Port of Oakland – 1999

- 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

Source: Drewry Maritime Research
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**

** Plus up to $40 million in 4 new cranes in 2018**
Industrial Real Estate Market – Bay Area

Vacancies at all time lows, no slow down in sight
Average annual rent growths >10% (2011-2016)

Source: Jones Lange Lasalle
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

Rendering of Cool Port Oakland – Port of Oakland
Brownfield Development

Former Oakland Army Base
Former Oakland Army Base

Rendering of CenterPoint Properties Phase 1 Facility – Port of Oakland
Supplemental Slides
Oakland Terminal – 2007 Wheeled

- Low storage density and no yard lift equipment
- Two longshore moves, one trucker move
Oakland Terminal – 2014 Grounded

- Higher storage density with CY lift equipment
- Four longshore moves, two trucker moves
Ocean Carrier Consolidation & Alliances

Current Alliances 2016

G6
- APL
- Hapag Lloyd
- Hyundai
- MOL
- NYK
- OOCL

Ocean 3
- China Shipping
- United Arab Shipping
- CMA CGM

2M
- Maersk
- MSC

CKYHE
- COSCO
- Hanjin
- Evergreen
- Yang Ming
- K-Line

Future Alliances 2017

THE Alliance
- Hapag Lloyd
- K-Line
- MOL
- NYK
- Yang Ming

Ocean
- CMA CGM
- COSCO Line
- Evergreen
- OOCL

2M
- Maersk
- Hyundai
- MSC

Hapag Lloyd acquired UASC
CMA CGM acquired APL
COSCO Shipping merged with China Shipping
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

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

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

Source: Jones Lange Lasalle
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

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

*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