Port Tampa Bay Overview

- Florida’s largest port in cargo tonnage and land area
- 35 million tons of cargo a year
- Diverse mix of bulk, break-bulk and container traffic
- Huge and expanding local market
- Energy products gateway for Central Florida
- Major fertilizer export port
- Shipyard-ship repair center
- Major cruise homeport
- Expanding container gateway for distribution centers and manufacturers
- Diverse lines of business = solid financial performance
- Over $17B in economic impact supporting more than 85,000 jobs in Central Florida
Port Tampa Bay Core Market

Over 380 million square feet of distribution center space within 10 miles of I-4

Tampa Bay/I-4 Corridor – Huge market driving demand for consumer products, e-commerce, food & beverage, construction & building materials and energy products.

10th largest economy in the U.S. with a GDP of more than $300 billion

Tampa Bay/Orlando I-4 Corridor largest concentration of distribution centers in Florida

250 DC’s > 200,000 – 500,000 SF
50 DC’s > 500,000 SF

Very active market with over 10 million square feet of additional capacity under development
Energy - Bulk

- Central Florida’s hub for gasoline, diesel, jet fuel, ethanol, lube oil
- Partnership between Port Tampa Bay and petroleum companies at REK
- Central Florida Pipeline connecting Port Tampa Bay to Orlando
- Adjacent land for future tank farm capacity
Fertilizer & Agriculture - Bulk

- One of the world’s leading fertilizer export ports
- Ardent Mills – New tenant for Redwing
- Potential new dry and liquid bulk opportunities
- Positive outlook for phosphate and related fertilizer products
Construction & Building Materials – Bulk & Breakbulk

- Florida’s largest steel port
- Processing & Distribution
- Manufacturing & Fabrication for Export
- Cement – New tenant SESCO
- Aggregates – Granite & Limestone
- Gypsum & Fly Ash expanding
- New Lumber business
Shipbuilding & Repair

- Four major shipyards – one of the largest hubs in the Southeast
- Refit, repair & maintenance
- New ship construction
Cruise

• Prior to Covid 19, Port Tampa Bay was poised for record year of 1.3M passengers in FY20
• March 2020:
  • Cruise Line Industry Association announces voluntary suspension of cruise operations.
  • Centers for Disease Control (CDC) issues a 'No Sail Order' for cruise ships operating in the U.S.
October 31:
  • No Sail Order expired and CDC issued framework for conditional sailing and testing requirements
November 3:
  • CLIA extends voluntary suspension through the end of the year
  • PTB staff working in close collaboration with cruise lines, industry associations and partners to prepare for a safe return to sailing.
Environment

• First in the nation dedicated Environmental Affairs Dept.
• First in the nation National Weather Service "Storm Ready" designation.
• 2 spoil islands home to globally significant populations of nesting birds.
• “Water Goat” in McKay Bay
Containers

• Huge, expanding Central Florida market
• Working with our carriers to support new services
• Expanding terminal capacity
• Priorities:
  • Attracting new Latin American services
  • Developing exports
  • Attracting new DCs and manufacturers
• Container TEUs up 34% in FY20
Container Terminal Expansion

- Renewed agreement and long-term partnership with Ports America
- Terminal expansion now underway:
  - Increased storage from 67 acres to 97 acres
  - Berth extension planned from 3200 to 4500 feet
  - New gate
  - Additional gantry cranes
New Asia-Direct Container Services

### GME / GMX / GCC2

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<th>Xiamen</th>
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### ZGX / TP88 / PELICAN EXPRESS

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**Latin America**

- Central America, Caribbean, South America
- Costa Rica

**Mexico**

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**Logos and Branding:**
- Seatrade
- Port Tampa Bay
- COSCO
- CMA CGM
- OOCL
- Evergreen

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**Shipping Lines:**
- ZIM
- MSC
- MAERSK
Expanding Global Service Connections – Latin America

- New Supply Chain Solutions for Latin America, Florida & the Southeast
- Focus on Central/South America, Mexico & Caribbean
Supply Chain Strategy
Cost Savings For Inland Trucking

Savings:
Average truck cost savings of $800+ per container when shipped through Tampa compared to other east coast ports.

Increased Capacity:
Drivers picking up at Port Tampa Bay are able to deliver up to 3 containers a day within Central Florida under one flat, daily rate while following DOT hours of service rules.

Operational Efficiency:
Truck service to Central Florida from other regional ports
- Miami/Port Everglades, FL
- Jacksonville, FL
- Savannah, GA
- Charleston, SC
Limited to 1 or less deliveries a day

Strategic Location:
Same day truck deliveries to Atlanta and Charlotte from Port Tampa Bay versus extra 3+ hours from ports in South Florida.

Northbound Advantages:
Competitive outbound Florida trucking rates via Tampa due to size of Florida market and heavy inbound truck traffic.
On Dock Cold Storage Facility

134,000 sq ft. state of the art:

- On site CBP Ag inspection and fumigation services
- 148 reefer plugs
- Food grade glycol refrigerant throughout
- Cross dock container yard connectivity w/ truck capacity
- Adjacent berth with dedicated mobile harbor crane
- Uninterrupted cold chain solution
- Non-union operation
- 2 Gottwald Mobile harbor cranes

“Chiquita is very pleased with this first shipment of bananas through Port Tampa Bay as a new entry Port for the distribution of our fresh fruit into the Continental US market.”

- Manrique Bermudez, Logistics Director for Chiquita Brands International
Container Terminal Expansion

PROPOSED
30 ACRES

PROPOSED
BERTH 214
1300 FT

COLD STORAGE WAREHOUSE

PROPOSED TRANS-LOAD WAREHOUSE FACILITIES

EXISTING
67 ACRES

ON-DOCK RAIL

BERTH 213
1300 FT

BERTH 212
760 FT

BERTH 210/211
1200 FT