



WE DO MORE



2016

Brunswick State of the Port
Georgia Ports Authority

2016 BRUNSWICK STATE OF THE PORT OVERVIEW



- Economic Engine
- Our Terminals
- Expansion
- Industry Dynamics
- Next Steps

ECONOMIC ENGINE



STATEWIDE IMPACT



\$84 BILLION
IN SALES

\$20 BILLION
IN INCOME

\$33 BILLION
IN STATE GDP

370,000 JOBS

#1 FOR BUSINESS!



3 YEARS IN A ROW*

FY2016 RESULTS

STATE OF GEORGIA

MORE THAN

25,300

NEW JOBS

\$4.4B

IN PRIVATE INVESTMENT



BRUNSWICK AREA ECONOMIC IMPACT



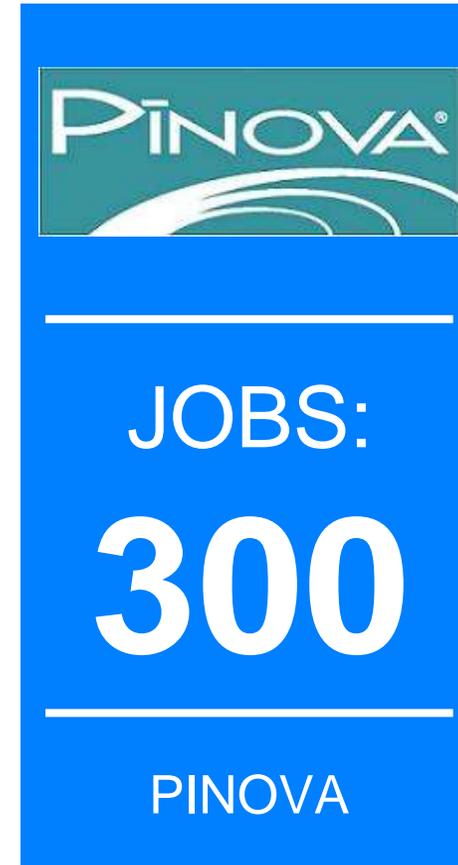
9,000 JOBS

OPERATIONAL
MECHANICAL
TRANSPORTATION
PRODUCTION
ENGINEERING

Source: Terry College of Business, University of Georgia (FY2014)

BRUNSWICK AREA

TOP PORT-RELATED SHIPPERS



PORT OF BRUNSWICK

TOP ON-TERMINAL EMPLOYERS



JOBS:

360

INTERNATIONAL
AUTO
PROCESSING



JOBS:

70

WWL VEHICLE
SERVICES
AMERICAS



JOBS:

75

LOGISTEC
CORPORATION



JOBS:

65

BMW NORTH
AMERICA



Mercedes-Benz

JOBS:

65

MERCEDES-
BENZ USA

OVER 20 BRANDS: NAMES YOU KNOW



OUR TERMINALS



5 DEEPWATER TERMINALS

Helping to Generate 370,000 Jobs in Georgia

Ocean Terminal



Colonel's Island



Mayor's Point



East River



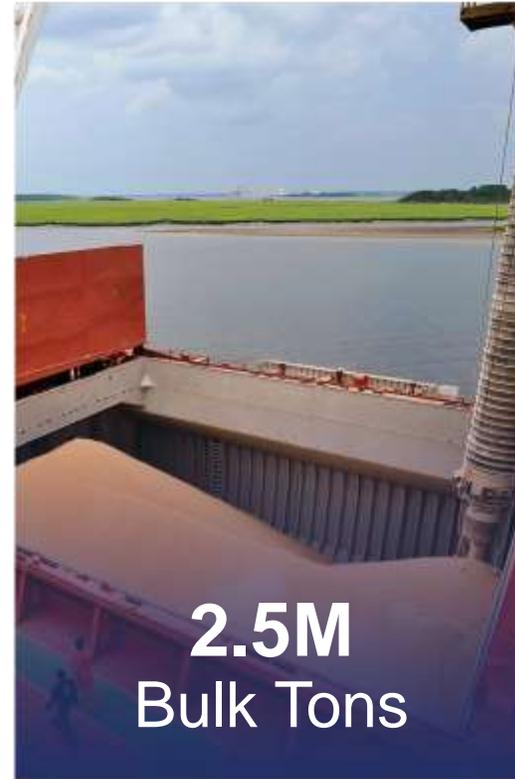
Garden City



FY2016 TOTAL VOLUMES

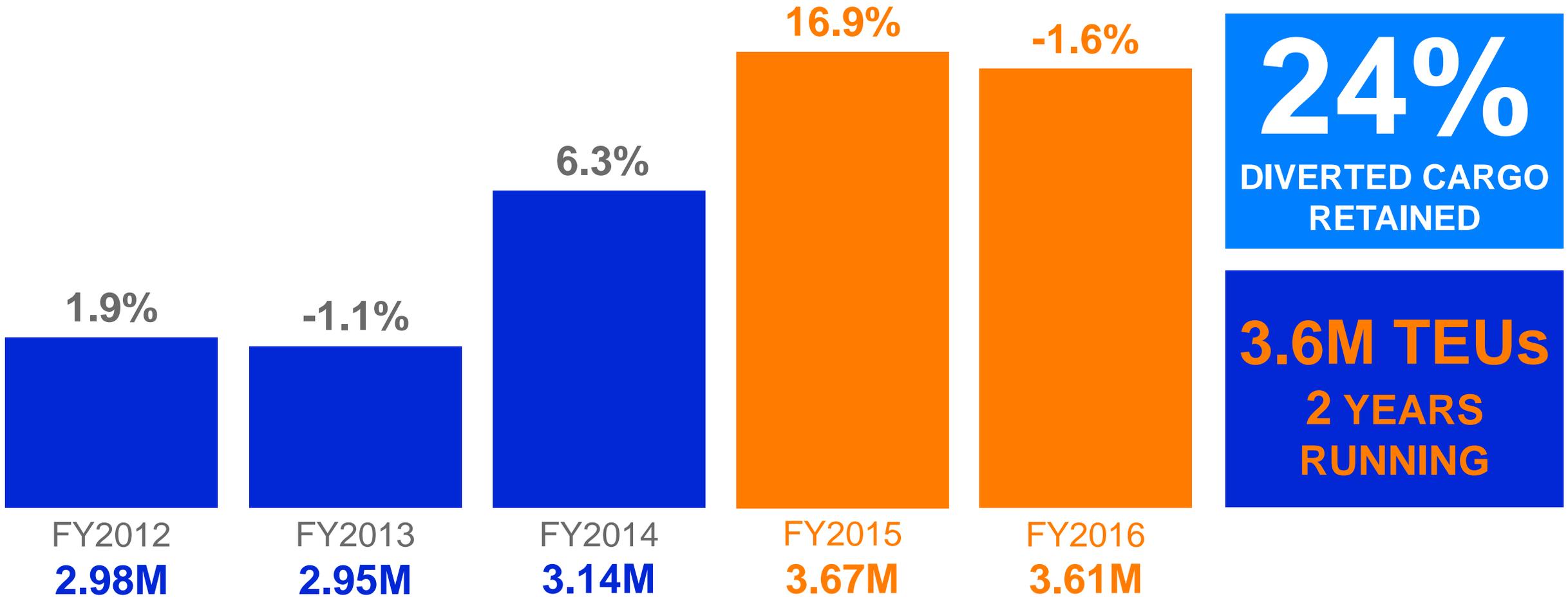
BRUNSWICK AND SAVANNAH

A Diversified Portfolio:
31M tons



GARDEN CITY TERMINAL

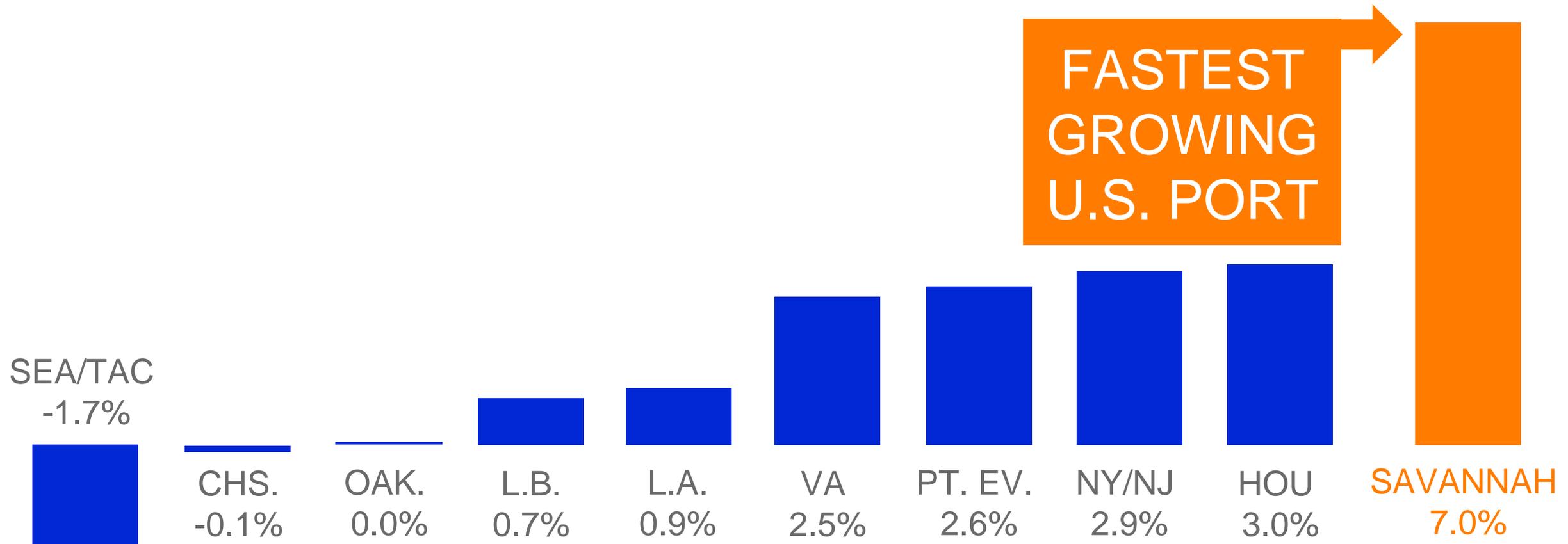
5-YEAR TEU ANNUAL GROWTH RATE



Source: GPA internal loads & empties

TOP 10 PORTS: 10-YEAR GROWTH RATE

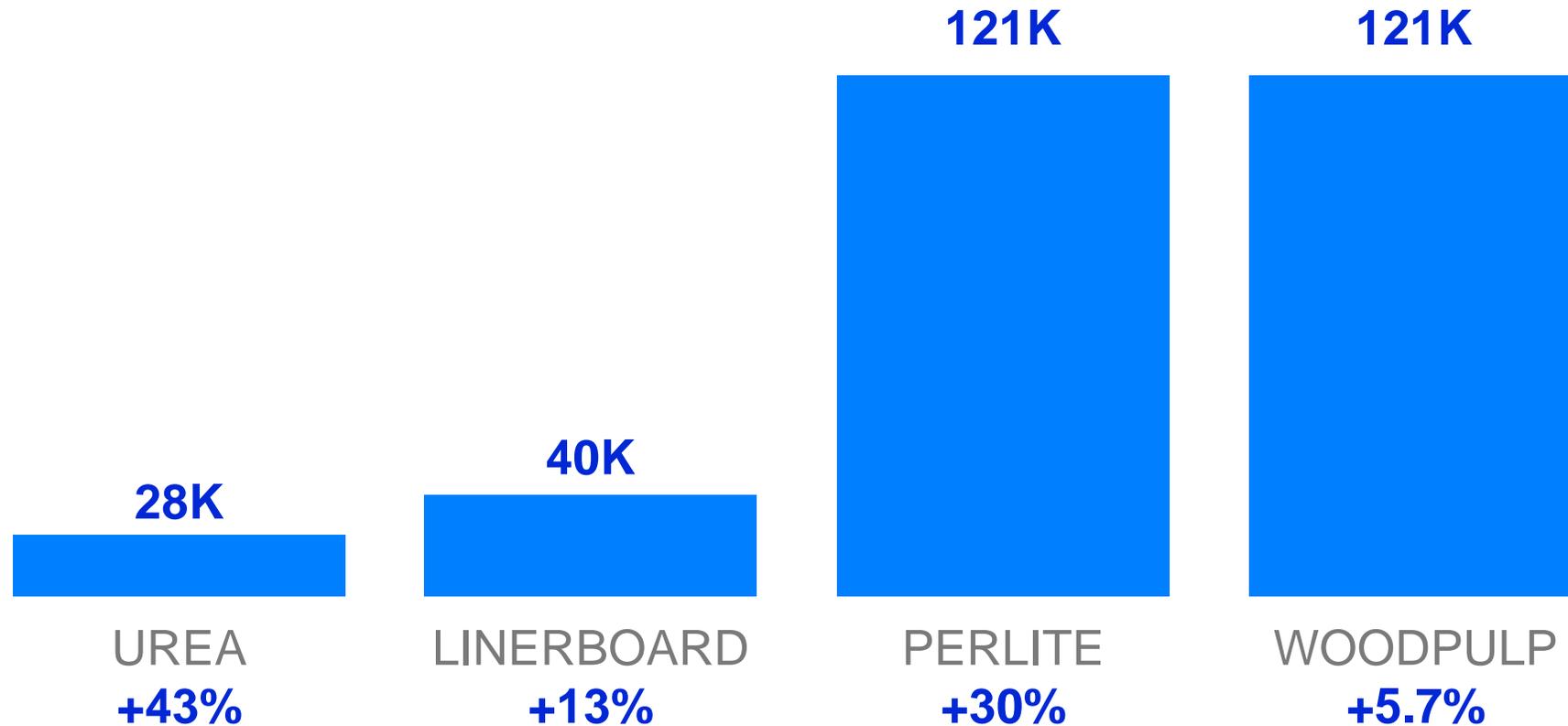
CY2005-2015



Source: AAPA; CAGR. Throughput excluding domestic

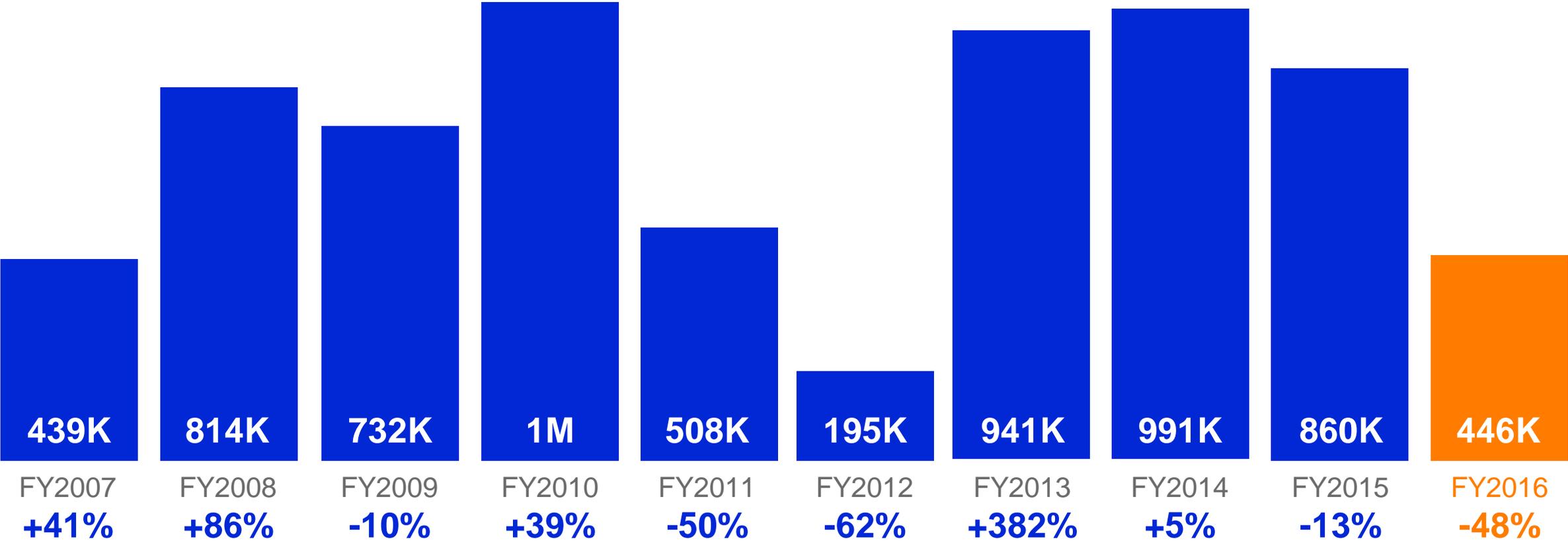
BRUNSWICK: KEY COMMODITIES

FY2016: BULK AND BREAKBULK TONNAGE



COLONEL'S ISLAND: 10-YEAR BULK TONNAGE

SLOW YEAR = OPPORTUNITY FOR INVESTMENT

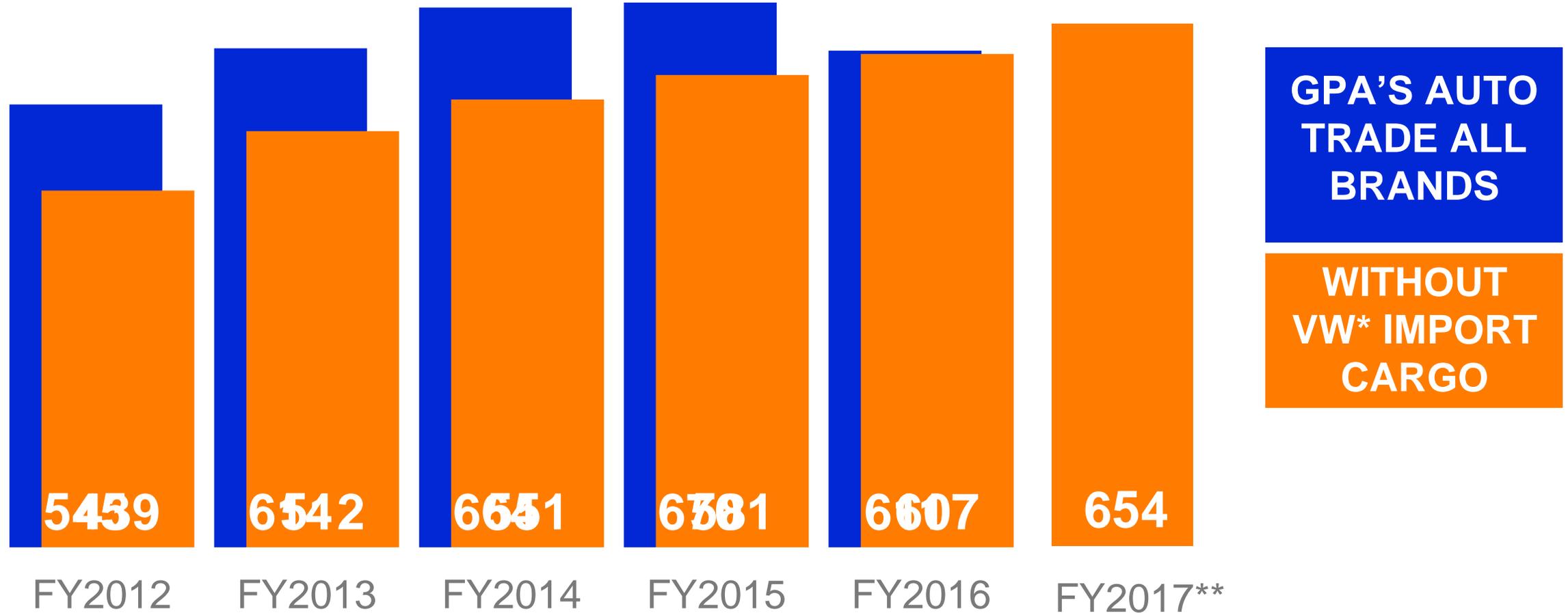


Source: In tonnage; GPA Trade Development Marketing

GPA TOTAL RO/RO GROWTH

COLONEL'S ISLAND

UNIT=1,000

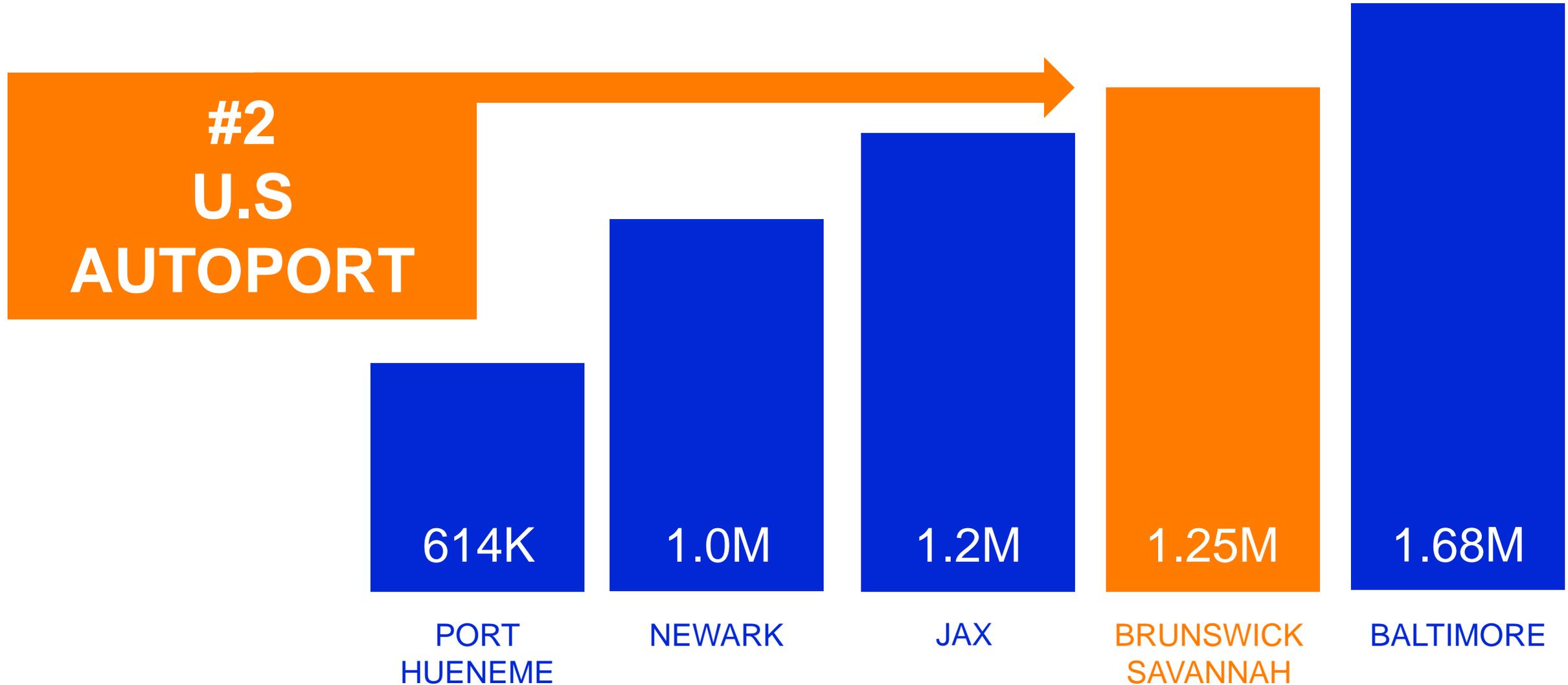


Source: GPA: units, including machinery

* VW BRANDS - VW/AUDI/PORSCHE/BENTLEY

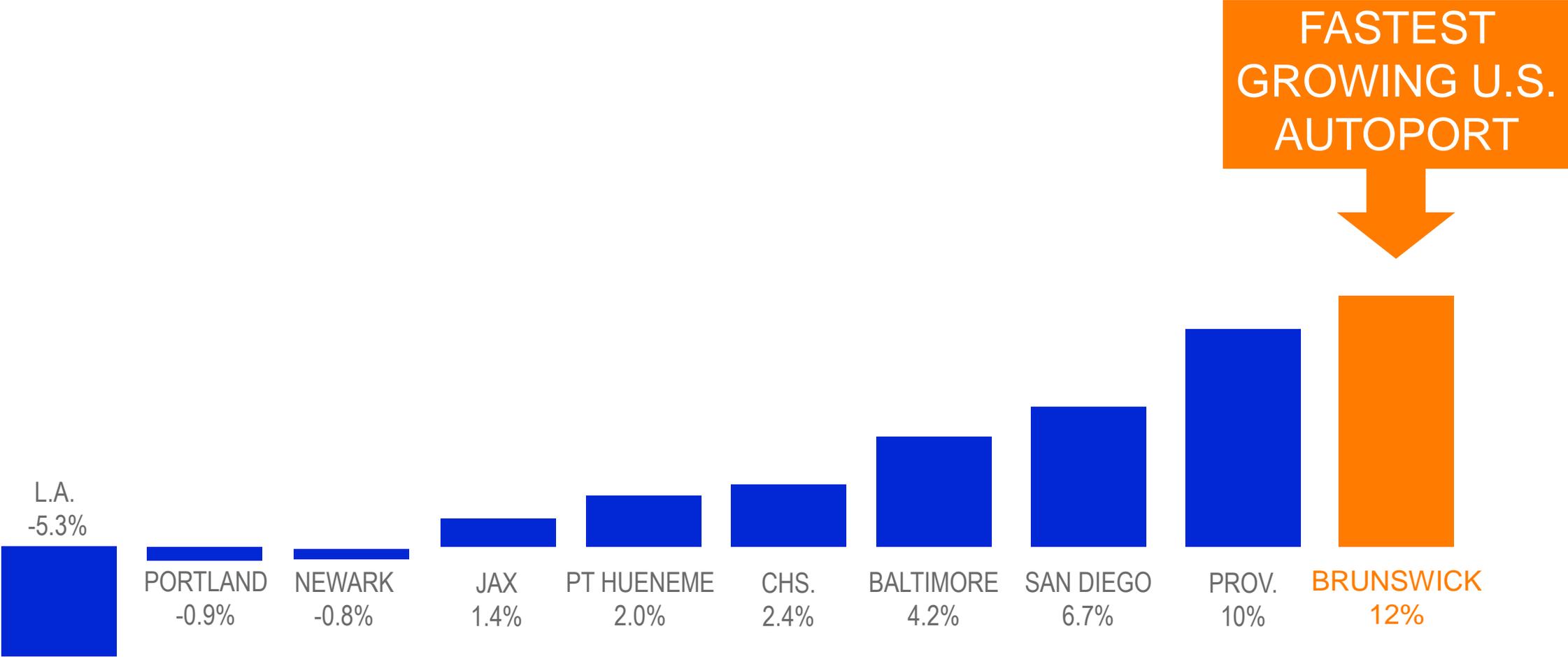
**FY2017 – Projected Ro/Ro Growth

TOP 5 AUTOPORTS: FY2016 RO/RO TONNAGE



Source: U.S. Census; FY16 tonnage

TOP AUTOPORTS: 10-YEAR GROWTH RATE: FY2006-2016



Source: U.S. Census; CAGR, import and export tonnage

EXPANSION

- SOUTHSIDE COLONEL'S ISLAND
- RAIL EXPANSION
- LOGISTEC EXPANSION
- ROADWAY IMPROVEMENTS





“STEERING A NEW COURSE”

“Auto processing plant is underway at Colonel’s Island”

AnchorAge Magazine, January 1986

216 ACRES

CONGRATULATIONS IAP FOR 30 YEARS OF SERVING BRUNSWICK AND THE NATION!

2016

ROOM TO GROW

504 ACRES

TODAY

+

550 ACRES

TOMORROW

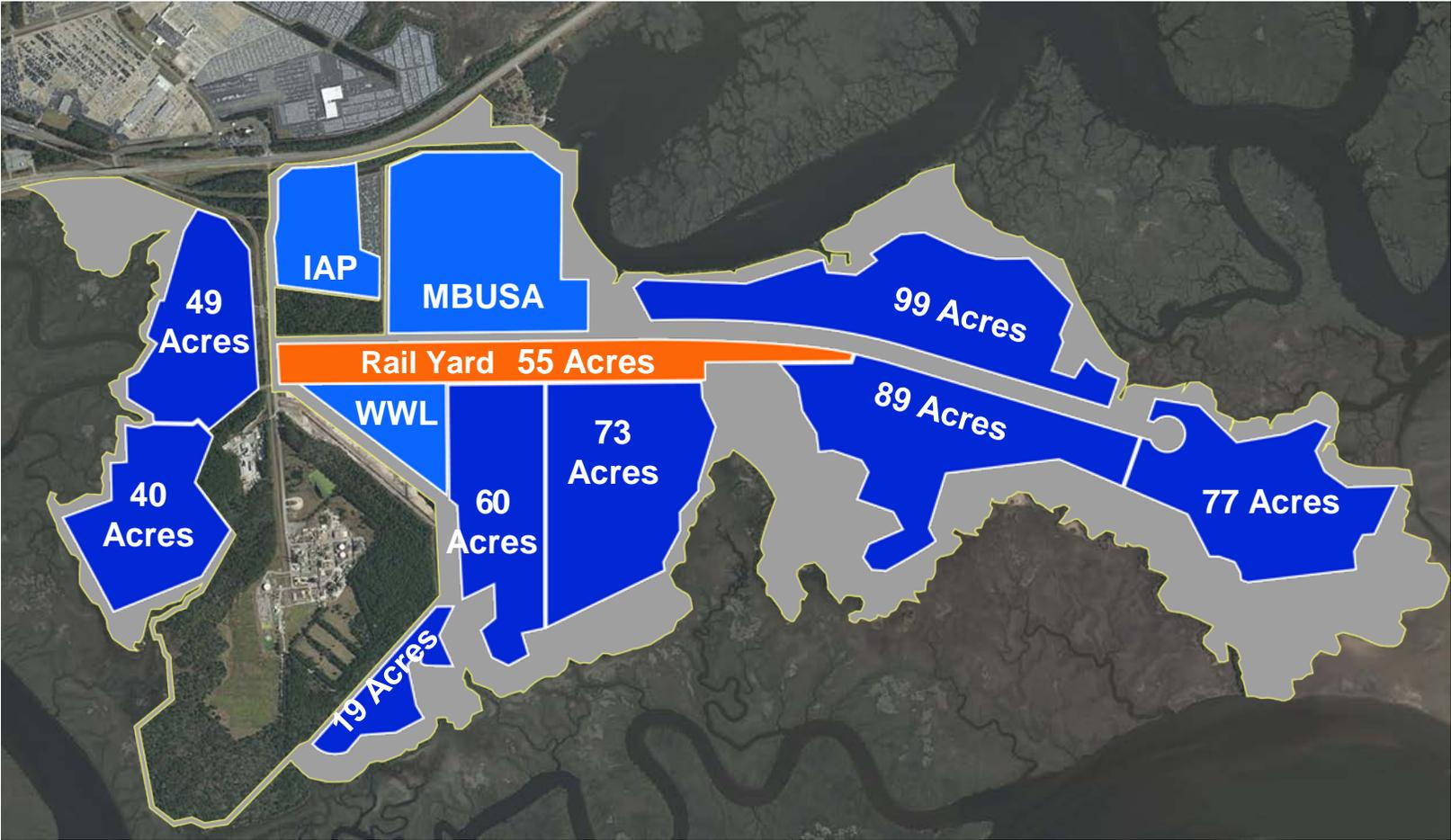
**TO BE
DEVELOPED**

=

**AUTOS ON
TERMINAL:**

157,000

SOUTHSIDE: POISED FOR EXPANSION



- SOUTHSIDE
- EXISTING AUTO PROCESSORS
- RAIL YARD
- TOTAL VEHICLE PROCESSING ACRES **540+**

CALL TO ACTION!

KEEP RO/RO CAPACITY 20% AHEAD OF DEMAND

100 ACRES TO BE ADDED FOR AUTO PROCESSING

- 20 ACRES ADDED JUNE 2016
- 30 ACRES BY JAN 2017
- 50 ACRES BY MAY 2017

28%

INCREASE
IN PARKING
CAPACITY



RAIL EXPANSION

ANGUILLA JUNCTION

**8,740 FEET RAIL TRACK
ADDED OCT 2015**

**TOTAL RAIL TRACK AVAILABLE:
40,000 FEET**

UNIT TRAIN CAPABLE





GRAND RE-OPENING:
TODAY

LOGISTEC IMPROVEMENTS



+101%

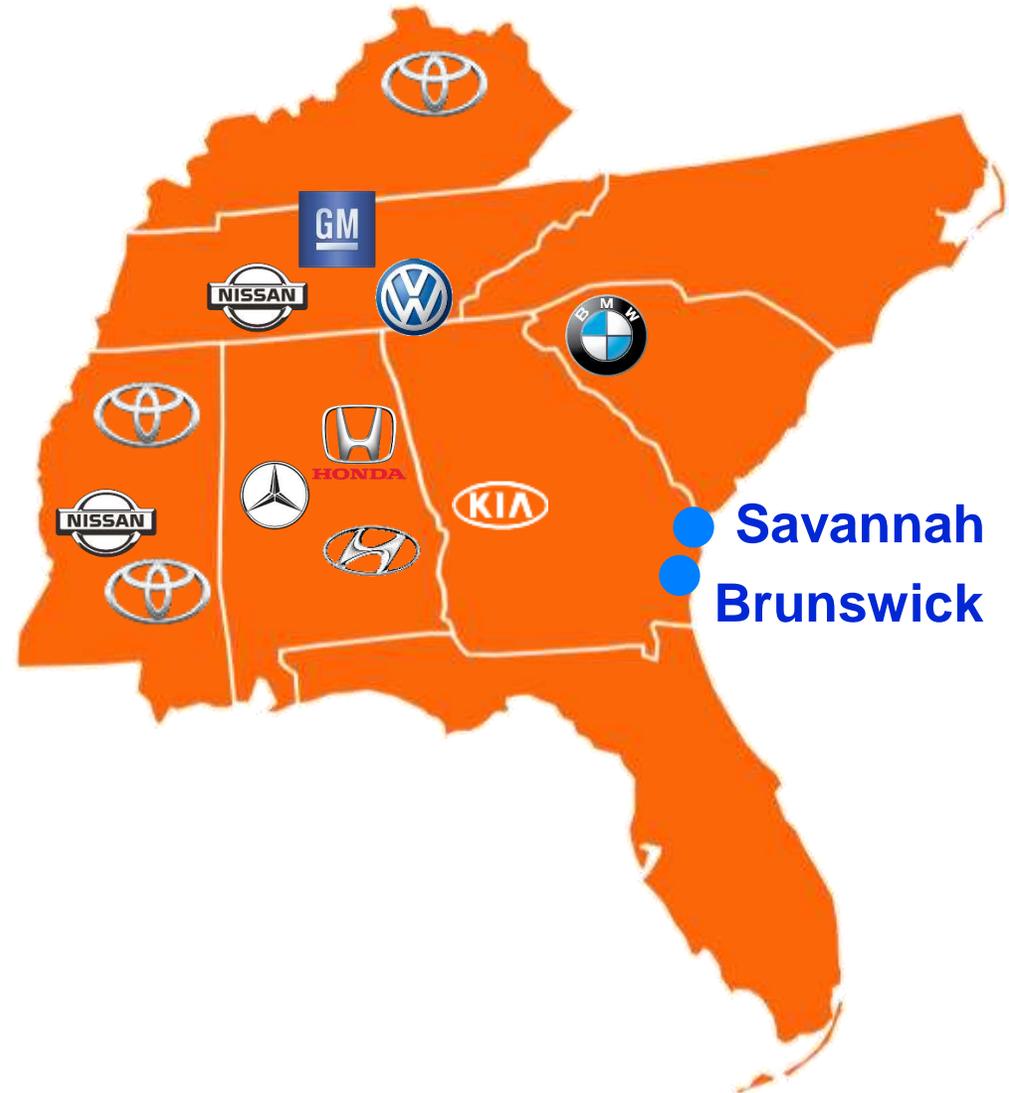
**INCREASE
IN WAREHOUSE
SPACE**

INDUSTRY DYNAMICS



U.S. SOUTHEAST: HUB FOR AUTO MANUFACTURING

- AVAILABLE LAND/
INCENTIVE PACKAGES
- LOWER COSTS
- WORKFORCE DEVELOPMENT
- COST-EFFECTIVE INTERMODAL
TRANSPORTATION

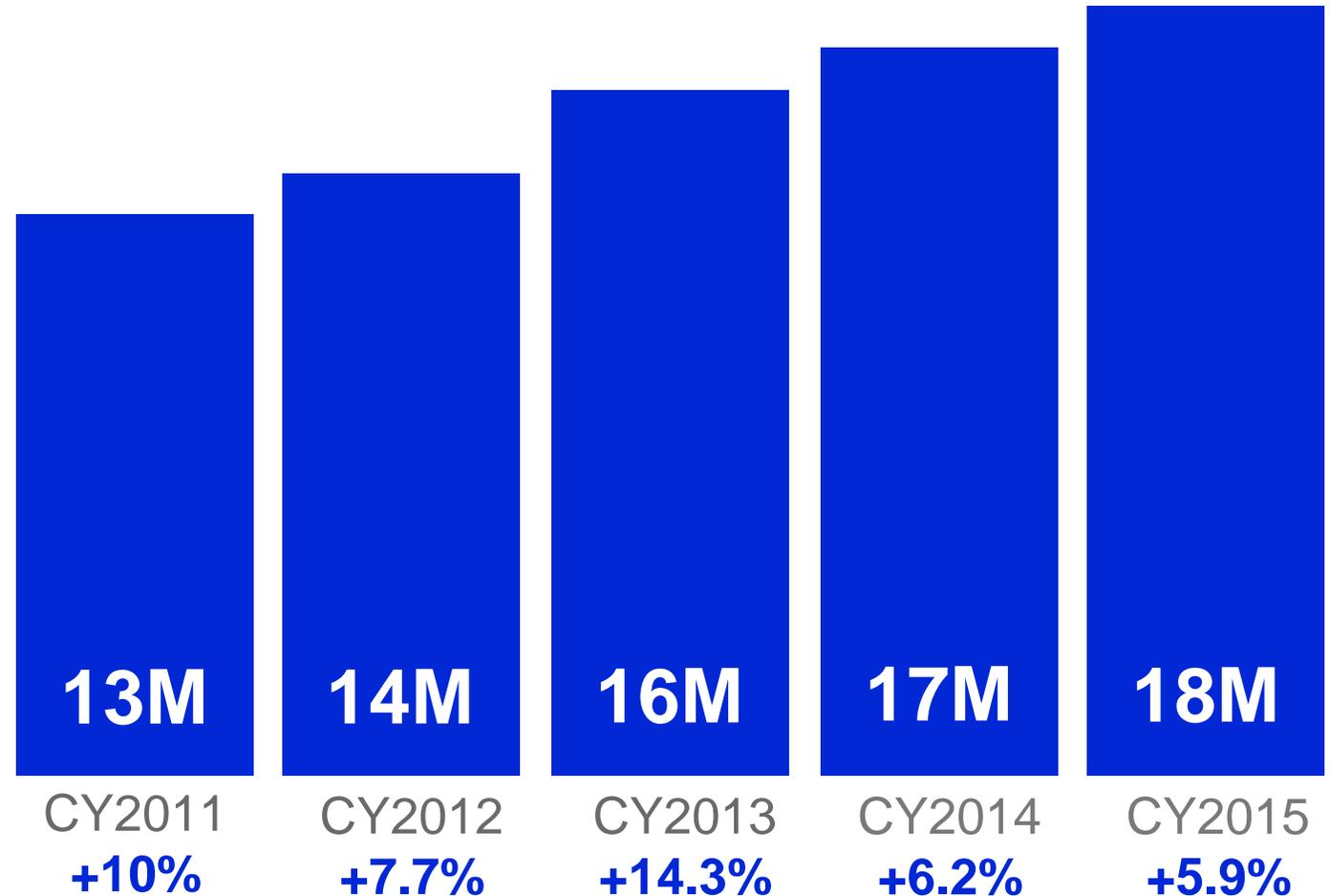


U.S. CAR AND TRUCK SALES CY2011–2015

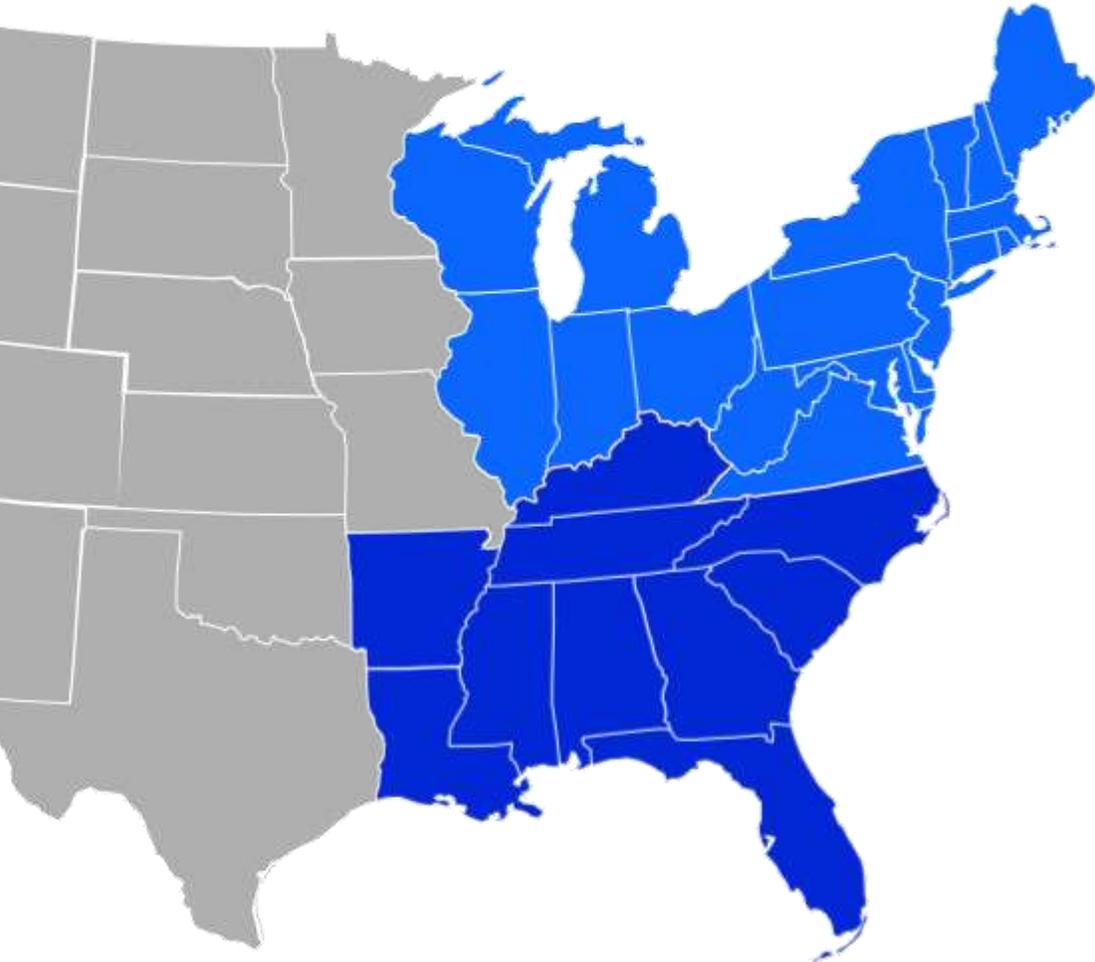
**2010-2015:
37% INCREASE
IN AUTO SALES**

**DEVELOPING TREND:
SHORT-SEA SHIPPING**

**CAR & TRUCK SALES
PROJECTED TO BE FLAT
IN 2016 AND 2017**



GROWING SOUTHEAST POPULATION = GROWING DEMAND FOR NEW AUTOS



NORTHEAST
POPULATION
121M

10-YEAR GROWTH
+3% (3.7M)

SOUTHEAST
POPULATION
72M

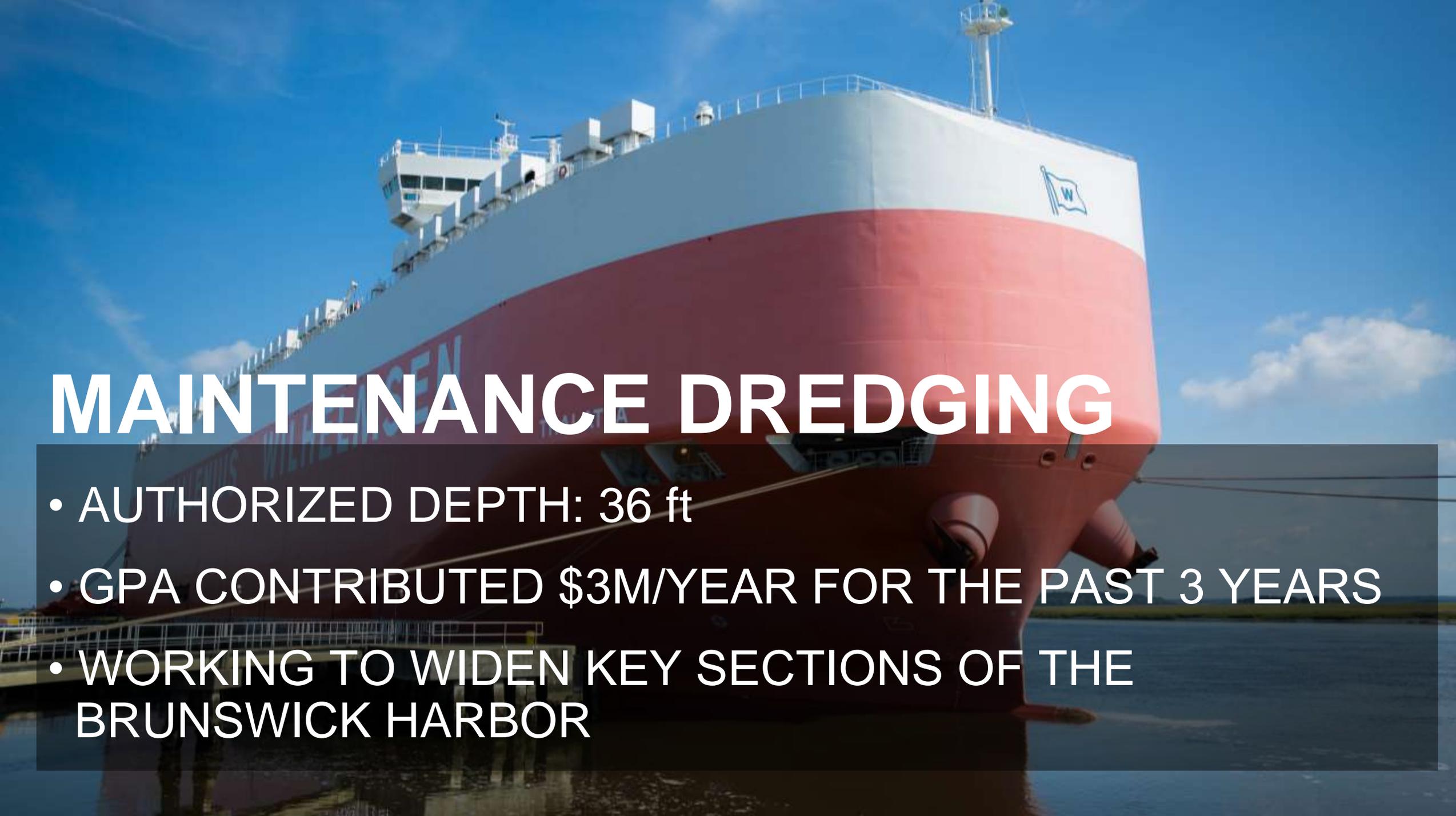
10-YEAR GROWTH
+11% (7.2M)

**SOUTHEAST POPULATION:
FASTEST GROWING
U.S. REGION**

NEXT STEPS

- MAINTAIN CHANNEL AT AUTHORIZED DEPTH
- INCREASE RAIL CAPACITY
- DEVELOP SOUTHSIDE ACREAGE





MAINTENANCE DREDGING

- AUTHORIZED DEPTH: 36 ft
- GPA CONTRIBUTED \$3M/YEAR FOR THE PAST 3 YEARS
- WORKING TO WIDEN KEY SECTIONS OF THE BRUNSWICK HARBOR

GROWING COLONEL'S ISLAND AUTO CAPACITY

- CURRENT VOLUME: 611,000 UNITS
- FUTURE CAPACITY: 1.4M UNITS

GOAL:

TO BECOME AMERICA'S #1 RO/RO PORT

A BRIGHT FUTURE AHEAD



TEAMWORK



TEAM GPA BRUNSWICK



ILA LEADERSHIP

ILA 1423
ILA 1863





PILOTS

TUGS



OCEAN CARRIERS





AUTO PROCESSORS

AUTOMOTIVE MANUFACTURERS





RAIL

CSX & NORFOLK SOUTHERN



RAIL G&W

MOTOR CARRIERS



A group of ten U.S. Coast Guard crew members are posed on the deck of a ship. They are wearing dark blue uniforms and high-visibility safety vests in orange and yellow-green. Most are wearing white hard hats, while one in the front row wears a grey bucket hat. One crew member in the back row is holding a white tool with a black handle across his shoulders. The background shows the dark hull of the ship with yellow diagonal stripes. The text "U.S. COAST GUARD" is overlaid in white, bold, sans-serif font, underlined.

U.S. COAST GUARD



U.S. CUSTOMS AND BORDER PROTECTION



GEORGIA STEVEDORE ASSOCIATION

U.S. ARMY CORPS OF ENGINEERS





GOVERNOR DEAL,
GEORGIA
LEGISLATURE,
AND GPA BOARD

THANK YOU!
