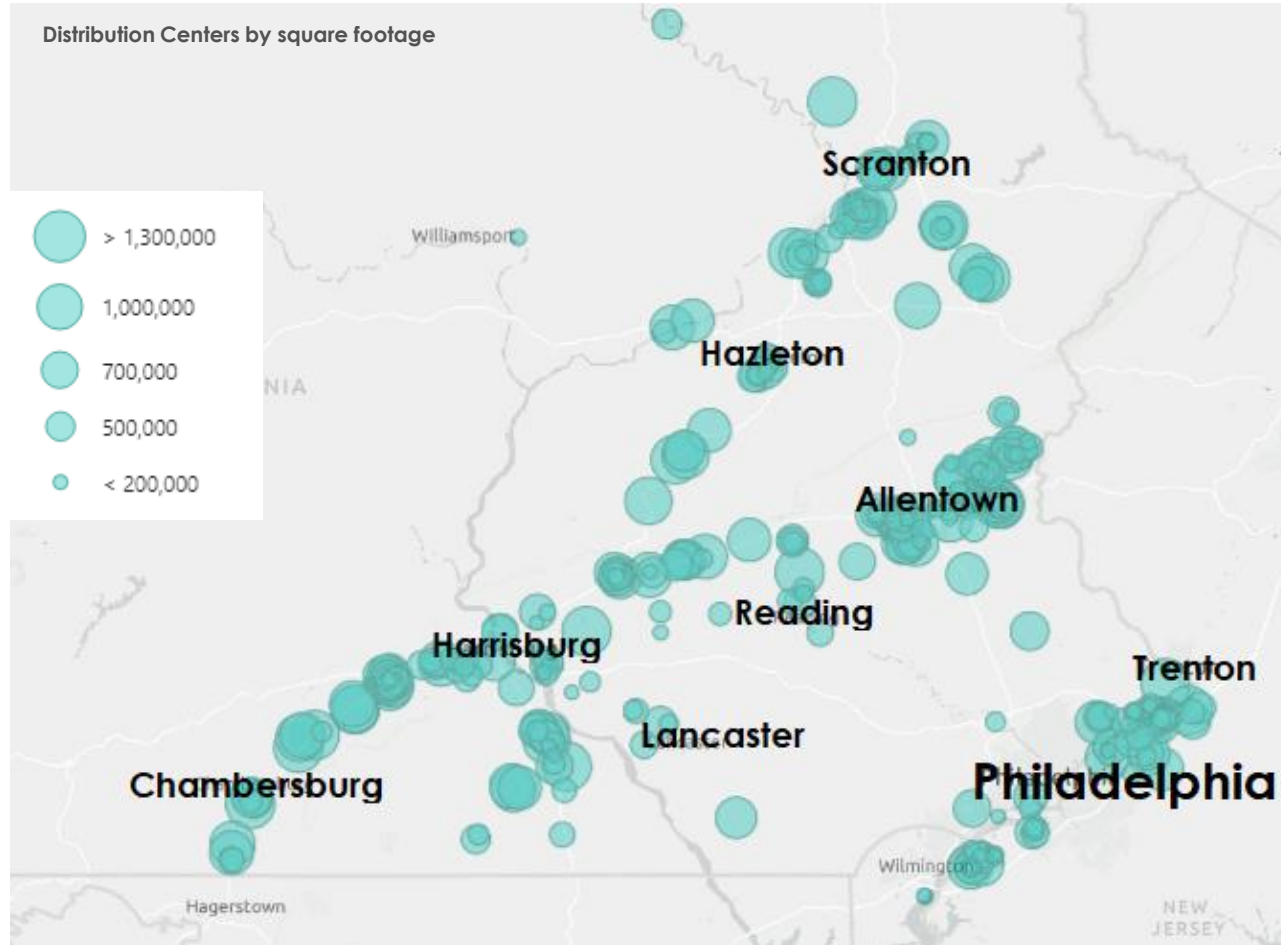
Current Vessel Capacity

14,000+ TEU

Big Ship Ready✓



Adjacent to the 2nd Largest DC Hub in the U.S.



“Lehigh Valley is the inland empire of the East Coast.”

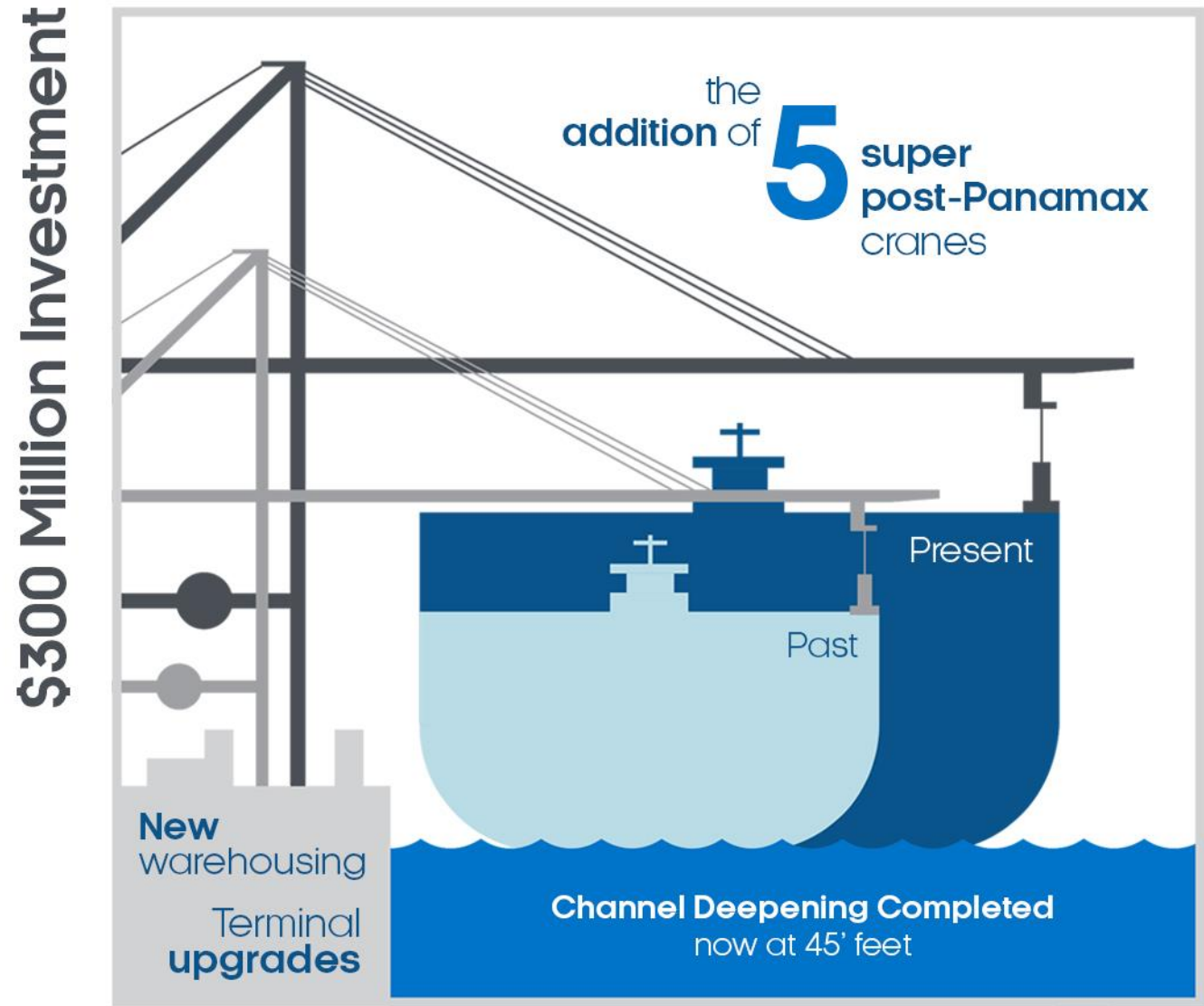
- David Egan¹








- Over 780 Distribution Centers within the PhilaPort's immediate hinterland
- South Jersey increasingly important nationally as a Distribution Center hub for perishable and dry cargoes
- Over 412 million square feet of large distribution center space²

¹Head of Industrial & Logistics Research for the Americas, CBRE (Real Estate); The Journal of Commerce - Oct. 2016.

²Only includes distribution centers larger than 200,000 sq. Ft.

Port Development Plan | PhilaPort

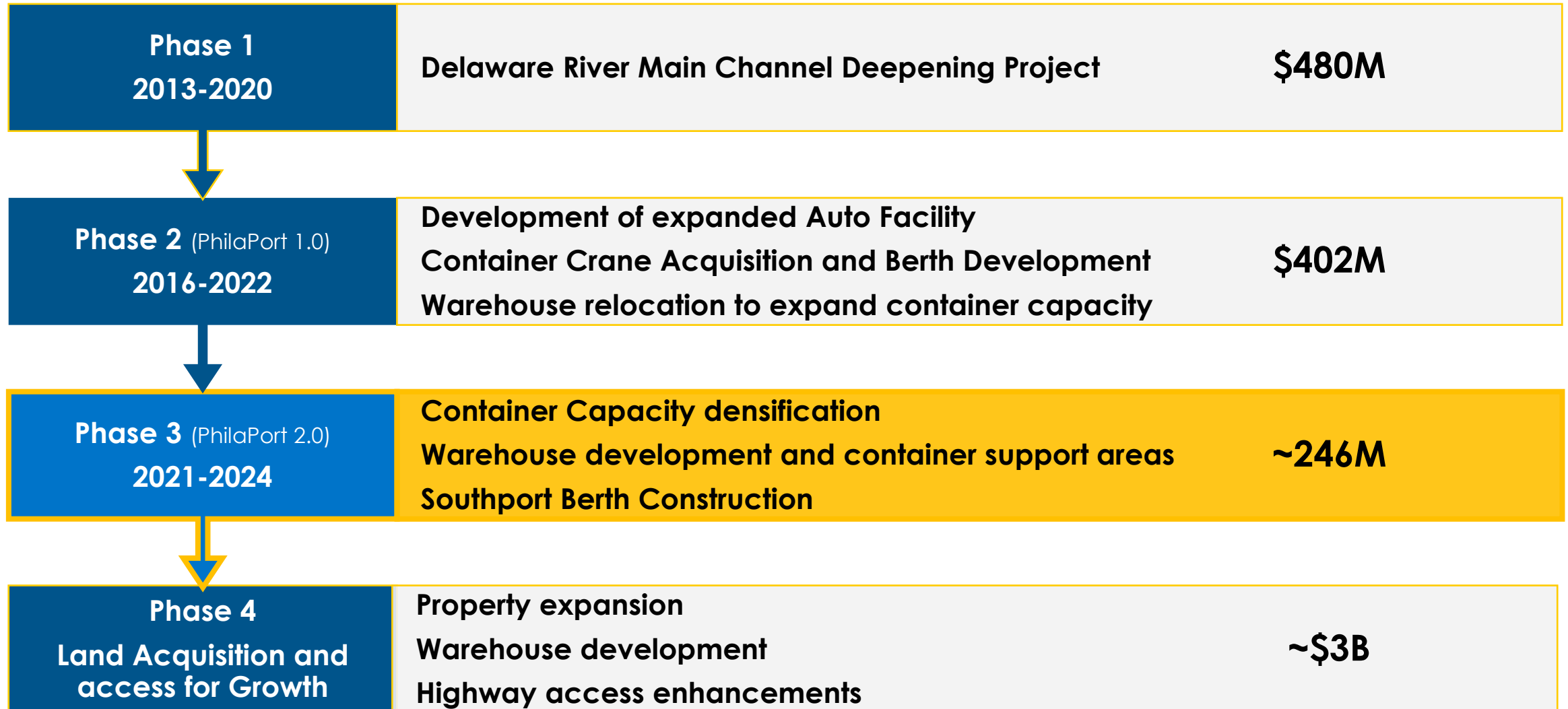


	Present	Future
 Containers	600,000 TEUs	900,000 TEUs
 Jobs	10,341	17,020 65% Increase
 Clean Air	Converting Diesel to Electric	Diesel to Electric
 Cars	155,000 Units	350,000 Units
 Cranes	Small Panamax	Large Super Post-Panamax
 Tax Benefit	\$69.6m Annually	\$108.4m Annually
 Forest Products ^{*1}	465,000 mt	540,000 mt

* Number represents pulp moving through Tioga Marine Terminal as pertains to Plan.




¹ PhilaPort handles over 1m ton of Forest Products annually.

PhilaPort's Continued Expansion Program



PhilaPort Port Development Plan 1.0

COMPLETED PROJECTS (2016-today)

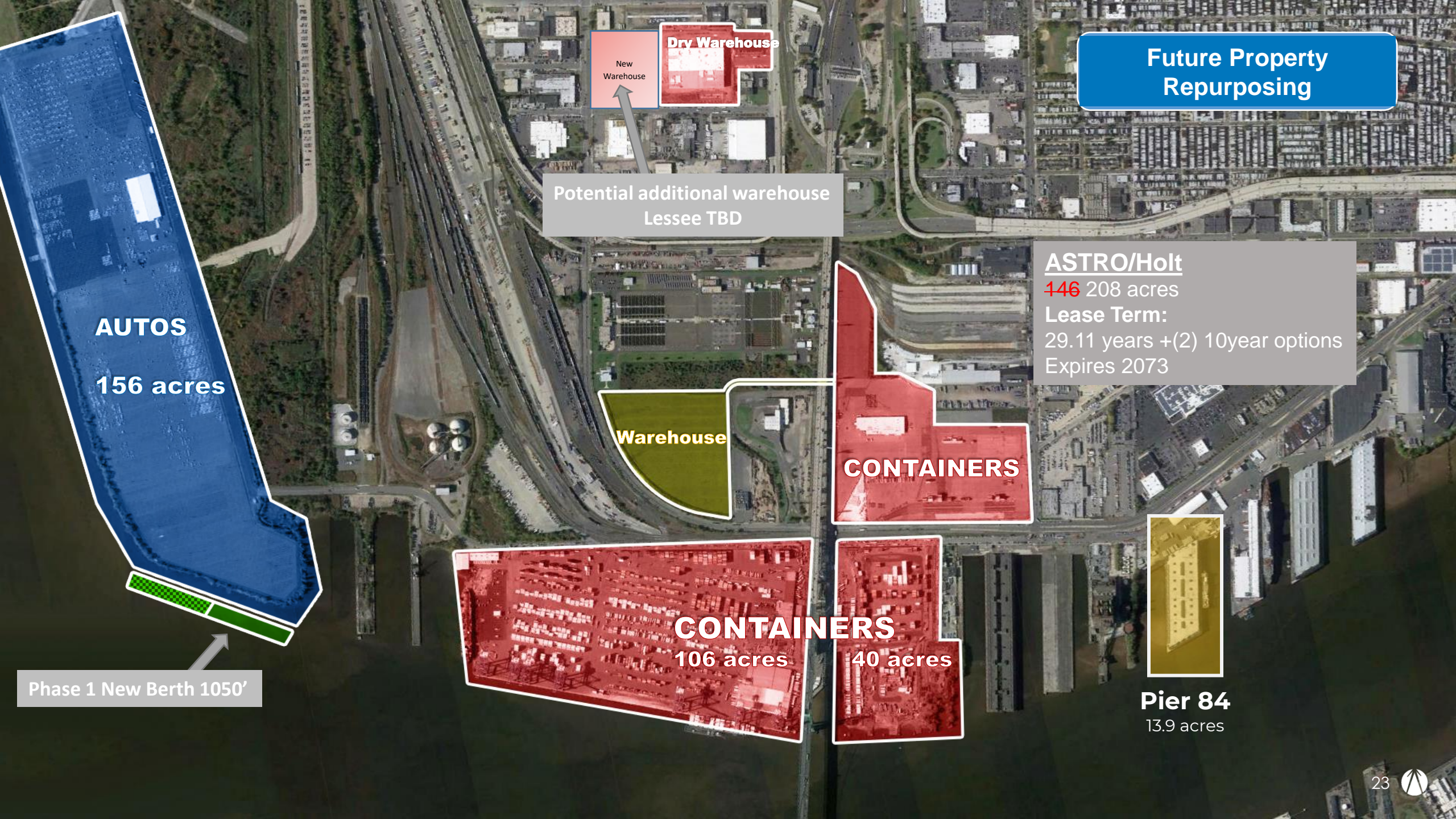
			Growth as Result of PhilaPort's Port Development Plan 1.0 (2016-today)	
Packer Avenue Marine Terminal <small>*Joint investment between PhilaPort and Holt Logistics</small>	\$297 MILLION*	<ul style="list-style-type: none"> ✓ Berth infrastructure improvements ✓ Creation of addition container storage capacity ✓ Enhanced terminal electric grid ✓ Five new electric super post-Panamax cranes ✓ Construction of new 201,621 sq. ft. dry warehouse (May 2022) 	 Containers	60%
Auto Processing Facility <small>SouthPort Auto Terminal</small>	\$93 MILLION	<ul style="list-style-type: none"> ✓ Grading, paving, fencing and lighting of 155-additional acres above 100-year floodplain ✓ Construction of new 108,000 sq. ft. Vehicle Processing Center (VPC) 	 Autos	32%
Tioga Marine Terminal	\$12 MILLION	<ul style="list-style-type: none"> ✓ Construction of new 100,000 sq. ft. warehouse 	 Breakbulk	33%
TOTAL INVESTMENT	\$402 MILLION			

NEW! PhilaPort Port Development Plan 2.0

INVESTMENT SUMMARY

Increased Operational Efficiencies and Capacity for Containers (PAMT/Various)	\$70 MILLION	<ul style="list-style-type: none">✓ Projected to expand PAMT container capacity by 40% up to 1.2Million TEU's.✓ Increases realized from enhanced terminal efficiencies, relocation of functions and further land development.
*Construction of New Multi-Purpose Berth (Southport)	\$70 MILLION	<ul style="list-style-type: none">✓ First new marginal berth in 50 years.✓ First Phase develops a fully permitted 1,100ft berth adjacent to the Southport terminal.✓ Provides direct access to the Southport Automobile terminal to enhance operations.✓ Creates additional long-term berthing capacity at PhilaPort for autos, bulk and containers.
Development of Additional Warehouse Capacity (Various)	\$106 MILLION	<ul style="list-style-type: none">✓ Increases PhilaPort warehouse space 18% by 467K SF to 3M SF.✓ New Temperature-controlled warehouse.✓ New Dry warehouses at multiple sites to induce additional breakbulk and container cargo.✓ Provides for expansion of customer base by providing PhilaPort customers additional warehouse and distribution capabilities, improving supply chains.
TOTAL INVESTMENT	\$246 MILLION	

*additional \$49 Million 2021 USDOT INFRA Grant Award



AUTOS
156 acres

Phase 1 New Berth 1050'

Warehouse

New
Warehouse

Dry Warehouse

Potential additional warehouse
Lessee TBD

**Future Property
Repurposing**

ASTRO/Holt

146 208 acres

Lease Term:

29.11 years +(2) 10year options

Expires 2073

CONTAINERS

CONTAINERS

106 acres

40 acres

Pier 84
13.9 acres



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Thank You!



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✓ Velocity ✓ Proximity ✓ Flexibility

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