Maryland Department of Transportation
Port Administration

State of the Port

July 6, 2018
The Port of Baltimore is a complex mix of Private and Public terminals...handling diverse cargoes.
Maryland Port Administration

- Global Trade
- Economic Impact to the State of Maryland
- Cargo Statistics and Rankings
- Infrastructure Investment
- Future Challenges
- MPA Accomplishments
Port of Baltimore’s International Cargo Flows - 2017

Asia 17.73m tons

Australia 0.23m tons

North America 1.78m tons

South/Central America 5.37m tons

Europe 11.96m tons

Africa 1.38m tons

POB Tons (Millions)
Imports = Red (13.6m Tons)
Exports = Blue (24.8m Tons)
Port of Baltimore Foreign Cargo 2007 – 2017

Bulk Cargoes
(Coal, Sugar, Gypsum, Salt, Fertilizers, etc.)

General Cargo
(Containers, Autos, RoRo, Pulp/Paper, etc.)
Economic Impacts of the Port of Baltimore

Among U.S. Ports, the POB is ranked 9th in dollar value for foreign cargo and 12th for foreign cargo tonnage.

- 13,650 direct jobs
- 20,270 induced and indirect jobs
- 93,700 related jobs to Port’s cargo

$2.9 billion in personal income

$310 million in state and local tax revenues.
1st in Autos/Light Trucks; and 1st in Roll on/Roll off (Ro/Ro) Cargo

1st in Imported Sugar

2nd in Exported Coal

9th in Overall Foreign Cargo Value ($53.9B)

12th in Overall Foreign Cargo Tonnage (38.4)
MPA Annual Container TEUs in Calendar Years

The MPA handled a record 962,480 TEUs in 2017.
In 2017, the POB handled a record amount of 807,194 units.
MPA Roll-On/Roll-Off Cargo (tons)

<table>
<thead>
<tr>
<th>Year</th>
<th>Import</th>
<th>Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>0</td>
<td>100,000</td>
</tr>
<tr>
<td>2009</td>
<td>100,000</td>
<td>200,000</td>
</tr>
<tr>
<td>2010</td>
<td>200,000</td>
<td>300,000</td>
</tr>
<tr>
<td>2011</td>
<td>300,000</td>
<td>400,000</td>
</tr>
<tr>
<td>2012</td>
<td>400,000</td>
<td>500,000</td>
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<td>2013</td>
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<td>2015</td>
<td>700,000</td>
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<tr>
<td>2016</td>
<td>800,000</td>
<td>900,000</td>
</tr>
<tr>
<td>2017</td>
<td>900,000</td>
<td>1,000,000</td>
</tr>
</tbody>
</table>

POB Market Share

- Georgia Ports: 26.1%
- NY: 5.5%
- Norfolk: 3.1%
- Charleston: 3.1%
- Jaxport: 6.4%
- others: 3.4%
- POB: 50.2%
MPA Annual Imported Forest Product Tons in Calendar Years
Baltimore is the 2nd largest coal port with 24% of all exports from the USA, after Norfolk/Newport News terminals (39%).
The Port of Baltimore was the largest USA port for gypsum imports in 2017.
Since 2010, Ports America Chesapeake invested over $260M in Seagirt:
- Deep Berth & world’s largest cranes
- Gate & truck scale improvements
- Additional Yard Cranes
- Chassis Yard
- Back Gate, etc.
Infrastructure – Needed Land for Cargo Terminals

In 2017, MPA set a new record with over 10.7 million tons of general cargo; additional land is needed to continue to grow business.

MPA General Cargo Tons

<table>
<thead>
<tr>
<th>Year</th>
<th>BB/Steel</th>
<th>Forest</th>
<th>Ro/Ro</th>
<th>Autos</th>
<th>Container</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>310,530</td>
<td>1,168,83</td>
<td>969,272</td>
<td>699,474</td>
<td>5,814,03</td>
</tr>
<tr>
<td>2009</td>
<td>145,380</td>
<td>844,041</td>
<td>598,302</td>
<td>495,549</td>
<td>5,248,18</td>
</tr>
<tr>
<td>2010</td>
<td>210,923</td>
<td>933,323</td>
<td>622,891</td>
<td>735,129</td>
<td>5,647,98</td>
</tr>
<tr>
<td>2011</td>
<td>328,718</td>
<td>912,823</td>
<td>938,675</td>
<td>829,282</td>
<td>5,877,17</td>
</tr>
<tr>
<td>2012</td>
<td>388,611</td>
<td>834,787</td>
<td>1,091,52</td>
<td>982,058</td>
<td>6,297,48</td>
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<tr>
<td>2013</td>
<td>272,763</td>
<td>934,344</td>
<td>899,032</td>
<td>1,093,69</td>
<td>6,368,57</td>
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<tr>
<td>2014</td>
<td>247,476</td>
<td>789,995</td>
<td>861,876</td>
<td>1,152,45</td>
<td>6,624,55</td>
</tr>
<tr>
<td>2015</td>
<td>213,908</td>
<td>674,628</td>
<td>760,182</td>
<td>1,102,89</td>
<td>6,878,24</td>
</tr>
<tr>
<td>2016</td>
<td>195,595</td>
<td>755,357</td>
<td>700,718</td>
<td>1,063,04</td>
<td>7,346,71</td>
</tr>
<tr>
<td>2017</td>
<td>217,589</td>
<td>670,811</td>
<td>726,026</td>
<td>1,073,33</td>
<td>8,032,07</td>
</tr>
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</table>
Economic Impacts of the Port of Baltimore Point Breeze Acquisition

• 4,120 jobs in Maryland potential on the 70 acre site
  • 1,650 direct jobs (29% in Baltimore City)
  • 2,470 indirect and induced jobs
• $343 million in personal wage and salaries
• $210 million in business revenues
• $36.1 million in state and local government tax revenues
Infrastructure – Needed
Howard Street Tunnel

This will allow double-stacked containers to reach the Midwest efficiently. MDOT and CSX originally applied for a grant under the FASTLANE. Both parties intended to reapply under INFRA, but CSX decided against it just a week prior to the deadline.

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Request</td>
<td>$155M</td>
</tr>
<tr>
<td>State Match</td>
<td>$145M</td>
</tr>
<tr>
<td>CSX Match</td>
<td>$145M</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$445M</td>
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Double-stacked access will improve the POB’s competitive standing for containers, create jobs and also improve freight rail connections north and south.
Economic Impacts of the Port of Baltimore
Howard Street Tunnel

• CSX deferred the project in November 2017
• $445 million project with costs shared equally by CSX, State of Maryland and Federal Government
• Approximately 7,290 long term jobs (2,950 direct associated with port activity)
• State/Local Tax Revenues: $65 million annually
• Personal Income and Re-spending: $613 million
• Business Revenues: $443 million
• Addition 6,550 jobs and $392 million associated with the 5 year construction period.
MPA Accomplishments

The Port of Baltimore’s public marine terminals set several cargo records in 2017. New records were established for: general cargo (10.7 million tons); containers (962,480 TEUs); and imported cars (419,304 cars).

The Journal of Commerce ranked the Port of Baltimore as one of the most efficient ports in container berth productivity for the third consecutive year.

For the ninth straight year, the MPA received a top rating of ‘excellent’ on a security assessment from the Coast Guard.

The Ocean Alliance (CMA-CGM, China COSCO, Evergreen and OOCL) will introduce a new container service to/from North Europe in April 2018.

Hoegh has started a new Ro/Ro service from the POB to Australia / New Zealand.

MDOT MPA purchased 70 acres behind Seagirt Marine Terminal for additional container and cargo storage

Port of Baltimore named the fourth-fastest growing North American port by the Journal of Commerce