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An aerial photograph of a busy port. A large container ship is docked at a pier, with its deck covered in stacks of colorful shipping containers (red, green, blue, and white). Several large gantry cranes are positioned along the pier, and several semi-trailers are parked nearby. The water is visible in the background.

PORT of TAMPA

Transportation Research Forum
March 2012

Port of Tampa Overview

- Largest, most diversified port in Florida
- \$8B in economic impact/supports nearly 100,000 jobs
- Largest economic engine in West Florida
- Solid financial performance, even during economic downturn
- Encompasses 5,000 acres
- Approx. 40M tons cargo/year—Nearly 40% of FL's waterborne trade
- Energy products gateway of West/Central Florida-critical to economy
- Premier U.S. fertilizer port
- Large/diverse bulk and break bulk business
- Shipyard/ship repair center
- Top ten cruise homeport—Carnival, RCI, HAL, NCL
- Expanding container/distribution center gateway



Petroleum



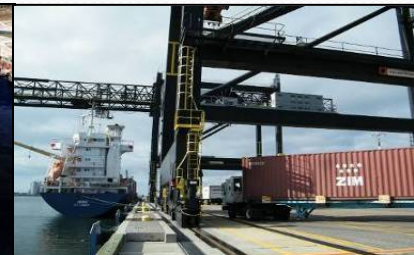
Phosphate



Building Materials



Cruise



Containers

Drivers of Florida Trade

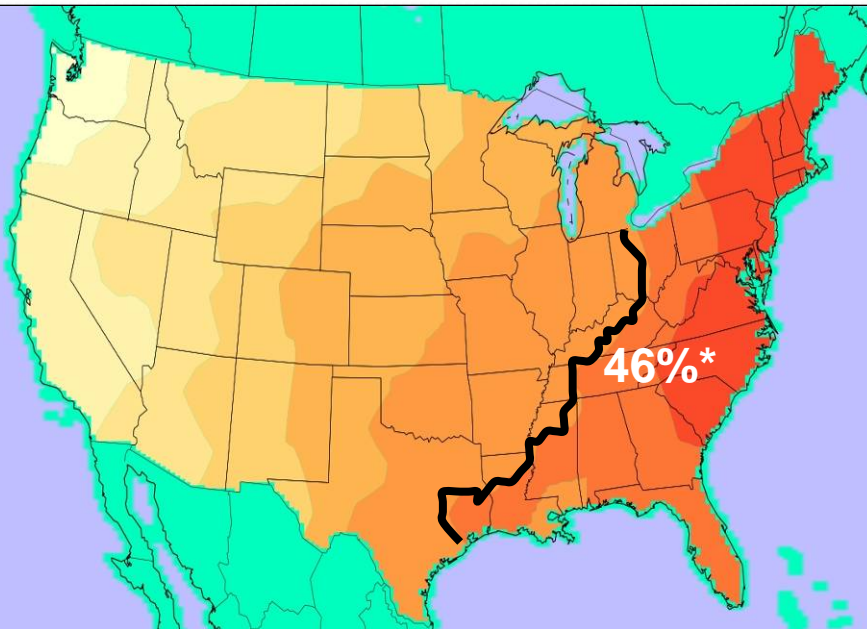
- Population Growth—Distribution & Logistics
- Florida to eclipse NY as 3rd largest state in next 2 years
- North-South Trades—Latin America (*esp. Brazil-Mexico-Colombia*)
- East-West Trades—Asia (*China via Panama Canal; India via Suez*)
- Panama Canal Expansion
- Cuba
- Free Trade Agreements

Assumptions

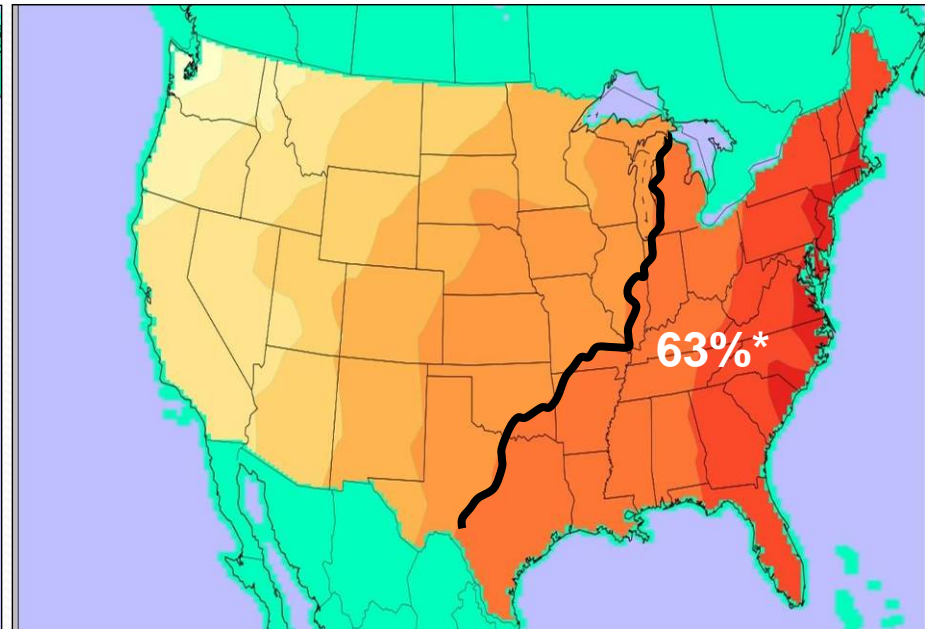
- \$400/MT bunker
- Canal tolls based on 2011 proposal
- Current ship charter rates
- Inland move by rail

**For a typical Asia-USEC voyage,
shifting to an 8000 TEU vessel expands the
market reach of the USEC ports**

4000 TEU ship



8000 TEU ship



- Left of the black line = West Coast has the cost advantage
- Right of the black line = East Coast has the cost advantage

***Share of the US population**

Transshipment Ports





THE GULF COAST ADVANTAGE

HOUSTON • MOBILE • TAMPA

OFFERING THE MOST
COMPETITIVE ACCESS
TO A HUGE MARKET

- 3 Distinct Markets,
1/3 of US Population
- Panama Canal Ready
- Deepwater Port Access
- Low-cost Efficient Alternative
- Expanding distribution Centers
- Fastest U.S. Population Growth

www.gcadvantage.com

Tampa Gateway Rail Project

- *Joint TPA-CSX multi-modal initiative*
- *Florida's only on-dock unit train terminal*
- *Ethanol, containers, other cargo*
- *Scheduled for completion in 2012*



I-4 Connector Project

- *Elevated express highway access between Port and Interstate System, scheduled for completion summer 2013*



Dedicated Truck Lane

Thank You!



TAMPA PORT AUTHORITY