

# PORT OF SAVANNAH

Garden City Terminal: The Southeast Gateway for the U.S.

Presented to



GEMINI SHIPPERS GROUP<sup>®</sup>

June 6, 2017





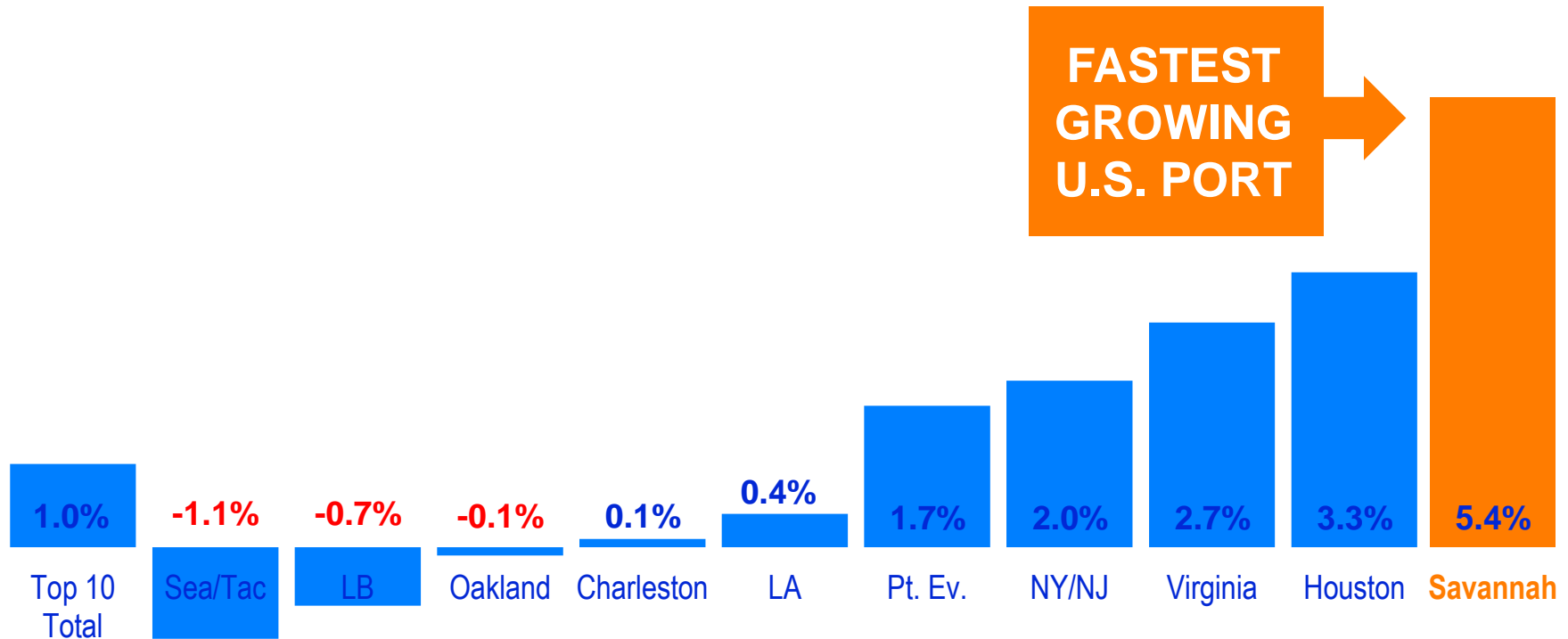


## **GARDEN CITY TERMINAL TODAY** **LARGEST SINGLE TERMINAL IN NORTH AMERICA**

- 9 Container berths
- 9,693 ft (2,955 m) of contiguous berthing space
- 26 Container cranes
- 146 Rubber-tired gantries
- 1,200 acres (485.6 ha) terminal area

# SAVANNAH: #4 AND FASTEST GROWING

## TOP 10 PORTS: 10-YEAR GROWTH RATE CY2006-2016



# SAVANNAH: A GLOBAL COMMERCE HUB



**35 WEEKLY SERVICES  
COVERING THE WORLD**

**THE MOST ON THE  
U.S. EAST COAST**

**EVERY MAJOR CARRIER  
CALLS SAVANNAH**

## **Key Savannah Service Features:**

- Offers 8 Services via Panama
- Offers 8 Services via Suez
- First in = 10; Last out = 12 (All Trades)

# U.S. EAST COAST WEEKLY CONTAINER SERVICES

Trade Lanes	SAV	USEC
Asia via Panama	8	13
Asia/India/MidEast via Suez	8	8
North Europe	7	13

Trade Lanes	SAV	USEC
Mediterranean	5	7
Oceania	1	2
Latin America	6	49

	Sav	Pt. Ev	Miami	Jax	Cha	Wilm NC	Nor	Balt	Phil	NY/NJ
Total	35	23	19	8	24	7	30	8	11	34



# ALLIANCE STRUCTURE



4 Mega Alliances  
(16 carriers)



3 Mega Alliances  
(12 carriers)

# PANAMA CANAL EXPANSION COMPLETE!

GAME CHANGER



Photo courtesy of Panama Canal Authority

# PANAMA CANAL EXPANSION: MARKET EXPANDS WEST

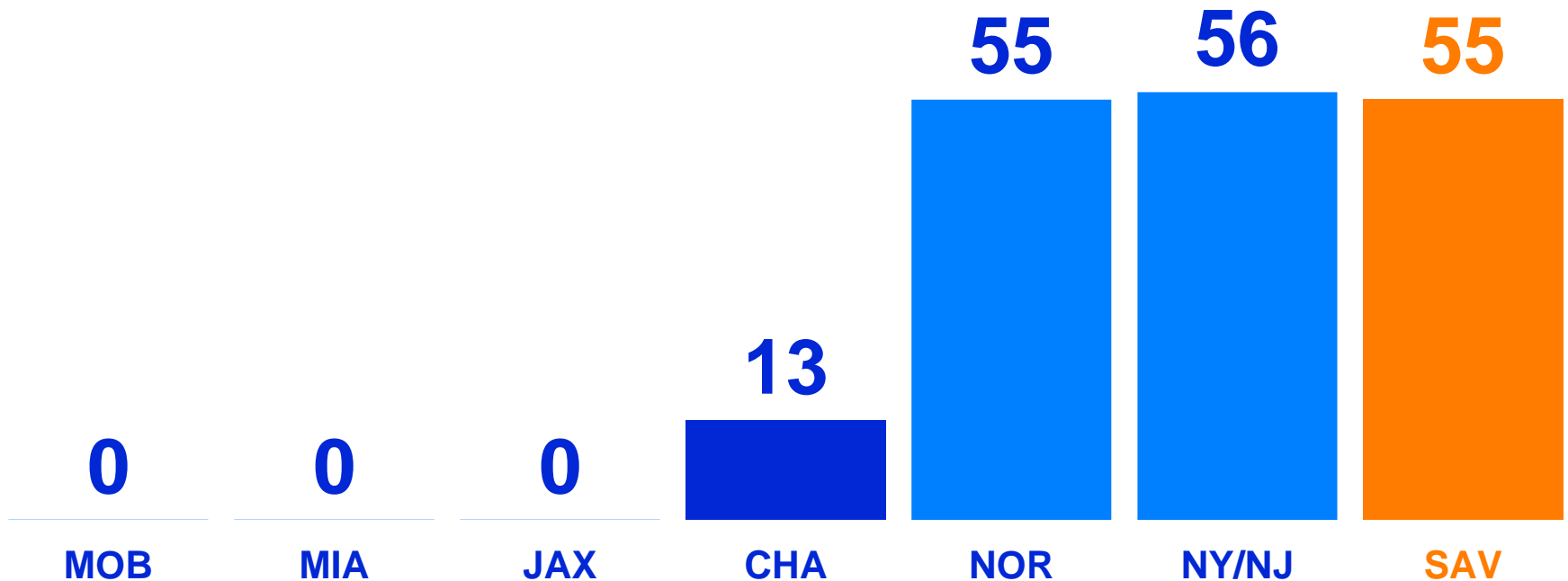


Source: U.S. Department of Commerce Bureau of Economic Analysis; BCG Analysis



# WHAT ARE THE GATEWAY PORTS?

10K+ TEU VESSEL CALLS FROM JULY 1, 2016 – APRIL 30, 2017



# AVERAGE CONTAINER MOVES PER VESSEL UP SHARPLY

Since Panama  
Canal expansion

**+26%**  
Average container  
moves/vessel



# NEOPANAMAX VESSELS: CALLING GPA IN GROWING NUMBERS

SINCE PANAMA CANAL EXPANSION,  
SHEP MORE CRITICAL THAN EVER



13,092-TEU COSCO Development

**60%**  
OF ALL VESSELS  
CALLING ON  
SAVANNAH ARE  
NEOPANAMAX

# CONSOLIDATE ALLIANCES, LARGER VESSELS REQUIRE INFRASTRUCTURE INVESTMENT

**GPA INVESTMENT FOR NEXT 10 YEARS: \$2 B**

Water

On Terminal

Road

Rail





# GARDEN CITY TERMINAL: EQUIPMENT NOW & IN THE FUTURE

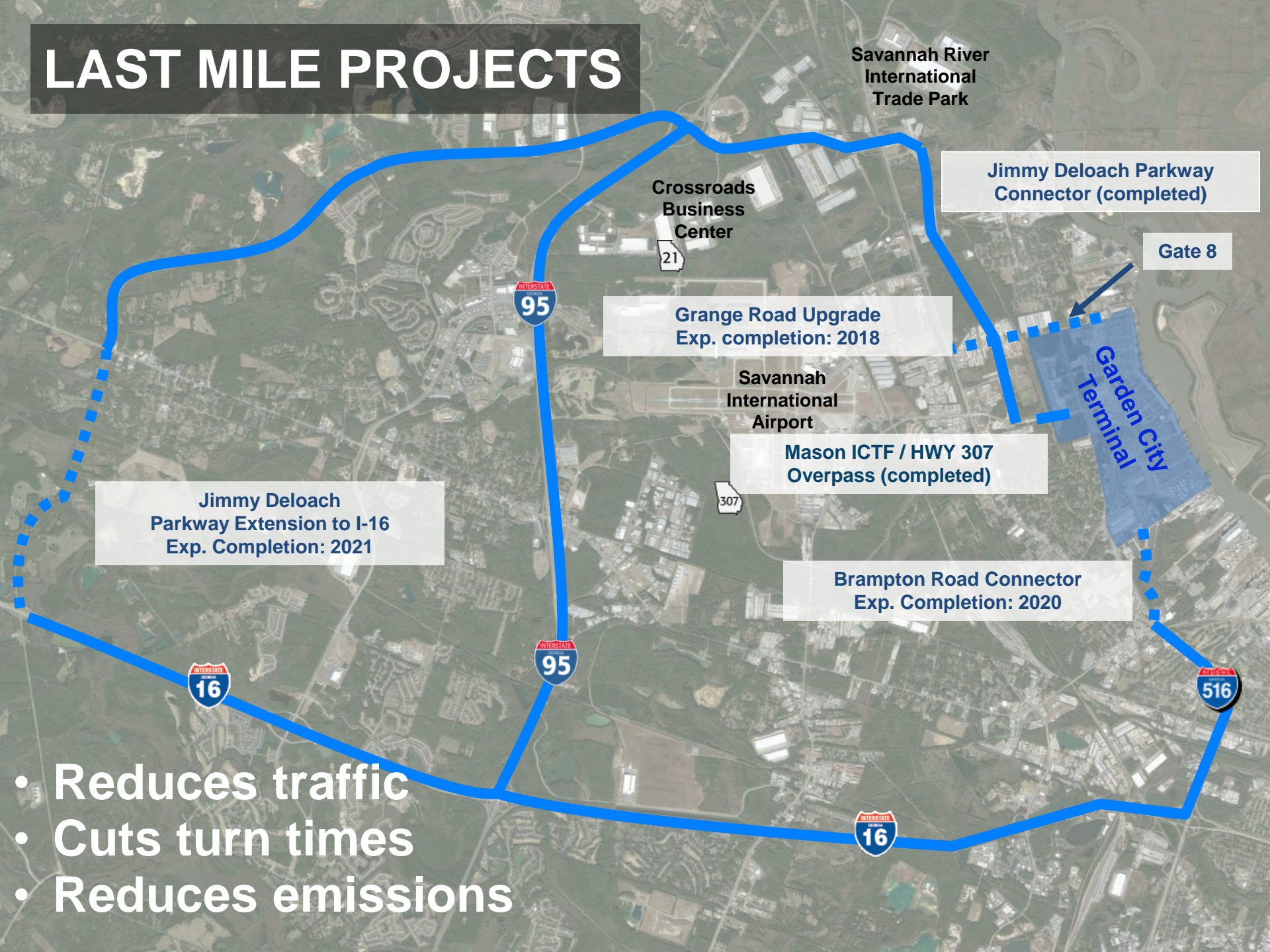
- 4 New Super Post-Panamax Cranes delivered in December 2016
- Additional 4 Super Post-Panamax Cranes on order for delivery in 2017
- 10 RTGs in Sept. 2015, 10 in Apr. 2016, 5 in Jul. 2016, and 5 in Sept. 2016

- Gate 8 & Mason Empty Depot Yard
- Stevedore Technology
- 20 refrigerated container racks and an additional 960 TEUs of capacity for a total of 3,200 reefer slots

Equipment Type	Current	Build Out
Ship to Shore (STS) Cranes	26	34
Rubber Tired Gantries (RTG)	146	169



# LAST MILE PROJECTS



Savannah River  
International  
Trade Park

Jimmy Deloach Parkway  
Connector (completed)

Gate 8

Crossroads  
Business  
Center

Grange Road Upgrade  
Exp. completion: 2018

Savannah  
International  
Airport

Mason ICTF / HWY 307  
Overpass (completed)

Garden City  
Terminal

Jimmy Deloach  
Parkway Extension to I-16  
Exp. Completion: 2021

Brampton Road Connector  
Exp. Completion: 2020

- Reduces traffic
- Cuts turn times
- Reduces emissions



# MEGA RAIL TERMINAL

## LIFT CAPACITY WILL INCREASE BY NEARLY 100%

- \$44M FEDERAL GRANT AS PART OF \$140M PROJECT
- GPA VIEWED AS A “PORT OF NATIONAL SIGNIFICANCE”
- GPA WILL HAVE LARGEST RAIL FACILITY ON EAST COAST





# SAVANNAH HARBOR EXPANSION PROJECT

✓ Feasibility Studies

✓ Project Design

✓ **Construction**

□ Completion





# SHEP UPDATE

ENTRANCE CHANNEL 49 FT (14.9M)  
INNER HARBOR 47FT (14.3M) MLW

WATER  
SUPPLY  
IMPROVEMENT  
79% COMPLETE

OXYGEN  
INJECTION  
31% COMPLETE

OVERALL  
PROJECT  
20%  
COMPLETE

DIKE RAISING  
70% COMPLETE

CSS GEORGIA  
80% COMPLETE

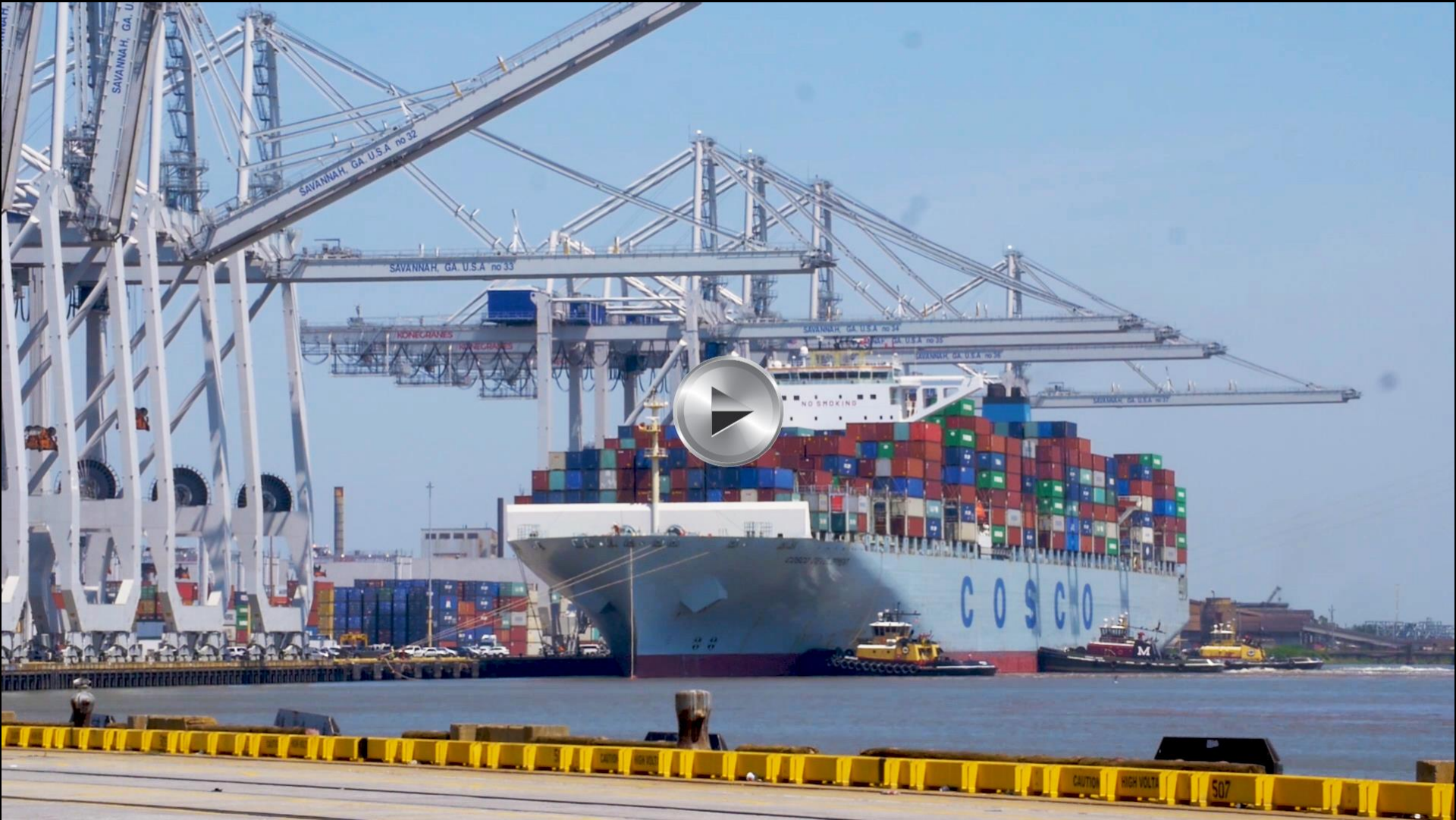
CHANNEL  
DEEPENING

ENTRANCE  
CHANNEL  
59% COMPLETE

Georgia Ports  
Authority  
GARDEN CITY TERMINAL

GEORGIA

Atlantic Ocean





13,092-TEU *COSCO Development*, the largest  
containership to ever call on the U.S. East  
Coast, arrived at Garden City Terminal on May  
11, 2017 and handled over 5,500 containers



# THANK YOU