Now this is how you serve Florida’s largest and fastest growing market.
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
• Shipyards/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
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
General Cargo & Containers

Major Commodities:

- Containerized
- Steel
- Roll on/roll off
- Vehicles
- Construction Equipment
• Homeport for Carnival Cruise Line, Holland America Line, Royal Caribbean International, Norwegian Cruise Line & Aida port of call
Distribution and Demographics

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

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

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

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

<table>
<thead>
<tr>
<th>County</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hernando County</td>
<td>35,611</td>
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<tr>
<td>Hillsborough County</td>
<td>211,716</td>
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<tr>
<td>Lake County</td>
<td>61,257</td>
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<tr>
<td>Manatee County</td>
<td>51,634</td>
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<tr>
<td>Orange County</td>
<td>251,699</td>
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<tr>
<td>Osceola County</td>
<td>116,424</td>
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<td>Pasco County</td>
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<td>Pinellas County</td>
<td>26,480</td>
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<td>Polk County</td>
<td>99,006</td>
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<td>Sarasota County</td>
<td>86,843</td>
</tr>
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<td>Sumter County</td>
<td>64,679</td>
</tr>
</tbody>
</table>

Tampa Bay/Central Florida 1,053,421

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

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

10th Largest Economy in the U.S.
Central Florida (Tampa/Orlando I-4 corridor), has the 10th 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.
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

New dedicated truck ramp to/from Port Tampa Bay & Interstate
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.
Port Tampa Bay Container Services

Europe, Mediterranean, Middle East

China/Asia Transpacific

Central/South America & Caribbean

Additional new services coming soon!
Master Plan for Integrated Food Logistics

- 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

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

- 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
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)*

<table>
<thead>
<tr>
<th>Year</th>
<th>Production (in millions)</th>
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<tbody>
<tr>
<td>2009</td>
<td>1.5</td>
</tr>
<tr>
<td>2010</td>
<td>2.3</td>
</tr>
<tr>
<td>2011</td>
<td>2.6</td>
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<td>2012</td>
<td>2.9</td>
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<td>2013</td>
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<td>4.3</td>
</tr>
<tr>
<td>2019</td>
<td>4.7</td>
</tr>
<tr>
<td>2020</td>
<td>5.1</td>
</tr>
</tbody>
</table>

50% Growth
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
Thank You

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