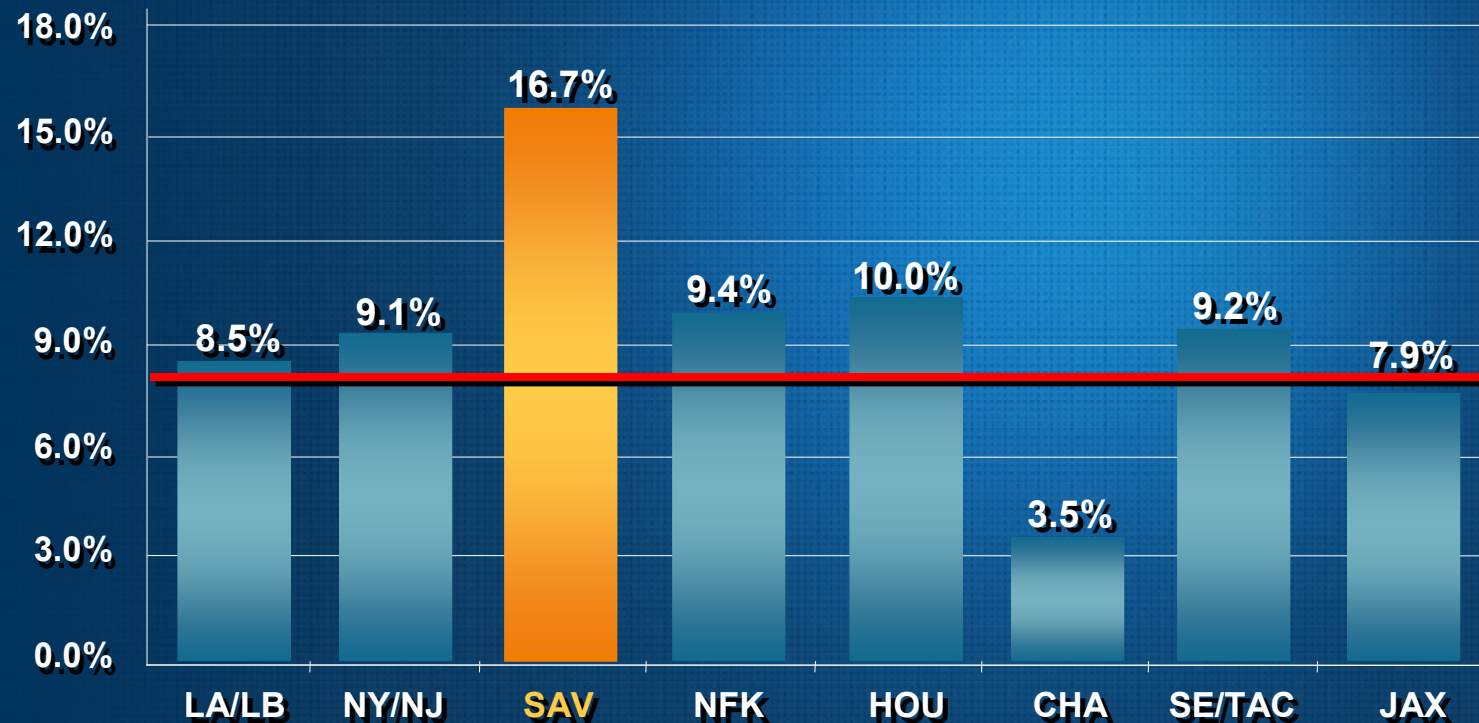


**How to Get Ports to Come Closer
to the Main Centers of Commerce:
Multimodalism & Zones of Logistics Activity**
**CASE STUDY: Savannah– Attracting DC
Operators & The Ocean Carrier.**

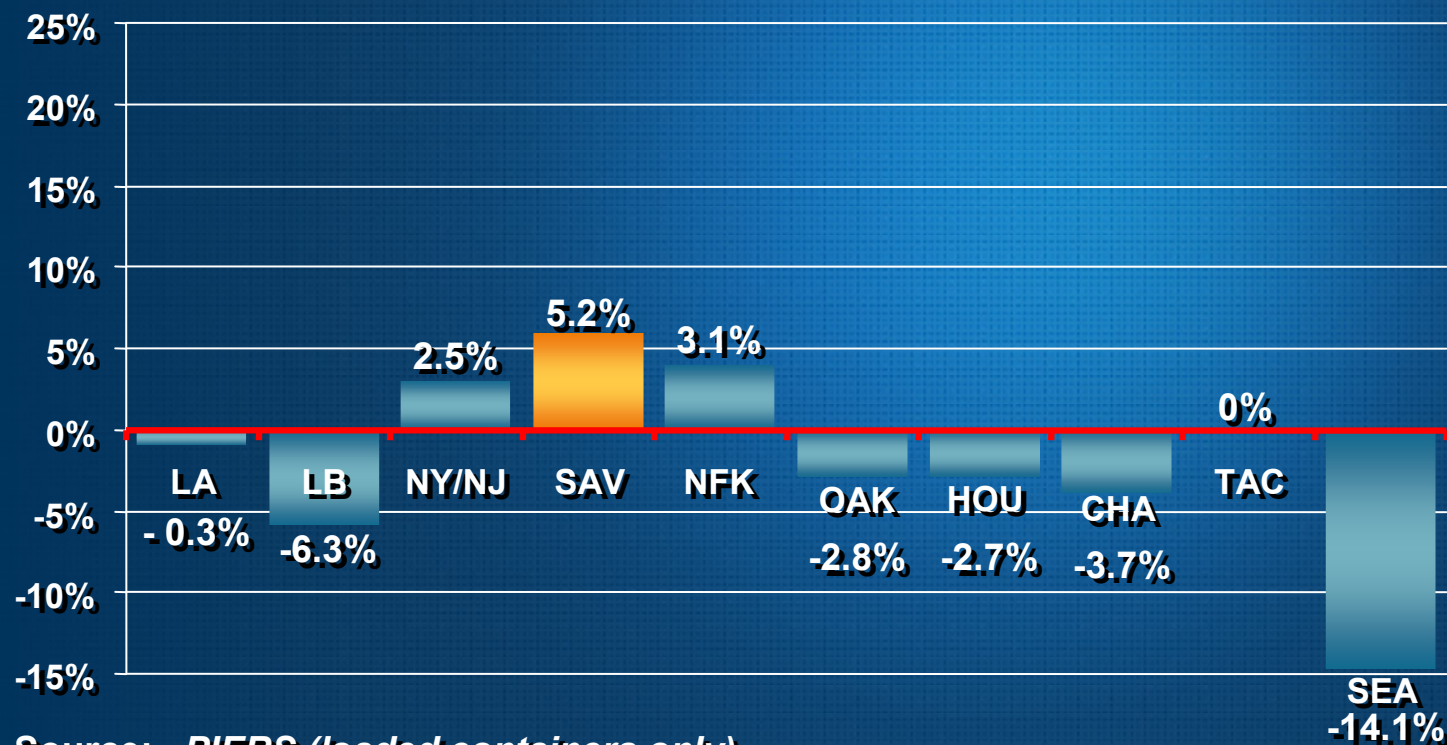
Doug J. Marchand
Executive Director
February 4, 2009

U.S. Compounded Annual Growth Rate (CAGR) = 8.2%
Overall U.S. Ports 2001 to 2007



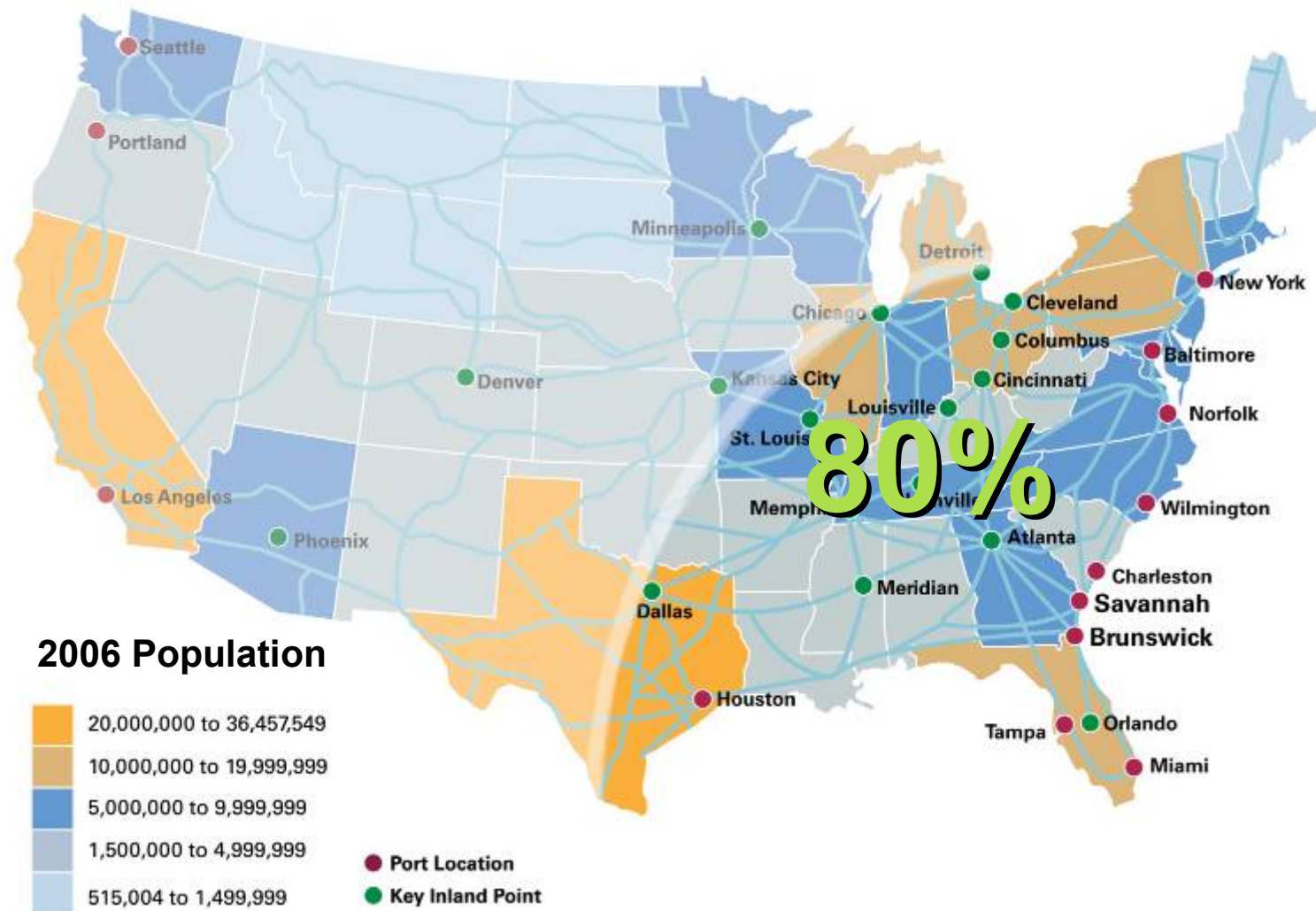
Source: PIERs (loaded containers only)

**Top 10 U.S. Port Ranking
by Percentage Growth**
January 2008 through November 2008

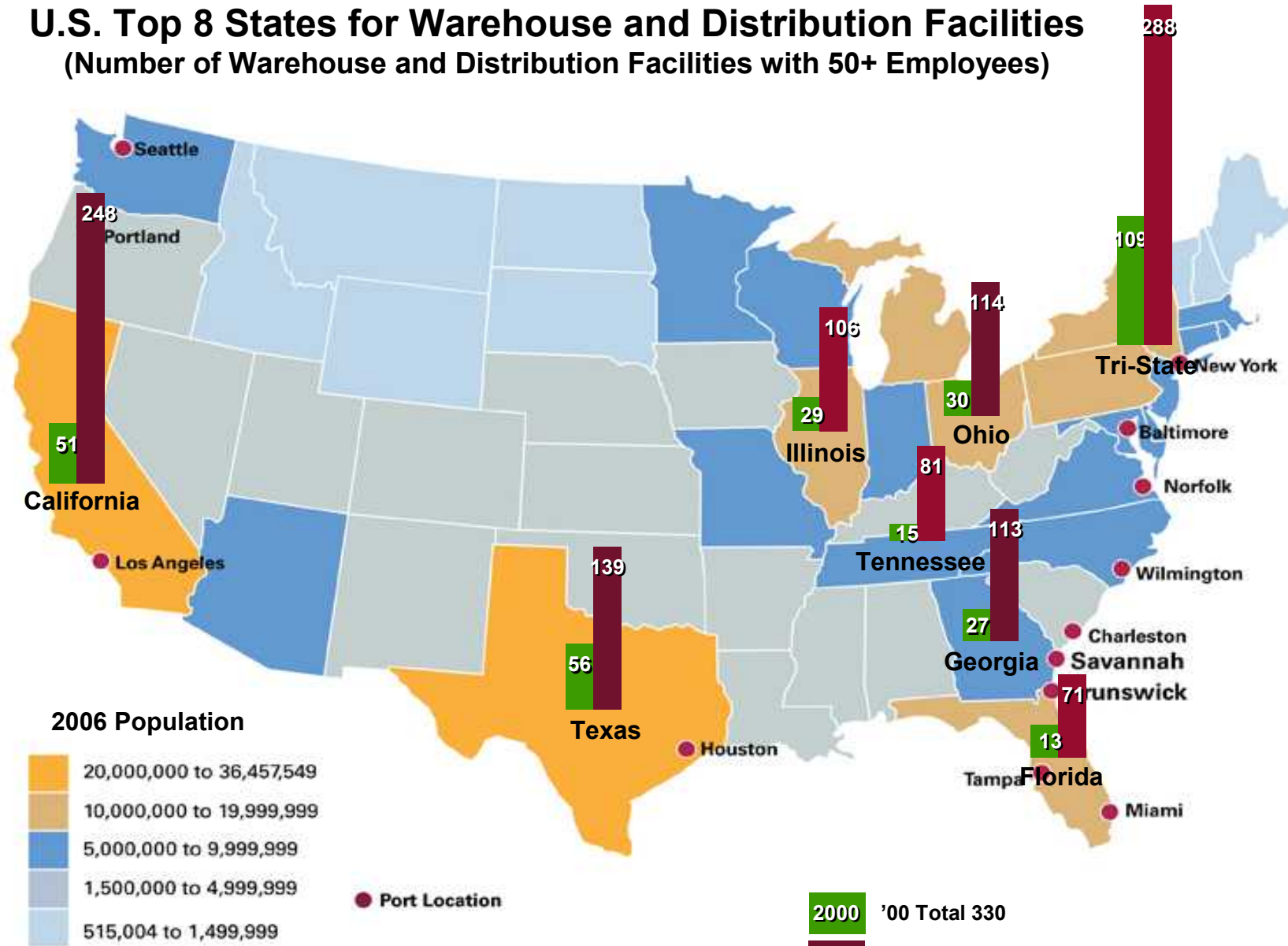


Source: *PIERS (loaded containers only)*

80% of U.S. Consumers are Accessible via the East Coast



U.S. Top 8 States for Warehouse and Distribution Facilities (Number of Warehouse and Distribution Facilities with 50+ Employees)



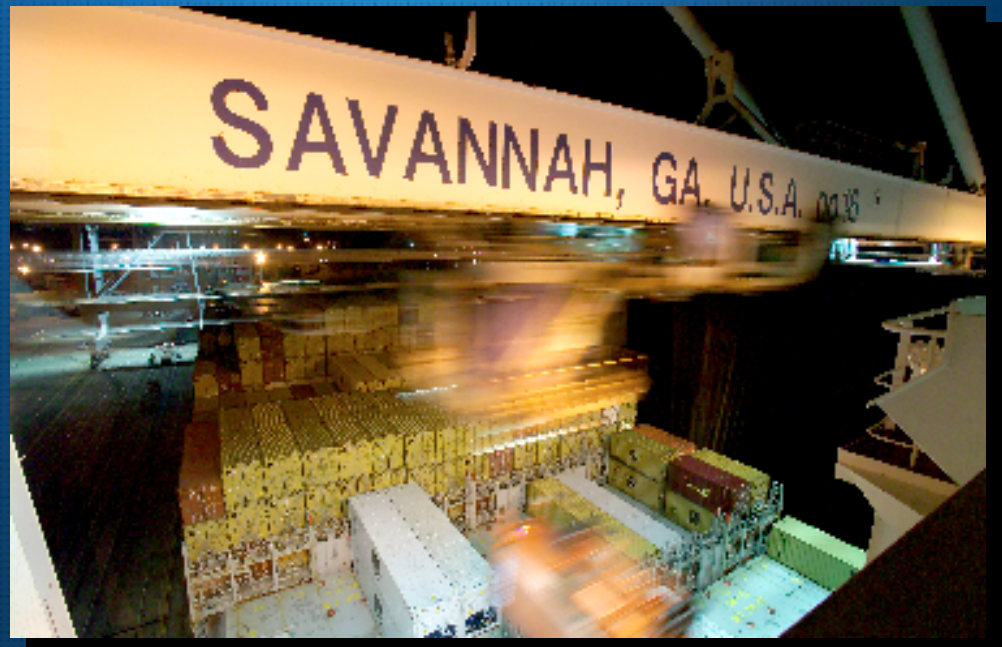
Note: Tri-State refers to New Jersey (3), Pennsylvania (6), and New York (10)

As sourcing looks even more to Southeast Asia and India, additional Suez services are developing...

Currently 40 Weekly Services via Savannah

- ▲ **Asia via Panama**
 - ▶ 15
- ▲ **Asia/India/Middle East via Suez**
 - ▶ 4
- ▲ **North Europe**
 - ▶ 6
- ▲ **Oceania**
 - ▶ 2
- ▲ **Mediterranean**
 - ▶ 8
- ▲ **Latin America**
 - ▶ 5

Source: GPA Marketing



Balanced Trade Important to Savannah

FY08 Exports (49.3%) 1,085,402

FY08 Imports (50.7%) 1,114,731

Seven Year History

FY	Exports	Imports
2007	865,705	949,973
2006	745,328	835,853
2005	666,788	741,784
2004	621,232	632,873
2003	542,731	642,468
2002	460,422	456,997
2001	394,339	418,169



FY08 Export Growth 25.4%

FY08 Import Growth 17.3%

Source: GPA Mktg. / EIS (loaded containers only)

Note: Fiscal Year = July 1 through June 30

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GPA Economic & Industrial Development Interacts with:

- ▶ **County Development Authorities**
- ▶ **Corridor Alliances**
- ▶ **Private Land Owners**
- ▶ **Realtors & Site Selection Firms**
- ▶ **Transportation Firms / 3PL's**
- ▶ **Georgia Power & other utilities**
- ▶ **Other State Agencies**
- ▶ **Georgia Department of Economic Development**

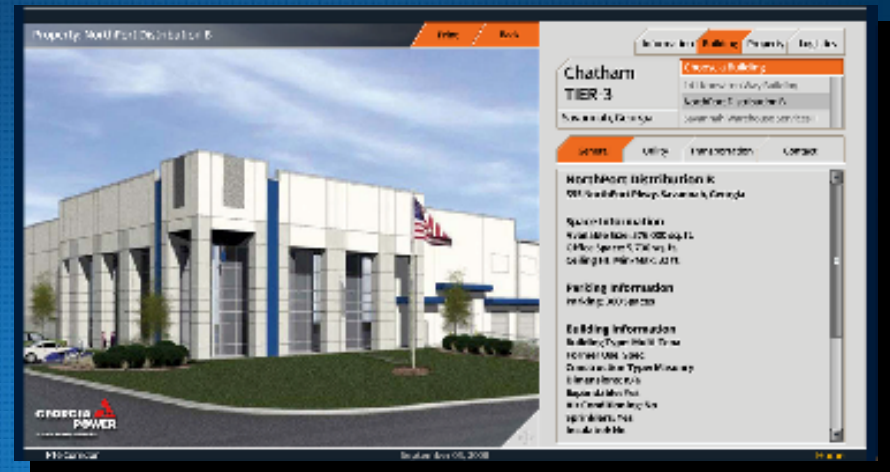


▲ **Stacy Watson, Manager, Economic & Industrial Development**

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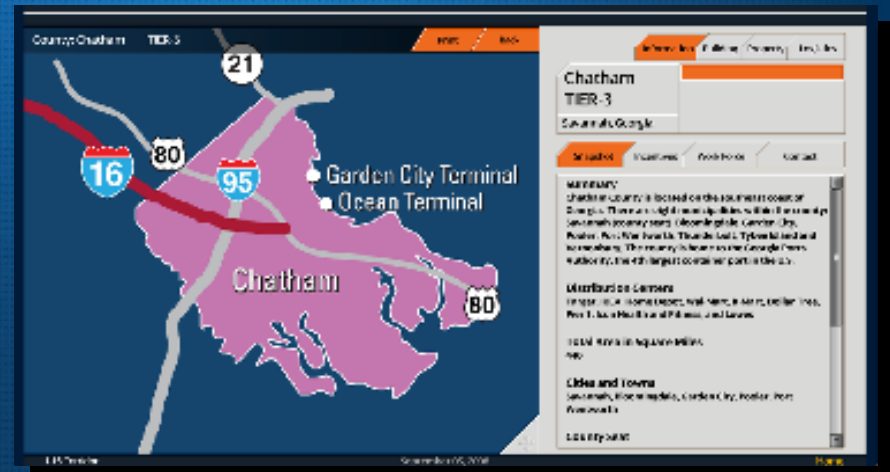
- ▲ Select any county along the Corridor of interest



- ▲ View Buildings available for occupancy



- ▲ View Sites Available for Development



- ▲ View Demographics, Incentives & More

Redefining the pace of trade.



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- ▶ **Wal-Mart Distribution Center / Statesboro, GA**
2 million square feet
Within 45 minutes of Garden City Terminal



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► **Academy Sports + Outdoors**

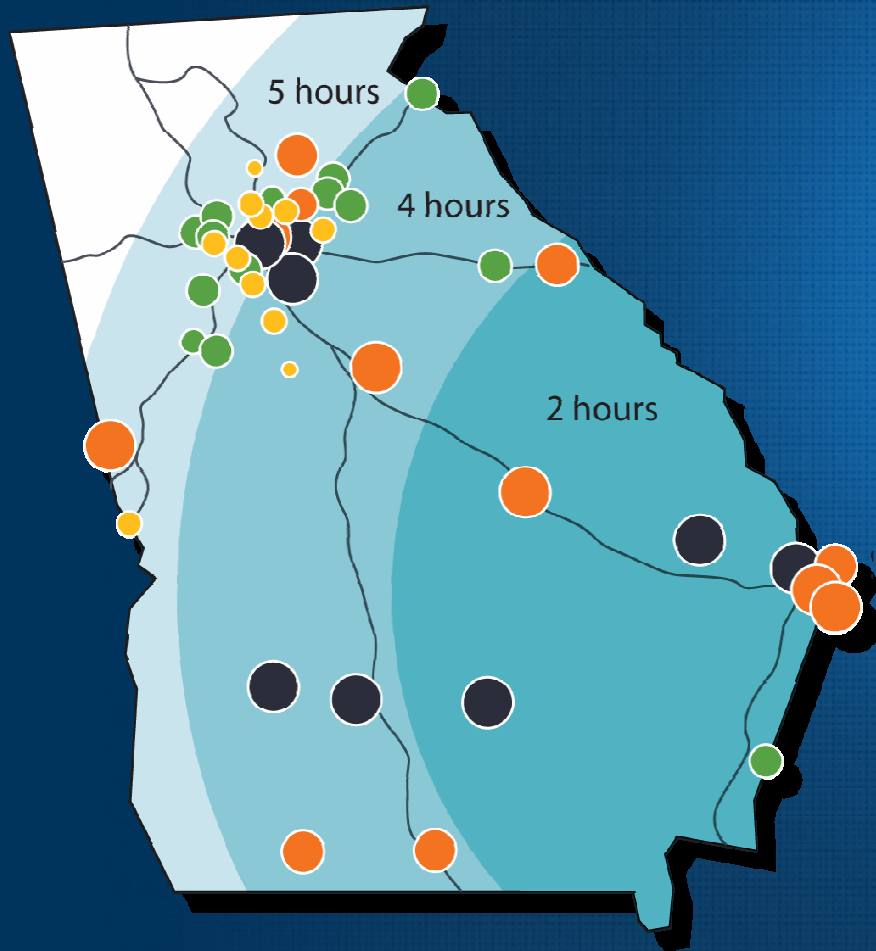
1 million square feet

Within 2 hours of Garden City Terminal



GEORGIA IMPORTERS: 20+ Savannah-area Import DCs, 200+ more within 5 Hours

Savannah-area Import DC's



	Sq. Ft.	Sq. Mi.
Academy Sports	1,000,000	92,903
Advance Auto Parts	380,000	35,303
Bass Pro Shops	600,000	55,742
Best Buy	748,000	69,491
Citi Trends Fashion	155,000	14,400
Dollar Tree	800,000	74,322
Farmer's Furniture	250,000	23,226
Fred's	600,000	55,742
Hugo Boss	165,000	15,329
Icon H & F	600,000	55,742
IKEA	1,700,000	157,935
Kmart-Sears	2,200,000	204,387
Kohl's	600,000	55,742
Lowe's	1,250,000	116,129
Midwest Air Technologies	150,000	13,935
Noritake	105,000	9,754
Oneida	500,000	46,452
Paper Tigers	115,000	10,684
Pier 1 Imports	783,000	72,743
Target	2,100,000	195,096
The Home Depot	1,400,000	130,064
Tire Rack	250,000	23,226
Wal-Mart (2)	3,300,000	306,580

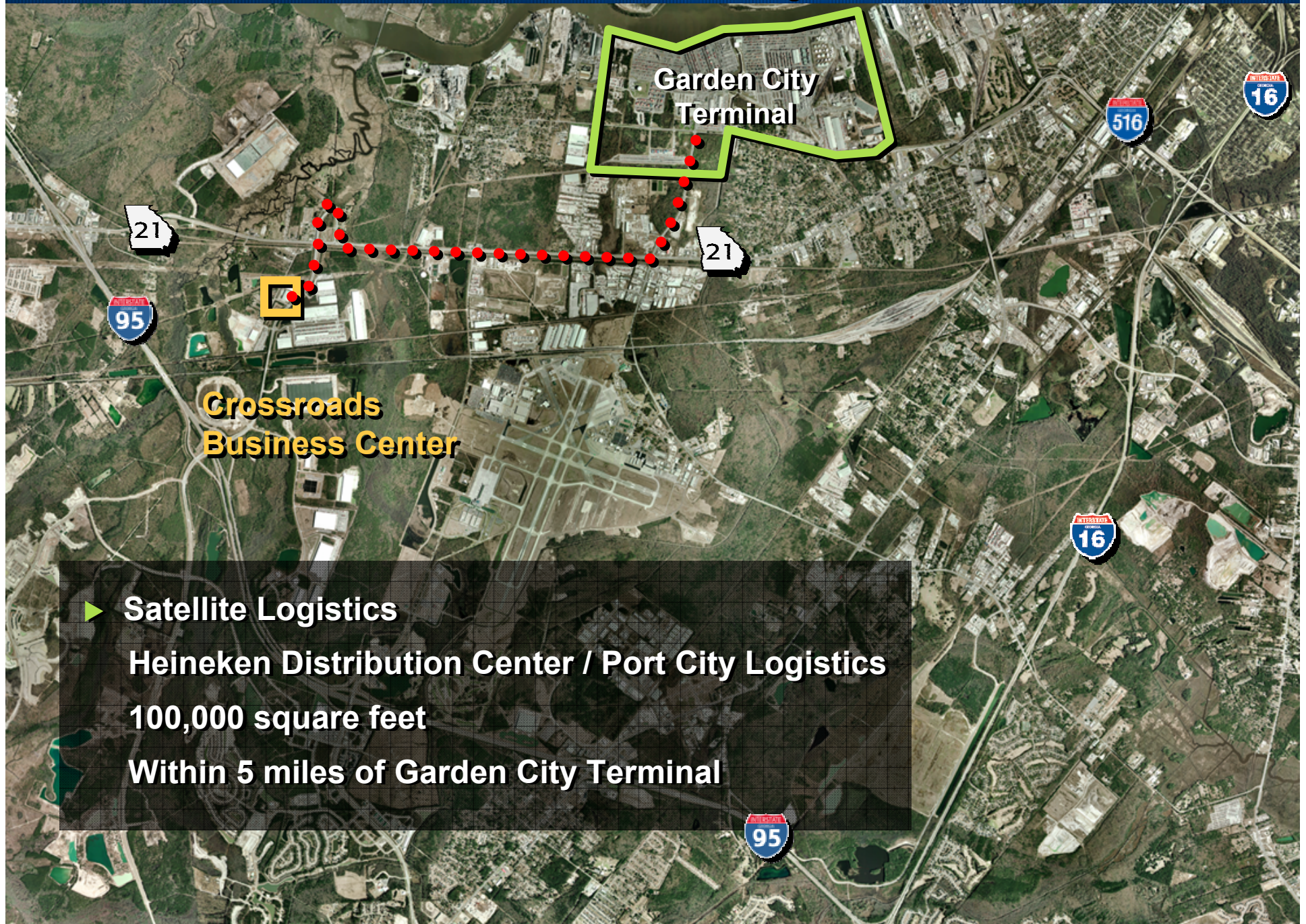
Sources: GPA Marketing

Note: This list is not intended to be definitive of Georgia's extensive list of port dependent DCs.

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- ▶ **Satellite Logistics**
Heineken Distribution Center / Port City Logistics
100,000 square feet
Within 5 miles of Garden City Terminal

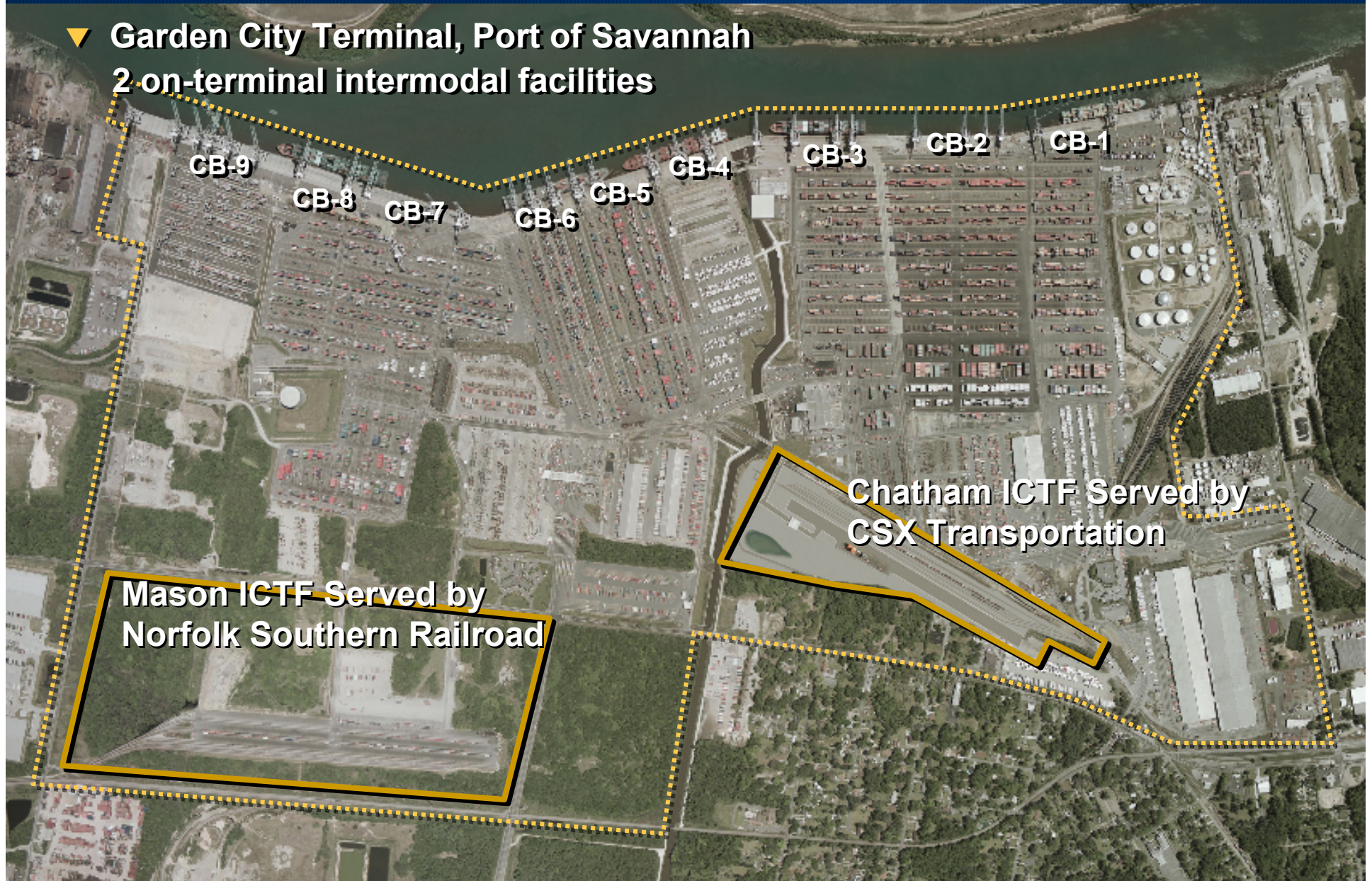
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- **Hasbro Distribution Center**
- Matson Global Distribution Services**
- 1 million square feet**
- Within 10 miles of Garden City Terminal**

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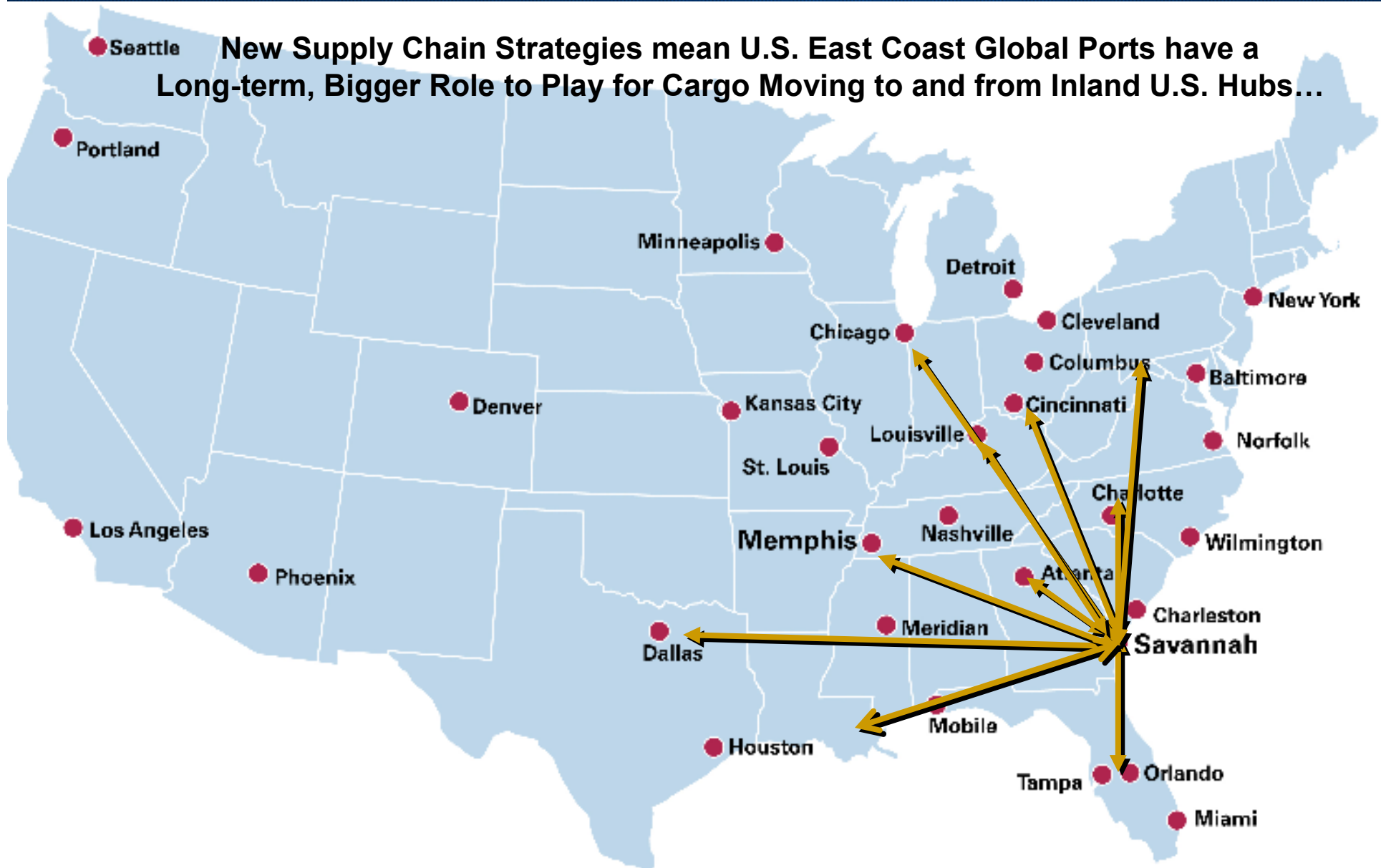
▼ **Garden City Terminal, Port of Savannah**
2 on-terminal intermodal facilities



Redefining the pace of trade.

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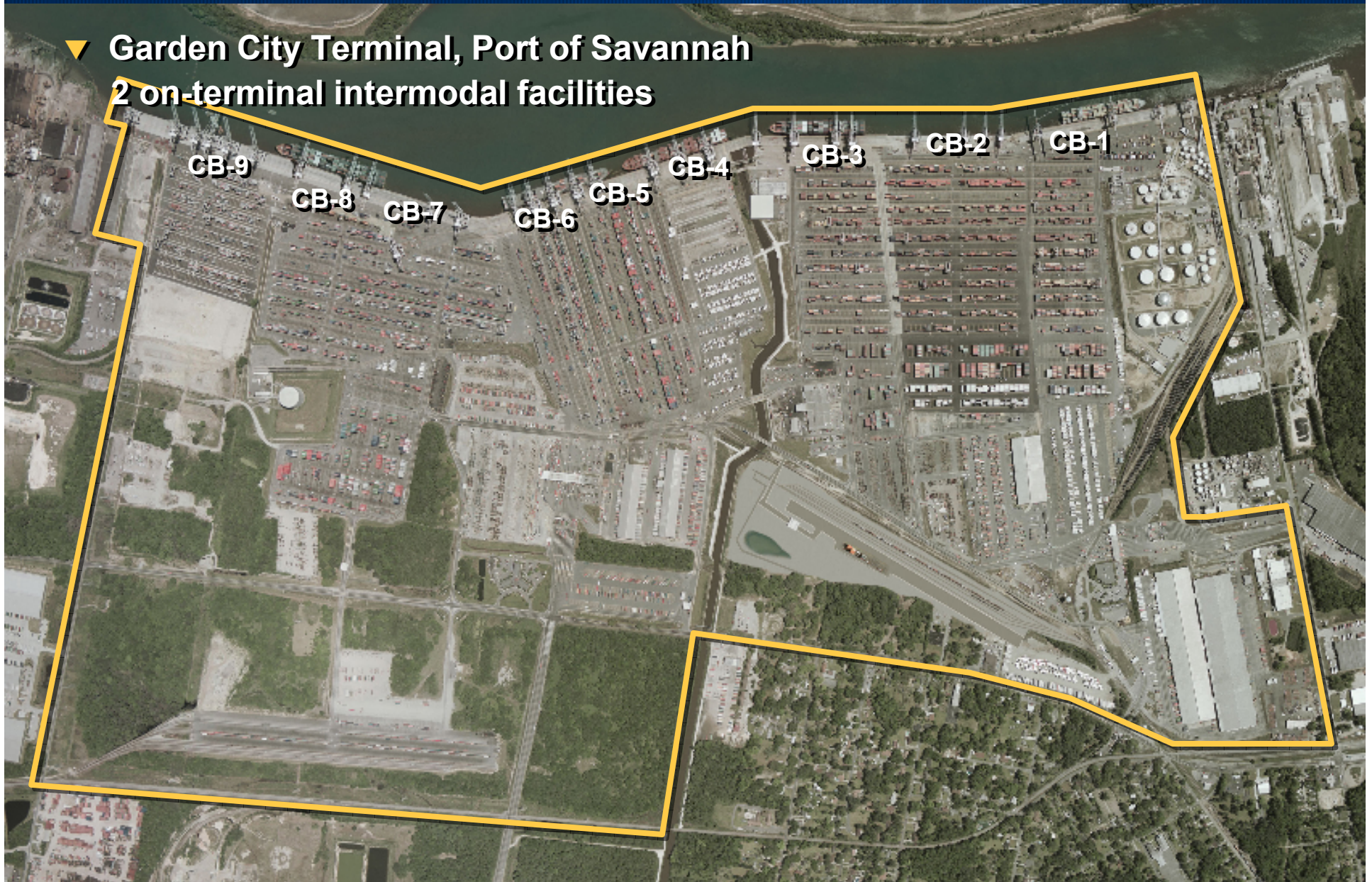
New Supply Chain Strategies mean U.S. East Coast Global Ports have a Long-term, Bigger Role to Play for Cargo Moving to and from Inland U.S. Hubs...



Redefining the pace of trade.



▼ **Garden City Terminal, Port of Savannah**
2 on-terminal intermodal facilities



AAPA: *Latin American & Caribbean Executive Management Conference*


▼ **Garden City Terminal, Port of Savannah**
2 on-terminal intermodal facilities

**Mason ICTF Served by
Norfolk Southern Railroad**

**Chatham ICTF Served by
CSX Transportation**

Redefining the pace of trade.



- 
- ▲ **Savannah Warehouse Expansion**
 - ▶ **1.2 million reported under construction in 2008**
 - ▶ **Another 20 million square feet planned within 5 to 30 miles of the terminal**

