



SOUTHEAST ASSOCIATION OF RAIL SHIPPERS

Fall 2022 Southeast Port Panel - September 14, 2022

DEEP WATER & INLAND TERMINAL OPERATIONS

Appalachian
Regional Port



CHATSWORTH



ATLANTA



Northeast Georgia
Inland Port
(In Progress)

West Central
Georgia Inland Port
(Future)



SAVANNAH

Garden City Terminal
Ocean Terminal



BRUNSWICK

Colonel's Island Terminal
Mayor's Point
East River



BAINBRIDGE





GARDEN CITY TERMINAL

Berth 9,693 ft (2,955 m) • Area 1,505 acres (609.1 ha)
STS Container Cranes 30 • Rubber-Tired Gantries 190



SAVANNAH #3 and Fastest Growing

PORT GATEWAY		FY2007 TEUs	FY2022 TEUs	CAGR '22 vs. '07
1.	LA/Long Beach	15,924,913	20,301,954	+ 1.6%
2.	NY/New Jersey	5,280,658	9,485,493	+ 4.0%
3.	Savannah	2,338,281	5,763,711	+ 6.2%
4.	Virginia	2,055,864	3,695,156	+ 4.0%
5.	Houston	1,623,443	3,742,538	+ 5.7%
TOP FIVE TOTAL		27,223,159	42,988,852	+ 3.1%
6.	Seattle/Tacoma	3,120,938	2,913,717	- 0.5%
7.	Charleston	1,883,651	2,853,046	+ 2.8%
8.	Oakland	2,358,510	2,377,259	+ 0.1%
9.	Miami/Pt Everglades	1,845,093	2,334,305	+ 1.6%
10.	Maryland	617,940	945,295	+ 2.9%
TOP TEN TOTAL		37,049,291	54,412,474	+ 2.6%



INFRASTRUCTURE RECORD INVESTMENTS FOR CAPACITY BUILDING

Past 10 years: \$1.2B

Next 12 years: \$4.5B

PROJECTS

Garden City Terminal Peak Capacity Project

+1.2M TEUs capacity

Completed: July 2022

Garden City Terminal Berth 1 Realignment

+1.4M TEUs berth capacity

Expected Completion: June 2023

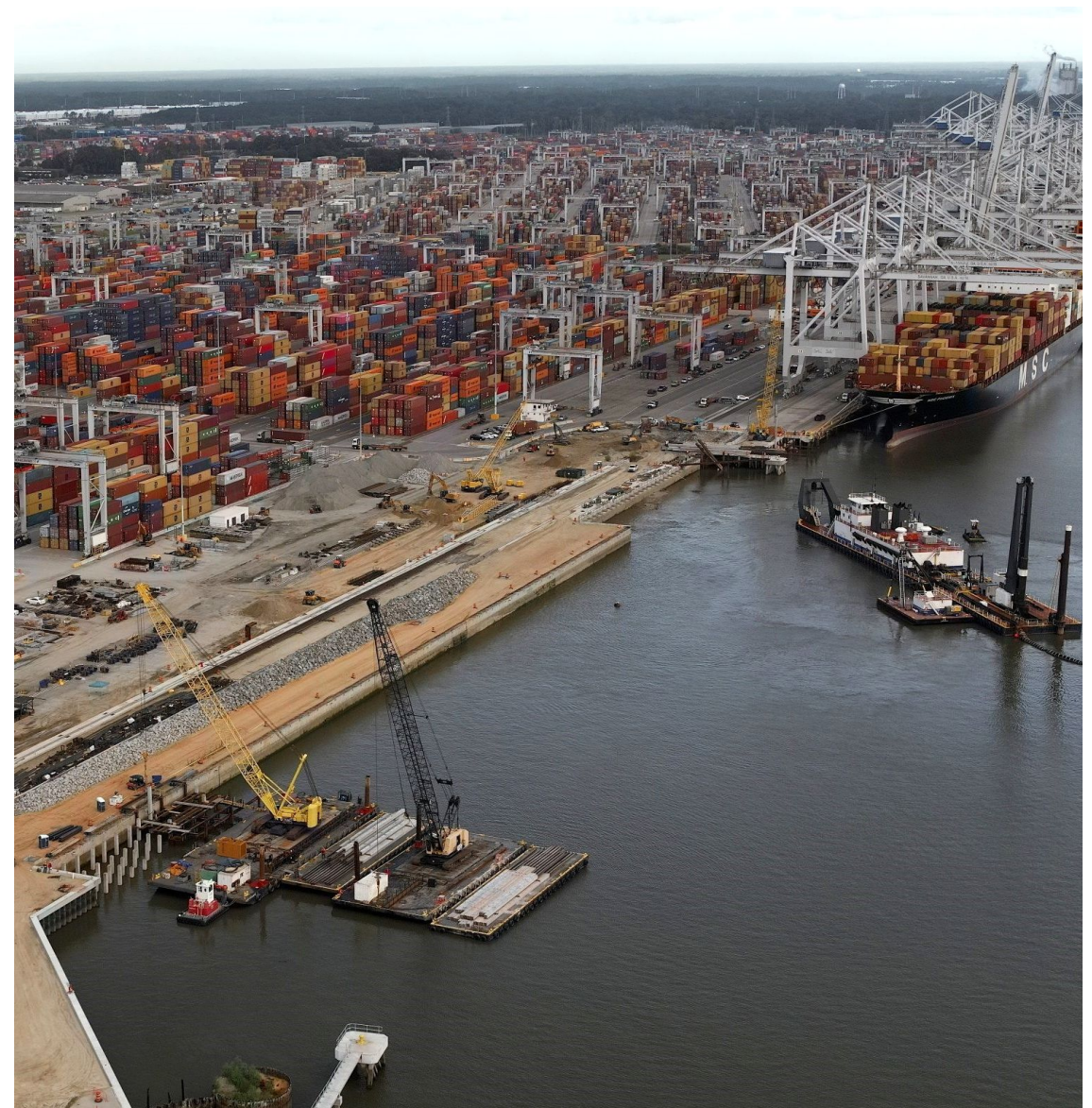
Garden City Terminal West Expansion Phase II

+1M TEUs capacity

Expected Completion: July 2023 & March 2024

Eight New Ship-to-Shore Cranes

Expected Completion: December 2023



GPA TRENDING IN THE RIGHT DIRECTION

- Vessels at anchor peaked in July at 45 and have come down to 38 vessels as of 9/8 and declining
- Imports have crested and are declining as retailers cancel and curtail orders
- Starting to see signs of weakening with ocean carriers noting space on ships out of Asia and spot rates decreasing
- GPA investing \$1.3 billion currently on berth and yard capacity additions and \$4.5 billion over the next 12 years, including the first phase of a new container terminal to come online in 2025
- Container inventory is returning to normal volumes and the yard remains fluid
- One container berth has been down for renovation, a \$250 million project that adds 1.4 million TEUs of berth capacity to be complete in June 2023
- Normalized volumes are expected by late October/early November

THANK YOU

