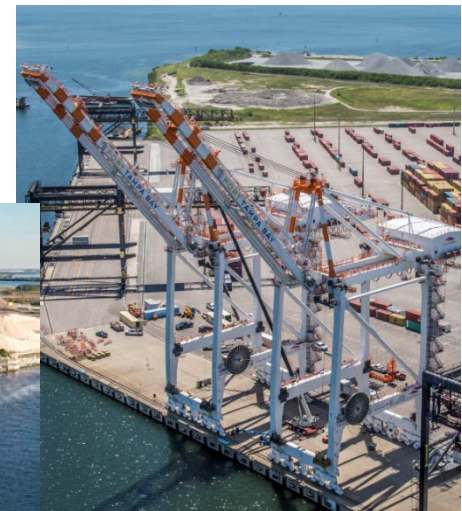




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# Business Development Update



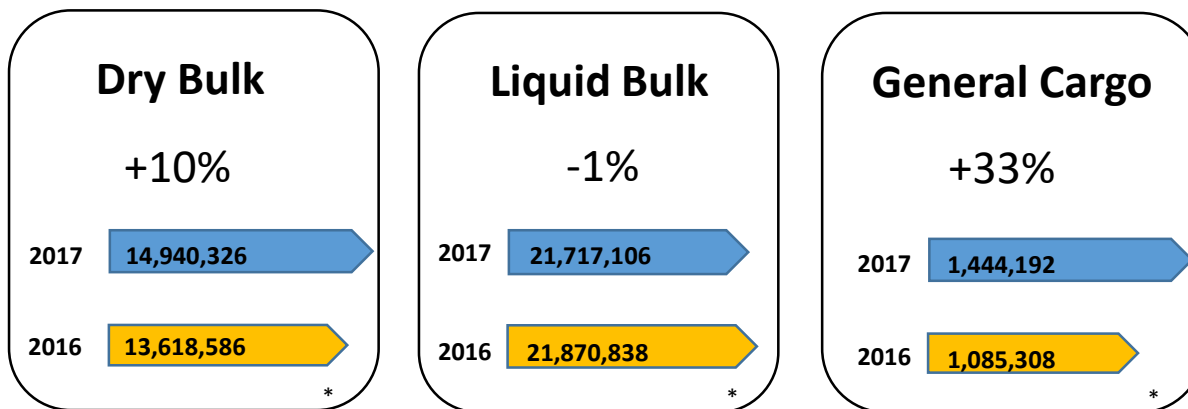


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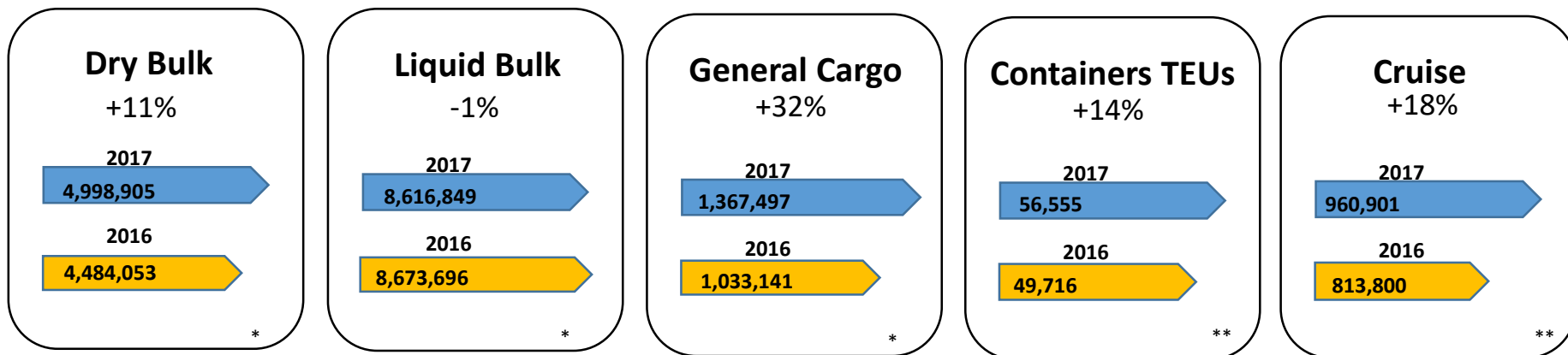
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# Performance By Commodity FY16 – FY17

## Total Port Berth



## Public Port Berth



\*Tons

\*\*Quantity/Count

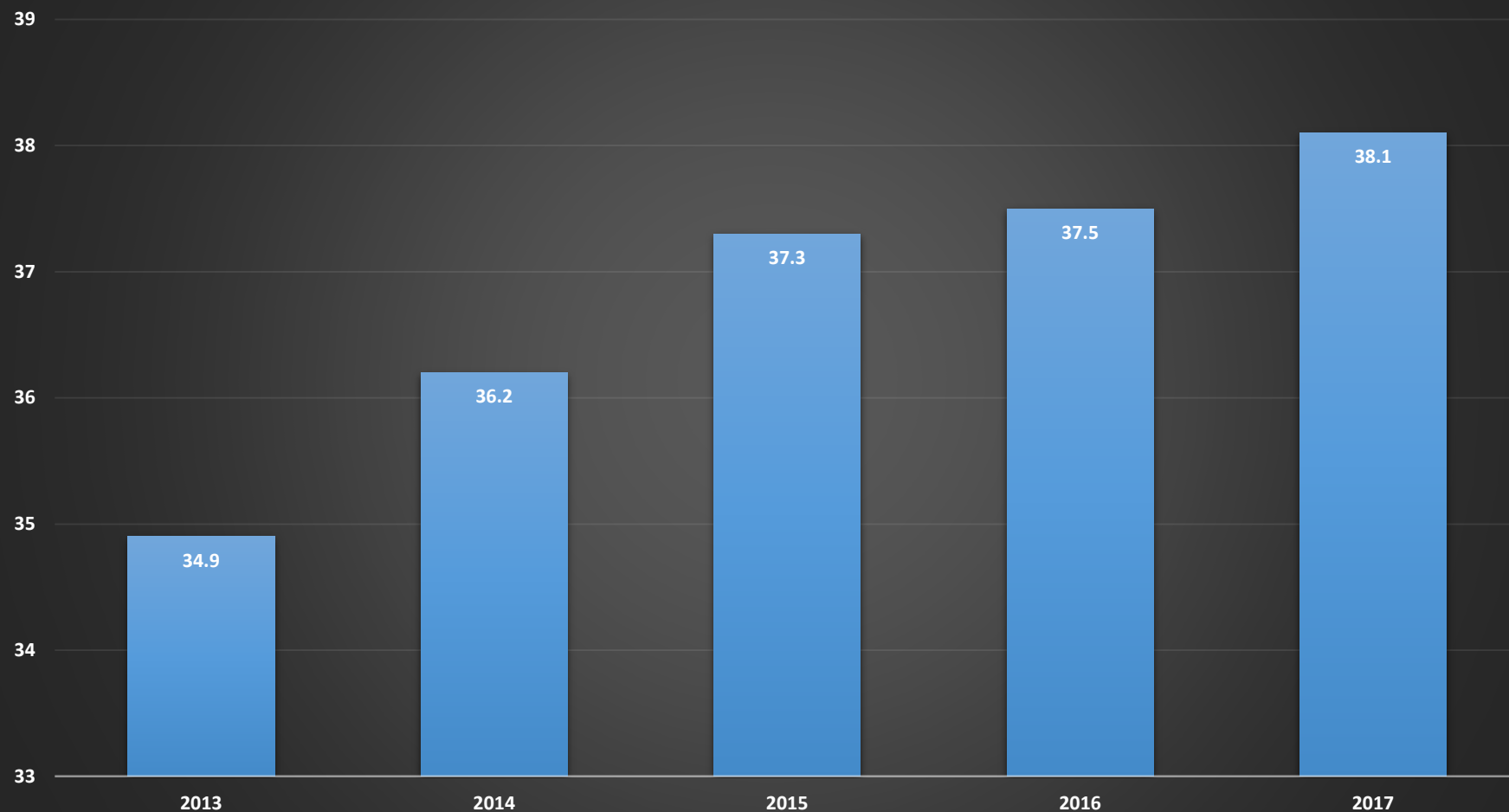


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# Total Port Tonnage

Total Port Tonnage



\*In Millions of Short Tons

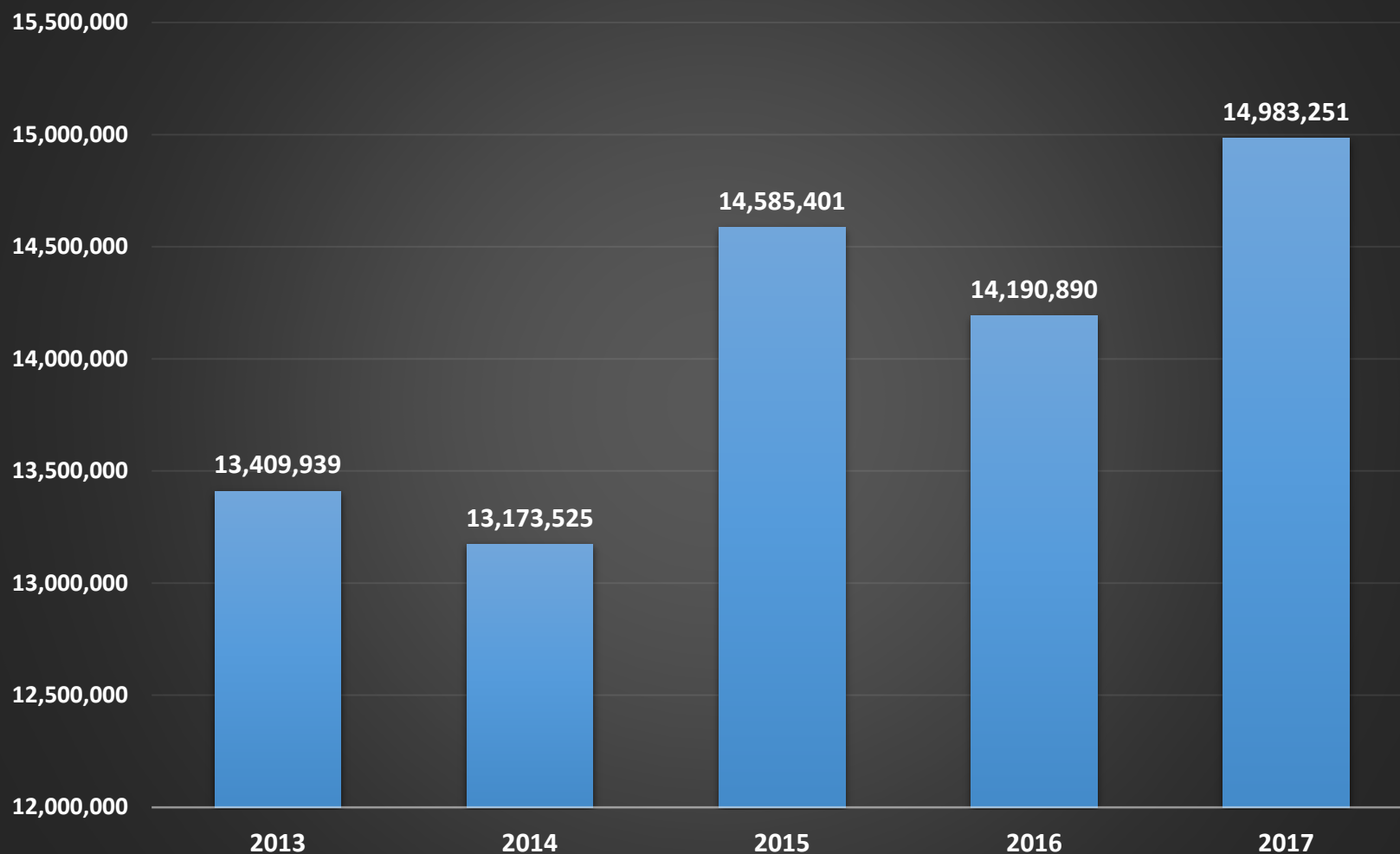


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# Public Berth Port Tonnage

Public Berth Tonnage



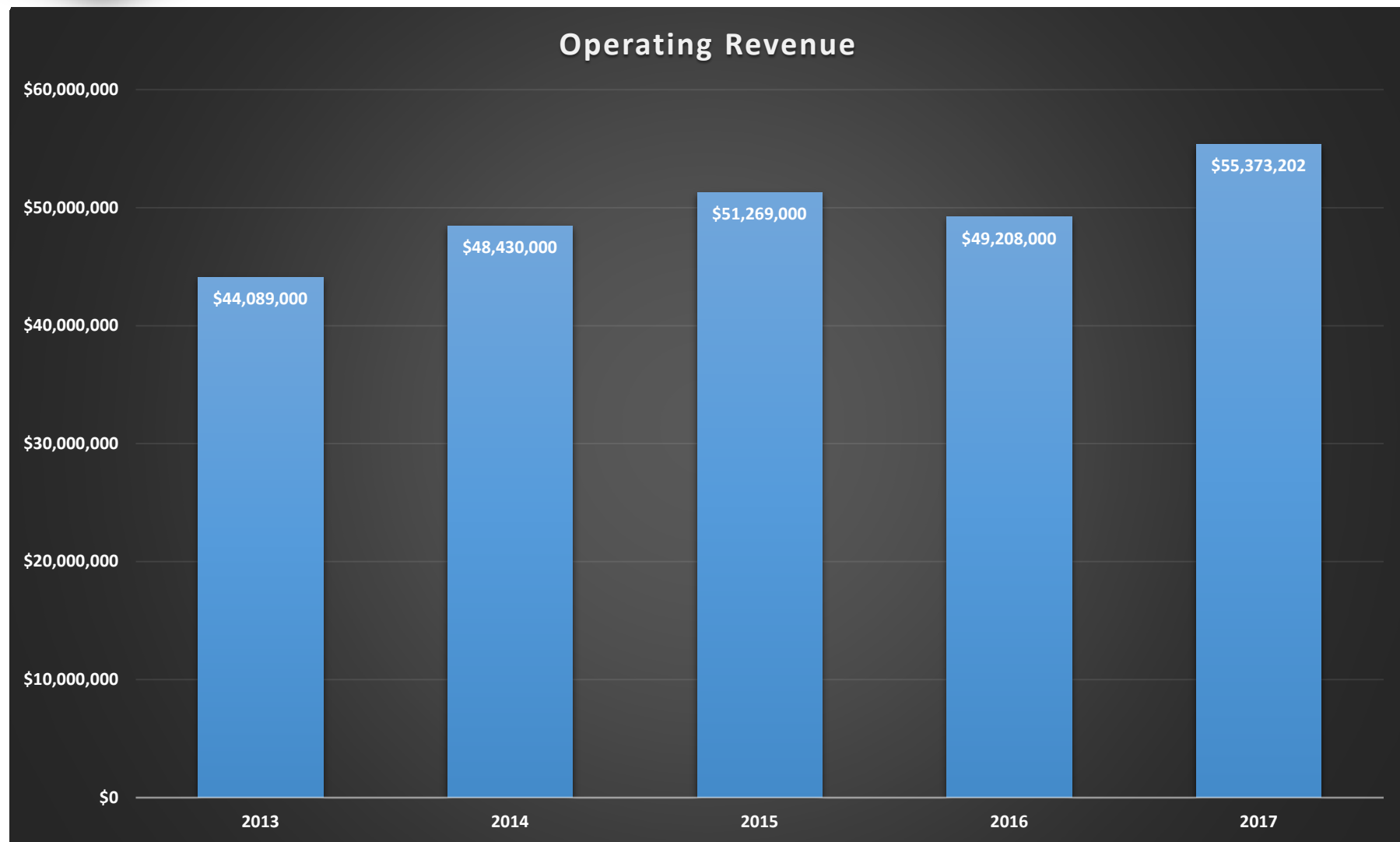




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# Total Operating Revenue

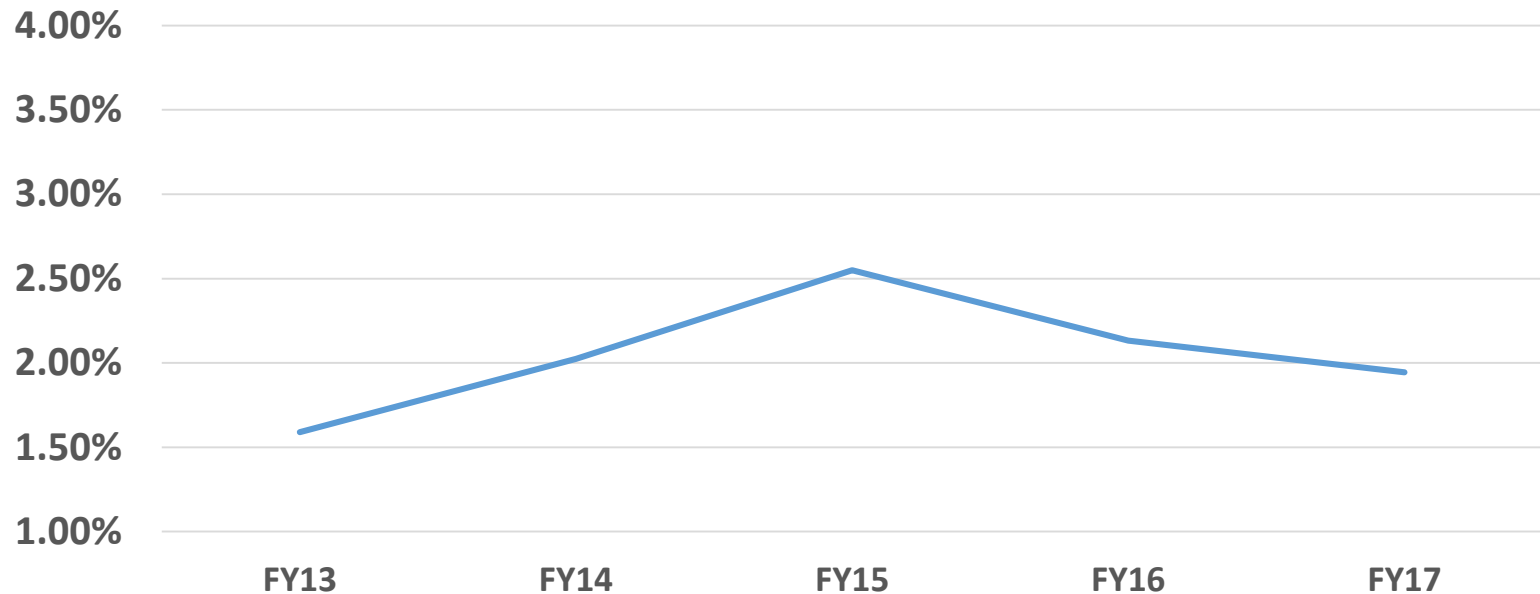




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# Operating Revenue & Promo Expenses

**Port Tampa Bay 2013 - 2017**  
**Promotional Expenses as a Percent of Operating Revenues**





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# Real Estate Board Items

## FY15 - Board Item List

First Quarter

	New Revenue Producing Acreage	Ex. Rev. Producing Acreage	Est. Annual Rev. Impact
Total Real Estate Board Items (FY17):	52.25	4.97	\$2,585,350

## FY16 - Board Item List

	New Revenue Producing Acreage	Ex. Rev. Producing Acreage	Est. Rev. Impact
Total Real Estate Board Items (FY17):	5	79.33	\$485,600

## FY17 - Board Item List

	New Revenue Producing Acreage	Ex. Rev. Producing Acreage	Est. Rev. Impact
Pasco Terminals		4	\$161,000
Total Real Estate Board Items (FY17):	94.41	90	\$4,398,630

## FY18 - Board Item List

	New Revenue Producing Acreage	Ex. Rev. Producing Acreage	Est. Rev. Impact
First Quarter Fiscal Year 2018	8.73	39.39	\$853,590
Totals	160.39	213.69	\$8,323,170.0



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# Real Estate

## New/Amended Leases/Agreements Summary

### FY 2015

- Gulf Sulphur
- Maritrans
- Tampa Tank
- Gulf Coast Bulk Equipment
- Amec Foster Wheeler
- Yara North America
- Port Logistics
- CH2M Hill

### FY 2016

- Batson Cook
- Titan Florida
- Bronco
- Sea-3
- Gaetano Cacciatore
- Tampa Ship
- Cemex
- Kloeckner Metals
- International Ship Repair

### FY 2017

- Amports
- Diversified Marine
- Logistec Gulf Coast
- Martin Operating Partnership
- Atlantic Sunshine
- Central Florida Pipeline
- Steelco
- Pasco Terminals

### FY 2018 Q1

- TransFlo
- Tampa Ship
- Plains LPG
- Gulf Marine Repair
- Gulf Sulphur
- Integral Energy
- ***Several additional new projects under negotiation***





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# Land Available for Industrial Development & Distribution

300+ acres available for new industrial and manufacturing projects with access to deep water, rail, highway and competitive energy costs



Available Parcels | Port Tam... X

### Parcels Available

Choose a category to filter the available parcels. Clicking on a parcel in the map below will provide more details about a parcel.

- All Available Parcels
- Bulk Cargo
- General Cargo
- Industrial Zoning
- Liquid Bulk
- Multi-Use

City of Tampa, Est. HERE, Garmin, INCREMENT P, USGS, METU... esri

### Real Estate Contact Information Form

Note: Fields marked with an \* are required.

PERSONAL INFORMATION	
First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Phone number	Email Address *
<input type="text"/>	<input type="text"/>
PARCEL PREFERENCE	



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# Strategic Long-Term Partnerships With Tenants & Key Customers



SATCO

TAMPASHIP

MSC for the real world



Tampa Juice Service, Inc.



TransGulf



Badcock HOME FURNITURE & more



TECO AN EMERA COMPANY

Seatrade

HAVERTYS

KANE'S FURNITURE



Holland America Line® SAVOR THE JOURNEY

Minute Maid



MOTIVA ENTERPRISES LLC



Carnival



MURPHY OIL CORPORATION



Royal Caribbean INTERNATIONAL

Pasco Terminals, Inc



TRANSFLO®

NCL NORWEGIAN CRUISE LINE®



Vulcan Materials Company

Good things come from Sysco®

BEALLS



PLRS Port Logistics Refrigerated Services



Tropicana

GULF SULPHUR

PORTS AMERICA

Knowledge grows





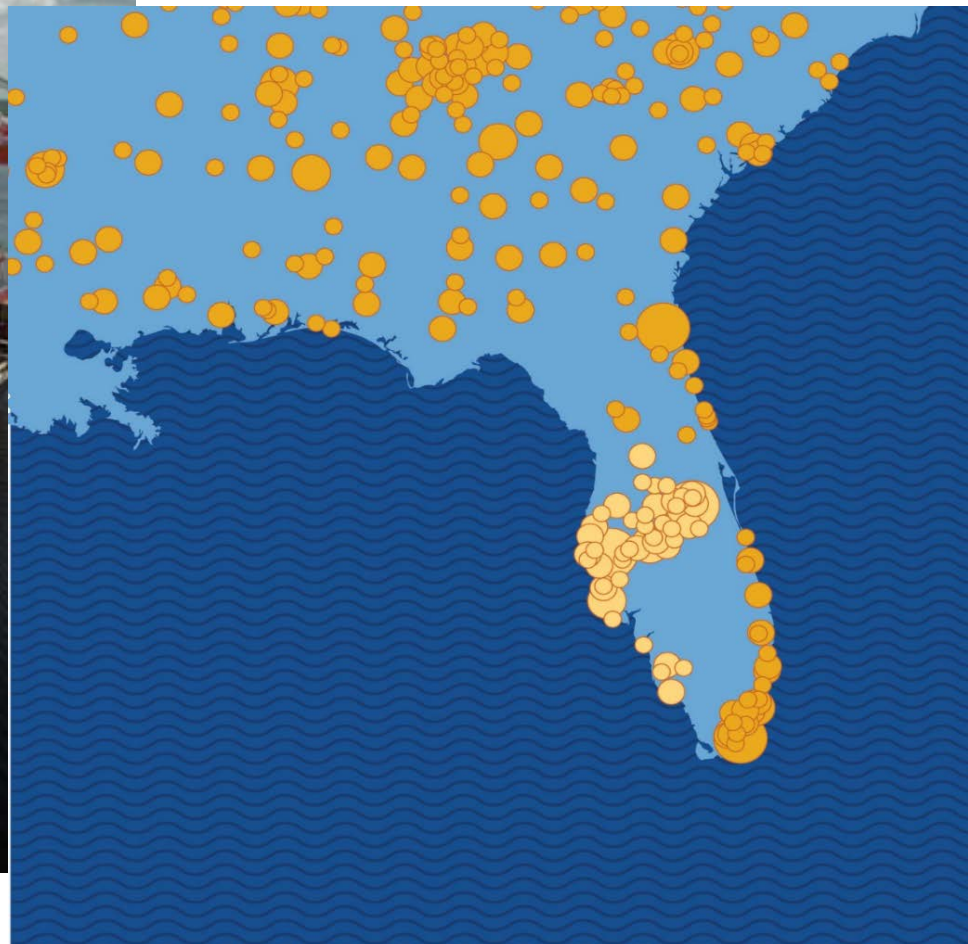
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# Containers

## Tampa Bay/Orlando I-4 Corridor – largest concentration of DC's in Florida

(179 distribution centers totaling 69million SF within 10 miles of I-4)



Ocean carriers looking at upgrading their Gulf services to post-Panamax vessels in 2018/19.

With new cranes, Port Tampa Bay is now in consideration for these new/expanded services when the decision is made to upgrade with larger ships.

Executive Shippers Council – 150 companies representing the major regional importers/exporters supporting expanded container services via Port Tampa Bay



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# Container Shipping Industry

- Supply/Demand
- Overcapacity
- Greater industry consolidation
- Ocean carriers mergers & acquisitions
- Alliances

2M



**MAERSK**  
LINE

HAMBURG SÜD GROUP

**m**  
**sc** for the real world

**HMM**  
HYUNDAI MERCHANT MARINE CO., LTD.

Ocean Alliance



THE Alliance



ONE

**K** "K" LINE AMERICA, INC.







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# Panama Canal Expansion & New Service Opportunities



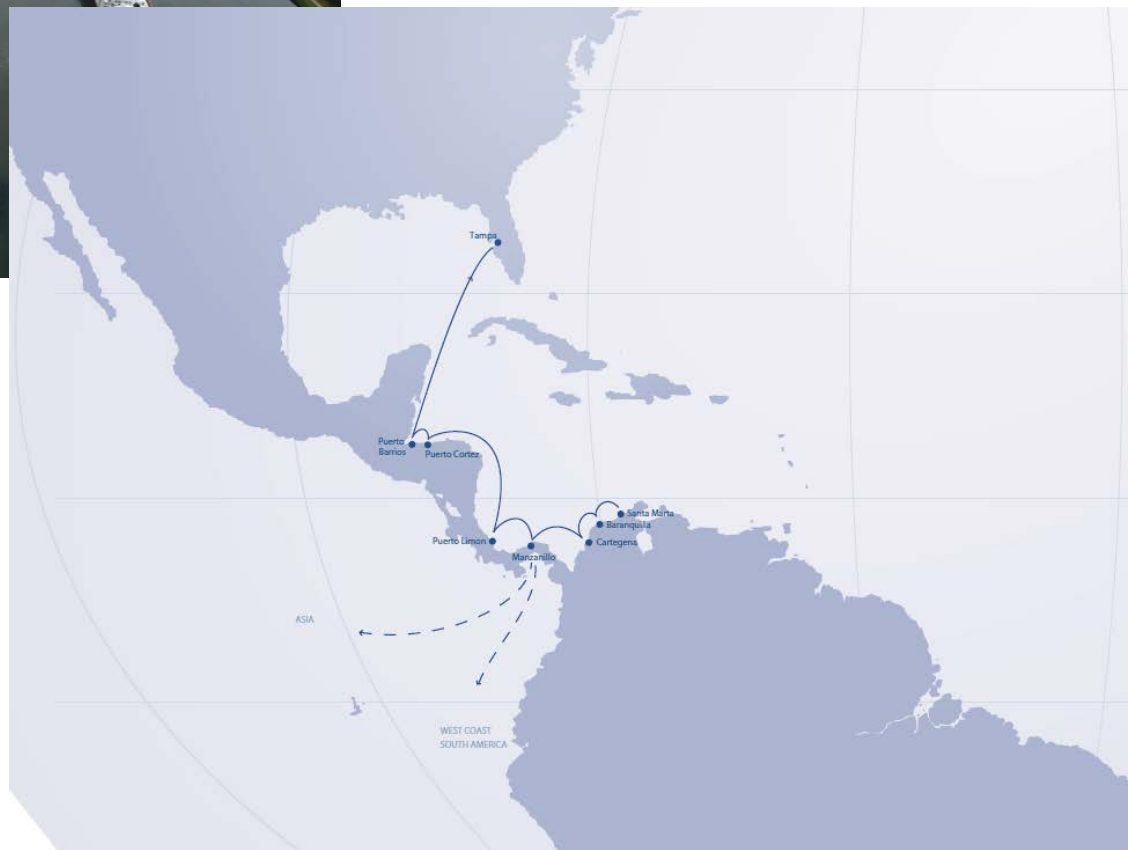
Port Tampa Bay well positioned for

- Upgrading of Asia – Gulf services
- Expanded Latin America regional services

Canal expansion: June 26, 2016

Phase I - Neo-Panamax ships deployed in US East Coast services (Norfolk, NY/NJ, Baltimore, Charleston, Savannah, Jacksonville, Miami) during 2016-2017

Pending Phase II – Still waiting on decision by carriers to upgrade US Gulf services to Neo-Panamax (Houston, Mobile, New Orleans, Tampa) 2018-2019?







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# Refrigerated



**PLRS**   
Port Logistics Refrigerated Services



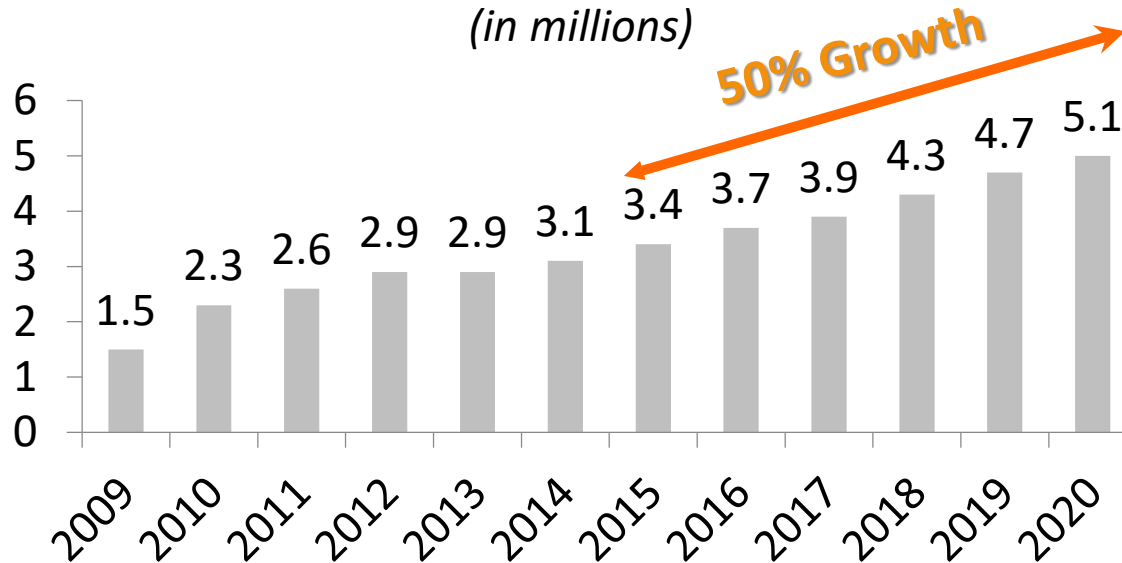
# Automobile Distribution and Ro-Ro

Port Tampa Bay has significant potential as a “short sea” shipping gateway for automotive plant expansion underway in Mexico

- Port Tampa Bay is in close proximity to Mexico’s Gulf Coast ports (Veracruz and Altamira)
- Tampa is well positioned as a gateway for exports to Latin America, including from the major POV and heavy equipment auctions in Florida

## Mexico Light Vehicle Production

(in millions)



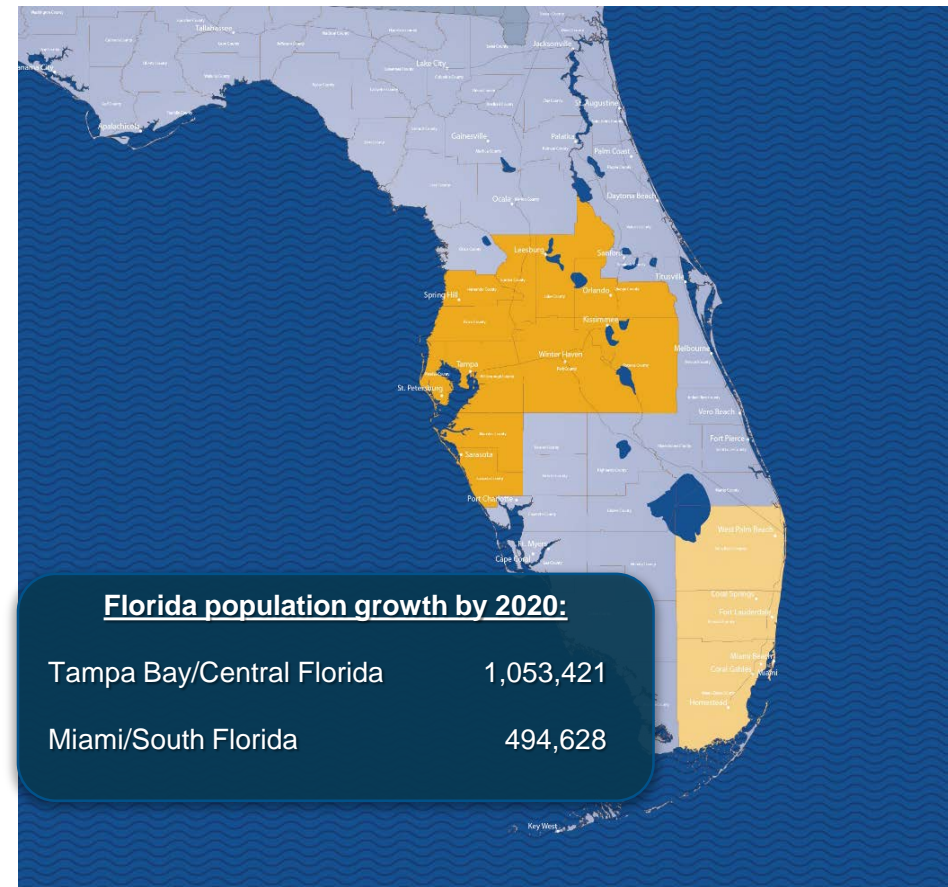
## Tampa Bay/Orlando I-4 Corridor = Huge Consumer Market

With over 20 million residents, Florida has overtaken NY as the 3rd most populous state and welcomes more than 100M tourist visitors/year

**Expanding population will drive cargo demand for liquid bulk, dry bulk, breakbulk and containerized cargo:**

- Consumer products
- Food & beverage
- Construction & building materials
- Energy products

**Central Florida is the State's fastest growing region  
– Twice the growth rate of South Florida By 2020**





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# Industry Awards & Recognition



**2017 American Metal Market's  
*Logistics/Transportation  
Provider of the Year***



**2016 Lloyd's List North  
American Port Operator of the  
Year**







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# Strength In Diversity

