Container Terminal Planning & Operations

Marine Terminal Management Training Program

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Where are we headed as an industry?

• Larger vessels are really driving the bus!
• Four consortiums will now handle close to 90% of the available freight.
• AMPT Virginia put a “line in the sand”
  • Global Bayonne set another.
• Spikes and move counts.
  • 6,000 moves with four cranes = 43 hours sustained
  • 6,000 moves with six cranes = 29 hours sustained
While we as an industry have talked about it for several years....there is now a changed “arena”

• Constraints are plentiful
  • Water depth
  • Air draft
  • City-center locations

• Where are the traditional sources of capital?
  • USACE
  • Port Authorities
  • Terminal Operators
  • Ocean Carriers
  • P3’s
    • The “investment” v. “the return”
Do the “new generation” terminals want to go up against the “traditional” issues?....

• Chassis
• RFID
• Higher Levels of Automation & Technology
  • Labor impacts
  • Training
• “Working the tides” and the “loadlines”
• BCO’s who require not only their reliable delivery; but it has to be “green”
We are starting to see a change....

• USACE interface
• Terminal Operators-”with a different skin in the game”
• Ocean Carriers-want the benefit
• Investor Community-really starting to look at the issue and perhaps package a “Wall Street” solution....
• The Greenfield is back!
It has been bantered about for a few years....

- Closest North American port to the Suez Canal
- No constraint
- No legacy operations
- Existing double-stack
- Divested by the federal government and now owned by a local government.
  - They don’t want to be a port authority
- No truck traffic
  - Non-Jones Act gives trans-shipment breadth
  - Integration into the heartland with existing rail
- Real network capabilities
- Delivered cost?
Quietly, they march forward....
Let us look at the Delaware Bay....

Share of East Coast Container Traffic: First Half 2014
Market Shares of Major North American East Coast Ports

- Port of NY-NJ, 30.0%
- Savannah, 17.6%
- Port of Virginia, 12.5%
- Charleston, 9.6%
- Miami, 4.9%
- Jacksonville, 4.9%
- Boston, 1.1%
- Port Everglades, 5.7%
- Halifax, 2.3%
- Montreal, 7.4%

Source: Individual ports. Data includes imports, exports and empties.
No surprises here....or is there?
Well maybe....there is!

Note: during the last thirty years, over 500% growth rate for the Delaware Bay region.
A City takes on a role....why?
A different role in container terminal development....

- Create regional economic impact....the elected official play
- Why not us too?
- A changing role with the traditional players
- Your dollars....and we facilitate!
So, which way is it going?....