



**PORT OF OAKLAND
SEAPORT**

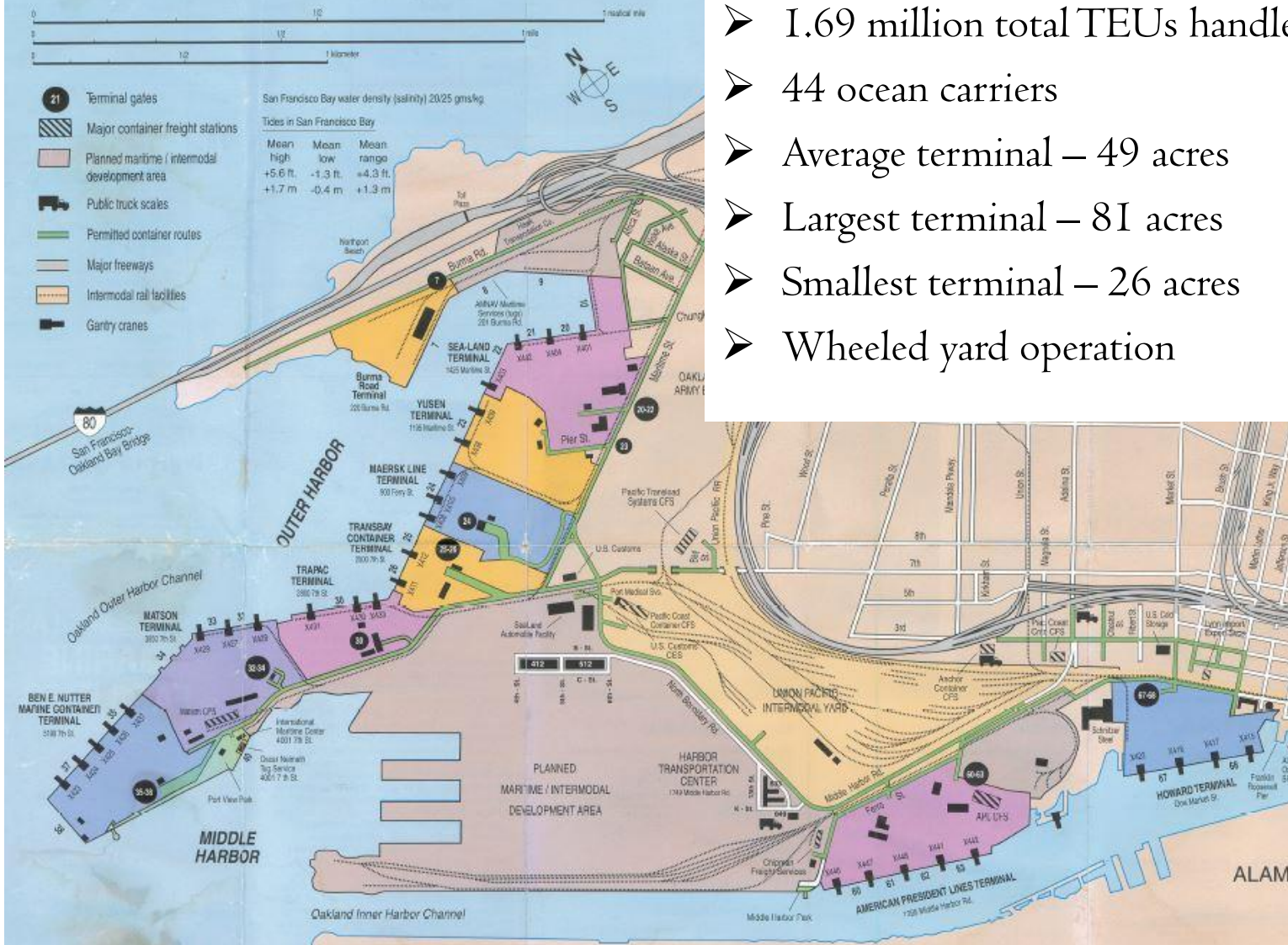


Alliance of the Ports of Canada, the Caribbean, Latin America and the United States

February 3, 2017

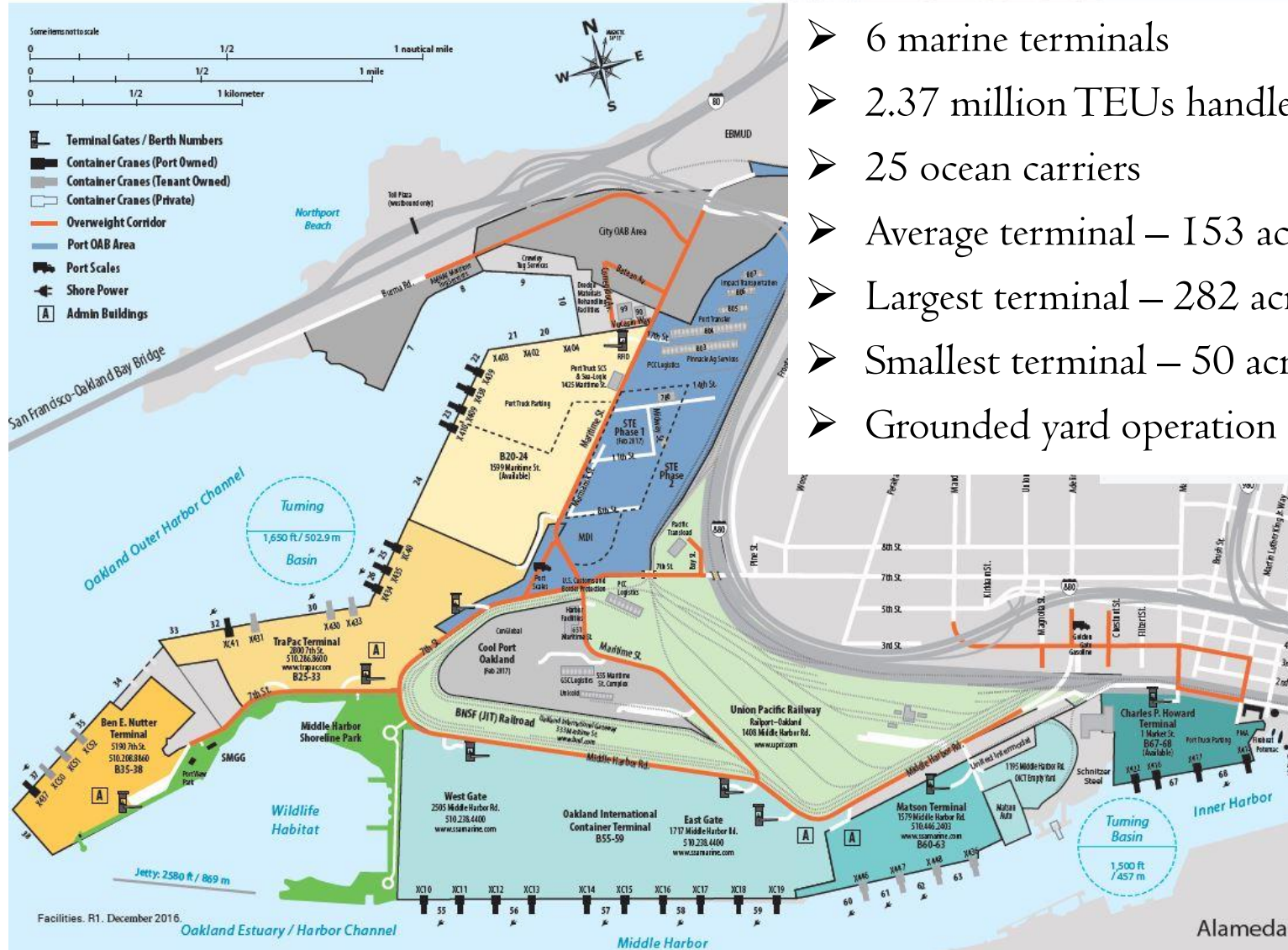
Port of Oakland – 1999

PORT OF OAKLAND MARINE FACILITIES



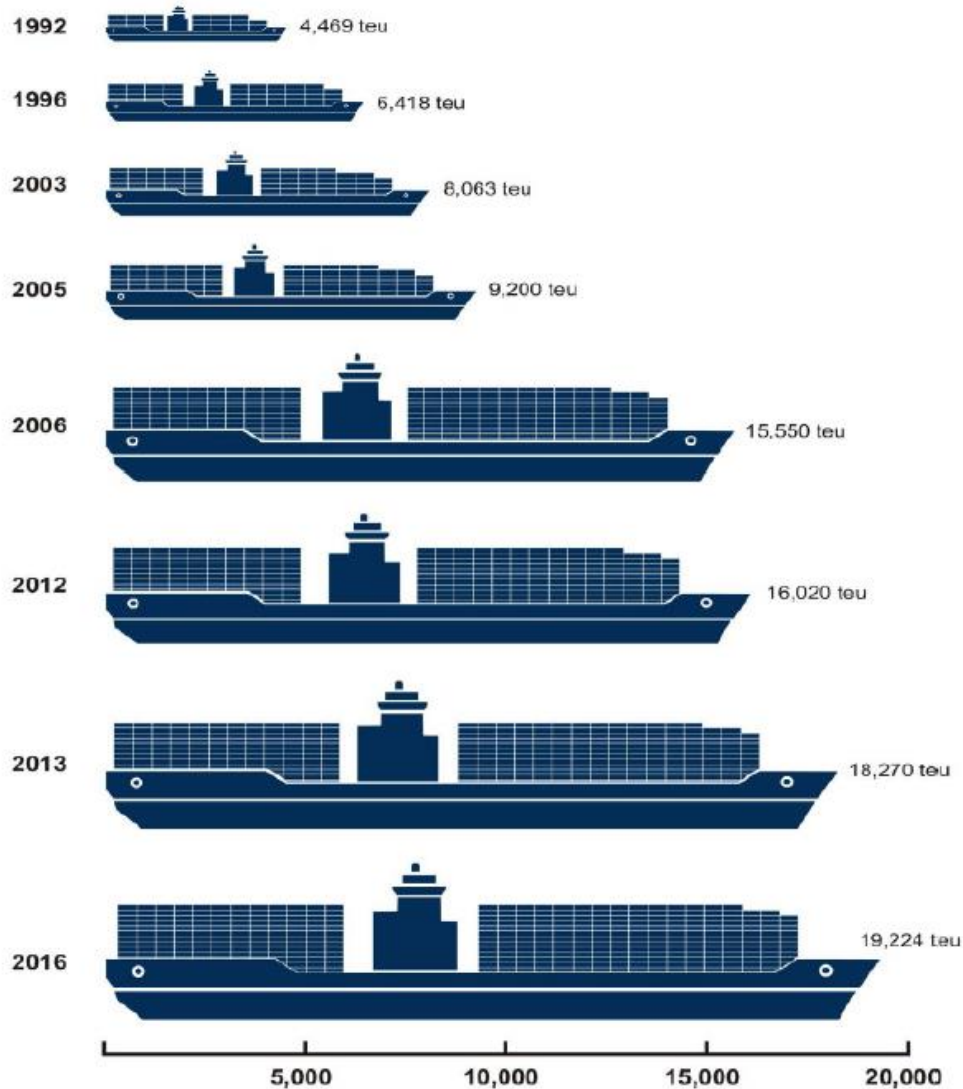
- 11 marine terminals
- 1.69 million total TEUs handled
- 44 ocean carriers
- Average terminal – 49 acres
- Largest terminal – 81 acres
- Smallest terminal – 26 acres
- Wheeled yard operation

Port of Oakland – 2016



- 6 marine terminals
- 2.37 million TEUs handled
- 25 ocean carriers
- Average terminal – 153 acres
- Largest terminal – 282 acres
- Smallest terminal – 50 acres
- Grounded yard operation

Exponential Vessel Size Growth



Investing in the Port's Future

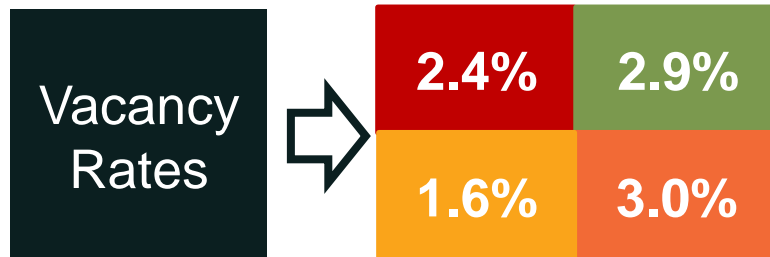
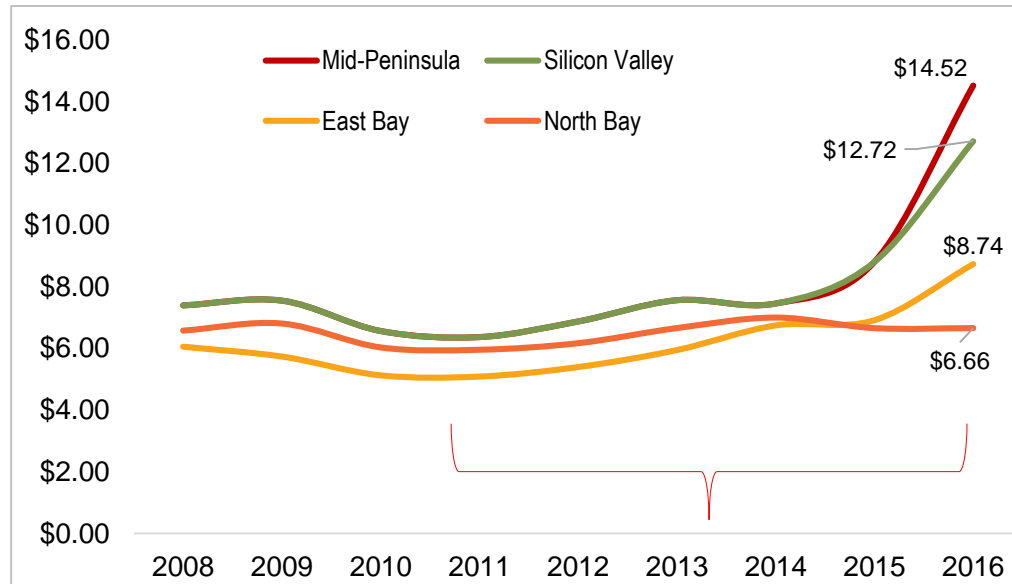
- **\$244 million** in **Grade Separation, Intelligent Transportation System & Traffic Circulation Improvements**
- **\$100 million** in **Rail Manifest & Support Tracks**
- **\$90 million** in **Cool Port**
- **\$50 million** in **TraPac Terminal**
- **\$47 million** in **Seaport Logistics Complex**
- **\$25 million** in **Oakland International Container Terminal**
- **\$25 million** in **Ben E. Nutter Terminal**
- **\$21 million** in **cranes** **
- **\$300k** in **grain transload facilities**

\$600+ million

Industrial Real Estate Market – Bay Area

Vacancies at all time lows, no slow down in sight

Average annual rent growths >10% (2011-2016)



Manifest & Support Tracks

- \$100 million public investment
- Fully complete late 2016
- 5 Manifest yard tracks
- 8 Support yard tracks
- 39,000 linear ft of track
- Capacity for up to 4 trains/day of 200 cars each



First UPRR train of 109 hopper cars arrived in July with grain from ADM/US Midwest for transload into 40' containers for export to Far East.

Cool Port Oakland



Brownfield Development



Former Oakland Army Base

Former Oakland Army Base



Rendering of CenterPoint Properties Phase 1 Facility – Port of Oakland



**PORT OF OAKLAND
SEAPORT**

Supplemental Slides

Oakland Terminal – 2007 Wheeled

- Low storage density and no yard lift equipment
- Two longshore moves, one trucker move



Oakland Terminal June, 2007

Oakland Terminal – 2014 Grounded

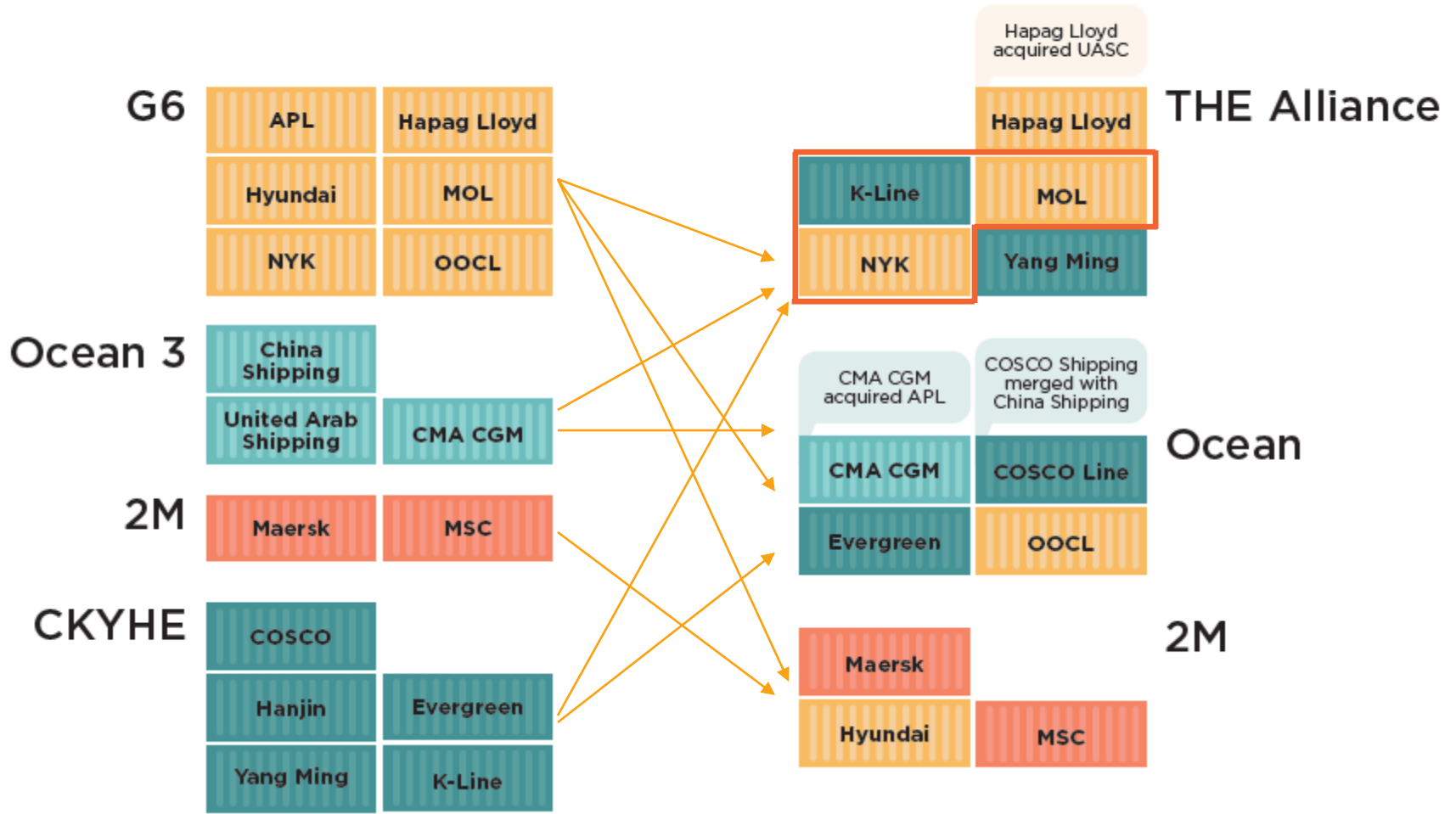
- Higher storage density with CY lift equipment
- Four longshore moves, two trucker moves



Ocean Carrier Consolidation & Alliances

Current Alliances 2016

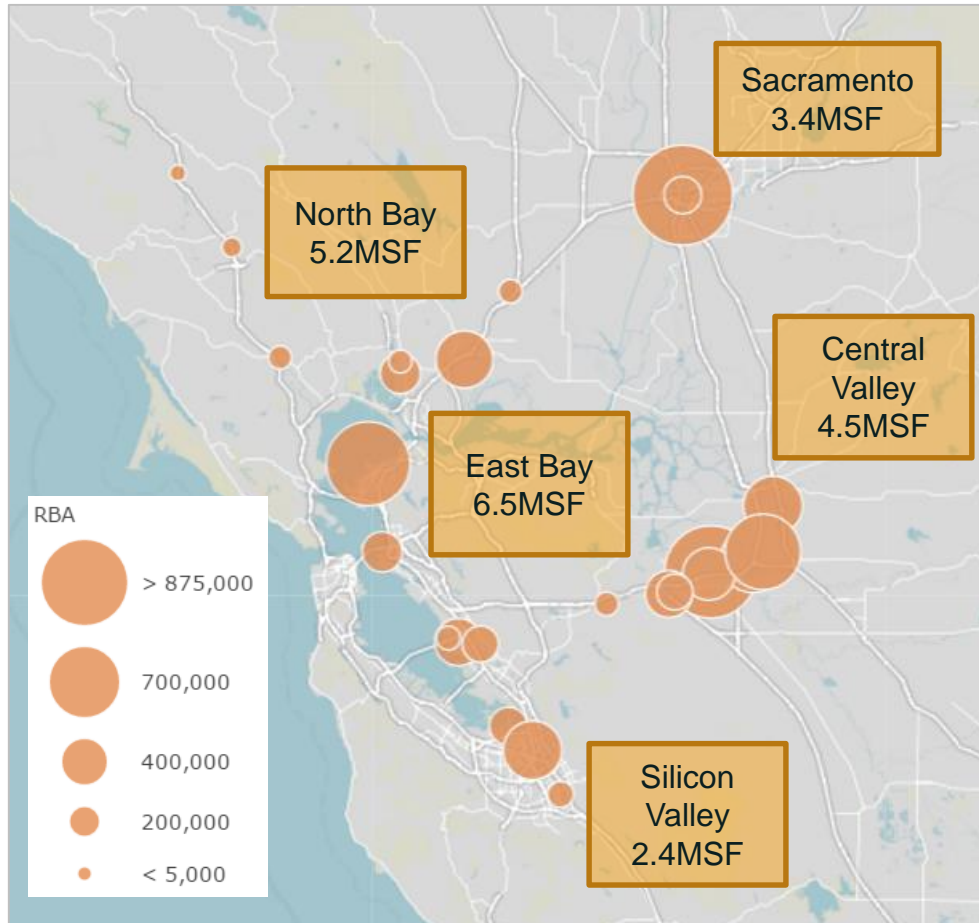
Future Alliances 2017



Industrial Real Estate Market – Bay Area

Widespread competition – 14.0MSF tenant requirements targeting the Bay Area

9.2 MSF of product under construction in NorCal, 50% preleased



NorCal Tenant Requirements

Requirement Size (s.f.)	Count
1,000,000+	5
750,00-999,999	2
500,000-749,999	4
250,000-499,999	18
100,000-249,999	57
50,000-99,999	31
Unknown/Other	19

Industry Rankings

1. Logistics & Distribution
2. Manufacturing
3. Food & Beverage
4. Retailer (e-commerce)
5. Consumer Durables

Marine Terminal Improvements

EverPort

- New Terminal Operating System
- Re-designed gate complex
- Replaced all container handling equipment

TraPac

- TraPac expansion has been finalized
- \$28 million private investments committed for Berths 25-26 expansion
- Introduced gate appointment system

OICT

- Leased additional 32 acres
- Purchased 6 new top-handler and 3 new side-handler machines
- Reconfigured yard layout
- Expanded import dray-off program & pre-mounting of import loads
- Introduced gate appointment system
- Implemented full night gate operations, Monday through Thursday

Port of Oakland – Key Events in 2016

- Terminal consolidation – OHT **vessel services** shifted to OICT and TraPac
- **Extended gate hours** to reduce peak day-side volume
- **Gate appointment systems**
- Launched technology to **provide real time visibility** and to **measure truck wait times**
- Dredging program enabled handling the **largest container vessel** to ever call United States
- **Daylight-only restrictions lifted** for larger vessels by SF Bar Pilots
- Concluded **Cool Port** lease
- Signed expansion agreement with **TraPac**

Port of Oakland & Agriculture

- **Balanced port**
 - 2016 Exports – 1,258,178 TEUs – 53%
 - 2016 Imports – 1,111,463 TEUs – 47%
- Loaded **exports up 10.5%** in 2016



- **Ag accounts for 53%** of all exports through Port of Oakland. Of that:
 - **California** accounts for 70% of ag exports via Port of Oakland – 2.7 million metric tons
 - 73% of ag exports destined to **Asia** with 12% headed to **Europe**
 - **Japan** is largest recipient of ag exports from Oakland – 22% and over 855,000 metric tons

Port of Oakland – Export Commodities

COMMODITY	Metric Tons	% Share
Wood Pulp	1,521,300	
Edible Fruits and Nuts	1,073,308	14.7%
Meats	447,860	6.1%
Beverages & Spirits	438,827	6.0%
Cereals	407,820	5.6%
Oil Seeds and Olaginous Fruits	390,412	5.3%
Wood	334,428	
Preparations of Vegetables	305,495	4.2%
Iron & Steel	288,197	
Plastics & Plastic Articles	237,984	
Top 10 Total	5,445,631	74.4%
All Agriculture Exports	3,893,927	53.2%
All Other Exports	3,429,361	46.8%
Total	7,323,288	

Calendar Year 2016

Source: U.S. Dept. of Commerce, Bureau of Census

Cool Port Oakland

- Phase 1:
 - ✓ 25 acres
 - ✓ 283,000 sq ft facility
 - ✓ 11,200 ft of new rail track
 - ✓ Up to \$90m investment
- Located within the Port's heavy weight corridor
- High efficiency/volume facility
- Capable of handling 36 rail cars/day
- Annual throughput projected of 27,000 containers

