

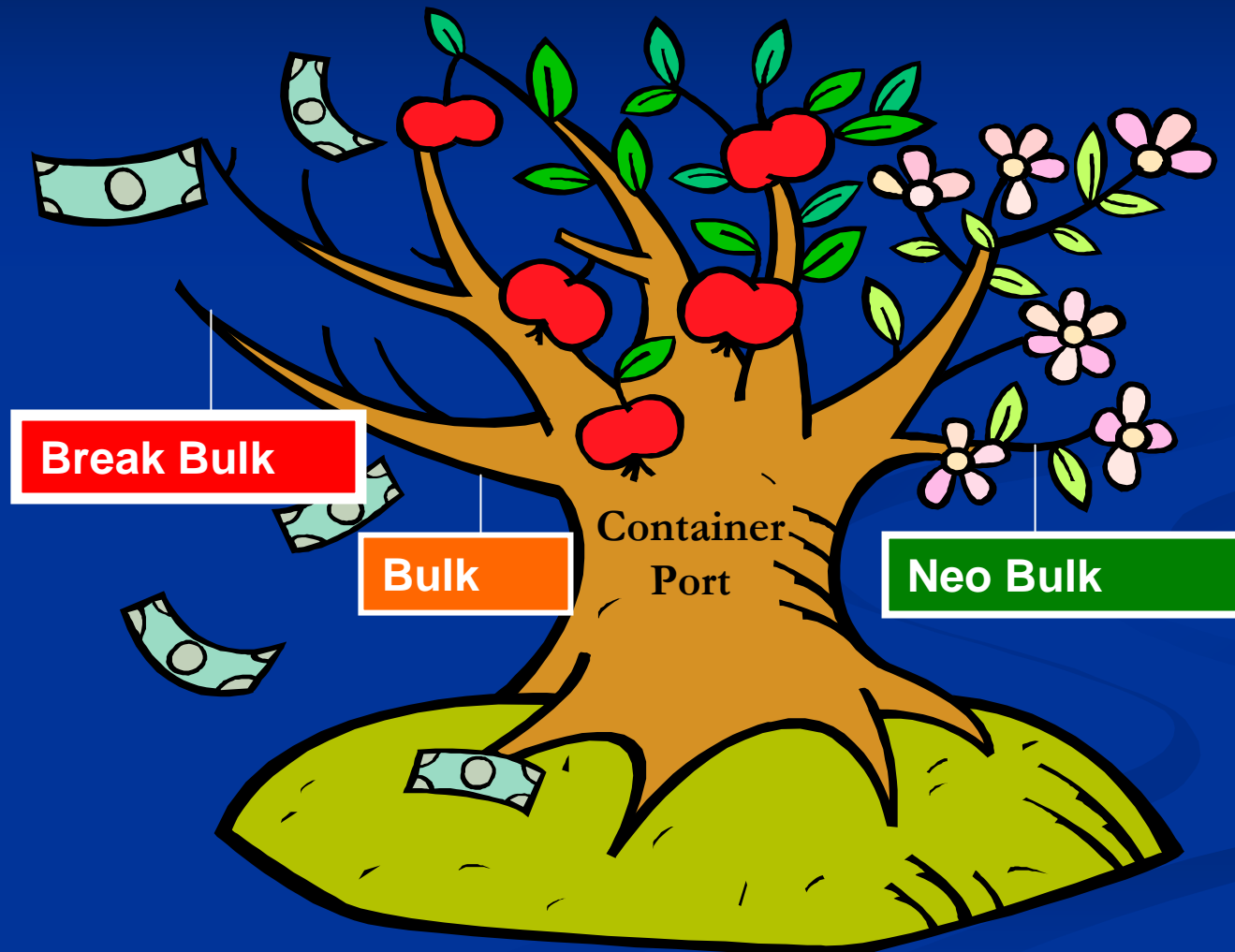


Marine Terminal Management Training Program

Topic V: Bulk, Breakbulk, Neobulk
and Passenger Terminal Operations

Tuesday, January 25, 2005

The Low Hanging Fruit



Bulk Cargo



Dry Bulk



Liquid Bulk

Break Bulk Cargo



- Miscellaneous goods and commodities in small packages, bags or boxes, non-containerized and which are usually loaded and unloaded on pallets by ships gear.

Neo Bulk ? ? ?



Neo Bulk Cargo



- Miscellaneous goods and commodities shipped packaged and transferred as units. Automobiles, lumber in stacks, and heavy machinery.



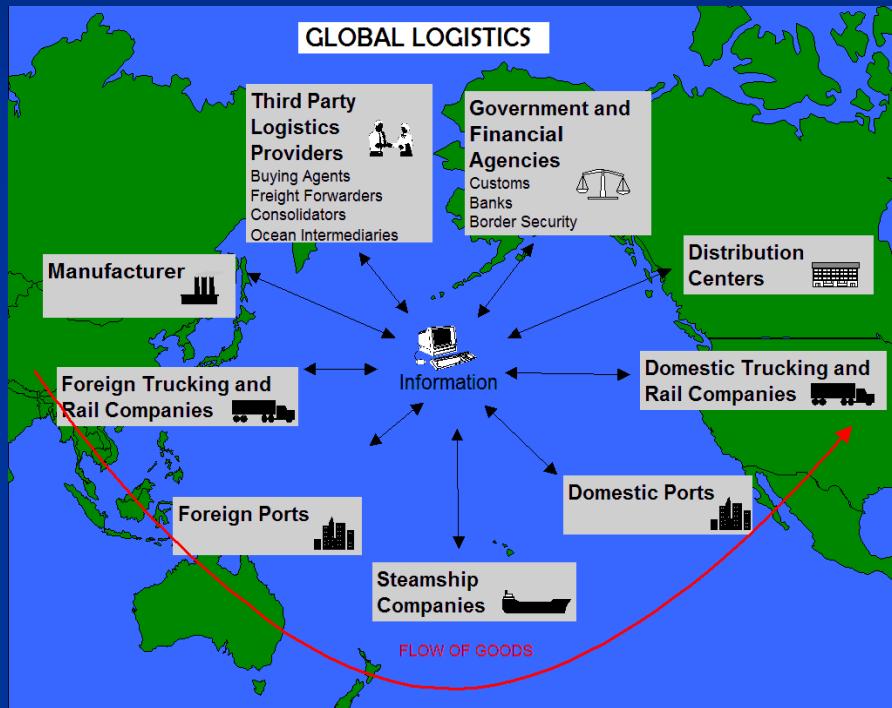
Cruise Operations



Guidelines for Port Planning - IAPH

“A port cannot be planned or designed as an arbitrary arrangement of independent terminals. It cannot even be planned as an independent whole, because the arteries connecting the port to the sea and to the hinterland are as important as the port itself. . .”

Guidelines for Port Planning - IAPH

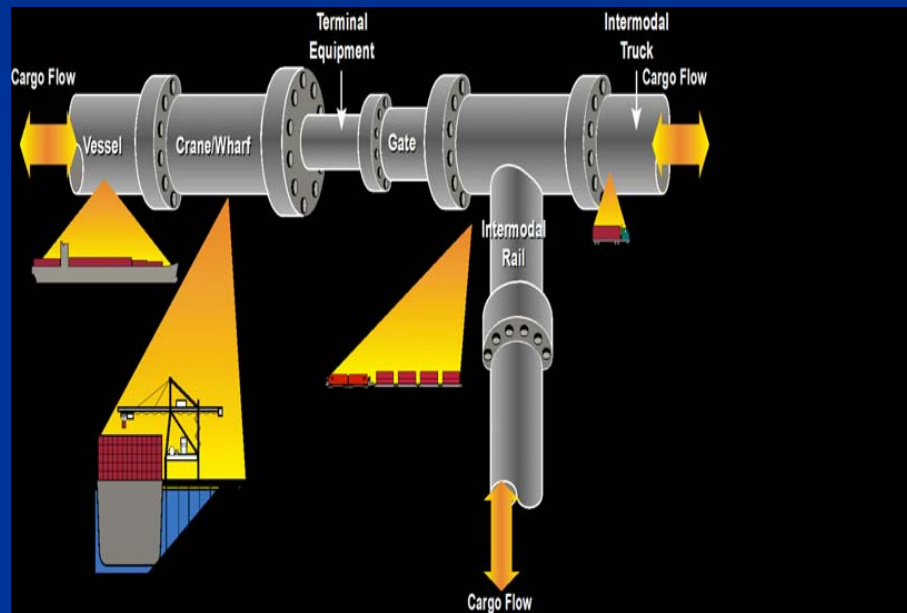


“A port should always be studied and planned in its true node or transit point in a complex system”.

Commercial Challenges

- Growth in containerization
 - Large Ships
 - Hub Ports (Transshipments)
 - Competition for Funding
- “Winners & Losers” – the winners will plan for growth in a sustainable manner – the losers may struggle to survive”*

The Pipeline Is Not Just For Containers



Ship Size

Ship / Apron
Transfer

Apron / Storage
Transfer

Storage
Capability

Storage Inland
Transfer

Inland
Transport

Give Your Port a Distinct Advantage

- Do not chase competition and offer “me-too” products.
- Know your customer and tell your customer you have a distinct product line.
- Brand your port and capabilities as a full service economic development entity.
- Develop a strategy based upon a great product, intelligent pricing and consistent marketing.



Port of Hueneme



Port of Gulfport



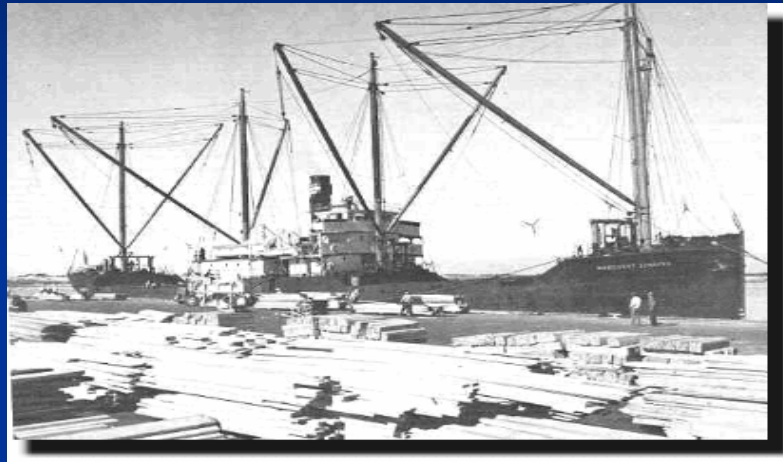
Port of Palm Beach

**“A strong
brand is
important
for success”**

Port of Hueneme

A Viable and Sustainable
“Niche – Port”

Port of Hueneme: An Economy dependent on Military, Oil and Agriculture



Lumber
from PNW

California
Offshore Oil



Bulk, Break Bulk, Neo Bulk
& Cruise

California
Citrus



A Strong Brand was Key to Standing Out - - -

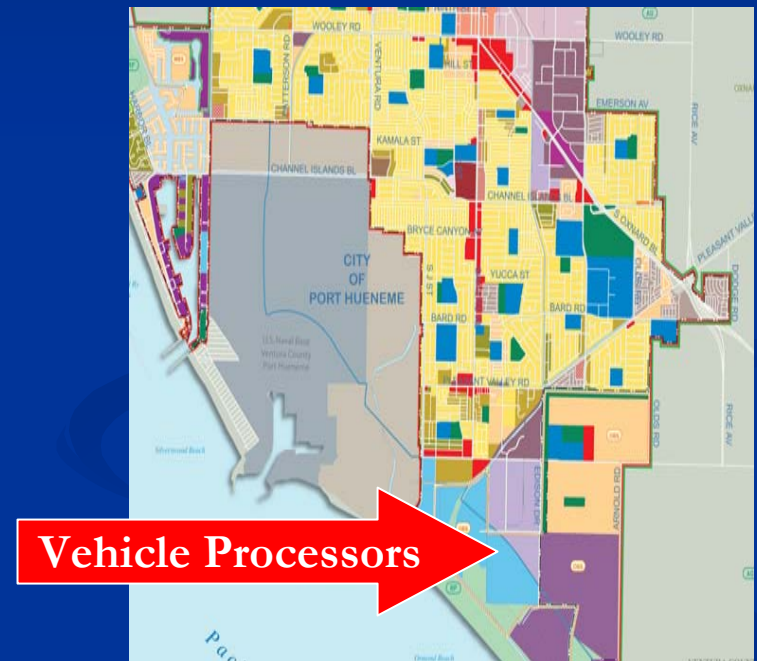


Racking system inside Del Monte reefer shed

Avoid the “Fire Sale” Approach



A Strong Brand
Reduces the Need
for Financial
Incentives to
Attract Customers



City of Oxnard Zoning



Port of Tacoma

Maintaining Cargo Diversity



PORT OF TACOMA DEVELOPMENT

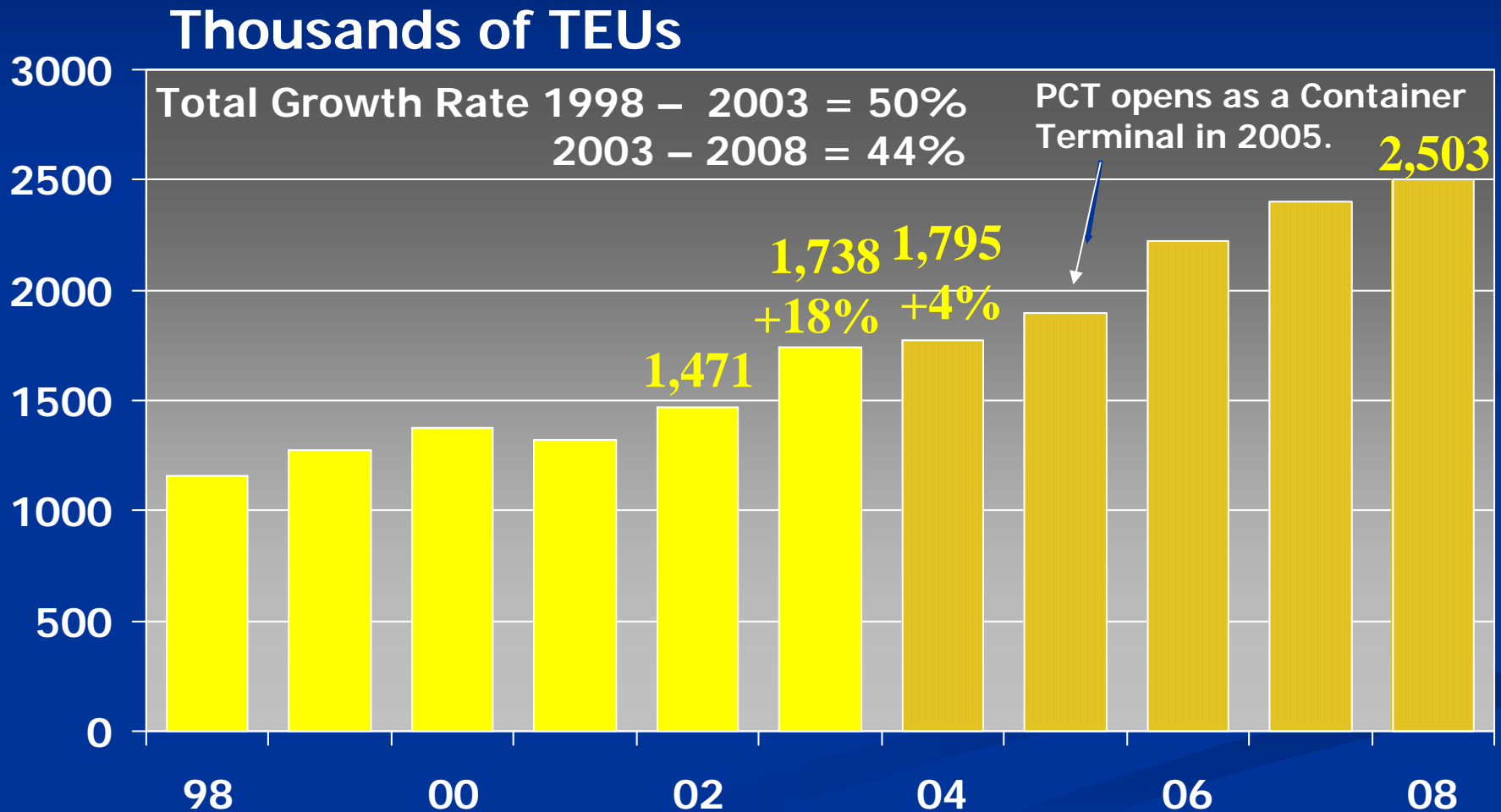
PORT OF TACOMA

1940 Aerial View

Newest Container Terminal



Port of Tacoma Container Traffic

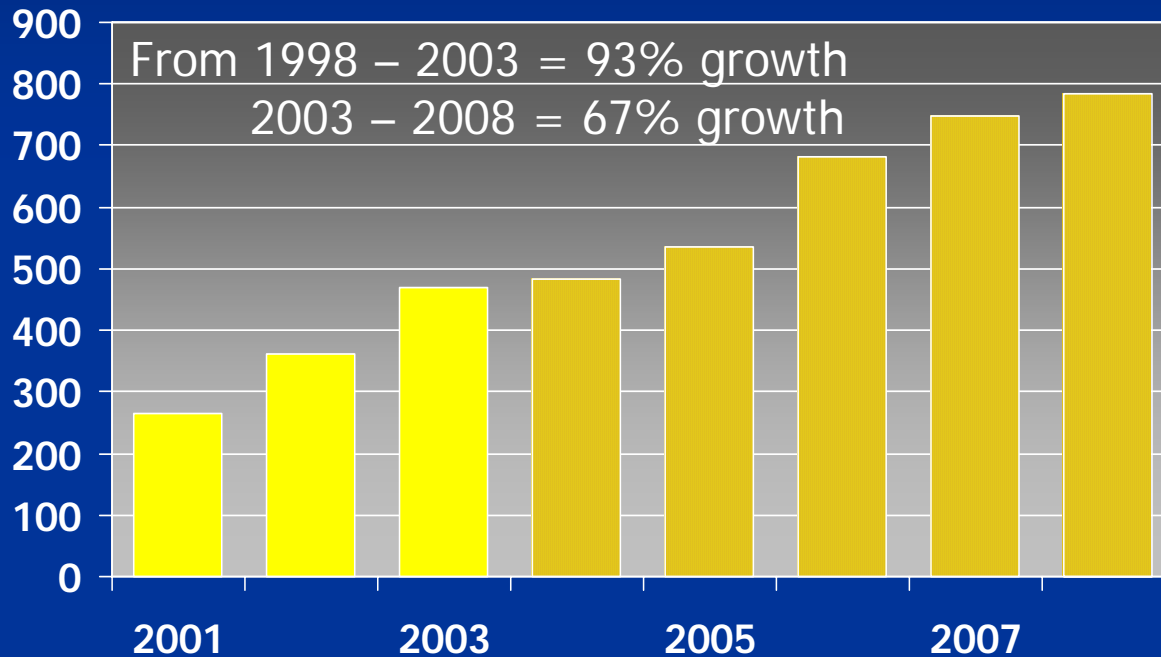


Bulk, Break Bulk, Neo Bulk
& Cruise

Marine Terminal Management Training
Jan. 2005

Intermodal Lifts

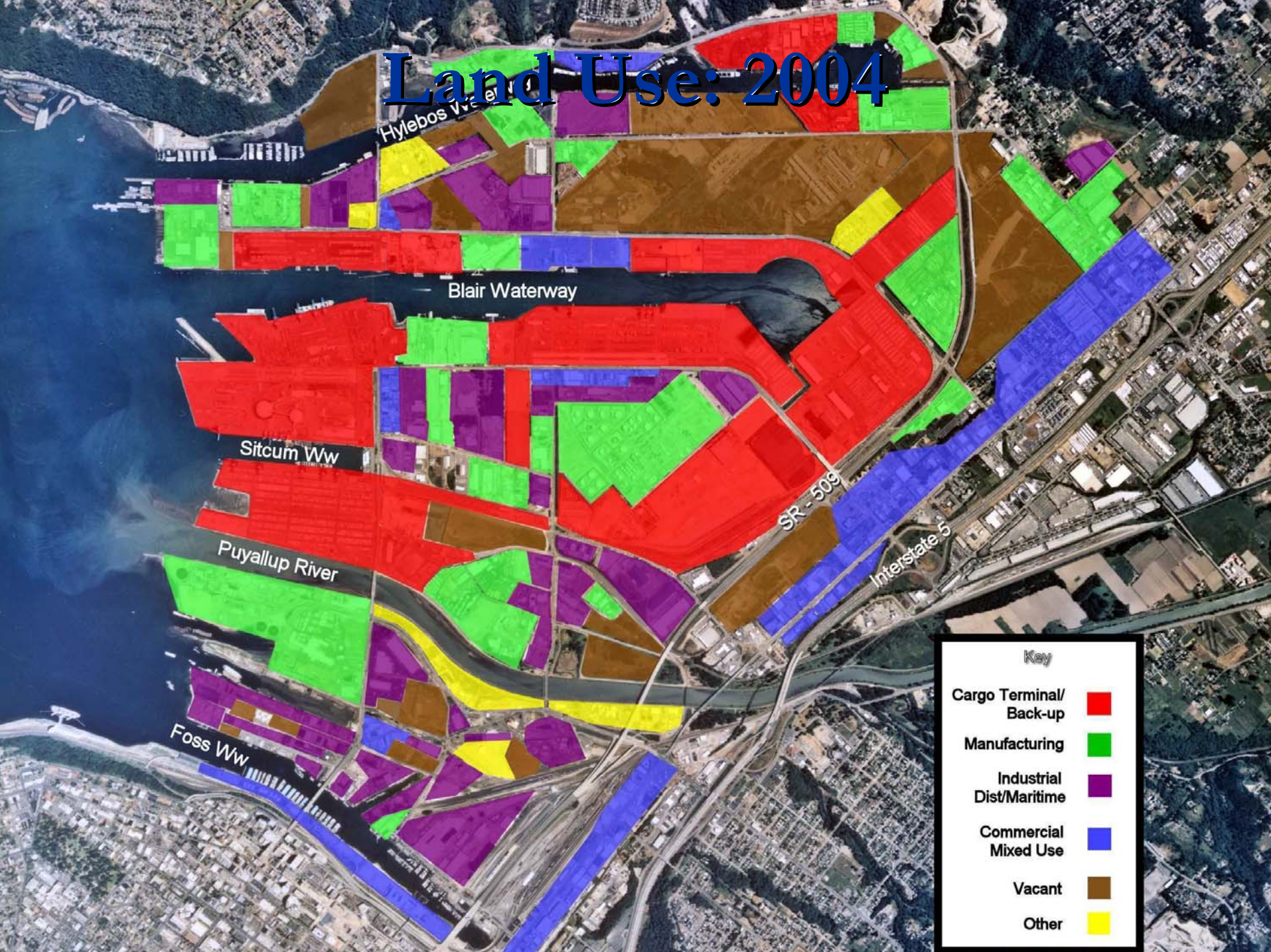
Thousands of Lifts



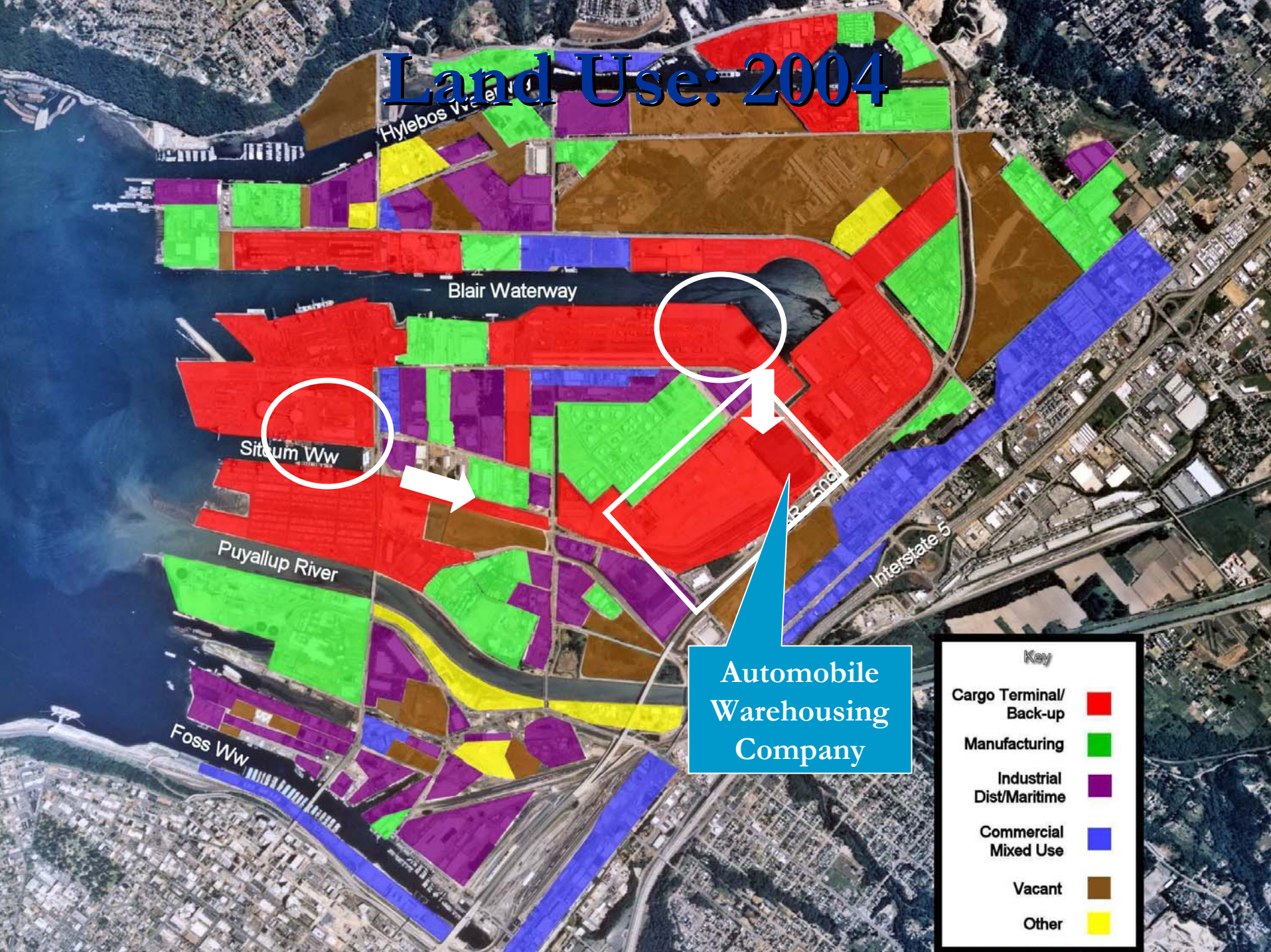
**2003 Intermodal Lifts =
468,600 lifts +29%**



Land Use: 2004



Land Use: 2004



Automobile
Warehousing
Company

Key

- Cargo Terminal/
Back-up
- Manufacturing
- Industrial
Dist/Maritime
- Commercial
Mixed Use
- Vacant
- Other

Marshall Avenue Auto Terminal



Why an Automobile Line of Business?



- Port has a 30 year experience with automobile manufacturers
- Automobiles along with breakbulk and ro/ro general cargo reflect a commitment to “diversity” within the Port industry.
- The Auto LOB has a positive financial impact on the Port’s overall finances.
- The Automotive industry is important to other LOB’s.

Auto Line of Business Mission

The Automobile Line of Business is to create economic growth opportunities by increasing the value and market share of imported and exported automobiles, automobile components, parts and accessories handled at the Port of Tacoma and to contribute to related activities that benefit the State, region, and local automotive industries.



Marshall Avenue Auto Terminal



Carrier Issues

☐ Berth Access and Availability

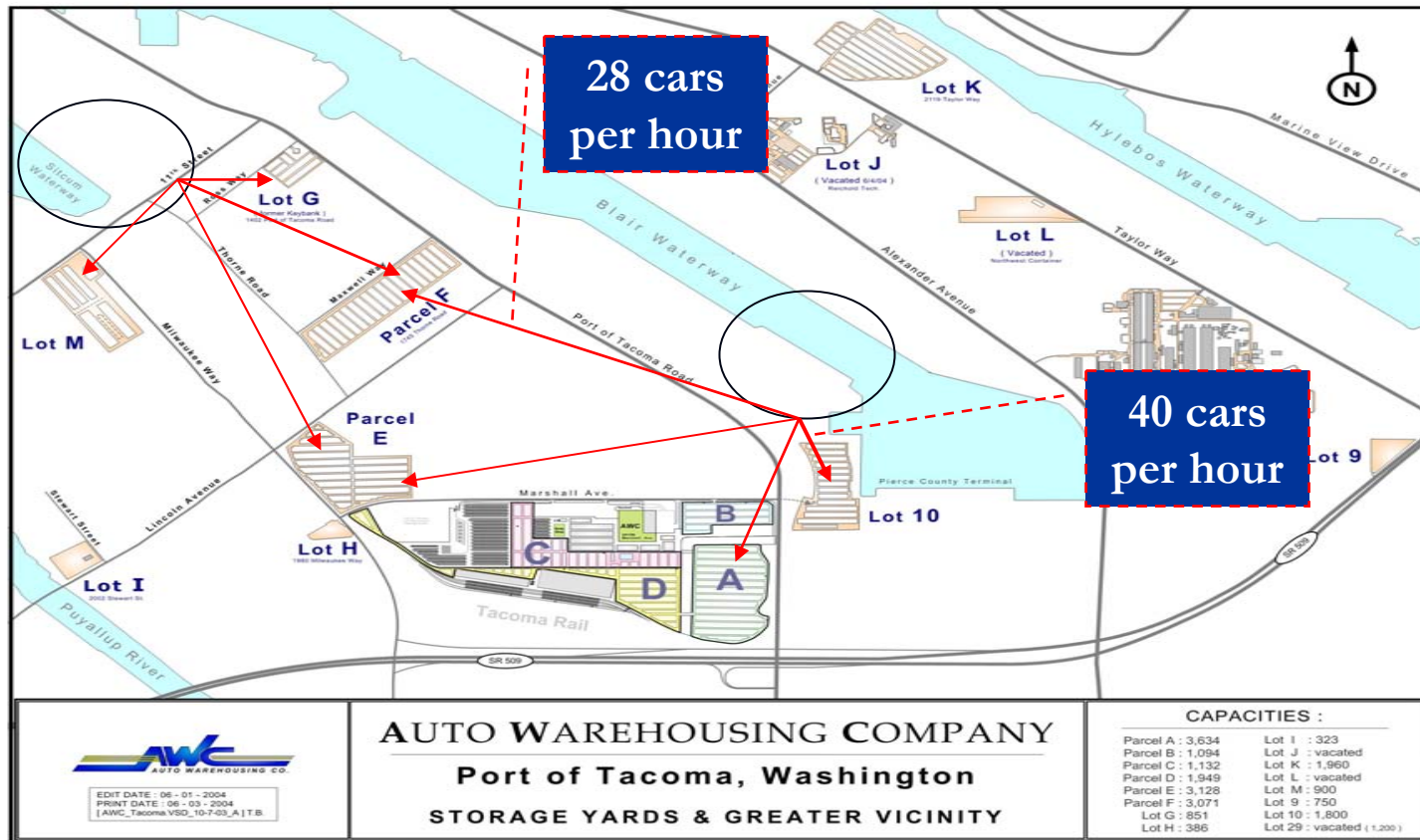
☐ Labor Availability and Productivity

☐ Location of First Point of Rest

Berth

Storage FPR / Bays

Tacoma FPR Locations

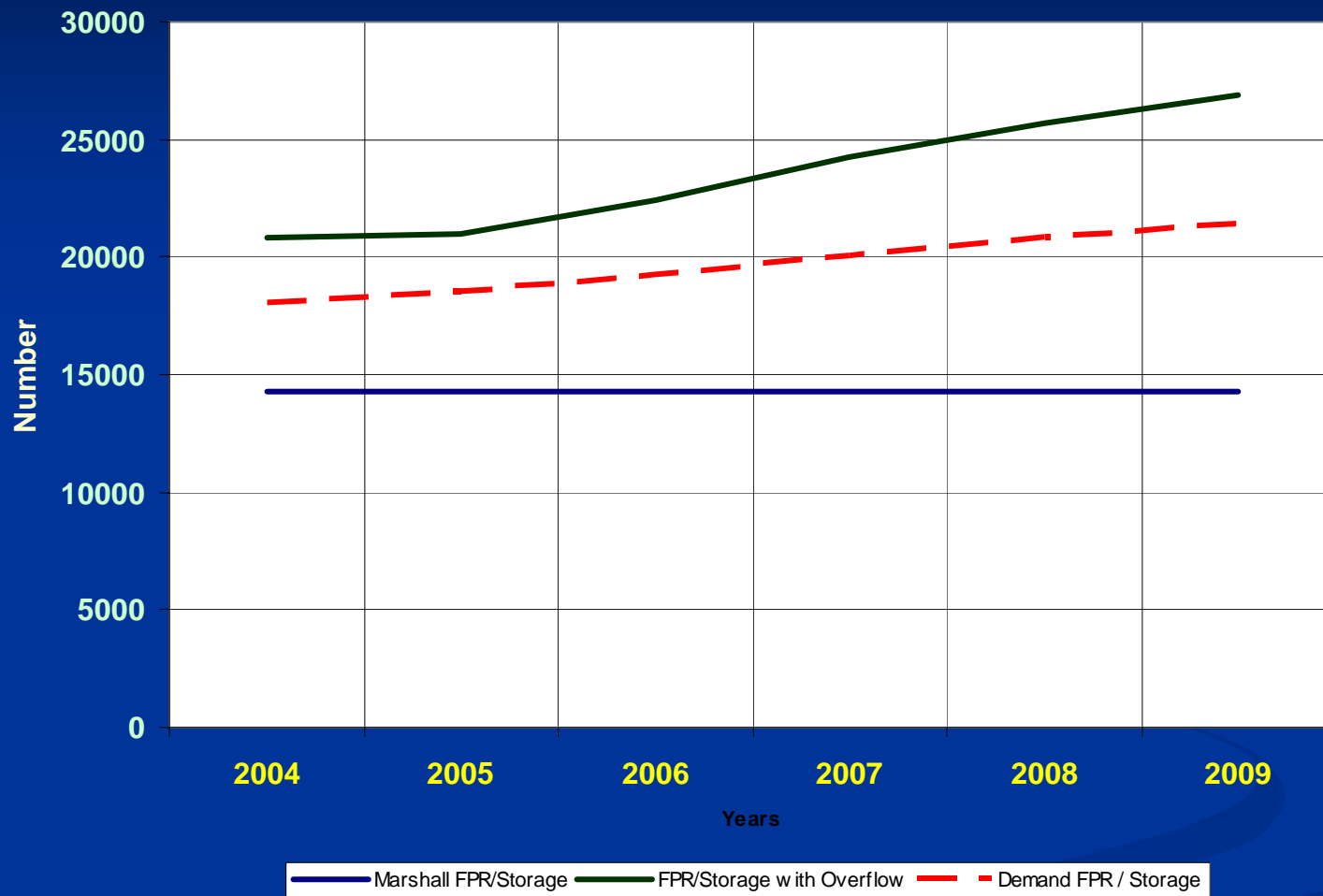


Processors Issues

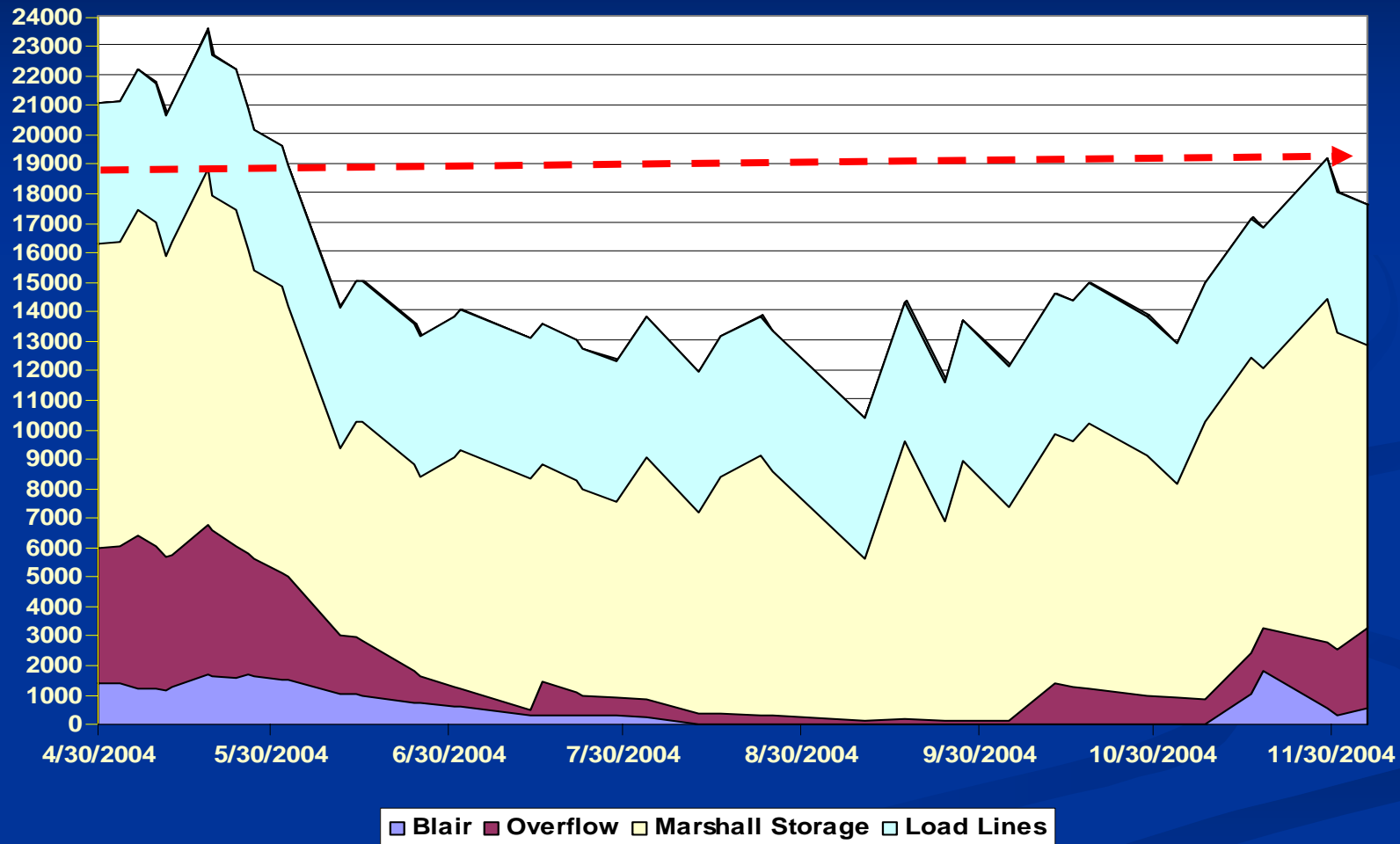
- ❑ Processing Capability
- ❑ Dwell Time and Storage Capability
- ❑ Lease Terms and Conditions



Forecast – Capacity = Need



Parking Bay Distribution



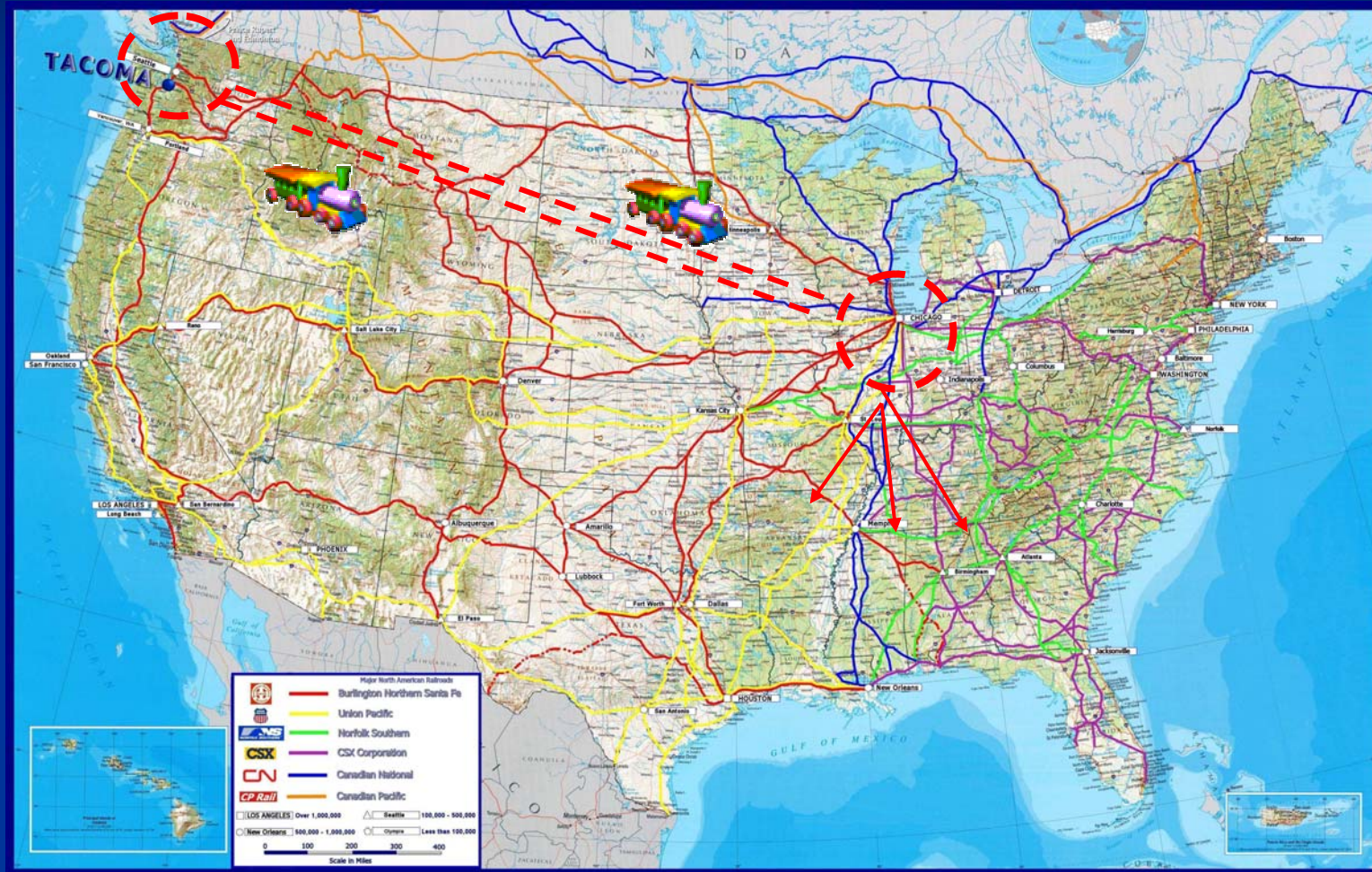
Strategic Initiatives



Holistic Approach for the Ultimate Customer - the Auto Manufacturer

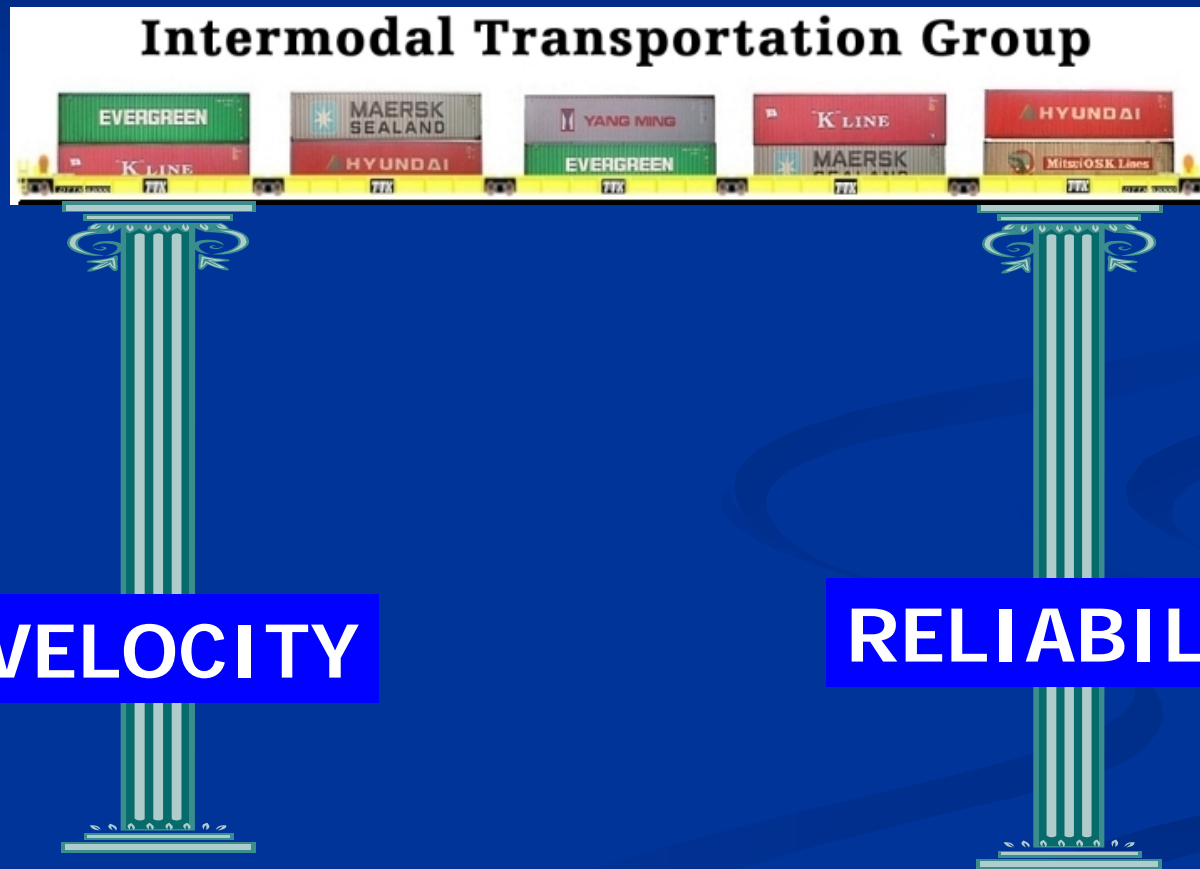
- Recognize there are various customers (e.g. carrier, auto manufacturers and auto processor).
- Customers have competing interests.
- Address daily, weekly, monthly and annual perspective.
- While you do not “*build the church to fit the entire congregation*” ~ you must have the capacity for peak demands.

Inland Port Strategy



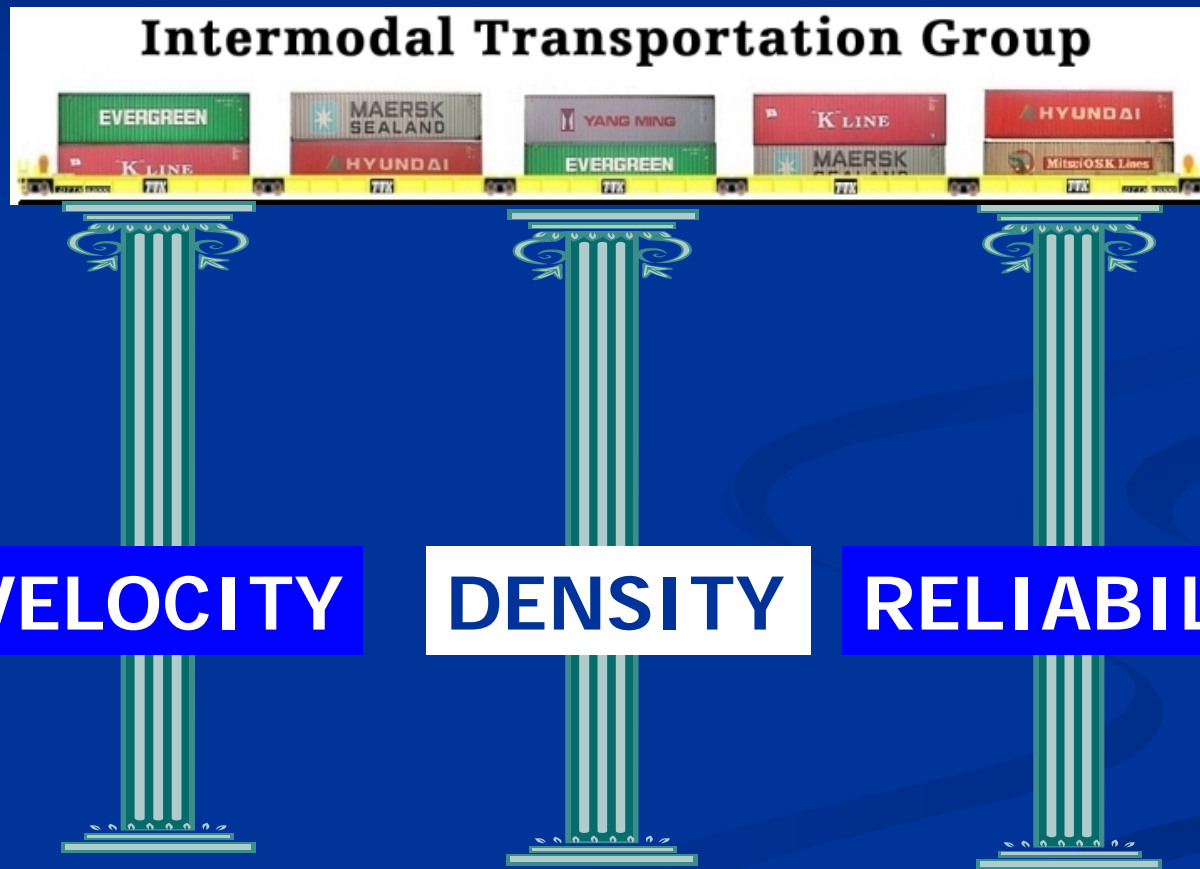
Intermodal Growth Strategies

TODAY'S **STRENGTHS**



Intermodal Growth Strategies

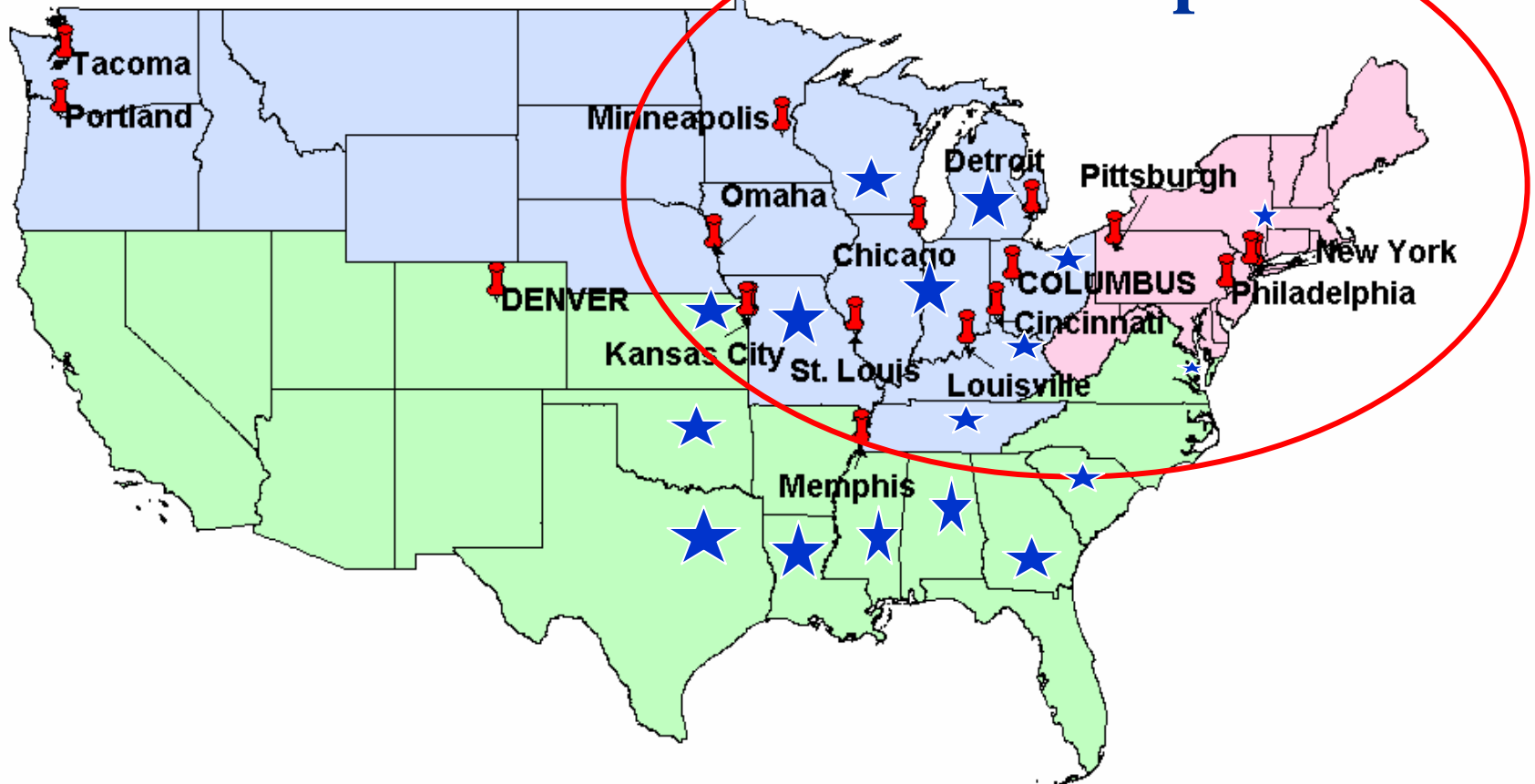
TODAY'S STRENGTHS



Density of Cargo Destinations

Port of Tacoma

Niche for Intermodal Rail Ramps



Transit Point in a Complex System





THANK YOU

**PORT of
TACOMA
U.S.A.*****