



GEORGIA MOTOR TRUCKING ASSOCIATION

June 21, 2022



GEORGIA
PORTS

DEEP WATER & INLAND TERMINAL OPERATIONS

Appalachian
Regional Port

CHATSWORTH

★
ATLANTA

Northeast Georgia
Inland Port
(In Progress)

West Central
Georgia Inland Port
(Future)

SAVANNAH

Garden City Terminal
Ocean Terminal

BRUNSWICK

Colonel's Island Terminal
Mayor's Point
East River

BAINBRIDGE



NATIONAL RANKING 15-Year CAGR

PORT GATEWAY	CY 2006	CY 2021	'21 CAGR vs '06
1. LA/Long Beach	15,760,218	20,061,978	+1.6%
2. NY/New Jersey	5,086,070	8,985,929	+3.9%
3. Savannah	2,160,196	5,613,163	+6.6%
4. Virginia	2,046,285	3,522,834	+3.7%
5. Houston	1,581,163	3,453,226	+5.3%
TOP FIVE TOTAL	26,633,932	41,637,129	+3.0% (Avg.)
TOP TEN TOTAL	36,542,110	53,161,696	+2.5% (Avg.)



SOURCE: AAPA and Port Websites

PROJECTED FY 2022 GROWTH

	FY2022*	FY2021	% CHANGE
★ TEUs	5,764,128	5,331,392	8.1%
★ TOTAL TONS	41,238,898	41,132,455	0.3%
GCT RAIL LIFTS	533,886	582,592	-8.4%
TOTAL RO/RO	634,096	704,376	-10.0%

★ Record Projection



SOURCE: GPA Internal Data / RoRo in units

THE WORLD'S TOP 30 CONTAINER PORTS

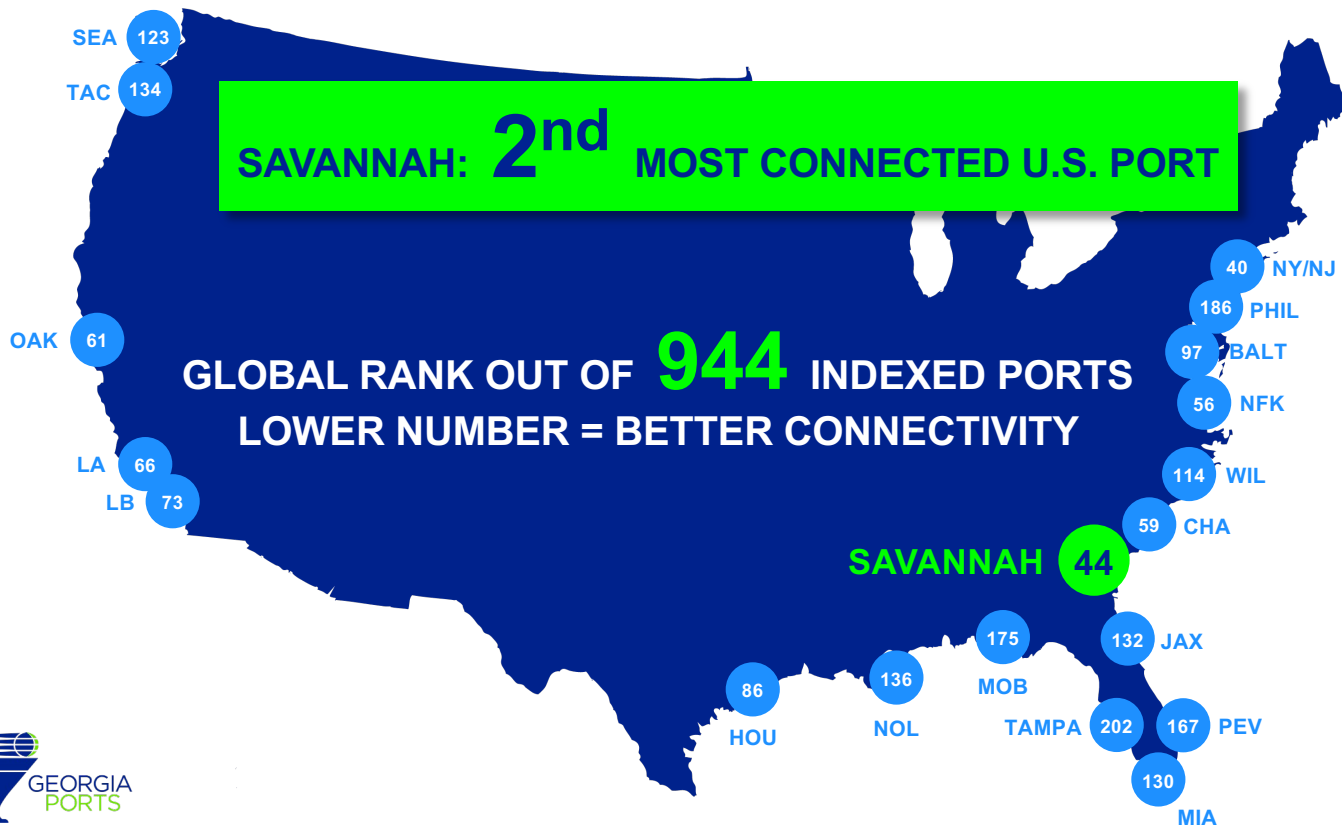
RANK (Last Year)	PORT NAME	COUNTRY	2021 (TEU Mn)	2020 (TEU Mn)	2019 (TEU Mn)	21/20%	20/19%
1	(1) Shanghai	China	47.5	43.5	43.3	8.1%	0.5%
2	(2) Singapore	Singapore	37.4	36.8	37.2	1.6%	-0.9%
3	(3) Ningbo-Zhoushan	China	31.0	28.7	27.5	8.2%	4.4%
4	(4) Shenzhen	China	28.8	26.5	25.7	8.3%	3.0%
5	(5) Guangzhou-Nansha	China	24.1	23.2	23.2	4.3%	-0.2%
9	(10) LA/LB	US	20.0	17.3	16.9	15.8%	2.1%
18	(20) NY/NJ	US	8.9	7.5	7.4	18.5%	1.5%
28	(35) Savannah	US	5.6	4.6	4.5	19.9%	1.8%
29	(27) Piraeus	Greece	5.3	5.4	5.6	-2.2%	-3.7%
30	(25) Yingkou	China	5.2	5.6	5.4	-7.8%	3.3%



SOURCE: Alphaliner Weekly Newsletter- 8 2022; *2021 estimate

SAVANNAH Better Global Connectivity

Q2 2021 Port Liner Shipping Connectivity Index



- 1 SHANGHAI
- 2 SINGAPORE
- 3 NINGBO
- 4 BUSAN
- 5 HONG KONG



SOURCE: UNCTAD
Quarterly Liner Shipping
Connectivity Index - June 2021

RECORD GATE MOVES

16,217

June 15, 2022

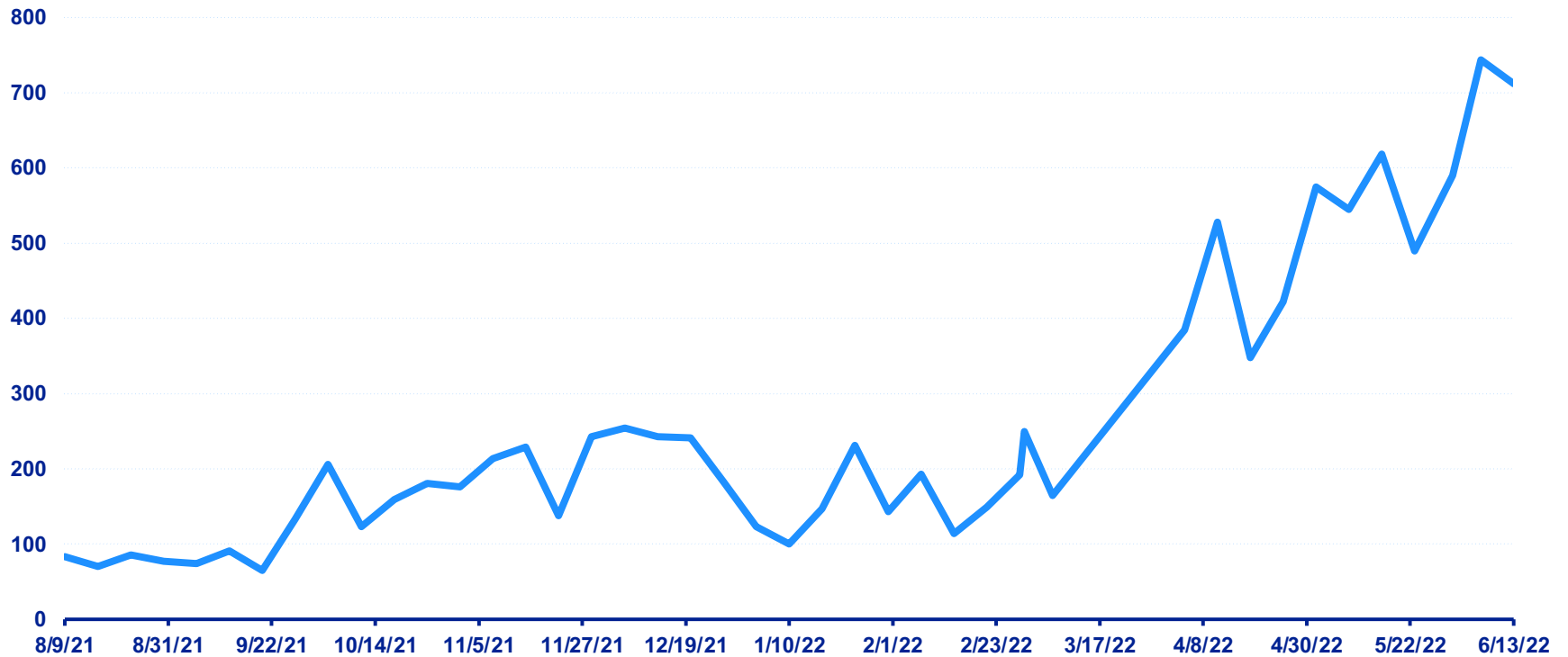
TURN TIMES

Single 42 Minutes / **Double** 61 Minutes



WEEKLY NIGHT GATES MOVES 7 p.m. – 11 p.m.

GATE MOVES



TRUCK DRIVERS ENROLLING IN GPA SYSTEM

FY 21: 3,294 drivers enrolled

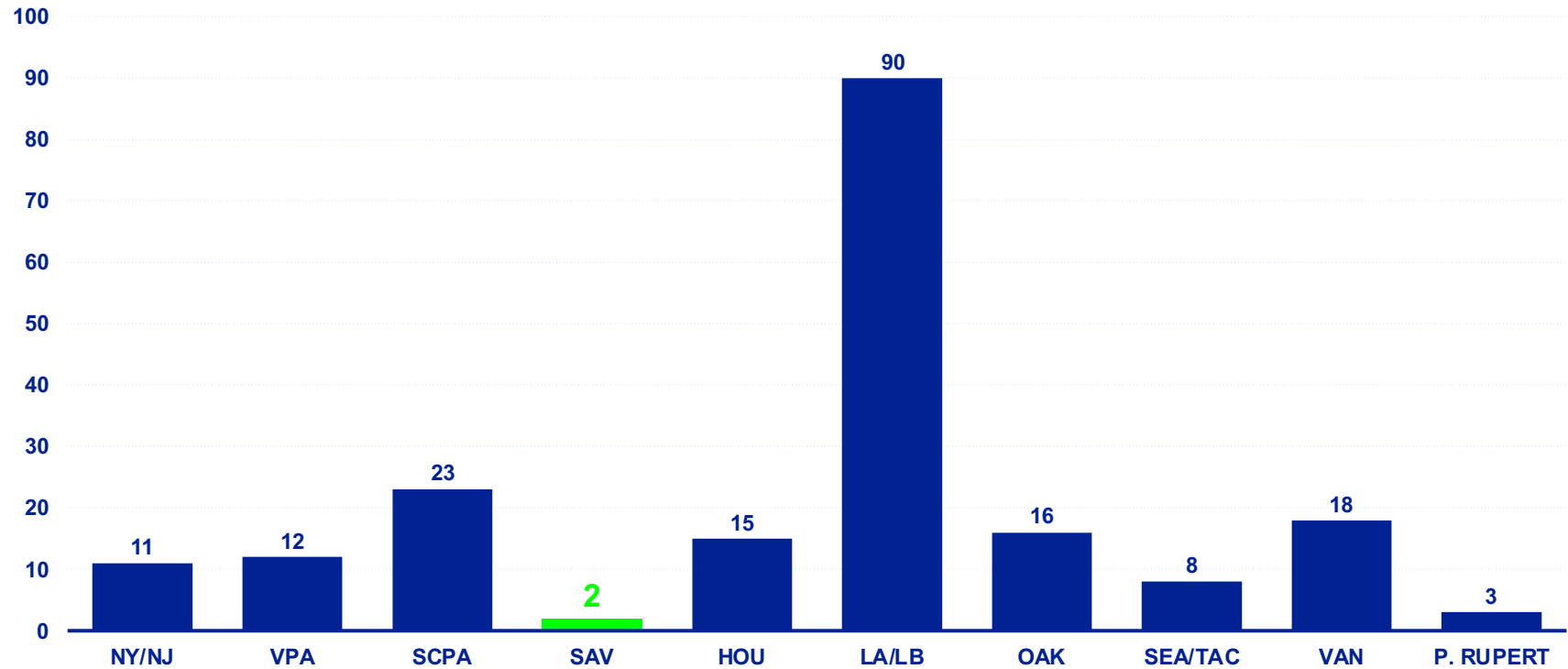
FYTD 22: 5,252 drivers enrolled

**Averaging 83 new drivers
per week**



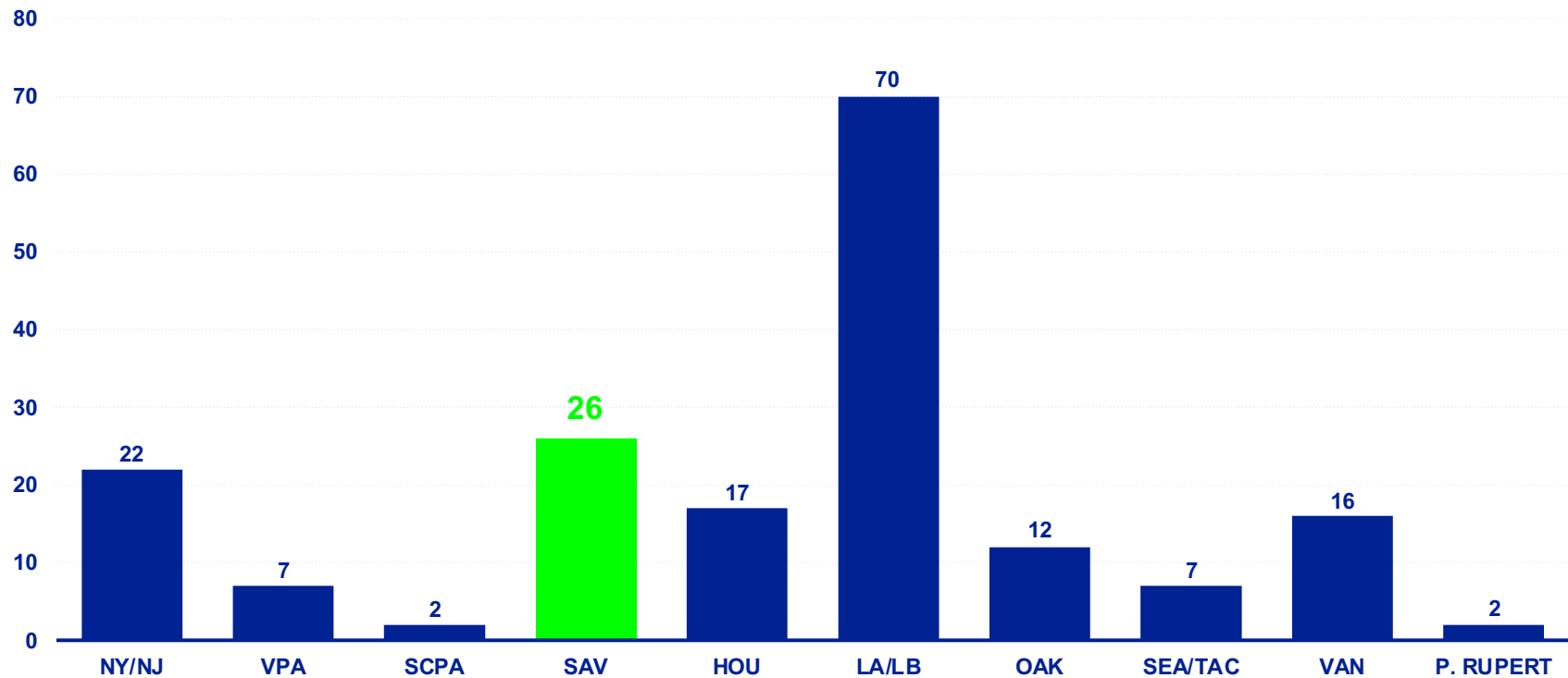
U.S. PORTS Vessels at Anchor – March 28, 2022

SHIPS AT ANCHOR

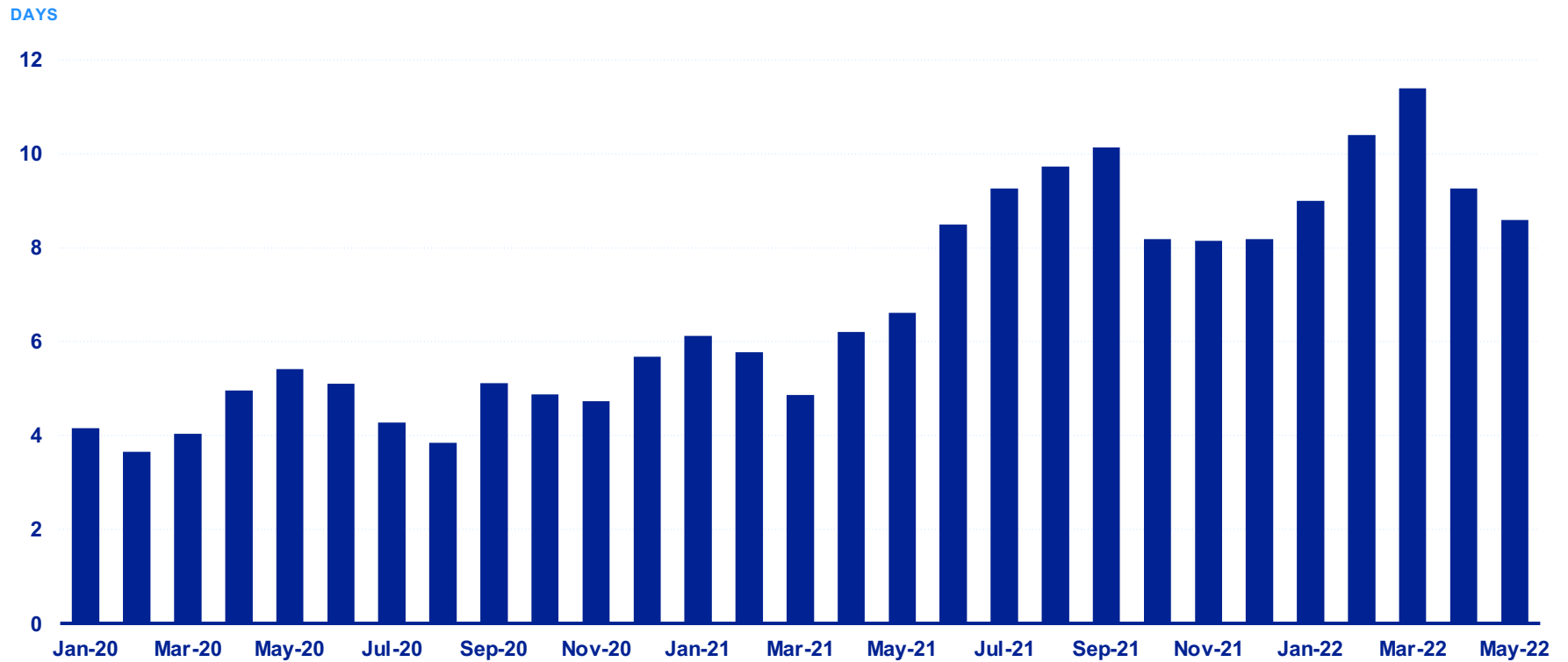


U.S. PORTS Vessels at Anchor – June 17, 2022

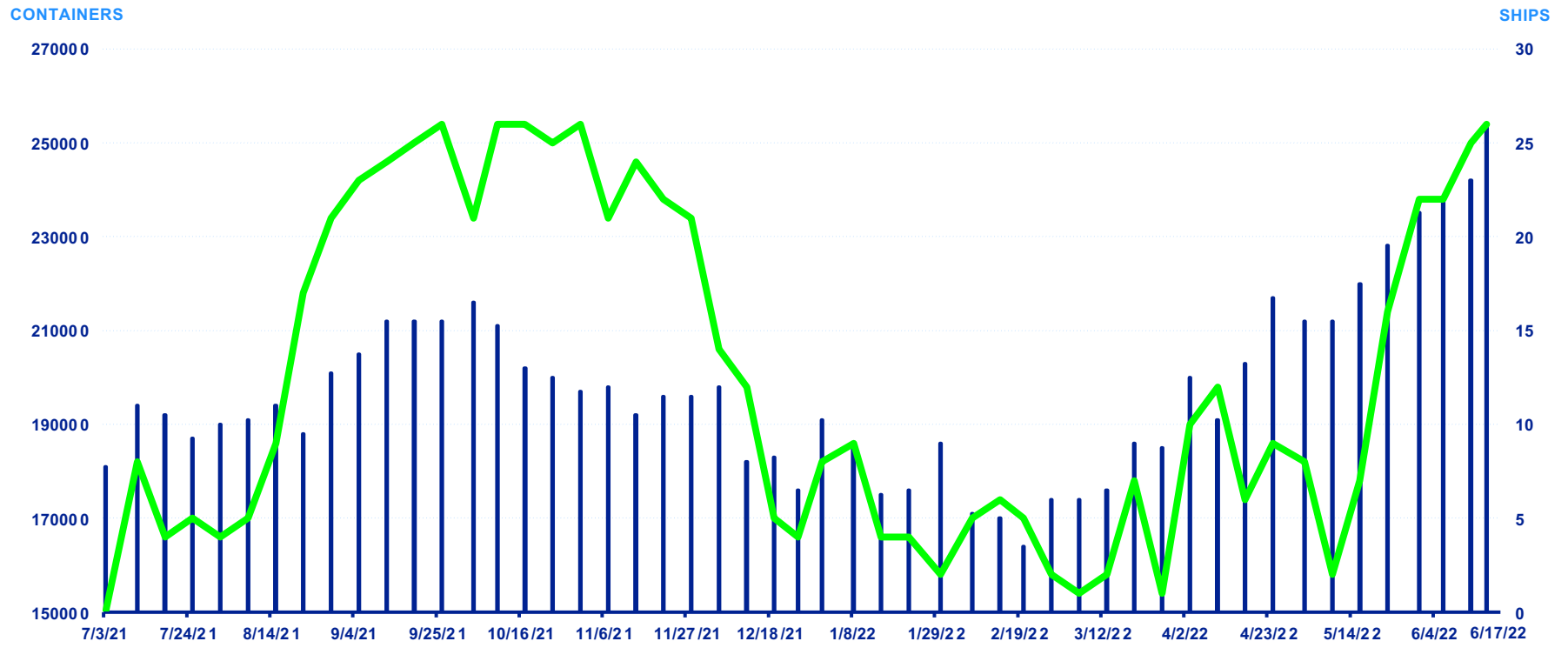
SHIPS AT ANCHOR



SAVANNAH IMPORT DWELL DAYS January 2020 – May 2022

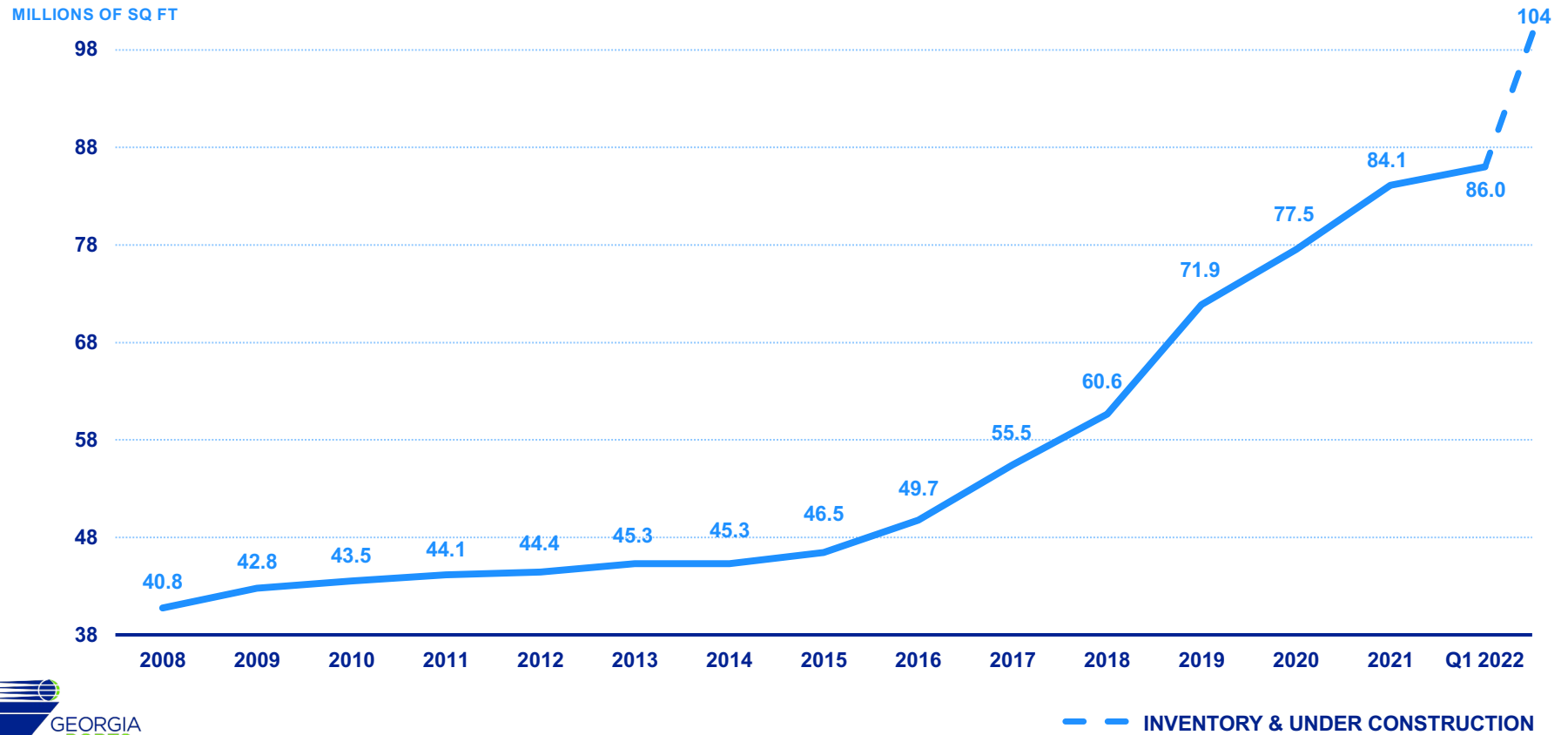


FY22 SAVANNAH IMPORTS 'On the Water'



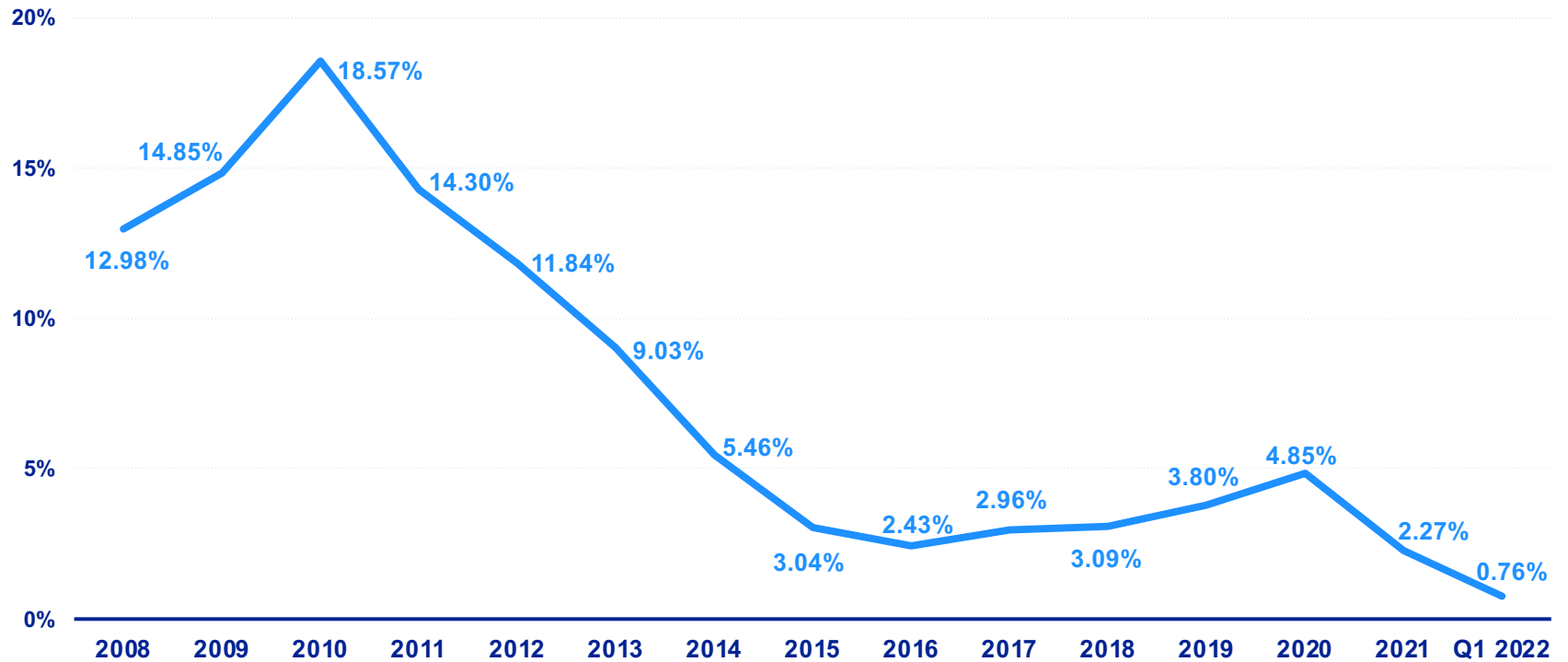
— IMP ON WATER — SHIPS AT ANCHOR

SAVANNAH INDUSTRIAL MARKET 2008 – 1Q 2022



VACANCY RATE 2008 - Q1 2022

VACANCY RATE %



CHASSIS POOL

**Partnering with CCM
to create a new chassis pool:**

- Improves condition
- Increases availability

**Fewer than 2% of chassis
currently available in Savannah**

17-day street dwell



CHASSIS POOL

Current SACP fleet:

- Fleet size: 58,000
 - Average age: 18 years
 - Utilization: 100%+
-

South Atlantic Pool 3.0 – phase in over 6 years

Goal: Increase chassis availability and update fleet

Wilmington, NC & Jacksonville, FL

FMC Review



RECENT DEVELOPMENTS

China/Shanghai outlook uncertain

- COVID impact
 - Manufacturing shift
-

West Coast labor negotiations

- West Coast to East Coast volume shift
-

Charleston to Savannah volume shift

OSRA



U.S. Retail Sales Fall as Inflation Stings Consumers

— *Wall Street Journal, June 15, 2022*

Stores Have Too Much Stuff. Here's Where They're Slashing Prices

— *Wall Street Journal, June 14, 2022*

GM, Ford CFOs Say They Are Preparing for Economic Slowdown

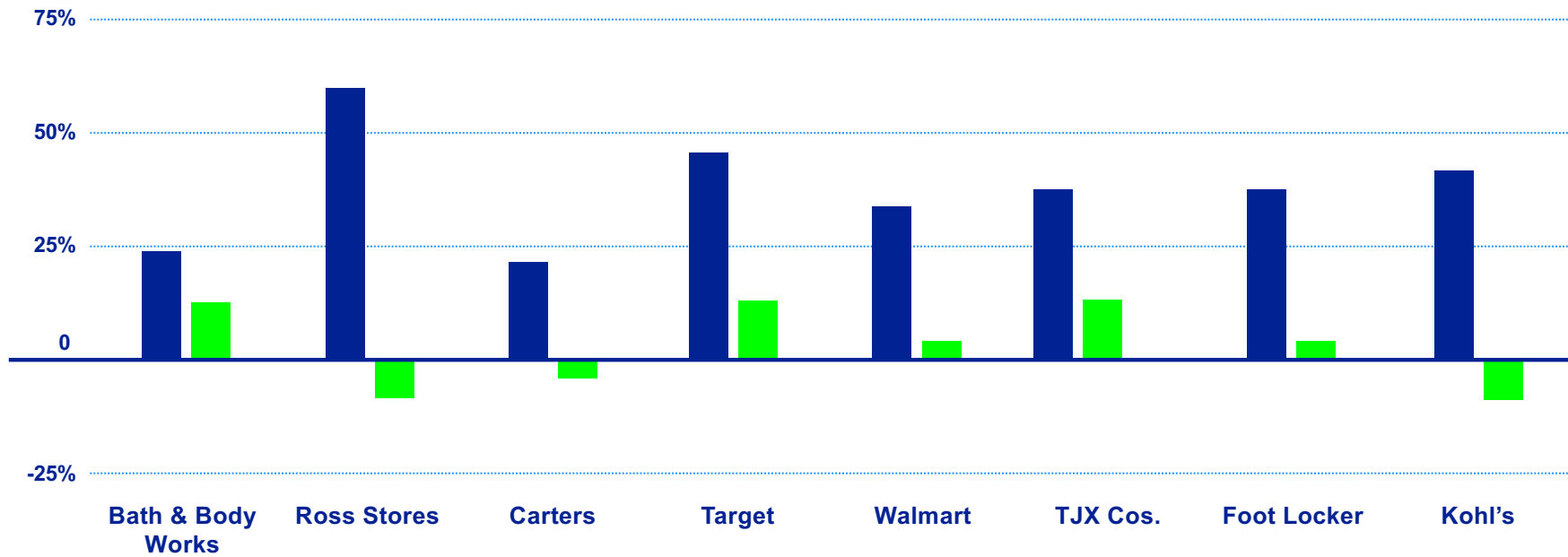
— *Wall Street Journal, June 15, 2022*

Macy's, GAP and Other Clothing Stores are Stuck with the Wrong Stuff

— *Wall Street Journal, June 5, 2022*



RISING INVENTORY vs. SALES FOR VARIOUS RETAILERS



— INVENTORY — SALES

SOURCE: Citi Research



GPA CAPITAL INVESTMENTS

**RECORD INVESTMENT
FOR CAPACITY BUILDING**

Past 10 years: \$1.2B

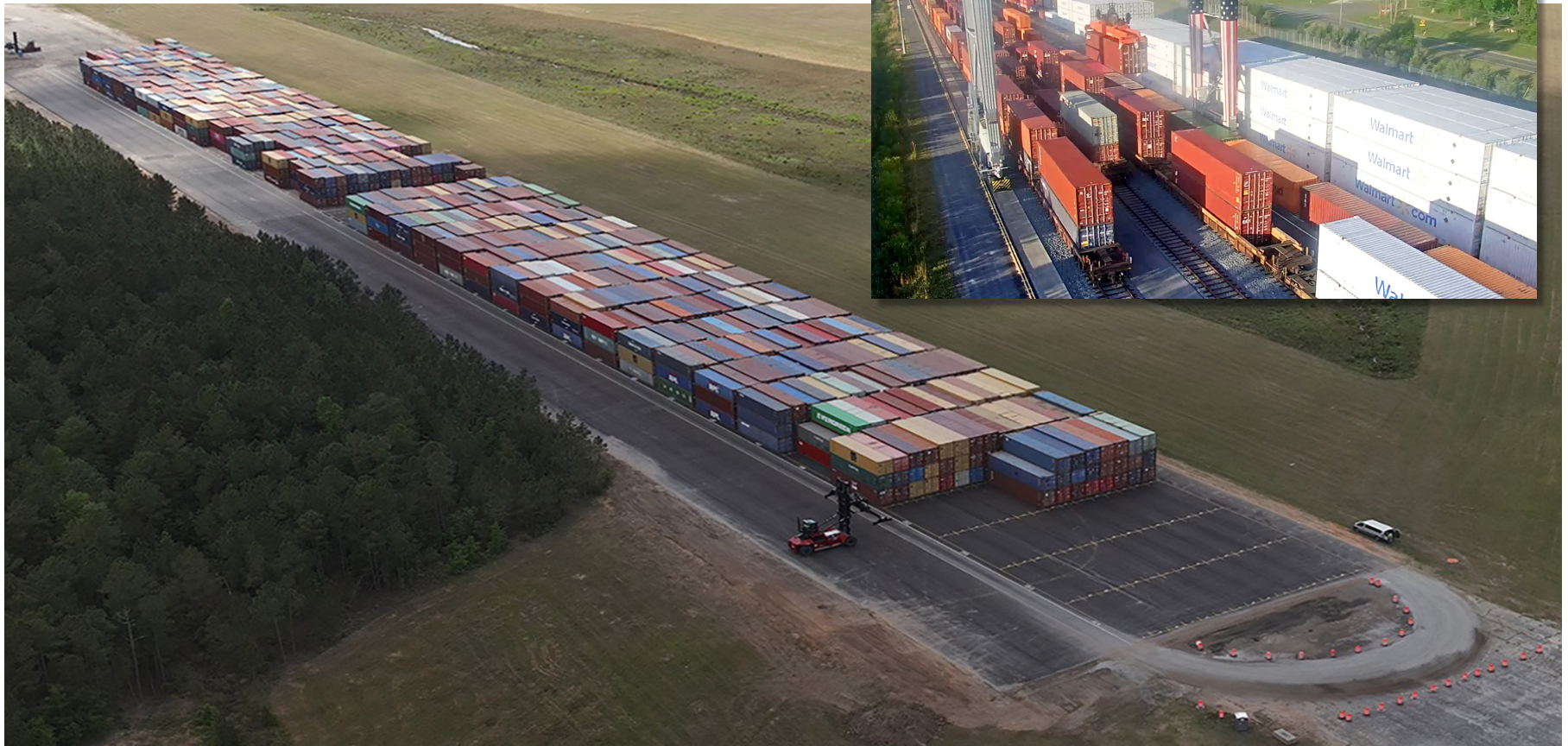
Next 12 years: \$4.5B



POP-UP YARDS



POP-UP YARDS

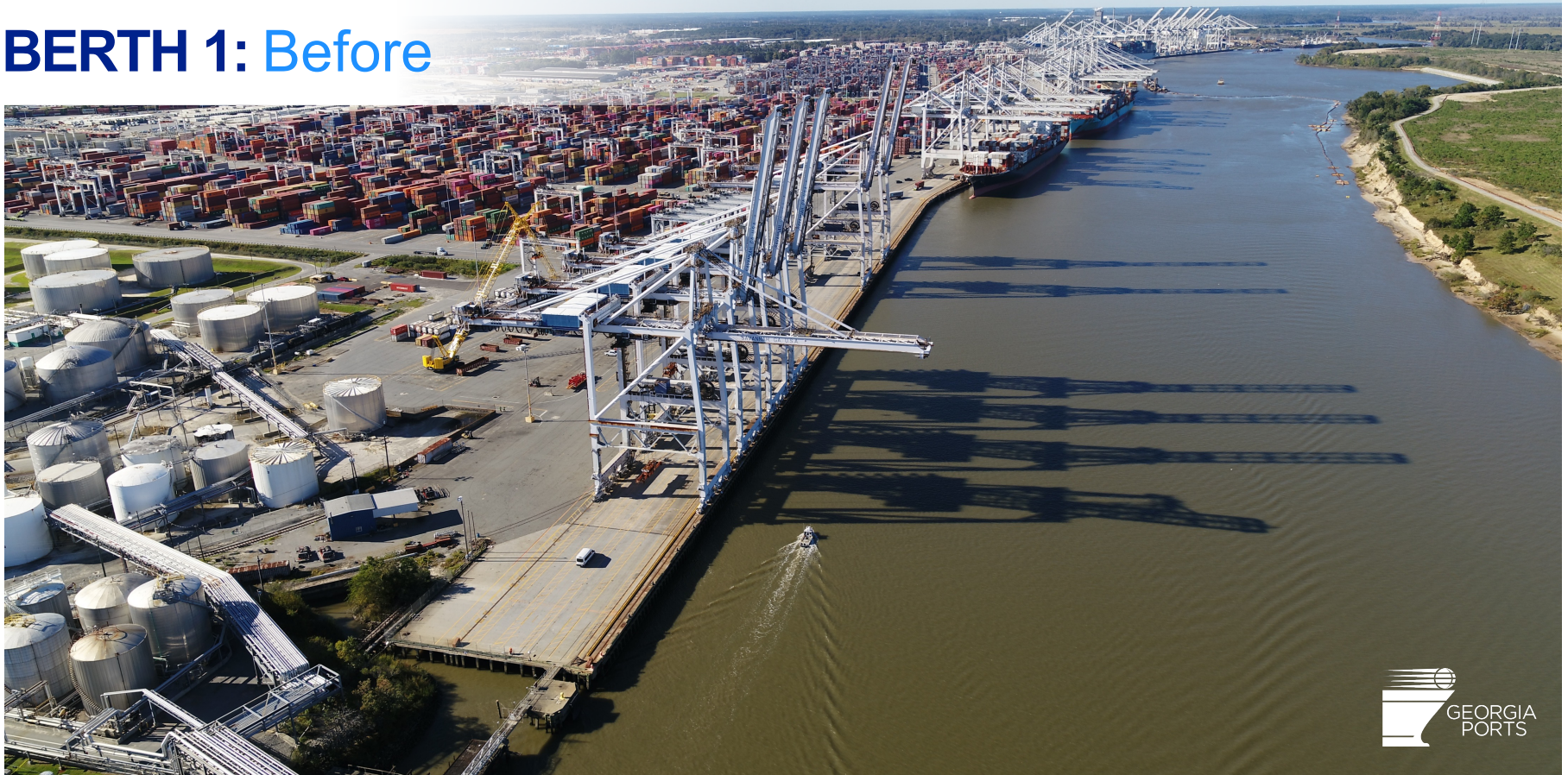






CROSS DOCK FACILITY: Coming Soon

BERTH 1: Before





BERTH 1 EXPANSION

**50%
COMPLETE**

OCEAN TERMINAL: Before



OCEAN TERMINAL: After



PORT OF SAVANNAH SPACE ADDED: Today & Tomorrow

TEU CAPACITY

CURRENT CAPACITY: 6M

NEXT 12 MONTHS: 7.5M

FY 2025 : 9M

THANK YOU TO ALL OUR TRUCKERS





GEORGIA
PORTS