IT'S ALWAYS MOVING AT THE PORT OF PHILADELPHIA

PHILADELPHIA REGIONAL PORT AUTHORITY

SPECIAL ADVERTISING SUPPLEMENT OF THE JOURNAL OF COMMERCE

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PLENTY OF ASSETS

Philadelphia Primed for Growth

Permit us some alliteration.

PHILADELPHIA IS:

PROXIMATE

PRODUCTIVE

PRISTINE

PROLIFIC

PREPARED

PROGRESSIVE

PROACTIVE

PHILADELPHIA is a multimodal port in every sense of the word. It retains its mastery and market share in the perishables trades. Container volumes moving through the Port of Philadelphia are on the rise and projected to continue to climb. Breakbulk and project cargoes regularly appear on the port's manifests. The Delaware River remains the vital entry point for refineries and other liquid bulk users.

COMPETITORS BEWARE. While proud of its track record, Philadelphia is most certainly focused on the future. Infrastructure improvements — including channel deepening, surface transportation enhancements and landside investments in equipment and facilities — and a single-minded approach to business development among all port players are the key factors in Philly's growth equation. Factor in strategic location and experienced, eager labor, and the port has all the tools to convert its projections to reality. ■

All articles written by John Powers.

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PROXIMATE

Distribution Centers Drawn to Location, Infrastructure and Market Access

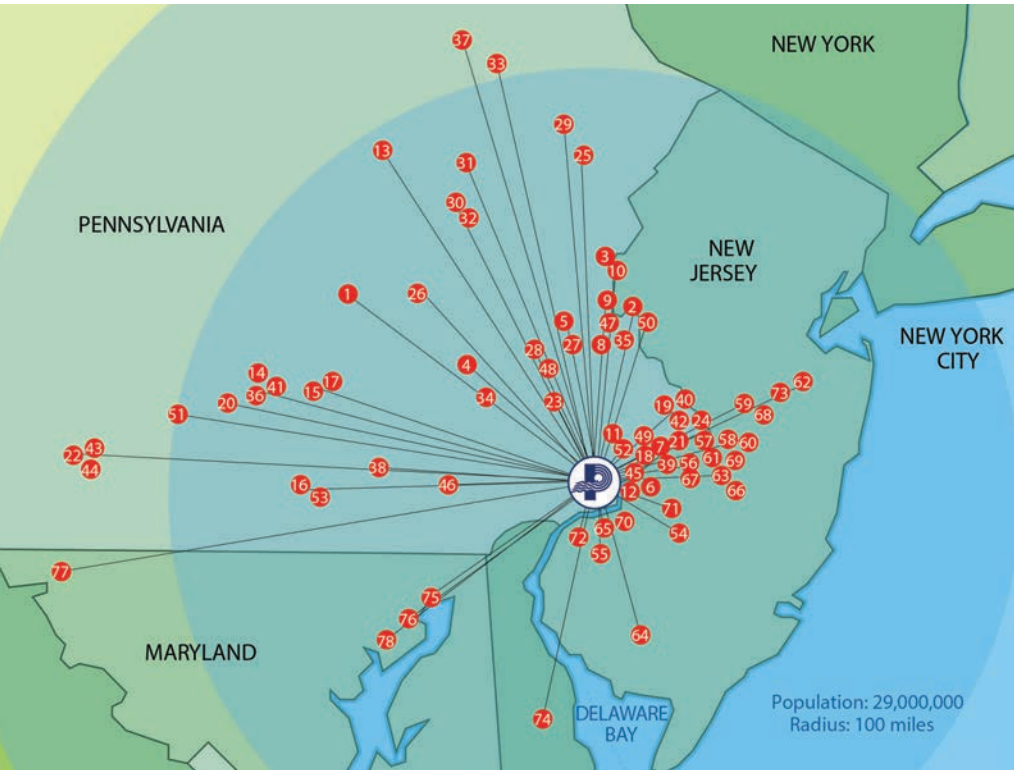
From the earliest days of the exploration of the New World, vessels seeking the shortest route between Europe and North America found their way to its north and mid-Atlantic coastlines. Notwithstanding the subsequent westward migration across America, the Northeast was and has remained the largest population hub in what became the United States.

This luck of geography places Philadelphia in the center of the action.

Tom Mutz, director – global business development, Penn Warehousing and Distribution, detailed this advantage. "Simply stated, there are many astute supply chain managers throughout the world that recognize where the greatest proportion of their supply chain costs are, and that, more often than not, is within the inland distribution segment. Therefore, your port of entry or exit should provide an advantage to customers to or from the production location. Philadelphia is strategically located in the middle of the coastal populace, when considering the northeastern and mid-Atlantic regions. We have the ability to distribute products within 48 to 72 hours to almost 70 percent of the Canadian and U.S. population. We are a half mile to the interstate highway system and have two Class I rail carriers, each serving our terminal," he said.

The port's location is a major driver in the commercial real estate endeavors of NAI Mertz, Vice President Roy Kardon said. "In the last two years, we have concluded more than 300 transactions as companies look to acquire or dispose of real estate. The greater Philadelphia marketplace is an excellent logistics corridor servicing the Northeast. Philadelphia has become

A DISTRIBUTION CENTER IN PHILADELPHIA CAN REACH MORE THAN 50 PERCENT OF THE U.S. POPULATION WITHIN TWO DAYS.



◄ *Philadelphia's Top Distribution Centers*

a major player in the port business due to the proximity to different logistics points, venues and infrastructure."

Regular shipments among Philadelphia shippers define the Philadelphia Regional Port Authority's extensive hinterland. "We have a 10-hour or two-day delivery time by truck to half of the United States markets. ... We regularly service a market extending west as far as Illinois, as far south as Kentucky, and as far north as Canada," said PRPA Chairman Jerry Sweeney.

Philadelphia's extensive roster of breakbulk commodities also benefits from location. "Regarding commodities such as wood pulp, as well as steel, machinery and projects, the region is close to key manufacturers, distributors, processors and end users. So given the entire nexus of logistics, marine terminals in the Greater Philadelphia region make sense," Delaware River Stevedores President Robert Palaima said.

Infrastructure and market access make the city's hinterland a prime site for distribution centers. More than 300 distribution facilities are within one-day transit of the port, in Pennsylvania, New Jersey, Maryland and Delaware. Beyond this immediate region, Philadelphia enjoys rail-mileage advantages to distribution hubs in major metro areas such as Chicago, Columbus and St. Louis. Philly terminals have rapid, uncongested access to major highway arteries, including Interstate 95 and Interstate 76, and more than 300 motor carriers provide comprehensive and competitive trucking.

Dr. Neha Mittal is an international trade and transportation researcher at Temple University. Her studies reveal, "Philadelphia's excellent central location in the northeast corridor, coupled with a good transportation network in the state, has provided businesses with a strategic advantage in distribution center operations. A DC in Philadelphia can reach 25 percent of the country's population within a five-hour drive and more than 50 percent of the nation's population within a two-day truck driving distance. Its international airport connects to 87 domestic and 36 international destinations. Its port is served by two Class I railroads — CSX and Norfolk Southern. The availability of industrial land parcels and relatively cheaper real estate compared to neighboring states offers a very attractive location to DC operators."

Cost benefits of a distribution center near Philadelphia extend beyond proximity to markets. "Due to expensive land costs, excessive labor rates and high taxes in other regions, we have seen in recent years an effort to build distribution centers closer to the Port of Philadelphia. Big box retailers, online merchants, manufacturers and others have been moving into southern New Jersey, the Lehigh Valley and Central Pennsylvania. In other words, they have been moving closer to the Port of Philadelphia," Sweeney said

Colliers International's industrial department leases and sells warehousing and distribution facilities, and Senior Vice President Richard Gorodesky offered his observations: "Philadelphia works as a hub-and-spoke environment, with the confluence of the major rail providers immediately adjacent to the ports. We generally consider the New York-to-

Washington, D.C./I-95 corridor and the east-west Pennsylvania Turnpike corridor to be our bread and butter for same-day distribution points." The vital signs for distribution center business are trending positively, he said. "Philadelphia's warehouses have enjoyed low and decreasing vacancy rates over the last several years. Until very recently, new construction has been limited to build-to-suits. Recent demand has caused some spec construction to begin, but certainly not excessively. We see continued balance in our markets between landlord and tenant supply and demand," he said.

Produce specialist John Vena Inc. lays claim to an even larger distribution network. "Much of the product we receive in Philadelphia is literally shipped all over the country and Canada through our sister company Produce Sensation. This is facilitated by the excellent logistics facilities located near the port," President John Vena said.

"Within 100 miles of the Port of Philadelphia, there are 40 to 50 million square feet of distribution center warehousing. Along the I-81 corridor, there are 10 to 15 million square feet between Shippensburg and Carlisle alone," Keith Walborn, agent for Evans Delivery, said.

40 TO 50 MILLION SQUARE FEET OF INTERNATIONAL DC WAREHOUSING ARE LOCATED WITHIN 100 MILES OF THE PORT.

Forest products are a core commodity for the Port of Philadelphia, and CMS Transportation has been helping its customers expedite shipments for more than 25 years. Clayton Manthorpe, company president, discussed how his clients rely on Philadelphia for timely deliveries. "A large part of our ocean business is pulp from South America. We have seen our pulp clients benefit by moving their cargo through our port versus other regional ports. The efficiencies at the Port of Philadelphia help them keep costs down. From here, they are able to easily supply their customers covering most of the eastern half of the United States. At our facility, we are filling orders as far away as the Gulf states, Wisconsin and up into Canada," he said.

Port productivity and inland delivery velocity make Philadelphia the rational choice for DC operators, Mutz said. "There are many DCs out in the Carlisle, Harrisburg and Route 78/Route 80 corridors that serve all beneficial cargo owners quite well. That is whether they are using Baltimore, Port Elizabeth (New Jersey) or the Port of Philadelphia. However, the area that must be explored is which port will provide the efficiencies, and what are the underlying inland transportation costs to those respective DC zones? We believe the Port of Philadelphia is the best solution."

Distribution center operators in the Northeast can opt for a number of ports along the eastern seaboard. With increasing frequency, they opt to "Ship Philly First" because of:

- Uncongested access to key highway and rail arteries.
- Unparalleled terminal and labor productivity.
- Shorter terminal turn times.
- More productive use of equipment.
- Lower-cost proximity to freight destinations and origins.
- A port community that understands what is needed and performs accordingly. ■

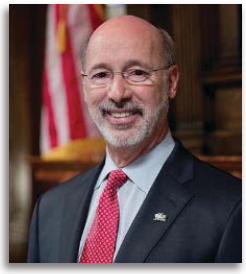
A LETTER FROM **GOVERNOR TOM WOLF**

As my administration works to improve the transportation infrastructure of Pennsylvania, we want the Commonwealth to become the keystone of your faster, more efficient supply chain. The improvements we are making to our roads, bridges, and ports will provide many benefits for cargo transportation. At the Port of Philadelphia, we are working to make the following substantial changes:

- We are deepening the Main Channel of the Delaware River to 45 feet. Through the work of Philadelphia Regional Port Authority staff and our partners at the U.S. Army Corps of Engineers, we have completed 85% of the project, and expect to finish the job in 2017. Channel deepening will allow larger vessels to come to the Port of Philadelphia, providing better opportunities for manufacturers and farmers in Pennsylvania, the Eastern USA and Canada to reach global markets.
- Equally important is our 196-acre Southport Marine Terminal Complex. We have completed environmental remediation, finished initial engineering work, built a road through the complex, and are now seeking a private sector partner to complete and operate this unique set of facilities. Southport gives the Port of Philadelphia room to grow.
- In addition to new infrastructure, PRPA, along with our marine terminal operators, have attracted new steamship lines to the Port. These include APL, NYK, SeaLand and Yang Ming, which came to our Packer Avenue Marine Terminal, and MSC, which significantly improved their European service. Fibria Celulose has also come to Philadelphia, bringing 360,000 tons of paper pulp to our Tioga Marine Terminal.
- Finally, we are making significant progress with my administration's strategic plan to ensure long-term stability at the Port of Philadelphia. We have launched a national search for a new executive director with a proven track record of successful port development. I have also directed PennDOT to conduct a study to determine the best use/economic feasibility of the port.

Our efforts of the past few years are bearing fruit in more cargo – and more jobs – for Pennsylvania workers. Important Pennsylvania exporters such as Cronimet in Aliquippa, East Penn Manufacturing in Topton, Hershey Foods in Hershey, JLG in McConnellsburg, Mack Trucks in Macungie, and PPG in Pittsburgh use the Port of Philadelphia to safely and efficiently ship their valuable cargos to global markets.

Please see the Philadelphia Regional Port Authority website at www.philaport.com to learn how Pennsylvania can be the keystone for your improved supply chain, and to learn of the improvements we are making to Pennsylvania's international seaport.



Tom Wolf
Governor of Pennsylvania

SPECIAL ADVERTISING SUPPLEMENT OF THE JOURNAL OF COMMERCE

PRODUCTIVE

Commitment, Cooperation Set Port Apart

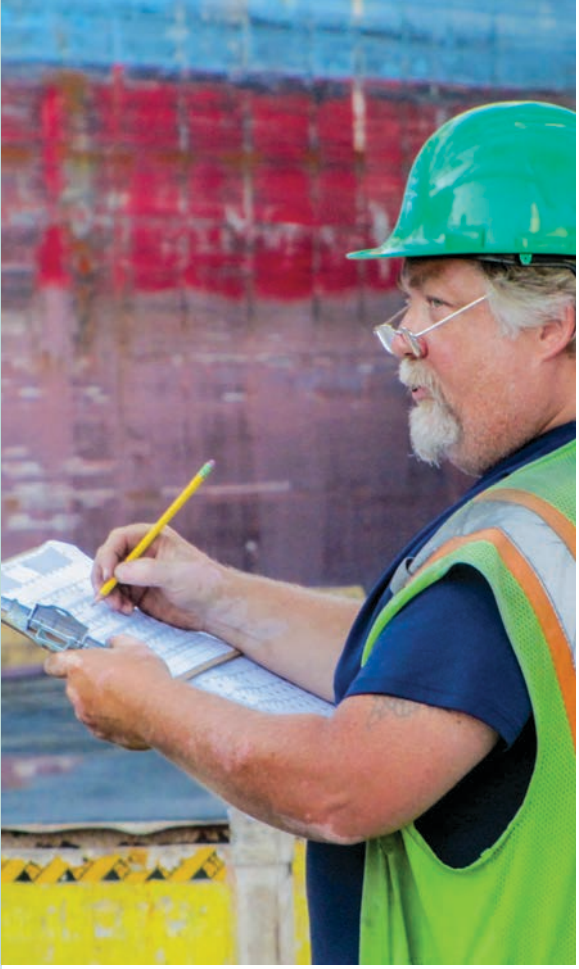
Congested, inflexible, combative, expensive and unproductive are adjectives you do not hear describing the Port of Philadelphia. In fact, it is quite the contrary.

UNCONGESTED. No vessels on the hook awaiting a berth. Ease of access for both rail and truck shipments in the form of on-dock rail and easy ingress and egress to and from major interstates and other highways. Unparalleled speed of truck turnaround at all terminals equates to optimal equipment usage.

FLEXIBLE. The International Longshoremen's Association Local 1291 offers 19 daily start times versus four in competing ports. For port customers, this translates into lower transit costs. Beyond its capacity to expedite containers, Philadelphia boasts an imposing array of equipment and carefully honed handling skills for a variety of niche cargoes ranging from perishables and breakbulk to construction materials and forest products.

COOPERATIVE. Logistics is the ultimate multiplayer game. Shippers, terminal operators, labor, ocean and surface carriers, government agencies, third-party logistics providers, broker/forwarders, beneficial cargo owners and governmental entities present a unified front in Philadelphia.

"Labor understands you have to come to the table to attract and maintain our business. As an example, we have



not had a labor strike in 20 years. In some competing ports, labor is unresponsive to the trade business community. Simply stated, they have too much work, and demand exceeds supply, so labor enforces its will as to rates and what they will and won't do. Fortunately for us, the opposite is the case in Philadelphia," Holt Logistics' Director of Fruit Marketing Thomas Mastromarco said.

The Philadelphia Regional Port Authority lists a number of willing partners that factor into its growth equation. "Our port's future is incredibly bright because of the alignment between labor, the private sector, the public sector and ourselves. Our labor is committed to growing the port, and they work cooperatively with management and our terminal operators," PRPA Chairman Jerry Sweeney said.

PHILLY FEATURES INCLUDE:

- Cost effective.
- Gross production as high as 40 container moves per hour.
- Willing, capable labor.
- Aggressive pricing for terminal tariffs and port services.
- Higher cross-terminal velocity.
- Shorter distances and fewer hours to inland destinations and origins = lower delivered costs.
- No container assessment charge, which can be as much as $100 per box at other ports.
- Six fewer holidays per year than in competing ports = fewer premium-pay labor hours.
- No ILA pension withdrawal liability.

PHILADELPHIA IS OUR
FAMILY
Mullica Hill is the largest receiver of imported meat in USA and Lucca is the largest 3rd party fruit repacking facility in the Northeast U.S. The Mullica Hill Group and Lucca Cold Storage are proud members of AGRO Merchants Group.

AGRO Merchants Group

Innovative Cold Chain Solutions

Visit us at agromerchants.com

AGRO Merchants Group partners with family businesses, creating new and reliable trade networks to help its customers grow. AGRO ensures the highest quality supply chain management standards in the industry.

We offer a variety of services, including:

CROSSDOCKING
INSPECTION SERVICES
MULTI-TEMPERATURE
BLAST FREEZING

Dependable Distribution Services helps its cocoa customers control transportation costs by transferring critical functions from consignee sites to Dependable facilities adjacent to the port. "Our customized attention on one product has allowed us to be the trusted partner for a large share of the market. We unload the beans, store them in our food-grade warehousing and inventory them with our technology. Equally important, we transfer the cocoa to the format that is most convenient for the end user, based on the receptive capabilities of their individual production sites. One customer may want to receive the beans in large, 2,000 pound, 'supersacks.' Another may want to receive them loose in a special truck. A third may want them by rail. We solve many of the costly, labor-intensive operations at the processors' locations by shifting these costs and creating value at the port, reducing total costs through the supply chain," President Harvey Weiner said.

PRODUCTIVE. "Productivity is definitely one of Philadelphia's greatest strengths. Our longshoremen are hard-working, conscientious and do a great job of representing the Port of Philadelphia. This can-do attitude also extends to the inland value-add locations where good labor excels in getting their assignments done," Fred Sorbello,

LABOR EDGE:
19 DAILY START TIMES VERSUS FOUR AT COMPETING PORTS.

Packer Avenue Marine Terminal (left) and Philadelphia Auto Processing Facility (right).

CEO of Mullica Hill Group, said. Agro Merchants' CEO Neal Rider added, "Philadelphia's a very efficient port relative to its competitors in the area. We find it to be highly customer friendly and are very happy with the relationship we have forged with the PRPA."

In-port labor plays the singular, most pivotal role in the physical expediting of cargo between vessel and quay. Longshoremen clearly understand the importance of their efforts in expediting cargo to destination. "It's about customer service. These big ships are expensive to operate, and so the steamship lines want them to be moving. Their goal — and our goal — is in and out of port fast," Boise Butler, president, International Longshoremen's Association Local 1291, said. "Our Philadelphia labor is more flexible with start times, weather conditions, holidays and more. If we provide more start times, the ship gets worked quicker, and it can get on to the next port. That helps the steamship line stay on schedule. We have fewer non-work holidays than our neighboring ports. We also are willing to work with the terminal operators to extend gate hours if necessary to get the job done. ILA labor is a major contributor to Philadelphia's high productivity."

Penn Warehousing's Tom Mutz, director – global business development, concurred that Philadelphia's ability to out-produce nearby competing ports is a major tactical advantage. "I believe that each port has its unique advantages and challenges. Port Elizabeth is really not a breakbulk port (aside from roll-on, roll-off), so the Delaware River and our terminal directly benefit from that. We do not have congestion in the Port of Philadelphia, and we have certainly capitalized on that. Simply stated, this has positively impacted our container handling and transloading volumes. I would be remiss if I didn't mention the advantages of our facility being adjacent to Packer Avenue Marine Terminal and our ability to cost-effectively and timely dray overweight containers."

For imports of perishables, the port meets John Vena Inc.'s demand for the fastest possible transit. Historically, Vena has not found this to be the case in other locales. "Clearing containers in Philadelphia is an operational dream. Once our containers are released, we can actually schedule the arrival at the intended destination. In other ports, we are at the mercy of variables over which we have no influence. In those locations, wait times are intolerable and cost money and time," he said.

Philadelphia's lengthy experience in its key commodity sectors results in a workforce particularly well-attuned to the handling demands of its particular cargo mix. "The ILA does have experience, we do have specialization, especially in our major cargo categories such as perishables, forest products, ro-ro, steel and project cargos, and we know how to use the equipment. In addition, we have the right training, and we have a 'hungry' attitude. We know we are not the biggest port, so we have to be the best," Butler said. ■

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111

PRISTINE

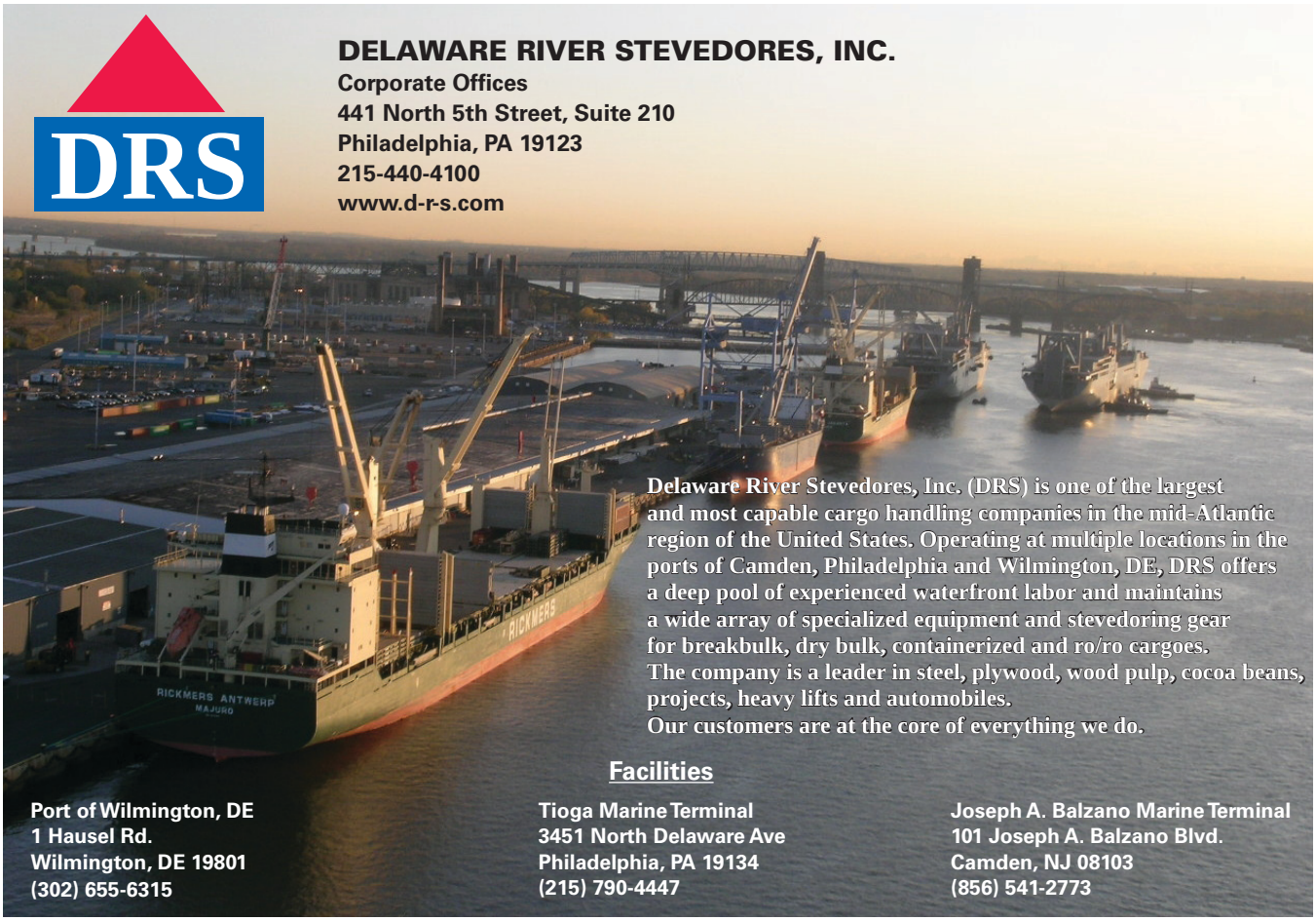
A Protected Cold Chain

On the spectrum of commodities, no sector commands more attention to detail than perishables. The consequences of failures along the supply chain range from expensive to disastrous. Unfortunately, the opportunities for in-transit glitches abound. Delivery delays, rough handling and faulty temperature control contribute to product degradation, spoilage, costly disposal and in the worst case, consumer illness.

Any port aspiring to participate in the perishables trade must meet and maintain a strict set of operating standards. These benchmarks comprise factors such as terminal turnaround, commodity-specific experience, proximate cold storage facilities, on-site federal inspections and a roster of viable truckers and rail providers. Nowhere is this mix more apparent that the preeminent perishables handling port on the U.S. eastern seaboard, Philadelphia.

Thomas Mastromarco, director of fruit marketing for Holt Logistics, detailed the development of Philly's perishables sector. "This business evolved over many years. Fruit imports began in the late 1970s and early 1980s with fewer than 1,000 boxes of fruit, and grew to a couple of thousand boxes, compared to the 100 million boxes we currently handle. Originally, the main origin was Chile, and then imports from Argentina and Brazil commenced. Now, fruit comes in from 20-plus countries all around the world. The growth of this business is reflected by the 20 to 30 facilities within 50 miles of the port. This growth can be attributed to the vision of the people involved in the business since the beginning, our steady growth and infrastructure that grew around it," he said.

Because days in transit are such a critical component of the perishables shipment cycle, a centralized distribution location becomes even more critical. "Philadelphia has become **THE** hub for distribution of perishables on the East Coast with reaches into the South, the Caribbean, the Midwest and Canada. This has been a steady evolution; early on



the agricultural base of apples, peaches, cranberries, vegetables, blueberries and mushrooms led to a strong base of logistic services such as transportation, warehousing and repacking. The Philadelphia region is also ideally located with easy access to the massive consumer base residing from Virginia to Boston," Tom Kovacevich, general manager, T. M. Kovacevich – Philadelphia, said.

Tim Brown, president of Horizon Stevedoring, expanded on the port's reach. "The entire Delaware River Basin is globally recognized for the handling of perishables. If there was one factor that drives our reputation it would be our ability to provide an inland distribution process that is unrivaled in the United States. We are capable of providing distribution to over two-thirds of the Canadian and U.S. population within a 48 to 72-hour window. Certainly, the more than 6 million square feet of temperature-control warehousing in the immediate Port of Philadelphia area provides an additional value-added proposition for products that will not be distributed more timely after vessel discharging."

Meat imports comprise a significant portion of vessel manifests arriving in Philadelphia. The shipments originate primarily in Australia, New Zealand, Uruguay, Brazil and Chile. Testament to the volumes moving in this trade are the 13 U.S. Department of Agriculture-certified meat inspection houses in the immediate Philadelphia area. Vegetables, seafood and artisan breads are additional examples of commodities benefiting from the perishables infrastructure.

SeaLand's new weekly services offering connections to Mexico, Colombia, Guatemala, Honduras and Panama provide evidence of the continued evolution of these trades. The new rotations provide mid-week arrivals for fresh fruit and frozen products. Philadelphia augments its handling capacity for temperature-sensitive goods with 1,800 reefer plugs and 320,000 square feet of cold storage space on terminal. Port interests are quick to point out that additional additional capacity continues to be added, and there is ample land available to do so.

APPROXIMATELY 90 PERCENT OF THE U.S. COCOA BEAN WAREHOUSING IS LOCATED IN THE PHILLY AREA.

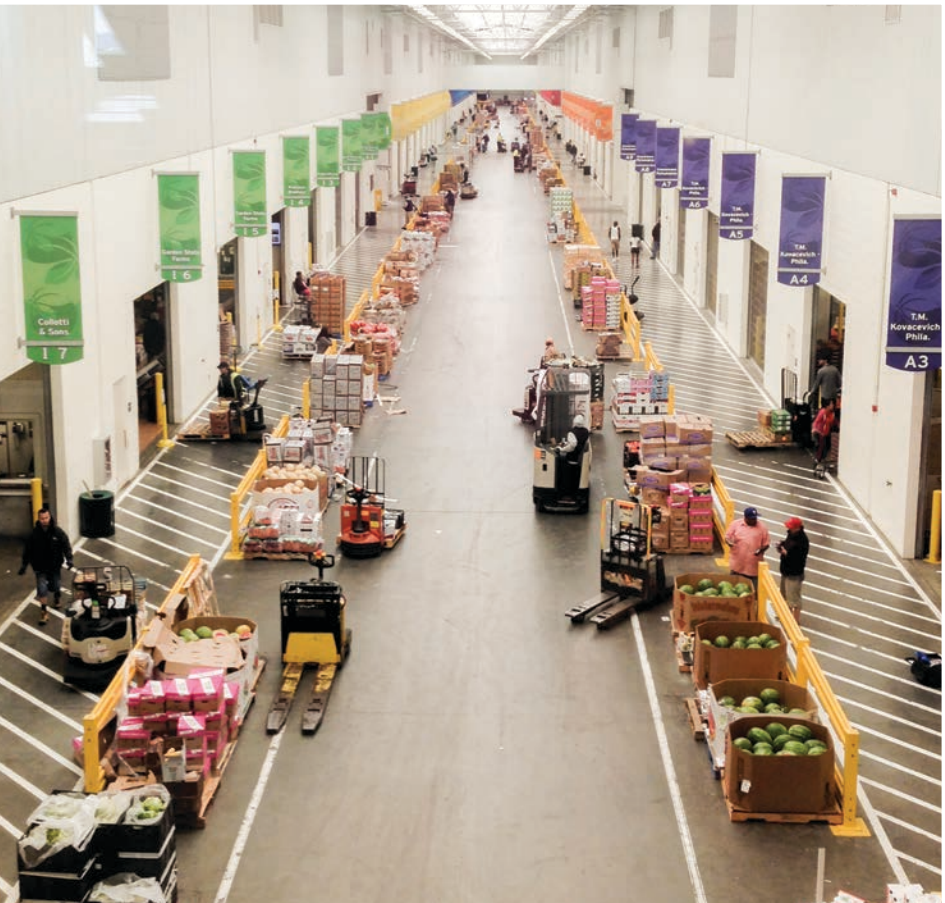
Agro Merchants is the parent company for Philadelphia-based Mullica Hill Group and Lucca Freezer and Cold Storage. CEO Neal Rider summarized the company's rationale for these acquisitions. "Philadelphia is the gateway into one of the largest metro markets in the country. We were attracted by the services already established for the products we're interested in, specifically agriculturals and protein-based products. The existing flows for retail, wholesale, food services and club business in the Northeast, Boston, Philadelphia and New York were already in place. From a transportation perspective, we want to bring these products in as close as possible to these ultimate destinations. Philadelphia is a logical hub for us."

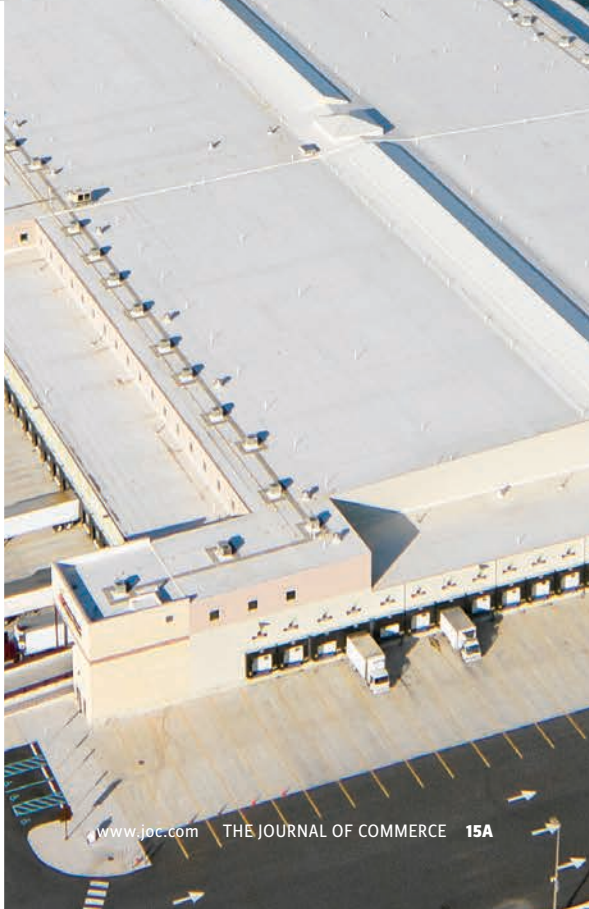
Mastromarco provided a case study on how the port continues to expand its share of the perishables trade. "We are actively involved in outreach marketing. As an example, we recently initiated import shipments of clementines from Morocco. These were going to other ports, but we went to Morocco, made the contacts and negotiated the relocation of the business. These shipments arrived for the first time this year."

Mullica Hill Group's CEO Fred Sorbello believes that the key to the port's success lies in its approach to the perishables sector. "The advantage Philly has over competing ports is in the value adds provided by our port services entities. We view our job as making products ready for retail consumption. The days of merely handling and shipping on demand are antiquated. We see our job as fast tracking from receipt to final destination for all perishables."

Imports from Chile remain a key component of the Philadelphia perishables profile. Since 1988, the Chilean and American Chamber of Commerce of Greater Philadelphia has fostered

PORT OF PHILADELPHIA





commercial and trade relations with Chile. The CACC facilitates connection of businesses, entrepreneurs and investors by linking them with the appropriate individuals and organizations such as Pro Chile or the Chilean Fresh Fruit Association.

CACC Director Christina Lista is a firm proponent of the port. "The Philly region is in its fourth decade of partnership with the Chilean perishables export industry. During this time, the CACC and its members have forged enduring relationships with producers, exporters and shipping lines involved in this dynamic business, often serving as advocates and representatives on issues affecting the trade. Philadelphia's central location, with the ability to reach over two-thirds of the U.S. population within one to two days, is also a strong driver for a solid relationship. Couple this with the wealth and depth of knowledge on handling the needs of this industry and you have the enduring bond that exists today," she said.

Philadelphia provides a growth environment for firms of all sizes. "John Vena Inc. is a small company, and in order to be successful, we need to have responsive, reliable trading partners at the port. We have found them in the cuss brokers and service providers in Philadelphia. In addition, we find it to be less expensive to handle our container freight due to our proximity to the port and cold storage facilities, and the relative lack of highway and port congestion in general. In reality, the Philadelphia area is a transportation hub with access to trucks going literally all over the country," President John Vena said.

When it comes to the importation of cocoa beans, to describe Philadelphia's position as a niche would be woefully inadequate. "In the cocoa segment, Dependable Distribution Services has seen growth in the percentage of cocoa beans entering the U.S. via the ports of greater Philadelphia. We now handle about 90 percent of all cocoa beans entering the United States," DDS President Harvey Weiner said.

DDS operates Pier 84, the leading cocoa terminal in the United States. That location boasts 540,000 square feet of on-dock storage served by dockside rail. The firm is a true value-added provider with comprehensive services comprising stevedoring, warehousing, de-bagging, sampling and transportation services. The company receives more than 150,000 tons of cocoa beans each year. It has more than 2 million square feet of certified cocoa warehousing space in the immediate area.

Michael Lang, corporate logistics manager for Blommer Chocolate, provided a rationale for Philly's pivotal role in the cocoa trades. "Philadelphia is the cocoa capital of North America with most of the major processors located within 80 miles. As a large cocoa processor it's just logical to build an efficient supply chain in the Philadelphia area. Philadelphia is close to one of our major plants in East Greenville, Pennsylvania. In addition, it's close from the countries of origin and affords the immediate-proximity warehouses and rail heads to resourcefully get our cargo to our other North American plants."

Most of the beans originate in the Ivory Coast, Ghana and Nigeria. Additionally, others arrive from Ecuador and the Dominican Republic, with smaller amounts from Central America. Beans transiting Philadelphia do move as far as the Midwest, Canada and along the U.S. East Coast. However, they are primarily earmarked for grinding facilities and chocolate factories located nearby.

Asked why Philadelphia has become such an epicenter for cocoa beans, Weiner summarized, "We've made the

right building and equipment investments at Pier 84, and we have the experience in handling the particular needs of cocoa beans. Also, about two-thirds of the cocoa grinding companies are located within a day's drive of Philadelphia. In addition, about 90 percent of the cocoa bean warehousing in the United States is located in the Philadelphia area. Finally, we are part of the Intercontinental Exchange, which is the largest global market for cocoa. ICE allows cocoa buyers and sellers to trade product globally and virtually, using trusted, certified transportation service providers. Philadelphia is an ICE-certified port, and Pier 84 is an ICE-certified facility, giving cocoa shippers added confidence."

There is no greater single symbol of Philadelphia's ascendancy in the global perishables trades than the Philadelphia Wholesale Produce Market.

DAYS IN TRANSIT ARE A CRITICAL COMPONENT OF THE PERISHABLES SHIPMENT CYCLE.

"The Philadelphia Wholesale Produce Market, a 678,000-square-foot, state-of-the-art behemoth in southwest Philadelphia, houses the largest continuous cold chain in the world. The PRPA is the landlord of the property, the 2011 opening of which preserved thousands of jobs in one of the great Philadelphia legacies. The outcomes were more than $1.5 billion in sales annually, 25 produce firms and 1,500 employees," PRPA Director of Strategic Planning and Development Nicholas Walsh said. The venture is a joint public-private partnership facilitated by an infusion of $152 million in Commonwealth of Pennsylvania funds.

It is the world's largest fully enclosed, fully refrigerated wholesale produce terminal. The cold chain at PWPM is preserved by 224 sealed dock doors that surround the building's perimeter, allowing the entire loading dock and sales floor to be continuously kept at 50°F all day. Trailers are snugged against weather-tight loading dock seals, protecting produce as it moves across the

cool loading dock to or from refrigerated warehousing. Temperatures within each merchant's individual refrigerated warehouse are commodity adjusted.

Merchants at the market carry a full line of fruits and vegetables and serve all types of food service and grocery businesses. Additionally, the facility is open to the general public. Receiving and selling hundreds of truckloads of fresh produce on a weekly basis, PWPM boasts cumulative annual sales of $1 billion.

Its proven operating philosophy revolves around cradle-to-grave cold chain protection for fresh fruits and vegetables to maximize shelf life. As a result, PWPM boasts that it is unsurpassed from an international food safety standpoint.

Kovacevich believes that PWPM is its own best marketing tool. "All anyone needs to want to do business through the Philadelphia ports and facilities is to visit. Our home, the Philadelphia Wholesale Produce Market, is a beautiful example of what makes this region a perfect distribution hub for the world's produce. Vibrant yet uncongested, modern, clean and temperature-controlled, we are constantly showing off what is certainly one of the best produce distribution centers on earth. Visitors nearly always smile and say 'Wow, this is how it's supposed to be!'"

Port interests are confident in their ability to protect and grow Philadelphia's perishables niche. "Whenever the competition has tried to steal some of our business, they quickly find out it's not something you decide to get into one day. You can't just immediately put the port equipment, facilities and people in place. You can't buy the expertise. The major importers and distributors know they can distribute to a 1,000-mile radius from Philadelphia to points from Florida to Canada. And we're not stagnant. We're still growing and expanding, and people are adding square feet, technology and most importantly, value, every year. The operations, facilities and know-how are in Philadelphia, and importers realize that," Mastromarco said. ■

PROLIFIC

Cargo Diversity Keeps Volume Projections High

MORE THAN 6.6 MILLION TONS OF CARGO MOVED THROUGH PRPA IN 2015.

Hyundais and Kias being discharged at the Port of Philadelphia.

In 2015, marine facilities on the Delaware River worked more than 50 million tons of cargo, transloaded to and from nearly 2,400 vessels. The Philadelphia Regional Port Authority accounted for more than 6.6 million tons of the total and provides a microcosm of the region's diverse cargo mix.

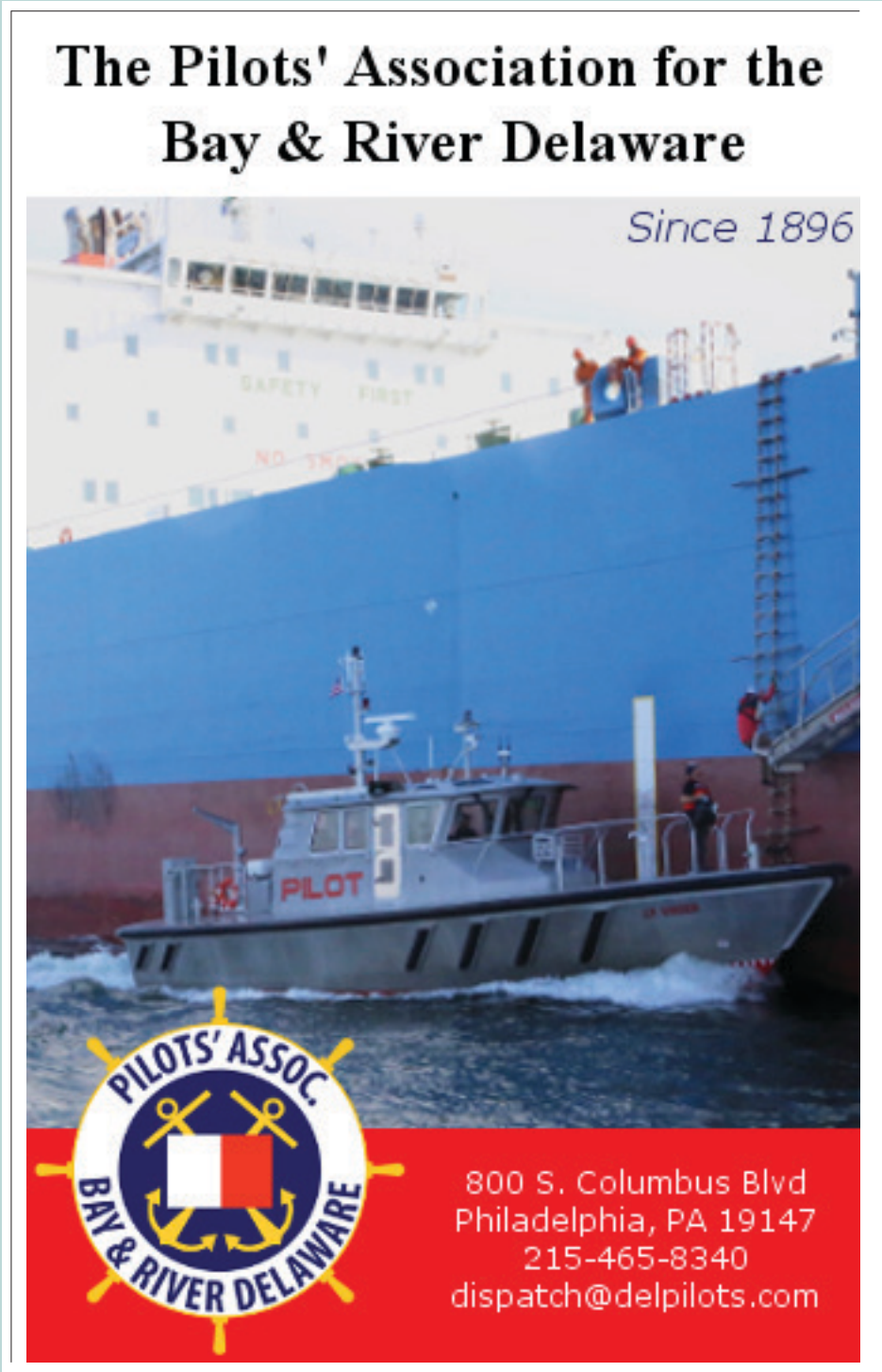
- **CONTAINERS:** 3.2 million tons or 430,000 TEUs.
- **BREAKBULK:** 1.8 million tons.
- **STEEL:** 466,631 tons.
- **FRUIT:** 295,419 tons.
- **FOREST PRODUCTS:** 857,598 tons.
- **COCOA BEANS:** 113,538 tons.
- **AUTOMOBILES:** 156,000 units.
- **LIQUID BULK:** 1.5 million tons.

Forest products have long been a staple along the Delaware. The port boasts a 52-acre Philadelphia Forest Products Center and more than 1.7 million square feet of warehouse space. These facilities are fed from over 5,000 linear feet of berthing space.

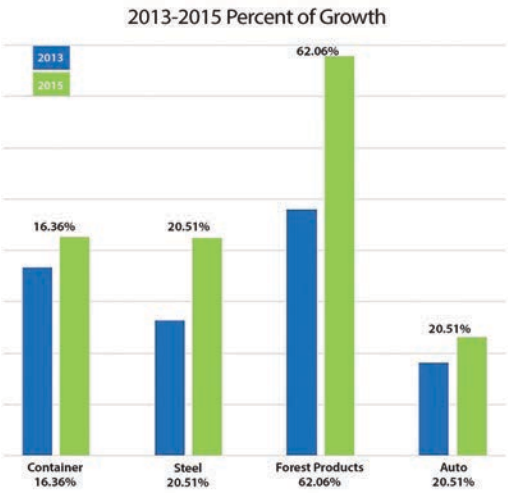
Penn Warehousing and Distribution is a major player in this trade, Director – Global Business Development Tom Mutz reported. "We handle the core forest products lumber, paper and pulp. Lumber has been steadily growing and certainly the housing recovery drives that. Pulp has been the hot commodity over the last few years, particularly with all the production in Brazil. The majority of our tonnage volumes are with northern Europe, Central and South America and Oceania. We are looking forward to the opportunities that our new Mexico service will provide. We operate a handful of piers within the Port of Philadelphia – Piers 38, 40, 78, 80 and 82. Of course, the majority of the containers we handle are processed through Packer Avenue Marine Terminal," he said.

In September 2014, the Tioga Marine Terminal in the Port Richmond section of Philadelphia officially welcomed Fibria Cellulose, a major Brazilian pulp and paper company. This venture will initially comprise up to 20 ship calls per year, with cargo projections calling for as many as 400,000 tons annually. In addition to more than $20 million in enhancements on the terminal, rail access was improved along the Port Richmond industrial track to allow for the pursuit of new business opportunities.

Kinder Morgan is the largest energy infrastructure company in North America. It owns an interest in, or operates, nearly 84,000 miles of pipelines and approximately



THE DELAWARE'S TREMENDOUS REFINING CAPACITY HAS STRENGTHENED THE PETROCHEMICAL AND FUEL SUBSTITUTE NICHE OF PHILLY'S FREIGHT PROFILE.



Credit: Philadelphia Regional Port Authority

165 terminals. These pipelines transport natural gas, gasoline, crude oil, carbon dioxide and other products, and the terminals store petroleum products and chemicals, and handle bulk materials such as coal and petroleum coke.

The company's Philadelphia terminal is situated on 35 acres adjacent to the Delaware River and handles a variety of commodities, primarily chemicals and refined products such as ethanol. The facility has ready access to Interstate 95, the Pennsylvania Turnpike and major arterials and state roads to New Jersey and Delaware. It has one ship dock, one barge dock and approximately 1.2 million barrels of storage capacity. Conrail, CSX and Norfolk Southern railroads connect with the terminal.

"The Kinder Morgan terminal is an integral part of the overall mix of vibrant business, industrial and industrial-support facilities in the Philadelphia area, driving regional economic health and development. We operate as a transportation 'toll road' and provide the key infrastructure necessary to add customer value to the movement of customers' commodities by road, rail and vessels," Operations Superintendent Jay Costello said.

Petrochemicals and fuel substitutes occupy a primary niche in the region's freight profile, due to the tremendous refining capacity along the Delaware. Recently, anti-pipeline sentiment has generated interest in waterborne alternatives for moving such products. Specifically, plans are under consideration to institute barge service between liquid bulk receiving facilities and refineries. ■

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PREPARED

Expansion Plans Encourage Long-Term Growth

Changes in vessel configuration. Emerging commodities. Advances in cargo handling technology. Enhanced inland connectivity. Competition for development resources. These are among the primary factors ports must consider in designing and funding development projects. All of these must be factored into a timeline that puts infrastructure in position quickly enough to accommodate new business, but not so early that cash flows needed to finance them are compromised.

In Philadelphia, the major development news is the impending completion of the Delaware River channel deepening. The five-year project is 85 percent complete and should be finished in 2017. The U.S. Army Corps of Engineers is principal sponsor bearing approximately 65 percent of the cost, with the Philadelphia Regional Port Authority acting as local sponsor and funding the balance. Vital statistics are:

- **LENGTH:** 103 miles.
- **COST:** $353 million.
- **CHANNEL DEPTH:** Increased from 40 feet to 45 feet.
- **DREDGE MATERIAL:** 16 million cubic yards.

The project was not easy to bring to fruition. "It has been a long and tortuous journey to finally deepen the Delaware River from 40 to 45 feet. This U.S. Army Corps of Engineers project was conceived in the early 1980s and authorized by Congress for construction in 1992, but not until 2010 — two years after the Philadelphia Regional Port Authority officially signed on as nonfederal sponsor — did the first dredge drop its cutter into the bottom to begin the deepening. Opposition to the project derailed the project for 18 years. Along the way, four proposed upland disposal sites were replaced by using existing federally owned sites, and overboard disposal sites in the Delaware Bay were converted to wetland restoration and beachfill projects. The Government Accountability Office performed two audits of the project, and two of the three states that originally supported the project — New Jersey and Delaware — sued the federal government in an attempt to stop the deepening," Anthony DePasquale, P. E., chief, operations division, U.S. Army Corps of Engineers, Philadelphia District, said.

THE FIVE-YEAR CHANNEL DEEPENING PROJECT IS 85 PERCENT COMPLETE AND SHOULD BE FINISHED IN 2017.

"Despite these obstacles, the Corps' Philadelphia District prevailed in court and commenced the deepening of the Delaware River Main Channel in March 2010. The project had been properly justified, and no evidence was unearthed of any potential environmental harm. Its start was also catalyzed by funding from the Commonwealth of Pennsylvania, which invested at its own risk when federal funds were not immediately available," he said.

In its evaluation of the project, the Corps noted that deeper channels at other U.S. East Coast ports had the potential to severely dampen future volume prospects for Philadelphia, particularly in the container trades. "Without the deepened channel, the ports on the Delaware cannot compete for the post-Panamax size vessels and will have trouble maintaining their current levels of business in the future," DePasquale said. "The imminent completion of the Panama Canal expansion will open up access to larger container vessels coming to the ports from Asia, Australia and New Zealand. The deepening of the Delaware River will allow the port to remain competitive in this rapidly expanding market."

The PRPA and its customers agree, categorizing the project as both a safeguard against customer attrition and a stimulant for increased business resulting from the deeper draft.

The project dovetails nicely with Horizon Stevedoring's expansion agenda. "We are a tenant of the PRPA, so many of the facility and infrastructure projects are within their scope, and it is a perpetual process. We continue to add pallet-storage positions in our atmospheric- and temperature-controlled warehouse, in the six segregated rooms throughout the facility. That would be inclusive of our specialized pressurized storage racks. We are looking forward to expanding our current reefer farm slots towards 200 positions. We're quite excited about the channel deepening and prospects it holds for all within the Delaware River Basin," President Tim Brown said.

From the perspective of those at Penn Warehousing and Distribution, the channel improvements will drive the region's long-term development objectives. "The completion of the channel deepening

will positively impact all terminals in the Delaware River Basin. This presents many exciting opportunities along the river, especially the PRPA's Southport Marine Terminal Complex development. It's clear to see that the container vessel operators are closely scrutinizing their rotations and how they will adjust them to support their customers. There are many companies that will not want to have their vessels sitting in New York Harbor or the Chesapeake, awaiting the mega-vessels to be turned in 72 to 96 hours. In short, they will decide to pursue alternative ports, and I firmly believe that Philadelphia will be a big winner in that process," Tom Mutz, the company's director of global business development, said.

If capital expenditures are a barometer of optimism, then the port interests in the Philadelphia area can be conservatively described as bullish. The roster of projects is expansive.

Perhaps the single greatest focal point for future development is the Southport project. Last fall, as part of Pennsylvania Governor Tom Wolf's strategic plan, PRPA launched a two-phased process to procure one or more developers to design, build, finance, operate and maintain commercial and industrial facilities at the three sites that comprise the Southport Marine Terminal Complex: the 119-acre Southport Marine Terminal (Site 1); the 75-acre Southport West Terminal (Site 2); and Pier 124 North Berth (Site 3). The 196-acre riverfront property is owned by PRPA, located immediately west of Packer Avenue Marine Terminal. It currently remains idle and undeveloped, but the goal is to enable the market-driven development of Southport in 2017, creating up to 3,700 new jobs.

PRPA Chairman Jerry Sweeney outlined additional recently completed and impending initiatives, in addition to the channel deepening, that will further the port's growth agenda:

"We have been focusing on taking the steps necessary for our long-term growth. Our Southport development project is the key to that growth, and the Commonwealth of Pennsylvania has invested $30 million preparing the site for the construction phase. In the next few months we will select the company or companies who will bring our vision into reality. Secondly, Philadelphia is well positioned to experience other growth, more organic growth, because of the many capital improvements that have already occurred.

- Expansion of intermodal infrastructure at Norfolk Southern's Navy Yard Intermodal Facility.
- Improved rail clearance in the northern part of the port, adjacent to the Tioga Marine Terminal.
- The retooling of Tioga Marine Terminal to handle forest products.
- Opening of the Southport Connector Road providing dedicated, unimpeded access to both rail and riverfront.
- Design of the Pier 124 North Berth Access road.
- Reinvigoration of Pier 122 and Pier 124 for energy-related operations.
- A $5 million investment in the Philadelphia Automobile Processing Facility at the Pier 98 Annex.
- Anticipated upgrades to Pier 82 to accommodate the transition of fruit imports from palletized to container operations." ■

SPECIAL ADVERTISING SUPPLEMENT OF THE JOURNAL OF COMMERCE

PROGRESSIVE

Prioritizing Long-Term Infrastructure Planning

Philadelphia's worthy competitors will not stand idly by as the port attempts to build market share at their expense. It is, therefore, incumbent upon the port to engage in a continuous process of rigorous self-analysis to identify and eliminate any potential obstacles to achieving its projections for growth.

Dr. Neha Mittal of Temple University's Fox School of Business outlined a long-term game plan for capitalizing on the region's intrinsic assets. "I foresee the current trend of growth and development continuing in distribution center operations in Philadelphia and Pennsylvania's near future. Its central location, reliable transportation network, availability of land and labor should continue to drive the growth," she said.

"However, following are some of the points that should be considered in order to sustain the growth and demand curve:

- Land use and zoning should be integrated with the transportation network. Given the transportation consequences of land-use decisions, strategies should be identified to manage growth to help alleviate traffic congestion, and pollution and enhance a livable and sustainable environment.

- Future transportation planning should focus on further integrating different modes of transportation. Identifying multimodal and intermodal strategies to reduce congestion and travel times can help regional growth.

- Explore more public-private opportunities for financing infrastructural projects."

Cocoa importer Blommer Chocolate Co. closely examines vessel rotations in determining its port utilization. "We will continue using the ports in Philadelphia as long as the port operators can continue to get direct shipments from various steamship lines. It is an entire supply chain and extremely important to have direct shipments from the cocoa-growing countries around the world," Corporate Logistics Manager Michael Lang said.

Ample ocean carriage is also high on the agenda at Evans Delivery. "We certainly need increased standard service. Our opportunity is there due to congestion and facility issues in ports further to the north. However, we need to

Site formerly known as Jack's Marine restored to tidal wetlands.

have the carrier service to take advantage of these circumstances," Keith Walborn, company agent, said.

John Vena Inc.'s president agreed. "The driver for growth for us in Philadelphia is really based in the success that the port has in opening new routes that will call on Philadelphia. We will happily move our freight to carriers coming here if the shipping points and schedules work for us," Vena said.

Lang also placed a premium on rail connectivity and calls for expanded infrastructure. "We would like to see Norfolk Southern occupy part of Southport next to CSX, as planned. This competition would benefit many in the Delaware Valley in moving cargo via the intermodal method. As you know, this has not occurred. However, $5 million taxpayer dollars have been dedicated to this project. My questions are: Why hasn't NS moved into this location? If NS does not plan on moving into this location, will the Pennsylvania taxpayers get their money refunded?" he said.

Fellow cocoa entrepreneur Harvey Weiner, president of Dependable Distribution, stressed the importance of keeping up with the Joneses. "One potential obstacle is sufficient public investment in transportation infrastructure, including ports. While the PRPA and the private terminal operators such as DDS have made considerable investments in port equipment and infrastructure, we will need greater support from the commonwealth going forward. Competing ports are getting bigger capital investments, and they will come after our cargoes (and our jobs) if we don't make similar investments," he said.

Colliers International has reported increased attention from site seekers in search of product distribution locations. "As far as a location for large regional distribution centers, Philadelphia has not competed with markets such as the Lehigh Valley and southern New Jersey because of the lack of developable land in close proximity to interstates. However, we have begun to see more 'last-mile' distribution requirements in the suburban counties and southern New Jersey. These are e-commerce package delivery locations for Amazon and Jet.com. Also there have been more subscription food companies showing interest in our market. This is a trend that may potentially benefit Philadelphia – as a location for smaller distribution centers for repeat daily deliveries to the metro population," Senior Vice President Richard Gorodesky said. ■

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PROACTIVE

Where Personal Relationships Produce True Collaboration

Teamwork is a popular port marketing term. Unfortunately, it is an unfulfilled promise in many locales. Often, the labor-management tension is palpable. Relationships between port authorities, tenants and port users are strained. The unavoidable and highly visible consequences range from poor communications to shipment delays and from cargo degradation to work stoppages. Enter Philadelphia ... Where harmony is not just a conversation, but a commitment.

The Philadelphia port community is dotted with enterprises that have been part of the maritime scene for decades. As such, they evidence an almost paternal pride in the growth and evolution of their port. This is confirmed in the ingenuity, attention to detail, energy and customer focus common among all the port's logistics players.

"The gains we have made have come as a result of strong collaboration with our business partners, especially the Philadelphia Regional Port Authority, the International Longshoremen's Association and the Pilot's Association for the River Delaware and Bay. There is no doubt that uncongested berths, strong intermodal connections, modern warehouses and a favorable location at the epicenter of the U.S. population are important items, but what I really think sets the Philadelphia region apart is a can-do attitude," Robert Palaima, president, Delaware River Stevedores, said.

For the cocoa sector, such cooperation in indispensable, Dependable Distribution President Harvey Weiner noted. "We have great relationships with the U.S. Food and Drug Administration, U.S. Customs and the other regulatory

HARMONY AT PHILLY IS MORE THAN A CONVERSATION, IT'S A COMMITMENT.

agencies. We know what they need to do their jobs, and working together, we ensure that the cocoa beans can move through our port quickly," he said.

For Evans Delivery Agent Keith Walborn, the personal relationship with the Philadelphia Regional Port Authority staff is vital to his operation. "I really appreciate our access to the Philadelphia marketing people, because anytime something is on the horizon, I hear about it. Unfortunately, in other ports, the news

comes from our drivers," he said.

The port authority is equally invested in the team approach, and has implemented a blueprint to facilitate it. "The communication and governance we have put in place has allowed the PRPA to create a competitive structure within our terminals and in the larger port community, which generates greater efficiencies and harmony in our labor. This enables us to be more flexible and competitive on the global market," Nicholas Walsh, director of strategic planning and development, said.

Clayton Manthorpe, president, CMS Transportation put it simply: "You can have the biggest port in the world. But at the end of the day, if you can't move boxes, you're not getting anything done." At PRPA, his drivers can do from four to sometimes six turns a day. "All the players in the logistics chain understand the end goal. Local and state agencies, private industry, labor, working hard to do what it takes to make the port and port-related facilities work effectively," he said.

This cooperative approach is an important driver for infrastructure improvements. "I believe the relationships between the Philadelphia Regional Port Authority and its stakeholders have had a significant impact on the port development. Changes in product mix imported and exported from the region required the repurposing of existing facilities and expansion of other facilities. Public-private partnerships allowed that to happen. The proposed development of the Southport site demonstrates a new era for the public-private initiatives under consideration, and will provide significant opportunities for the port to maintain its competitive edge," Horizon Stevedoring President Tim Brown said.

GREAT RELATIONSHIPS KEEP PRODUCTS MOVING QUICKLY THROUGH THE PORT.

Labor is a vital player in presenting a unified front to the port's customers and proponents. Boise Butler, president, International Longshoremen's Association Local 1291, offered their perspective: "We view our work with the terminal operators and other supply chain service providers as a partnership. The whole Philadelphia port community is committed to moving the cargo as safely and efficiently as possible. The entire port community, including labor, works as a team. We know each other, we trust each other, and we communicate.

"No port can thrive without labor on board, and we are a partner in selling the port's services, and a team member in moving the cargo. We try to be entrepreneurial in coming up with better ways to move the cargo. Obviously, safety is first. We also respect seniority in organized labor. But we know that we've got to get the job done for the customer in order to grow the port and grow jobs." ■

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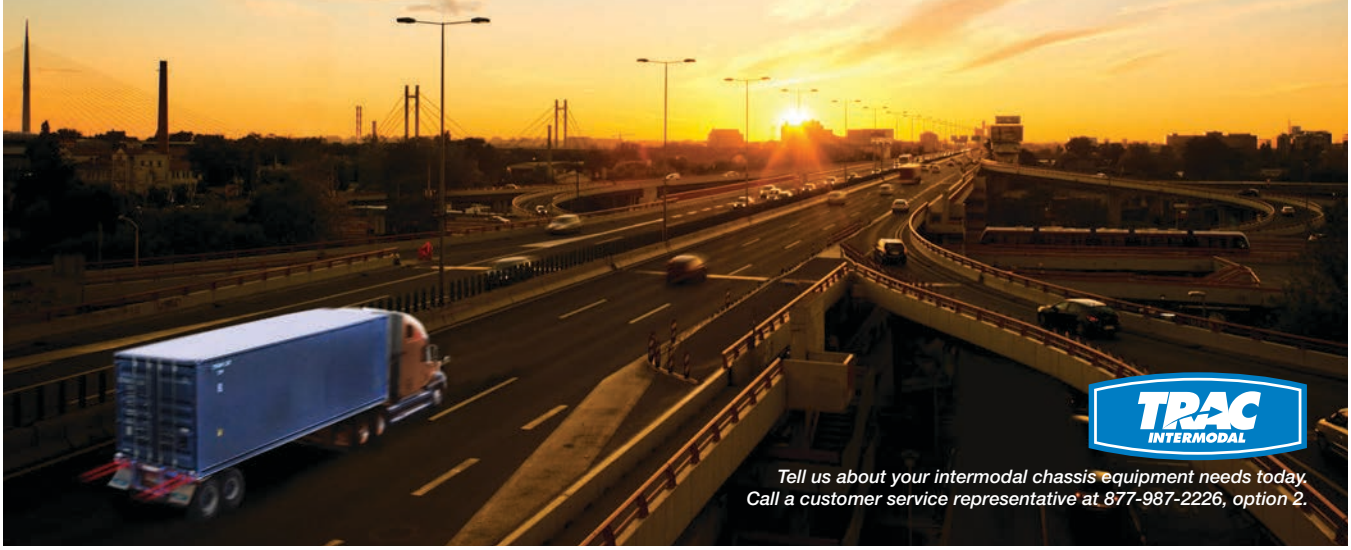

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PROMISE

The View From 40,000 Feet

So where does all of this activity lead? What will the portscape look like in 2026? Philadelphia Regional Port Authority Chairman Jerry Sweeney predicted, "We have put in place a platform for tremendous growth, made even sweeter by the imminent completion of our channel deepening. This is the first time in a while that we have had all the tools in place. While we have had a solid pace of volume increases over the last six years, we're in a position to accelerate that dramatically with the development of Southport and organic growth at all of our existing terminals.

We will certainly see:

- A broader and more cohesive waterfront;
- A doubling of the number of direct jobs in the port sector;
- More and larger ships across the commodity spectrum;
- Continued investment in this important economic driver."

Land, labor and capital are the key ingredients for long-term success of the port, Sweeney said. The Southport Marine Terminal Complex project provides ample expansion parcels. He echoed the port-wide sentiment regarding the partnership position and productivity of labor.

As far as capital, Sweeney trumpeted the $300 million that Pennsylvania has invested in the last four to five years on dredging and related projects. "Capital allocation will remain critical. We are a supplicant of public sector funding, so we need more than ever to make the case that we are a major driver in the Pennsylvania economy and that our waterfront is generating family-sustaining jobs and major economic impact," he said.

"Fortunately, we are blessed with a governor who understands and is committed to the optimization of our port and a new mayor who is an avid port booster. They complete our team so that for the first time in a decade we have a concerted effort to work collaboratively and develop our strategies for growing our piece of the pie." ■

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