



Pasha Group Logistics Introduction

Omni Terminal Operations





Company Overview

- Presenter: Stan Gabara, EVP – Logistics and Business Development
- A Freight Management and Logistics Company Founded in 1947
- Comprised of 35 separate companies
- Committed to world class customer service and quality
- Innovator and specialist in transportation and logistics for 67 years





Five Core Business Lines



Automotive Services

- Import and export vehicle processing
- Vehicle trucking and rail distribution
- End to End supply chain management – LLP



Maritime Services

- Maritime terminal management and stevedoring
- Automotive, project and break-bulk
- Vessel chartering

Relocation and Freight Forwarding Services

- Military and household goods
- Global move management services



Military Vehicle Transportation Management

- Movement and storage of personally-owned vehicles

Pasha Hawaii Lines – US Flag Ships

- PCTC – Jeanne Anne
- New “Con-ro” Container, RO/RO – Marjorie C - under construction



Key Port Locations

Pasha Automotive has key operations at:

- San Diego, California, National City Marine Terminal
- Baltimore, Maryland, Dundalk Terminal
- Grays Harbor, Aberdeen, Washington State
- Port Manatee, Florida

Pasha Stevedoring and Terminals has key operations at:

- San Diego, California, National City Marine Terminal
- Los Angeles, California
- Grays Harbor, Aberdeen, Washington State



Major Automotive Customers

- Acura
- Alamo-National
- America Honda
- Audi
- Avis/Budget
- Bentley
- BMW
- Case New Holland
- Chrysler
- Dollar Thrifty
- Enterprise
- General Motors
- Hertz
- Hino Truck
- Hyundai
- Isuzu Truck
- Kia
- Lamborghini
- Lotus
- Mazda
- Mitsubishi Fuso
- Nissan Motor Acceptance
- Porsche
- Toyota
- Volkswagen





Corporate Approach: Offer Customers Total Supply Chain Management

Pasha - One Group of Companies = Full Service

- Off line inspections at plant or Port (Pasha Automotive Services)
- Trucking from railhead to port (Pasha Distribution Services)
- Processing at port (Pasha Automotive Services)
- Vessel loading/stevedoring (Pasha Stevedoring - California)
- Ocean Freight (Pasha Hawaii)
- Vessel unload (Supervised by Pasha Stevedoring - Hawaii)
- Delivery to Dealers (Pasha Distribution Services)
- OHW Cargo handling (Pasha International)



Port Approach: Offer Full Service “On Dock”

Vehicle Processing

- Vehicle preparation centers
- Inspection services, e.g. IQS, damage
- Predelivery services
- Body shop and water borne painting
- Paintless dent repair
- Factory retrofit– mechanical services
- Accessory Installations
- Parts management
- Automated Car wash and fallout wash
- Long term storage and programs
- Preventative maintenance Programs

Terminal Handling / Stevedoring

- Vessel unloading and loading
- Manifest purification
- Port modifications
- Marine surveys
- Rail loading and unloading
- Railcar repair





Port Approach: Offer Value Added “On Dock”

Pasha Designed Programs and Processes Reducing Dwell, Increasing Velocity and creating jobs with Its Transportation Partners

- Real-Time radio frequency tracking
- Web based performance metrics for OEM and Distributors
- Web based railcar equipment ordering system
- Web based truck carrier load building
- On-Dock rail
- “Monroney” on demand printing program
- Design of pre - J.D. Powers inspection and programs





Location Components – Choosing a Site

- How does the location fit in the Supply Chain for targeted cargoes?
- Scalable – how many acres, berths and rail capacity for growth?
- Term to develop business base, cargoes and transportation partners, e.g. rail and truck?
- Concept/Business Plan Partners?
- Proactive Labor?
- Environment?





Why San Diego?



- Auto terminal operations becoming uncompetitive at LA/LB vs. container
- Reviewed 20 West Coast Ports
- Existing site with proximity to the major West Coast auto market
- Ability to repurpose the terminal – originally built as a container terminal prior to SS Deregulation - Site was fallow for 12 years
- Starting with a Blank sheet of paper – allowed for creativity and flexibility
- Interested Labor Groups offering creative agreements for Mutual Growth
- Pacific Rim Gateway - Geography in the Supply Chain – East of Reno – closer to growing Southern US and Mexico – NAFTA – Good Import / Export Location
- Rail access to allow for railroad “Landbridge” on dock - \$25 million investment
- Scalable – went from 30 acres to 180 acres of 220 acre terminal
- Clean environment



Why Grays Harbor?



- Position in the Supply Chain for Import and Export in the Pacific Rim Gateway
- Steamship advantages over other Ports, shortest steaming time to Asia Countries
- Ability to repurpose the terminal – primarily a logging port
- Starting with a Blank sheet of paper – allowed for creativity and flexibility
- Interested Labor Groups offering creative agreements for Mutual Growth
- Rail access to allow for railroad “Landbridge” on dock - \$18 million investment
- Scalable – from 30 acres to 150 acres with other terminal options for growth
- Clean environment
- Interested and participatory Port Authority



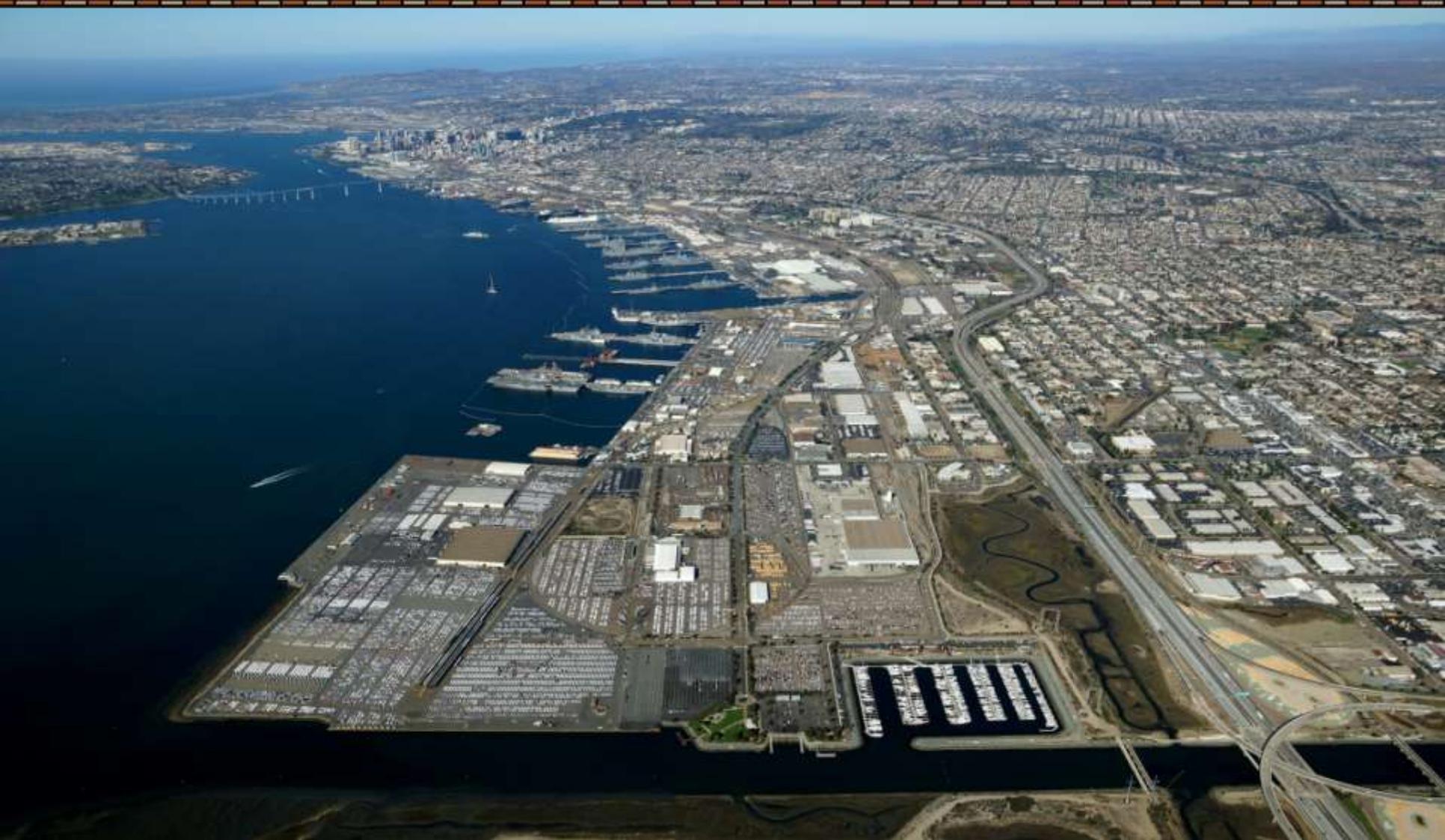
Flexibility for Growth

San Diego, Grays Harbor and Port Manatee have demonstrated creativity in leases, tariffs and land use allowing growth – and development to serve new trends:

- Short Sea Shipping for Mexico Auto Production to US
- Rate Structures to Consolidate Cargo – Import, Export & Domestic Production and US Flag Service
- Combining Compatible Cargoes



San Diego Terminal





San Diego Features



- Launched 1990 – Renewed Terminal Operating Agreement for additional 30 years in 2013
- 180-acre facility – 325 Pasha employees
- 8.5-acres of processing facilities under cover
- 5 berths terminal with draft of 35 feet Mean Low Water
- On dock 120-rail car loading
- 367,000 autos for 2013
- 24 vehicle manufacturers and distributors serviced



On Dock Rail Operations





Port of Grays Harbor



Port of Grays Harbor Milestones



- December 2011 – Port opens New Rail facility - \$18 million project adding 84 Multi Level spots to existing 43, greatly expanding port capacity
- December 2013 – Pasha completes \$5 million in new auto processing facilities including automated wash tunnel, drive over pits & new prep stations
- Port paved additional acres as volumes grow from 25K in 2010 to 93K in 2013 – five fold employment growth
- 2013 – Construction completed for “Full Services” on dock
- 25 year agreement – partnering for the long term – clear message to SS Lines and Customers of direction and commitment



Pasha Terminal Los Angeles, CA





PST Serving Steamship Lines

- PST stevedores for all lines – Project Cargoes and Break-bulk
- SCC
- K-Line
- NYK
- MOL
- VWT
- GLOVIS
- EUKOR



PST Maritime Terminal Services

- Facilities cargo management – Omni Terminal
- Break-bulk
- Project cargoes
- Vessel Operations
- Terminal Operations
- Stevedoring





Cargo Expertise





Cargo Expertise – Specialty Cargo





Cargo Expertise – RO/RO Container





Cargo Expertise – High/Heavy





Cargo Expertise – Heavy Lift





Port Manatee, Florida





Pasha Hawaii - Jones Act Vessel Service





Hawaii Service Profile

M/V Jean Anne

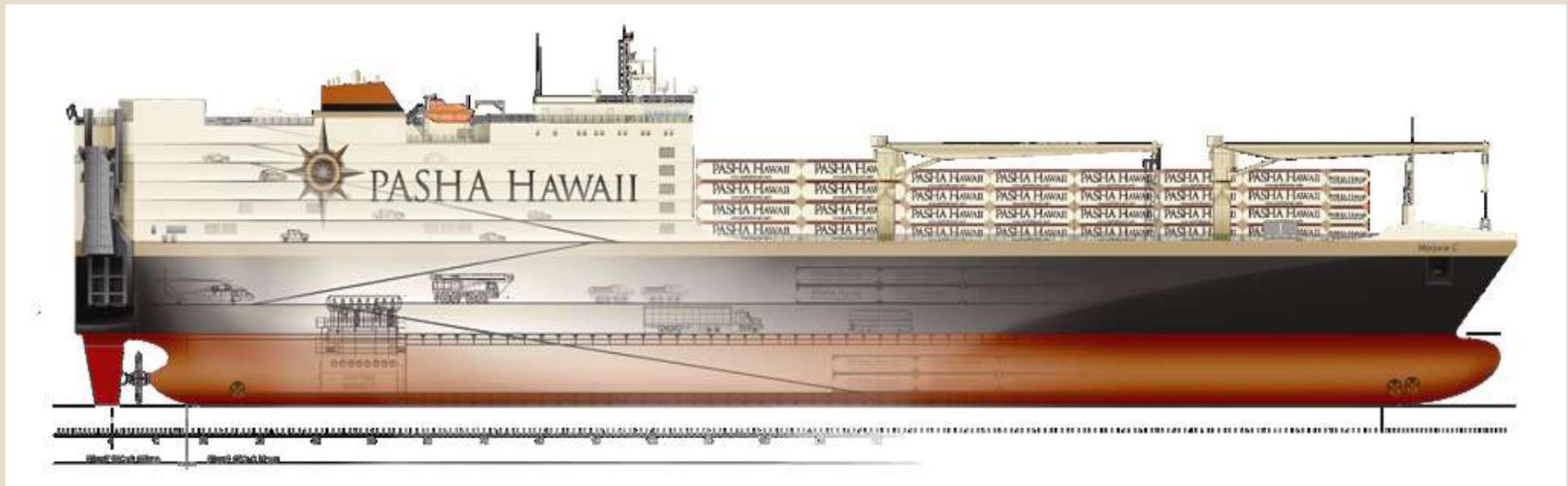
- The only Pure Car Truck Carrier in the Hawaii/Mainland Trade Lanes
- Established in 2005. US owned, US built, US flagged, Jones Act Vessel
- Three direct Port Calls from San Diego to Honolulu, Kahului and Hilo
- Fortnightly Service Rotating from the Port of San Diego to the HI Ports





Introducing the *M/V Marjorie C*

- A combination Container and Roll-On/Roll-Off Vessel, providing service between the Mainland and Hawaii.
- Service scheduled to start in the Summer of 2014
- Pasha Hawaii's Marjorie C and Jean Anne will provide weekly fully-enclosed Roll-On / Roll-Off service between the West Coast of California and Hawaii.
- OEM Service Parts Solution to Final Destination





Marjorie C Overview



- Currently under construction at VT Halter Marine, Pascagoula, MS
- Fortnightly calls to San Diego, Honolulu, Kahului and Hilo
- Designed to service automotive, rolling cargo, container and over high and wide clients
- Flexible capability accommodating all sizes and types of rolling cargo and containers
- Environmentally responsible design, engineering, construction and operations



Meet the *Marjorie C*





Pasha Distribution Services

Leveraging Internally and Externally

- Lead logistics LLP/LSP activities: processing → truck → rail → ship
- Fleet of 225 automotive car carriers throughout North America
- In excess of 350,000 vehicle moves per year



Siem Car Carriers NAPA Service



- 2009 – NAPA Service is formed with Siem management team experience focused on providing reliable high frequency service





Thank You

