



PHILADELPHIA Regional Port Authority



OVERVIEW



Philadelphia Regional Port Authority

2015 KEY HIGHLIGHTS

6th Consecutive years of sustained growth

Channel deepening continues

- PRPA management on track
- New deeper main channel to be completed by 2017
- New Panama Canal to open June 2016

Successful re-tooling of the Tioga Marine Terminal

- Base customer volume growing
- New customers show strong interest

Southport: Fall 2015 RFQ – Spring 2016 RFP

- PRPA has invested approx. \$30 million on site prep work

PRPA hits record volumes in import car volumes

- Add'l OEM's showing interest

SeaLand

- Mexico – Veracruz – Altamira
- Two Central/South American services (NAE & SAE)

NYK/Yang Ming

- East Coast/South America

CMA-CGM

- Columbia & Caribbean

New paper customer at Piers 38 & 40

- 70,000 MT – 12 ships

OUR MISSION, OUR GOAL

Philadelphia Regional Port Authority

The enhancement of waterborne trade and commerce to generate activity that will maximize port-related employment and revenues

To promote the use of the Philadelphia regional port system by Pennsylvania-based industries

To manage port infrastructure, maintenance, and facility development



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OVERVIEW

Philadelphia Regional Port Authority

A “Landlord” Port

11 Leases with Private Terminal Operators

Container, Bulk and Breakbulk Facilities

14 Deep Water Berths (*up to 42'*)

Covered Storage of 4,400,000 sq. ft. including
1,000,000 sq. ft. temperature-controlled

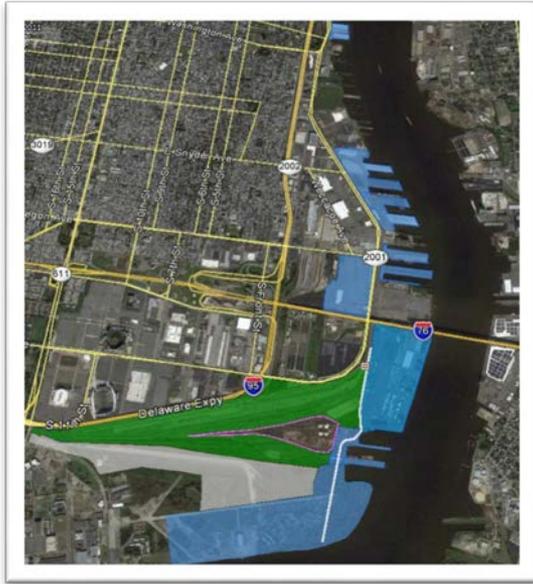


FACILITIES



Philadelphia Regional Port Authority

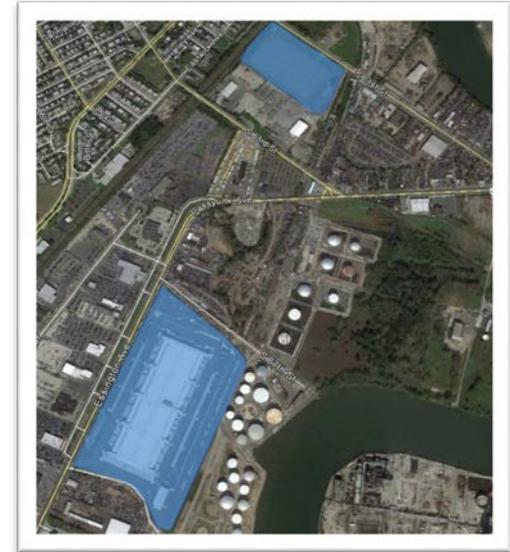
PRPA FACILITIES



- Piers 38 & 40
- Philadelphia Forest Products Center
- Pier 82
- Pier 84
- Piers 96, 98 and 100
- Packer Avenue Marine Terminal
- Pier 122
- Pier 124
- Southport Marine Terminal
- Philadelphia Auto Processing Facility
- CSX Intermodal Greenwich Yard
- Conrail Loop
- Norfolk Southern Intermodal



- Tioga Marine Terminal
- PRPA Administration Building
- 3200 E. Tioga Street
- Tioga Liquid Bulk Terminal (*Kinder Morgan*)



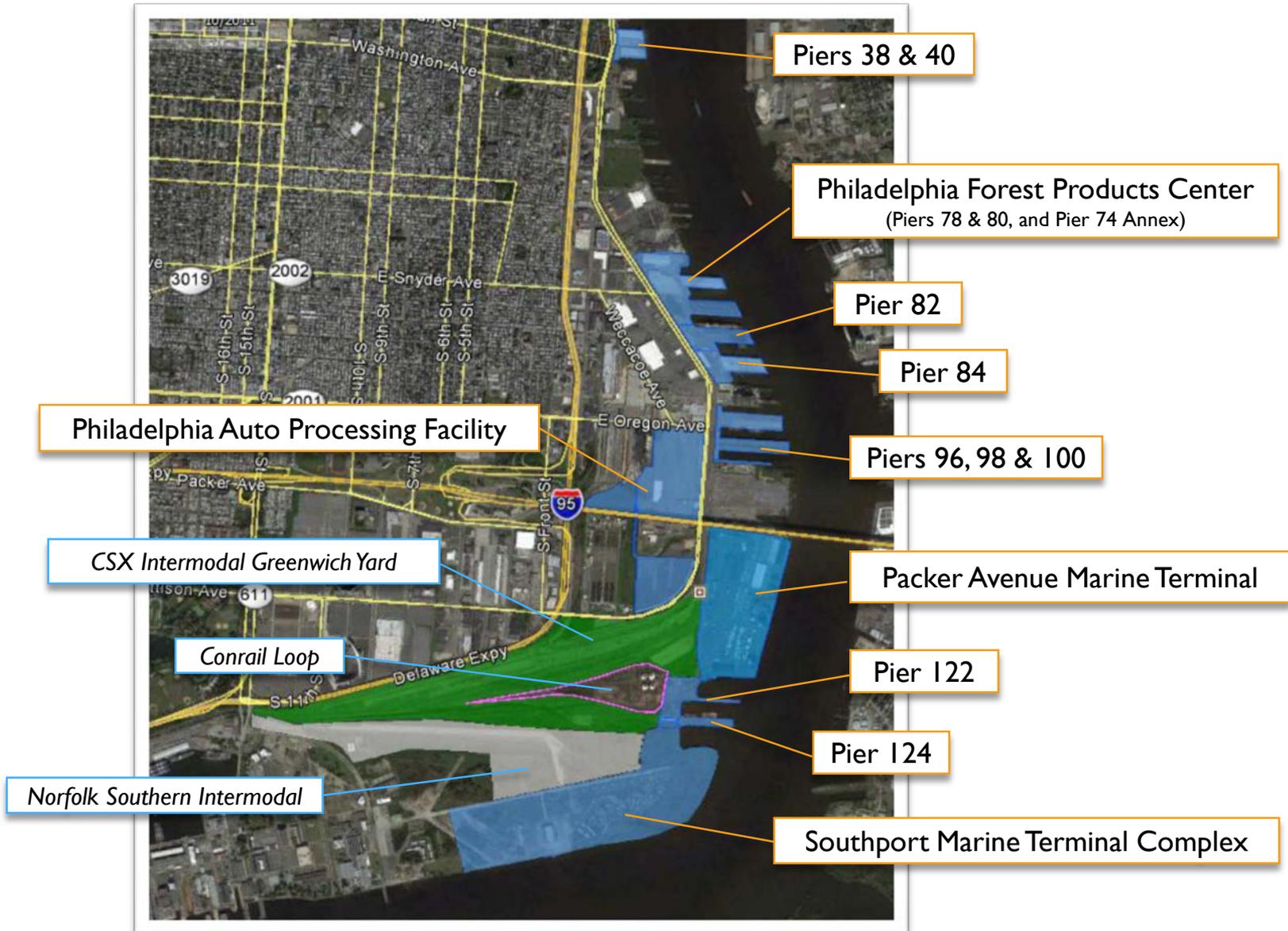
- Philadelphia Wholesale Produce Market
- PRPA Parking Lot (*on Essington Avenue*)

Philadelphia Regional Port Authority Facilities

16
Facilities

1,000 Acres
of Property

PRPA FACILITIES



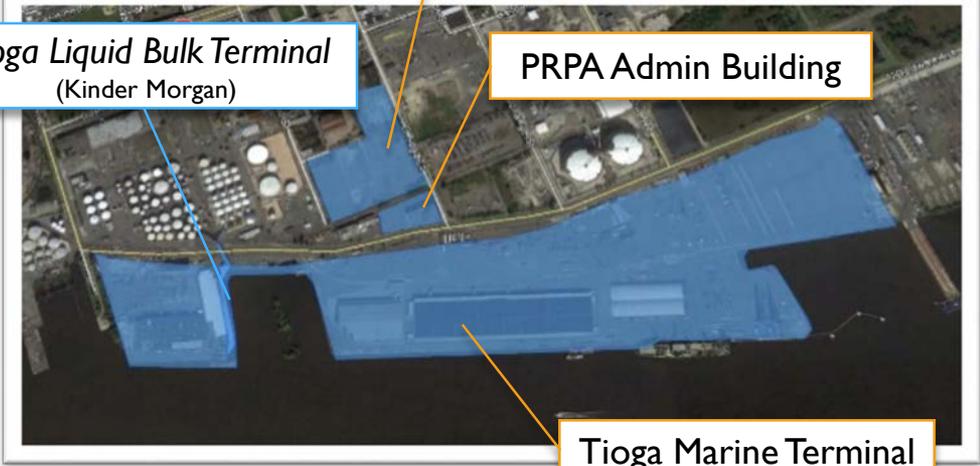
PRPA FACILITIES

3200 E. Tioga Street

Tioga Liquid Bulk Terminal
(Kinder Morgan)

PRPA Admin Building

Tioga Marine Terminal



PRPA Lot
on Essington Avenue

Philadelphia Wholesale
Produce Market



CARGO



Philadelphia Regional Port Authority

WATERBORNE CARGO – 2015

Philadelphia Regional Port Authority

Summary Total

1,019

Total Vessels Annually

6,092,787

Metric Tons

3,888

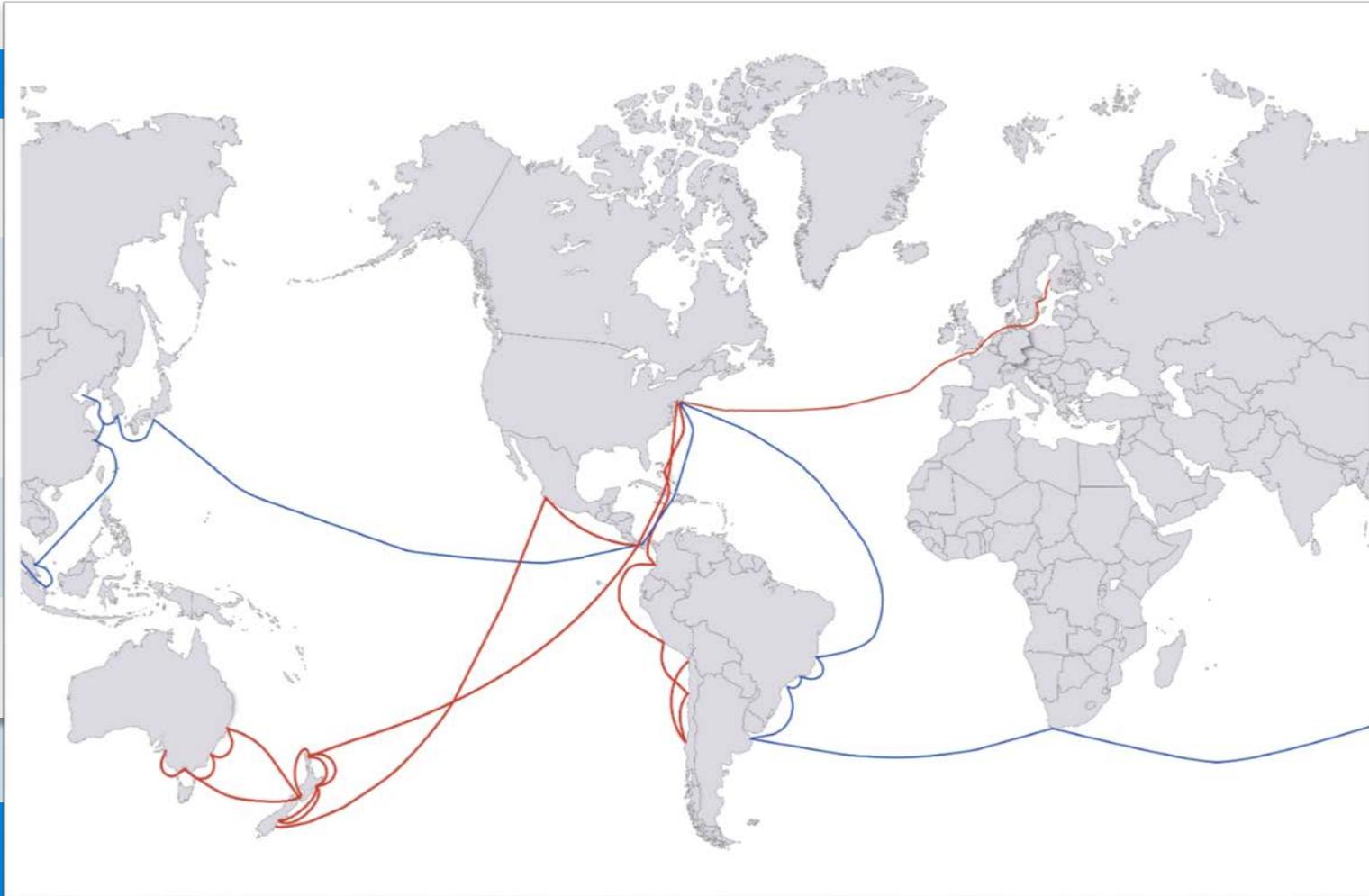
Direct Jobs

13,102

Total Jobs

\$86.2 million

State & Local Taxes



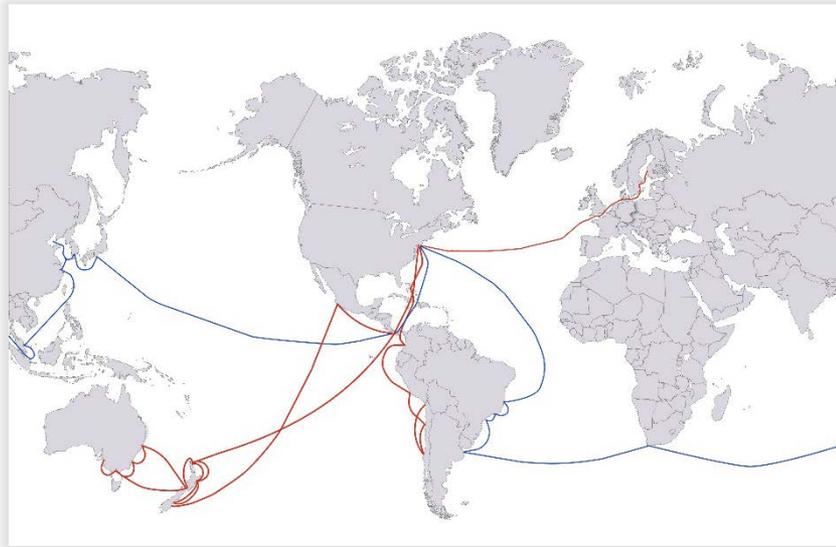
WATERBORNE CARGO - 2015



Commodity	Units/Tonnage	Port Rank *Among U.S. Ports	
		2010	2015
Container	427,630 TEUs 2,930,050 MT	17 th	16 th
Auto (Ro/Ro)	155,745 Units	16 th	12 th
Forest Products (BB)	778,271 MT	9 th	4 th
Fruit (BB)	268,319 MT	20 th	21 st
Cocoa Beans	103,121 MT	n/a	1 st
Steel (BB)	423,321 MT	22 nd	12 th
Liquid Bulk	1,331,722 MT	8 th	10 th

Ro/Ro= Roll on / Roll off
BB= Breakbulk

CONTAINERS



Shipping Lines

- Hamburg Sud
- Maersk
- Hapag Lloyd
- MSC
- Alianca
- CMA-CGM
- CSAV
- NYK
- Yang Ming
- SeaLand
- APL
- Marfet

Countries

- Argentina
- Australia
- China
- Colombia
- Bahamas
- Chile
- Brazil
- New Zealand
- Panama
- Belgium
- England
- Jamaica
- Ecuador
- Germany
- Netherlands
- Tahiti
- Mexico
- Costa Rica
- Guatemala
- Honduras
- France
- Fiji
- New Caledonia

By the numbers:

Vessels Annually:
381

Direct Jobs:
1,763

State & Local Taxes:
\$30.9 million

Total Jobs:
5,087

Terminal(s)

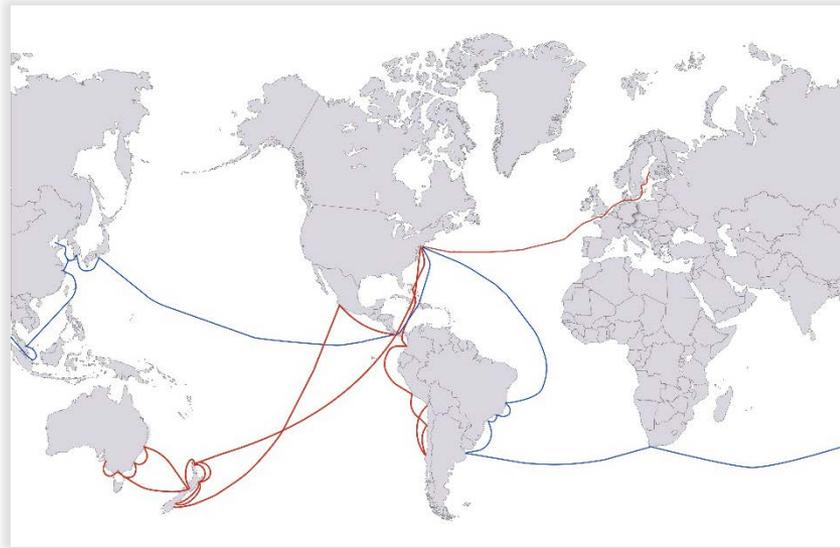
- Packer Avenue Marine Terminal

Containers	2010	2015	% Change
Containers (TEUs)	272,824	427,630	56.74%
Containers (Metric Tonnage)	1,860,097	2,930,050	57.52%



AUTOS *Ro/Ro*

12th



Shipping Lines

- Eukor
- Auto Lines

Countries

- Korea

By the numbers:

Vessels Annually:
113

Direct Jobs:
335

State & Local Taxes:
\$8.2 million

Total Jobs:
1,209

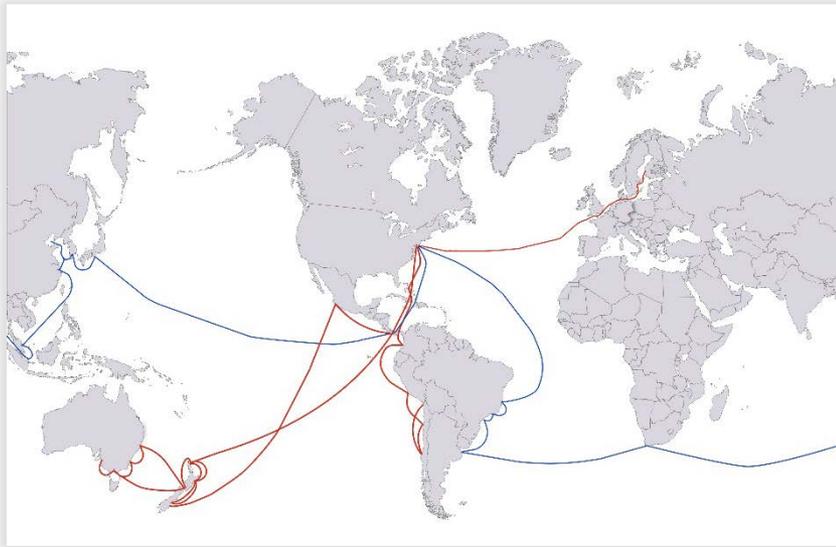
Terminals

- Packer Avenue Marine Terminal
- Auto Processing Facility
- Auxiliary Acreage at Southport

Autos	2010	2015	% Change
Auto (Units)	68,876	155,745	126.12%
Auto (Metric Tonnage)	77,350	231,016	198.66%

FOREST PRODUCTS *Breakbulk*

4th



Shipping Lines

- Gearbulk
- Fibria
- Pan-Ocean
- Saga-Welco
- Spliethoff
- Wagonborg

Countries

- Germany
- Finland
- Sweden
- Belgium
- Norway
- Brazil

By the numbers:

Vessels Annually:
59

Direct Jobs:
722

State & Local Taxes:
\$20 million

Total Jobs:
2,874

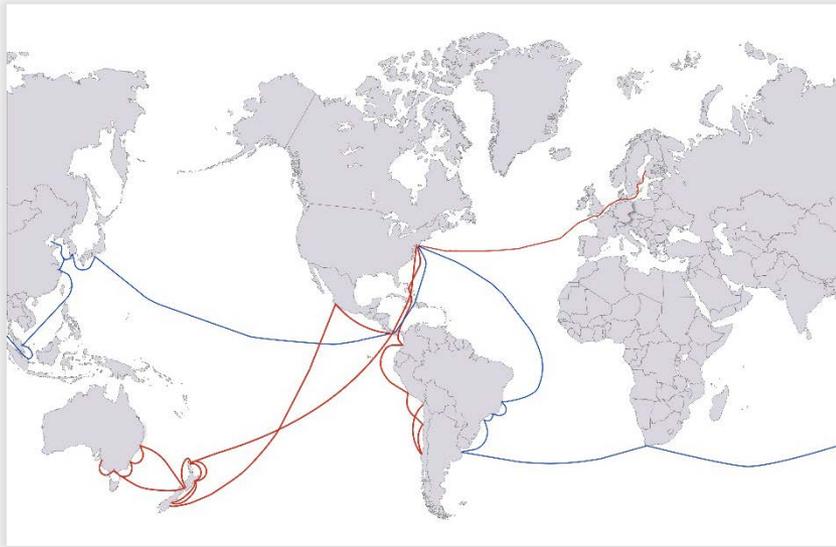
Terminal(s)

- Forest Products Distribution Center
- Tioga Marine Terminal

Forest Products	2010	2015	% Change
Metric Tonnage	389,060	778,271	100.04%



FRUIT *Breakbulk*



Shipping Lines

- Isabella Shipping

Countries

- Colombia
- Costa Rica

By the numbers:

Vessels Annually:
52

Direct Jobs:
232

State & Local Taxes:
\$6.8 million

Total Jobs:
954

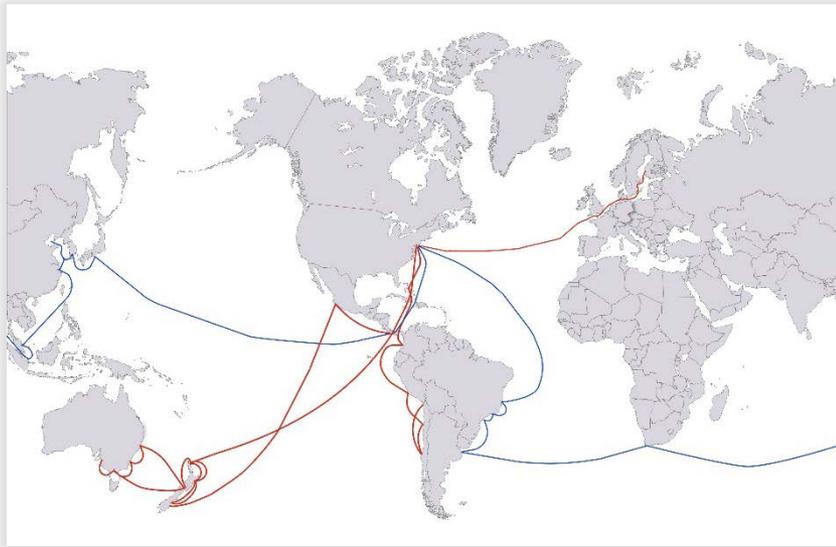
Terminal(s)

- Pier 82

Fruit	2010	2015	% Change
Metric Tonnage	308,010	268,319	-12.89%



COCOA BEANS *Breakbulk*



Shipping Lines

- Unicargo Shipping
- Spliethoff
- and Breakbulk/charter vessels

Countries

- Ghana
- Ivory Coast

By the numbers:

Vessels Annually:
11

Direct Jobs:
89

State & Local Taxes:
\$2.6 million

Total Jobs:
367

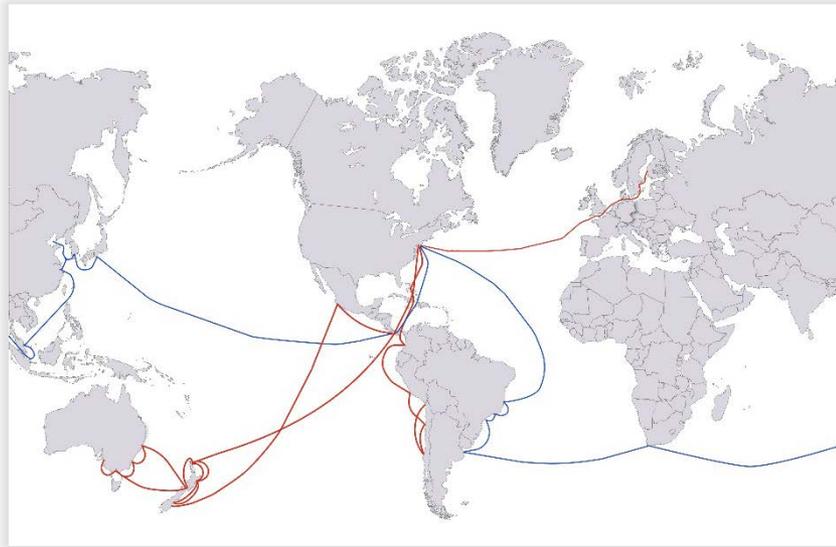
Terminal(s)

- Pier 84

Cocoa	2010	2015	% Change
Metric Tonnage	97,492	103,121	5.77%

STEEL Breakbulk

12th



Shipping Lines

- BBC
- Rickmers
- Westerbulk
- Chiplebrook
- Pan Ocean
- Pacific Basin
- Toko Line
- SK Shipping

Countries

- Argentina
- China
- Brazil
- Belgium
- Germany
- Netherlands
- France

By the numbers:

Vessels Annually:
59

Direct Jobs:
393

State & Local Taxes:
\$10.9 million

Total Jobs:
1,563

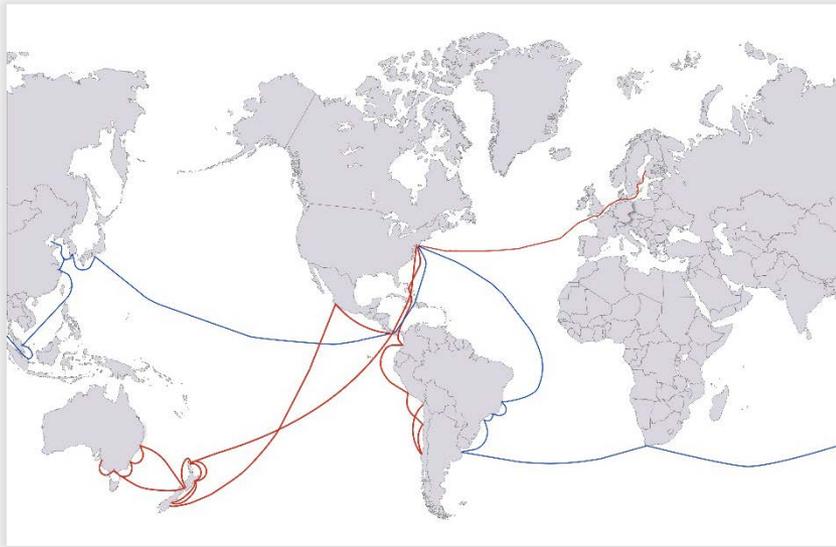
Terminal(s)

- Packer Avenue Marine Terminal
- Tioga Marine Terminal

Steel	2010	2015	% Change
Metric Tonnage	172,028	423,321	146.08%

LIQUID BULK

10th



Shipping Lines

- Ace Quantum Chemical Tankers CV
- Hansa Line Co.
- Stolt Nieslon

Countries

- China
- Belgium
- Egypt
- France
- Greece
- Mexico
- Netherlands
- Norway

By the numbers:

Vessels Annually:
344

Direct Jobs:
329

State & Local Taxes:
\$6.1 million

Total Jobs:
949

Terminal(s)

- Pier 124
- Tioga Liquid Bulk Terminal

Liquid Bulk	2010	2015	% Change
Metric Tonnage	676,491	1,331,722	96.86%

PORT DEVELOPMENT



Philadelphia Regional Port Authority

MAIN CHANNEL DEEPENING

Delaware River Main Channel Deepening to 45 Feet

Project Details

Current Depth vs. Future Depth	40 Feet to be deepened to 45 Feet*
Length	103 Miles
Cost Estimate	\$392 million
Material	16 million cubic yards of dredge materials
Duration	7 years
Progress	85% Complete
Expected Completion	2017

**The Delaware River has a 6 foot (1.83 meter) tide*

Sponsor:



Local Sponsor:



SOUTHPORT MARINE TERMINAL

Three sites located at the **Southport Marine Terminal Complex**

Site 1 Southport Marine Terminal

Site 2 Southport West

Site 3 Pier 124 North Berth

Public-Private Partnership

(i) Design and Build industrial/commercial revenue-generating facilities on the Southport Sites;

(ii) Finance all or substantial portion of the initial capital costs of the Project through private equity and debt and use revenues to fund the O&M period

(iii) Operate and maintain the facilities (including all lifecycle work) under a long-term leased-based contract.

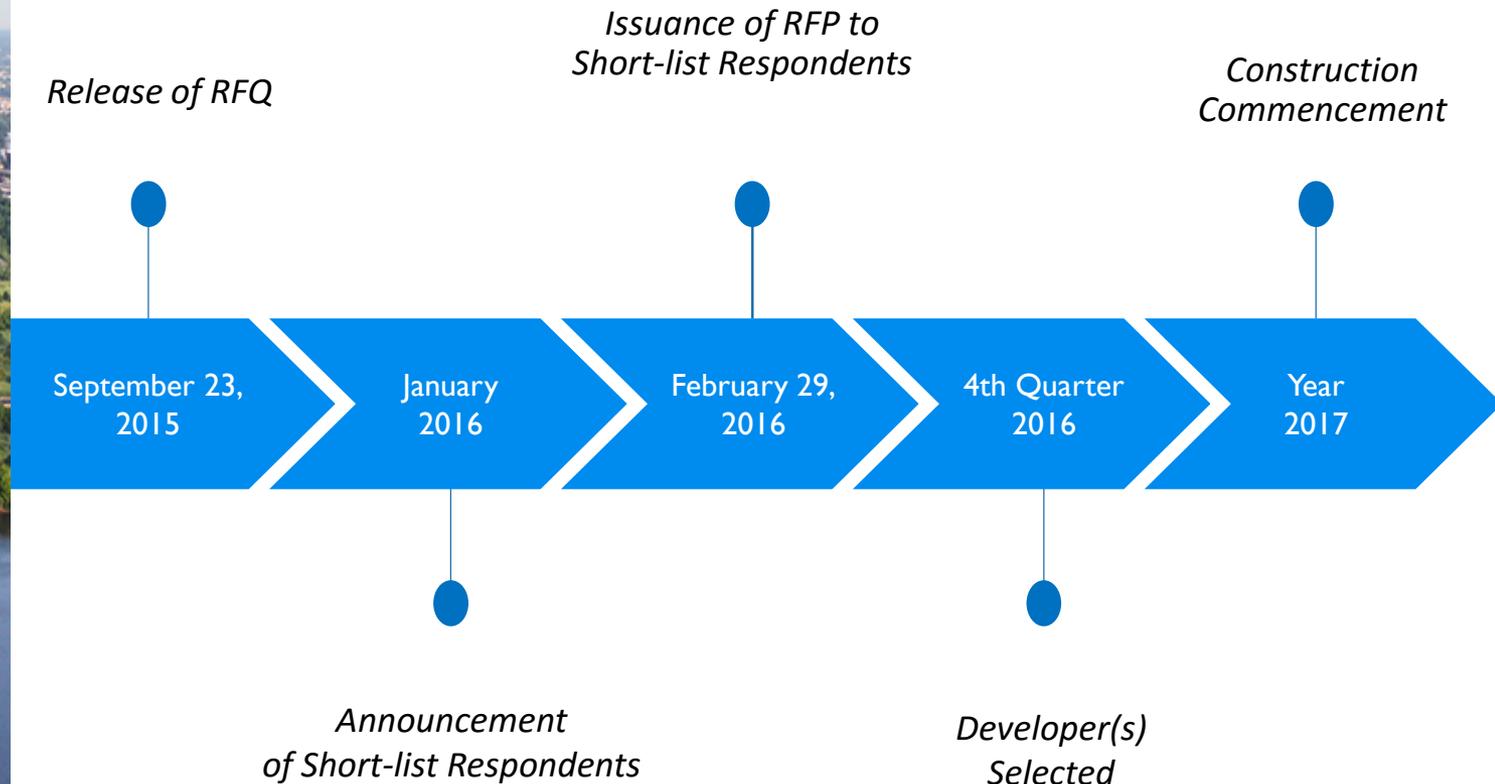
The Southport Marine Terminal Complex will be the first major expansion of the Port of Philadelphia in **over 40 years**.



The Project is located in Philadelphia, Pennsylvania, (shown above) in the context of the greater Northeast Region.

SOUTHPORT MARINE TERMINAL

Expected Timeline



SOUTHPORT MARINE TERMINAL

Shortlisted Respondents

All Shortlisted Respondents

Shortlisted Respondents for Site 1:

CenterPoint Properties

CenterPoint Properties – Development of Ro/Ro, warehousing and other cargo port

Liberty Consortium

Liberty Consortium – Development of a 500,000 TEU container port.

Liberty Property Trust

Philadelphia Energy Solutions - Development of an import/export facility for crude oil and refined oil products. Future development identified for non-energy cargos.

Philadelphia Energy Solutions

Southport Development Group - Development of container port.

Southport Development Group

Shortlisted Respondents for Site 2:

USD Group, LLC

CenterPoint Properties – Development of Ro/Ro, warehousing and other cargo port

Liberty Property Solutions – Development of 800,000 sq. ft. of warehouse space spread

Philadelphia Energy Solutions - Development of an import/export facility for crude oil and refined oil products. Future development identified for non-energy cargos.

Southport Development Group - Development of container port.

USD Group, LLC - 30 acres of bulk product processing facilities including conveyor, mechanical stacking equipment and bulk storage 45 acres auto storage facility

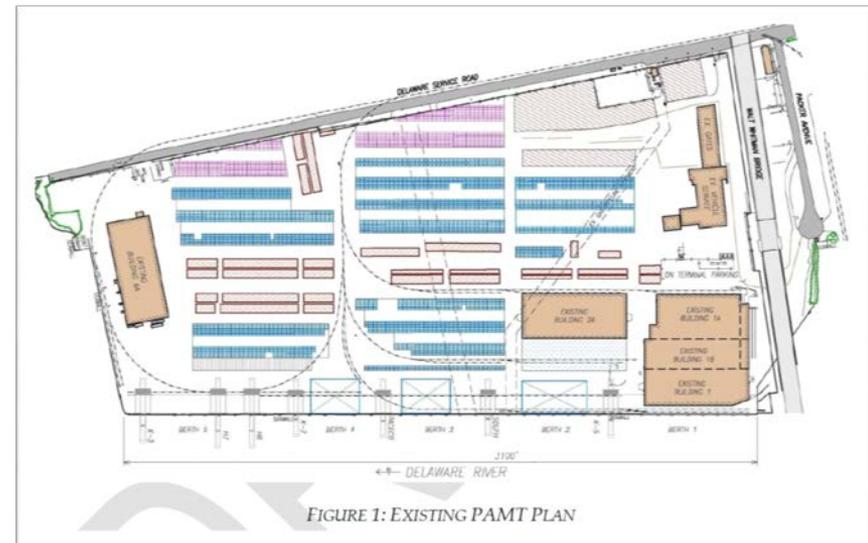
ON THE HORIZON

Opportunities Ahead

Packer Avenue Marine Terminal

Possible Improvements to Handle Growth:

- Wharf Improvement to accommodate 45 depth
- Electric terminal improvements
- Crane infrastructure improvements
- (4) New cranes/convert (2) old cranes to electric
- Removal of warehouses
- Yard Densification



ON THE HORIZON

Opportunities Ahead

Pier 124

- Barge operation fully utilizes leased area
- A potential expansion via ship is being explored in conjunction with tenant at Pier 122

Pier 122

- Operations to commence in August 2016 Breakbulk – Fertilizer and Road Salt
- Planned expansion Auto Export
- Planned expansion BioDiesel

ON THE HORIZON

Opportunities Ahead

Auto Processing Facility

- Potential to capture Mexico Business
- Potential to capture Canadian Business
- *Expanded footprint required:* Over 250 acres of autos in Philadelphia at this point over several locations
- *Requirements:* Pier 122 ideal due to proximity to rail

Pier 84

- Cocoa Beans
- If there was close access to 500,000-square-feet of near-dock warehouse space available, competitive efficiency could be improved by relocating warehousing operations from NJ to PA

ON THE HORIZON

Opportunities Ahead

Tioga Marine Terminal

- Retooling successful
- Additional warehouse improvements required for new wood pulp
- New warehouse to handle increasing steel business
- Potential for auto business due to volume at port
- Potential for LNG-related facility to support PGW effort

Tioga Liquid Bulk Terminal

- Berth enhancements for larger vessels

FINANICAL POSITION



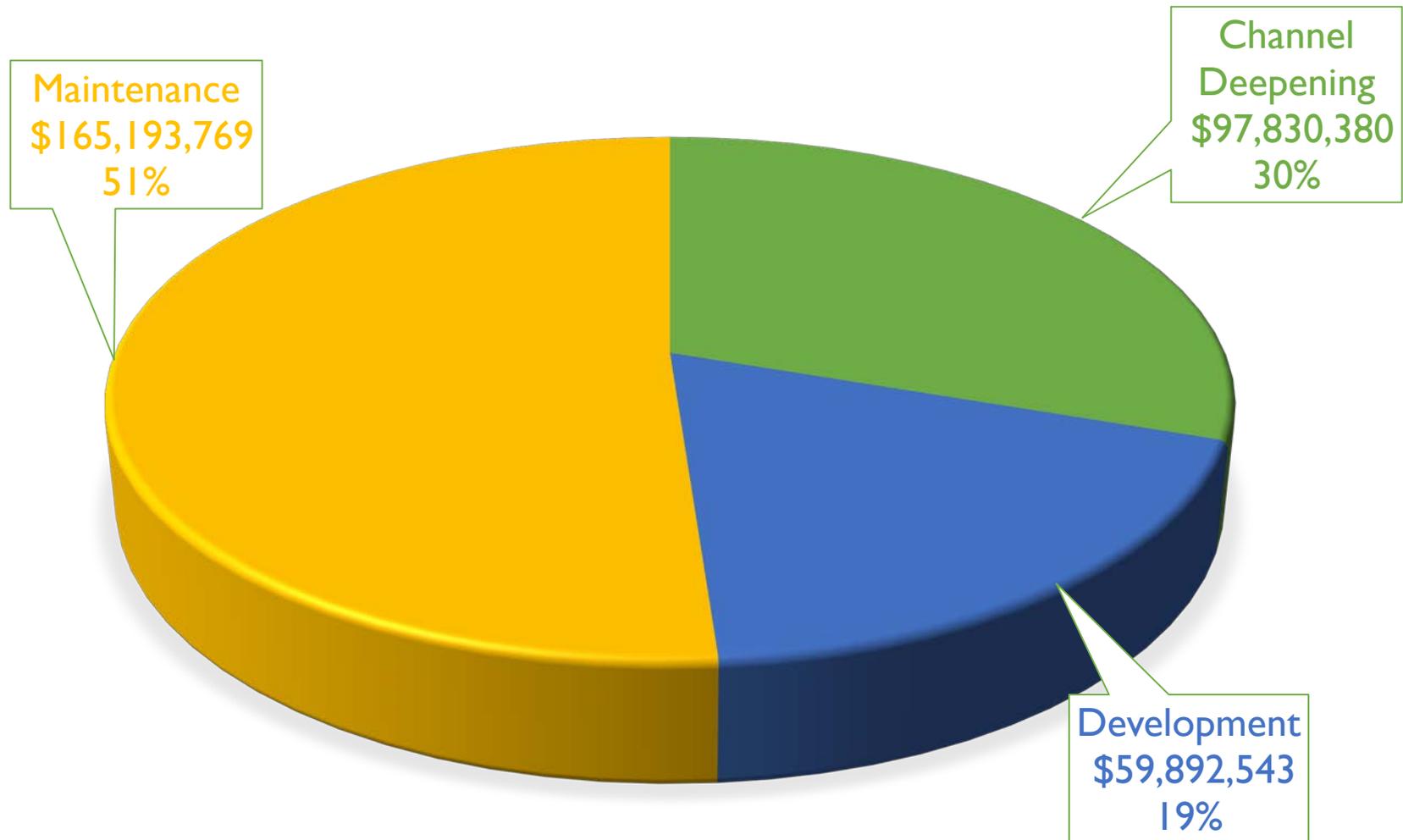
Philadelphia Regional Port Authority

2016 OPERATING BUDGET PROJECTIONS

	FY16 Total BUD	FY 16 Projected Actual	FY16 proj.- act. Variance
Operating/Other Revenue	11,365,819	11,730,212	364,393
			-
Personnel	8,293,381	8,118,551	(174,830)
Departmental	1,275,929	1,121,342	(154,587)
Utilities/Insurance/Loan	1,921,711	1,867,458	(54,253)
Professional/Legal	1,884,132	1,108,076	(776,056)
Contractual/Equipment	2,013,445	1,548,879	(464,566)
Total Expenses	15,388,598	13,764,306	(1,624,292)
			-
Net (loss)/gain	(4,022,779)	(2,034,094)	1,988,685
PA Appropriation	3,221,894	3,121,894	(100,000)
Beginning cash	3,151,639	2,885,561	(266,078)
Ending cash	2,350,754	3,973,361	1,622,607

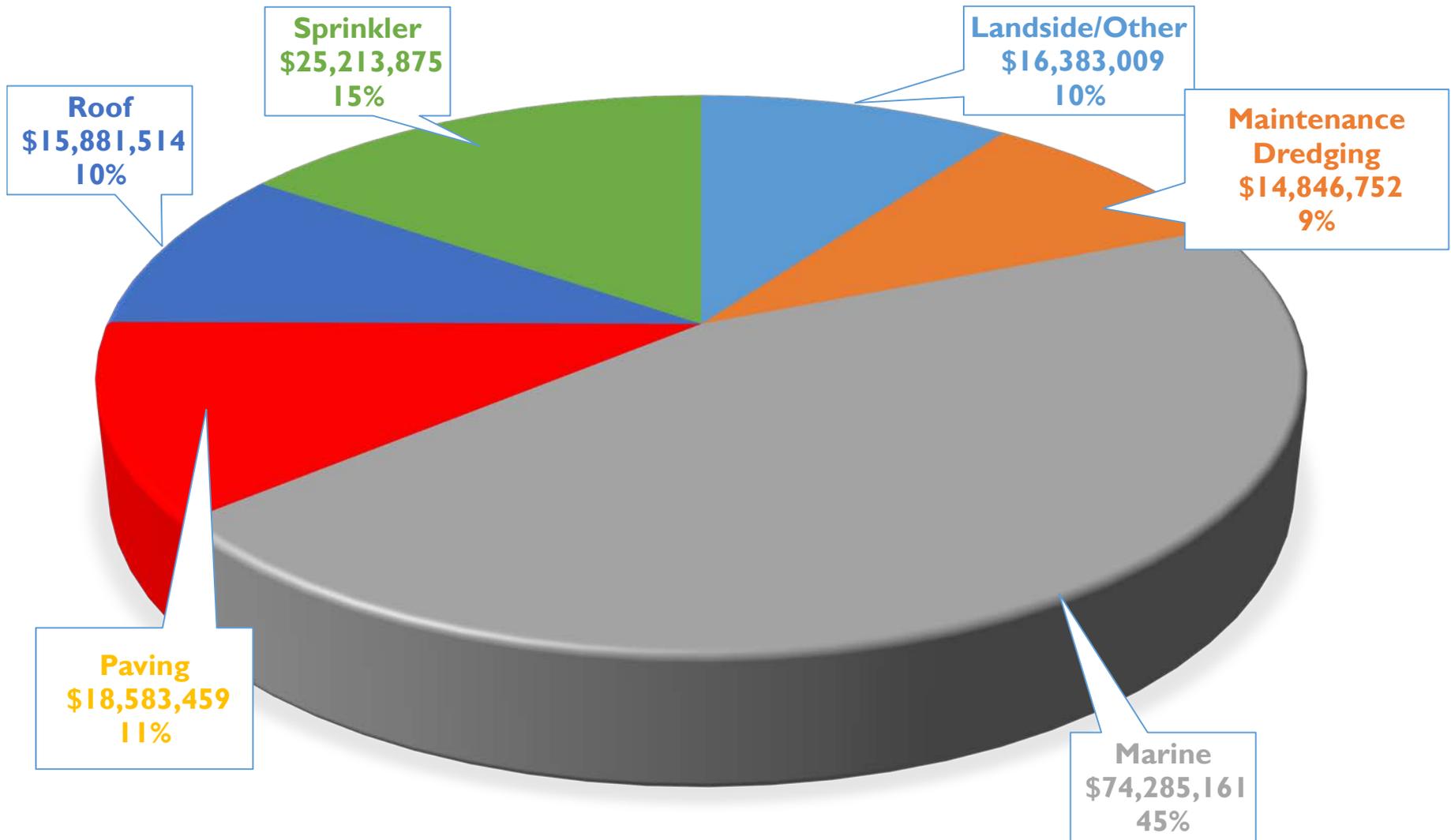
PRPA CAPITAL PROJECTS BY TYPE (FY 10-15)

(\$322 Million)



PRPA DEFERRED MAINTENANCE (FY 10-15)

(\$165 Million)



STRATEGIC INITIATIVES



Philadelphia Regional Port Authority

EXECUTIVE DIRECTOR SEARCH



Philadelphia Regional Port Authority

RFP – EXECUTIVE SEARCH FIRM

Procurement Timeline

- **October 2015:**
Issuance of RFP to select executive search firm
- **February 2016:**
Notice to proceed issued by Boyden – Global Search Firm

Boyden's 90-Day Search Timeline

Week 1	Kick off meeting to develop selection strategy
Weeks 7-8	Shortlist of candidates
Weeks 9-12	Interviews and presentation of candidate reports
Mid-June	Selection of new CEO

PennDOT STUDY



Philadelphia Regional Port Authority

PennDOT STUDY

Phase I

- Existing conditions assessment: **Completed**

Phase II

- Strategic Business Plan: **March – July 2016**
- DVRPC Outreach Meeting: **April 19th**

Phase III

- Capital Investment Plan: **Beginning Fall 2016**

DIVERSITY & INCLUSION



Philadelphia Regional Port Authority

DIVERSITY AND INCLUSION

New Policy – fully implemented.

- Mandatory **20%** of total contract value
- Must include **two** of the following categories:
 1. Minority
 2. Women
 3. Veteran and Service Disabled Veterans
 4. LGBT

Shift from aspiration goal to contractual obligation with monetary penalties

PROCUREMENT PRACTICES



Philadelphia Regional Port Authority

PROCUREMENT STRUCTURE

Request for proposals bidding schedule:

- Commonwealth Procurement Code
- PRPA Act
- Board – *Contracting, Procurement and Leasing Policies*

Methods of Procurement:

- Small purchase
- Sole source
- Invitations to bids
- Requests for Proposals
- Emergency procurements

PROCUREMENT STRUCTURE

Procurement applies to:

- Goods
- Services
- Construction projects

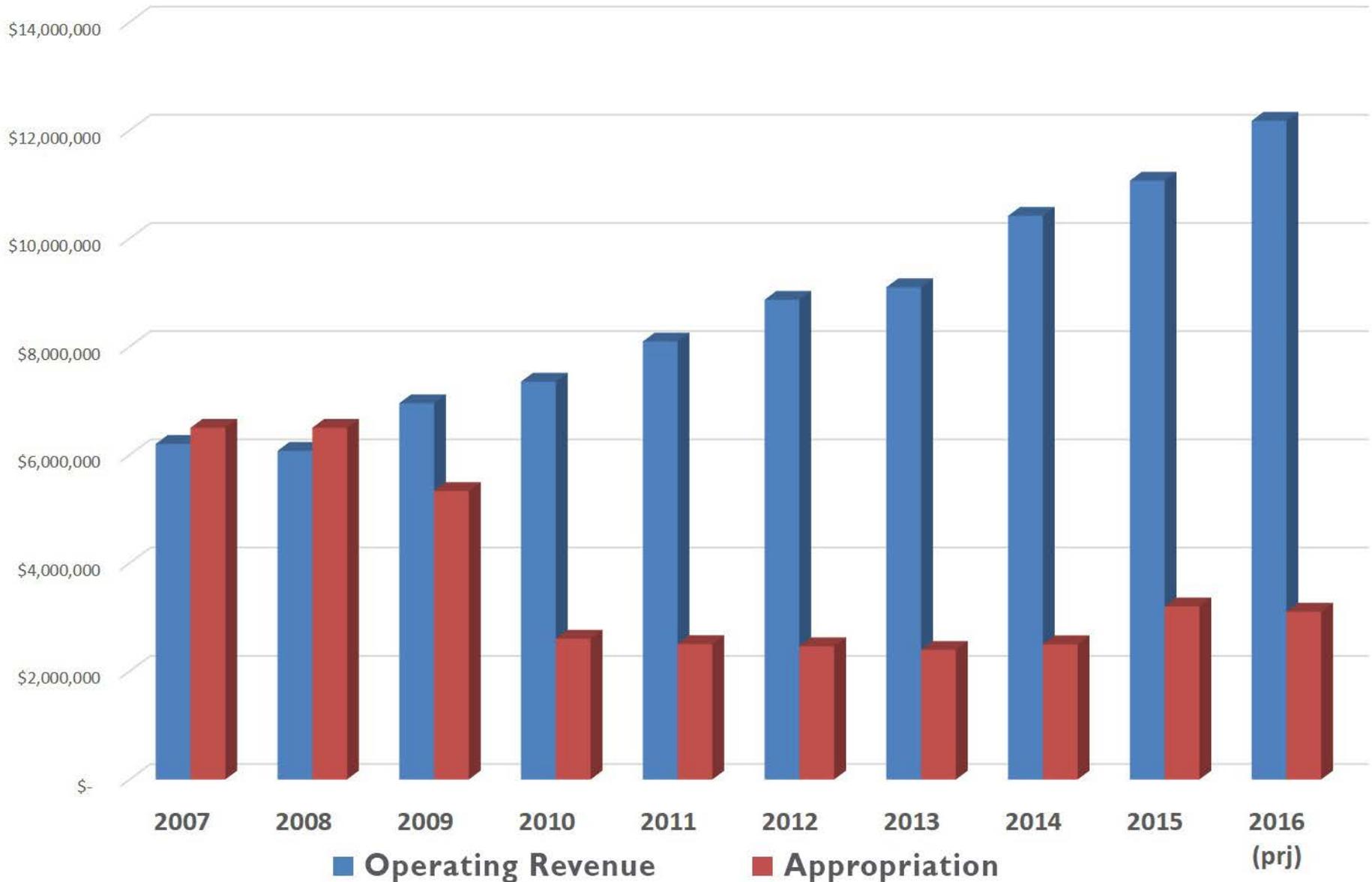
Approaching \$300 million in contracting for supplies, services and construction projects.

ADDRESSING STRUCTURAL CHALLENGES



Philadelphia Regional Port Authority

OPERATING REVENUE AND APPROPRIATION



PRPA CURRENT 5-YEAR DEFERRED MAINTENANCE PLAN

Project	FY16	FY17	FY18	FY19	FY20
Maintenance Dredging	8,000	6,000	6,000	6,000	6,000
Project Design/Planning	2,000	2,000	2,000	2,000	2,000
Pier marine repairs (38 -100)	4,000				
Pier 82 Roof	4,500				
Pier 78 Annex Roof	4,500				
Pier 78 Interior paving	1,000				
PAB/Maintenance building	1,000	1,000			
PAMT Building 7 Metal Roof		300			
Pier 82 dock levelers		250			
TMT Sheet Pile Repair		1,500			
PAMT Final Bollard Replacement		2,000			
PAMT Bldg 1A South Wall repairs		550			
PAMT Fendering		3,500			
Pier 98 Annex Paving		5,000			
Pier 98 Annex facility upgrades		2,900			
Pier 74-80 Paving			2,000		
Pier 78 Sea Wall			9,000		
TMT III Concrete Floor, loading, dock			3,000		
Pier 80 Fendering phase 2			3,000		
PAMT Infill				1,500	
PAMT Terminal Paving				6,500	
Shed 80 Annex rehab				2,500	
TMT-LBT paving and drainage				500	
TMT-LBT marine pile repairs				200	
TMT III Roof Repair				1,000	
TMT Tuna bay low deck				2,000	
TMT New Pavement				2,800	10,200
Pier 122 Maintenance Building Repairs					500
Pier 38-80 Façade/loading deck roof					1,500
TMT-LBT berth concrete pads					2,300
3200 E. Tioga fending, access, lighting					500
Railroad At-Grade Crossings (7)					2,000
Total	25,000	25,000	25,000	25,000	25,000

QUESTIONS & ANSWERS



Philadelphia Regional Port Authority

THANK YOU!

Philadelphia Regional Port Authority



university of pennsylvania