



# Thank You.





**SOUTH  
CAROLINA  
PORTS**

The World Connects Here

*Welcome  
to Charleston, SC*



# Top 10 U.S. Ports Container Volume Update

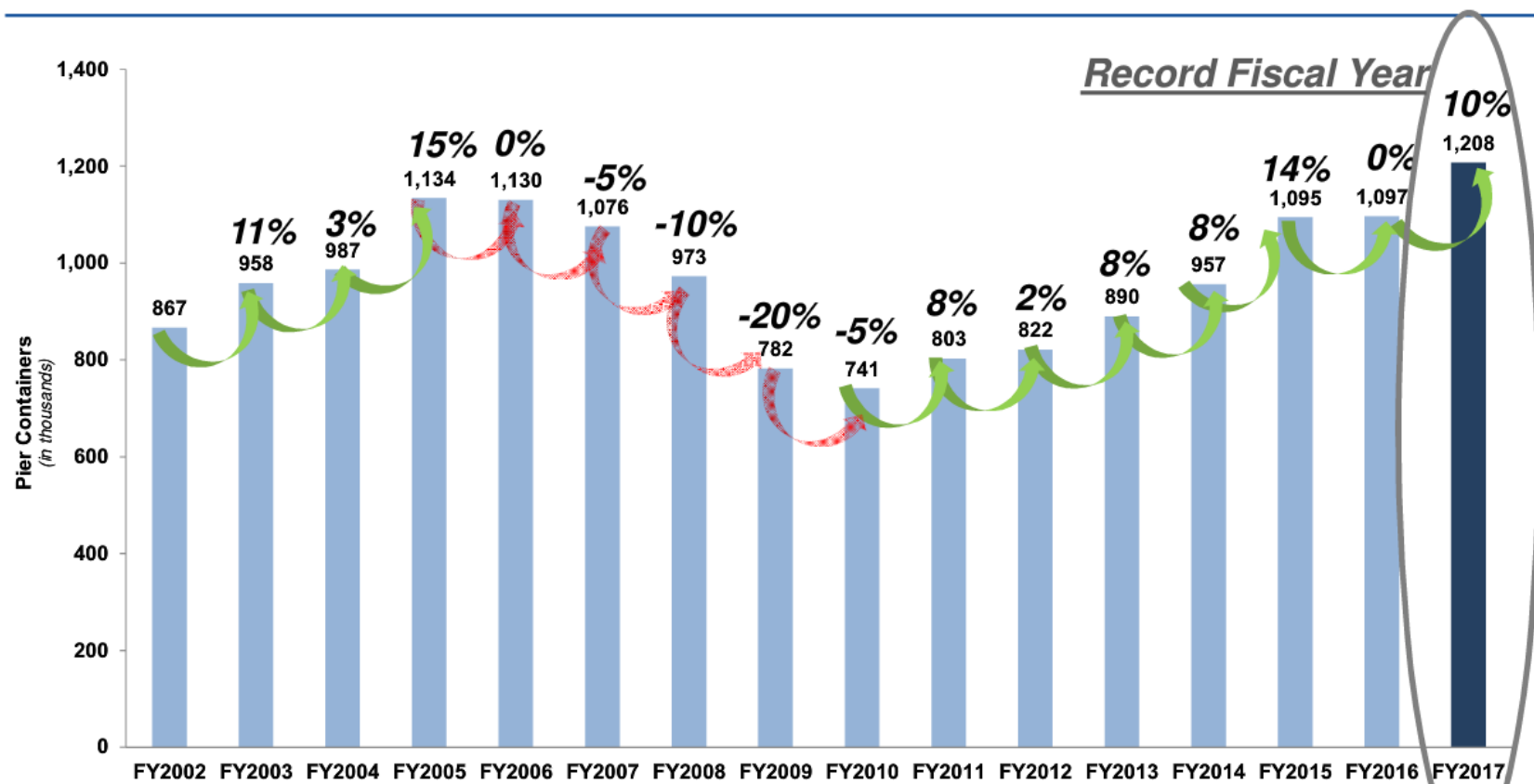
## 2009-2017

(in TEU x Millions)

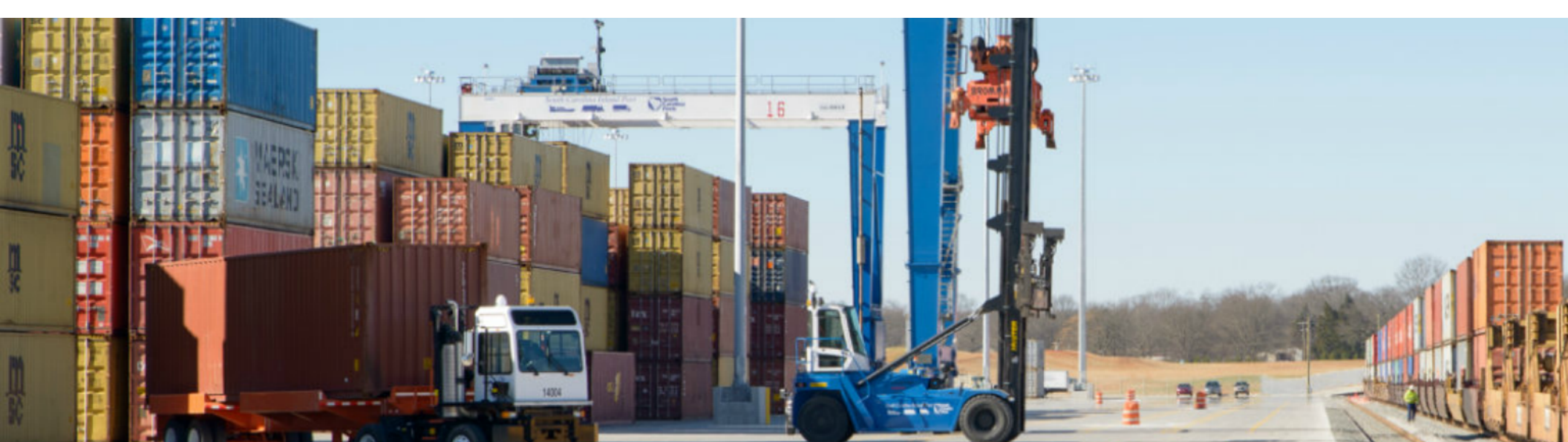
Port	2009	2016	2017	CAGR 2009-17	TEU Growth
Los Angeles	6.75	8.86	9.34	4.1%	2.59
Long Beach	5.07	6.78	7.54	5.1%	2.47
NY/NJ	4.56	6.25	6.71	4.9%	2.15
Savannah	2.36	3.64	4.05	7.0%	1.69
NWSA (Sea-Tac)	3.13	3.62	3.67	2.0%	0.54
Norfolk	1.75	2.66	2.84	6.2%	1.09
Houston	1.81	2.18	2.46	3.9%	0.65
Oakland	2.04	2.37	2.42	2.2%	0.38
Charleston	1.18	2.00	2.18	8.0%	1.00
Port Everglades	0.79	1.04	1.08	4.0%	0.29
Top 10	29.44	39.40	42.29	4.6%	12.85
All U.S. Ports	37.53	48.74	51.50	4.0%	13.97
Top 10 %	76%	81%	82%		

Source: AAPA

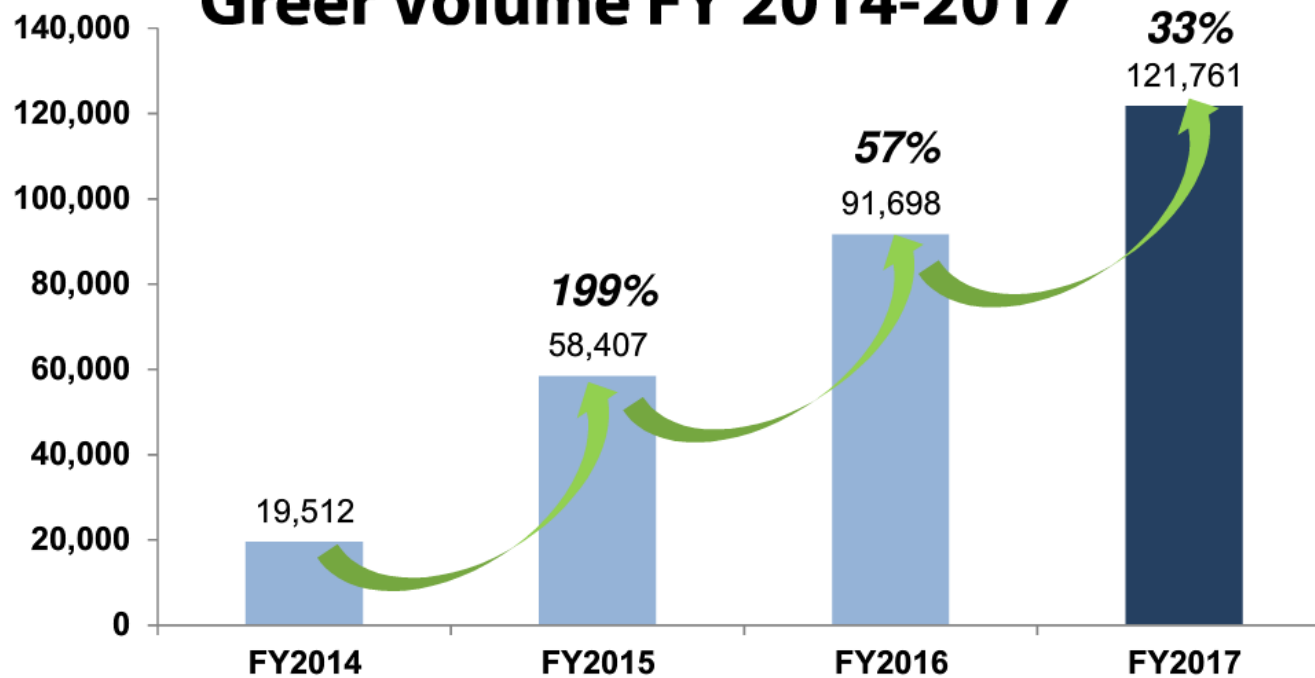
## Historical Pier Container Volumes through FY2017







## Greer Volume FY 2014-2017



# FY2017 Major Accomplishments

Record Container  
Volume Year in  
Port History

First 13,000 TEU  
Ship

Chief's Report Harbor  
Deepening/ New Start for  
Construction



Commissioned  
155 Foot Cranes

New Advanced  
Gate System

Wando Wharf  
Refurbishment  
80% Completed

25% Intermodal  
Container Rail

Substantial Progress Leatherman  
Terminal





Greer at over  
120,000 Rail Lifts

Sale of Main  
Office Building

Culture Change Initiative







# FY 2018 Approved Capital Investment

(in millions)

Wando Welch	86.3
Hugh K. Leatherman	54.0
Dillon Inland Port	32.2
Corporate Office	23.3
Tideworks (On-Premise Option)	12.8
North Charleston	5.3
Greer Inland Port	5.3
Columbus Street	4.5
Dike Upgrades & Capital Repairs	4.0
All Other	9.7

Total  
237.3

<b>Leatherman Terminal (Phase 1)</b>	\$770 Million	<b>South Carolina Ports Authority</b>
<b>Inland Port Dillon</b>	\$40 Million	
<b>Other Infrastructure &amp; IT Projects</b> (Improvements To Existing Terminals & Facilities, New Container Cranes, New IT Systems, etc.)	\$560 Million	
<b>Harbor Deepening to 52 Feet</b>	\$300 Million	<b>State of South Carolina</b>
<b>Leatherman Terminal Access Road</b>	\$200 Million	
<b>New Dual Access Intermodal Railhead</b>	\$289 Million	
<b>CAPEX Investment By 2021</b>		<b>\$2.15 Billion</b>





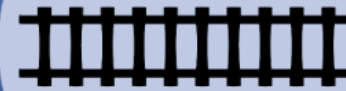
**Ensure that  
our Port  
Works Well**



**Invest  
Heavily in  
Infrastructure**  
-Existing and New-



**Continued  
Growth  
of Cargo Base**



**Drive  
Intermodal  
Efficiency**



**Enhance the  
Effectiveness of  
Our Workforce**

**SC Ports**  
**Strategic Plan**  
**For the Next Five Years**



# Hugh K. Leatherman, Sr. Terminal



Image by Holy City Helicopters



# South Carolina Inland Port Dillon



A 2015 study by the University of South Carolina's Darla Moore School of Business concluded that the Port's statewide impact includes:

- \$53 billion in annual economic activity
- 187,600 jobs
- \$10.2 billion in labor income
- 10% of total annual gross state product
- \$912 million in tax revenue

For the full economic study visit:

[www.scspa.com/our-impact/economic-impact/](http://www.scspa.com/our-impact/economic-impact/)

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*The Economic Impact of the  
South Carolina Ports Authority  
A Statewide and Regional Analysis*



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Developed by:  
Division of Research  
Moore School of Business  
University of South Carolina  
September 2015

# The Port is Integral to SC Economic Development



# Refrigerated Cargo Growth



## Export

	Jul `15	Apr `16	Jul `16	Apr `17	% Growth
CHARLESTON	36,561		43,372		19%
NORFOLK	37,027		36,156		-2%
SAVANNAH	68,802		73,929		7%
<b>Grand Total</b>	<b>142,390</b>		<b>153,457</b>		<b>8%</b>

## Import

	Jul `15	Apr `16	Jul `16	Apr `17	% Growth
CHARLESTON	10,555		11,576		10%
NORFOLK	25,803		27,261		6%
SAVANNAH	31,334		31,657		1%
<b>Grand Total</b>	<b>67,692</b>		<b>70,494</b>		<b>4%</b>

## Both

	Jul `15	Apr `16	Jul `16	Apr `17	% Growth
CHARLESTON	47,116		54,947		17%
NORFOLK	62,831		63,417		1%
SAVANNAH	100,136		105,587		5%
<b>Grand Total</b>	<b>210,083</b>		<b>223,951</b>		<b>7%</b>



# Harbor Deepening on Track

- Feasibility and Design Phases Completed in Less Than 7 Years
- New Construction Start Achieved June 2017
- \$558 Million Project: \$287 Million Federal/ \$271 Million State
- \$300 Million Set Aside by Legislature in 2012 Decisive
- Entrance Channel Contract Let By Army Corps. October 2017
- Envisioned Completion to Wando End 2019
- \$17.5 Million in FY2017 Corps Work Plan
- Pressure Must Be Kept for Requisite Federal Funding



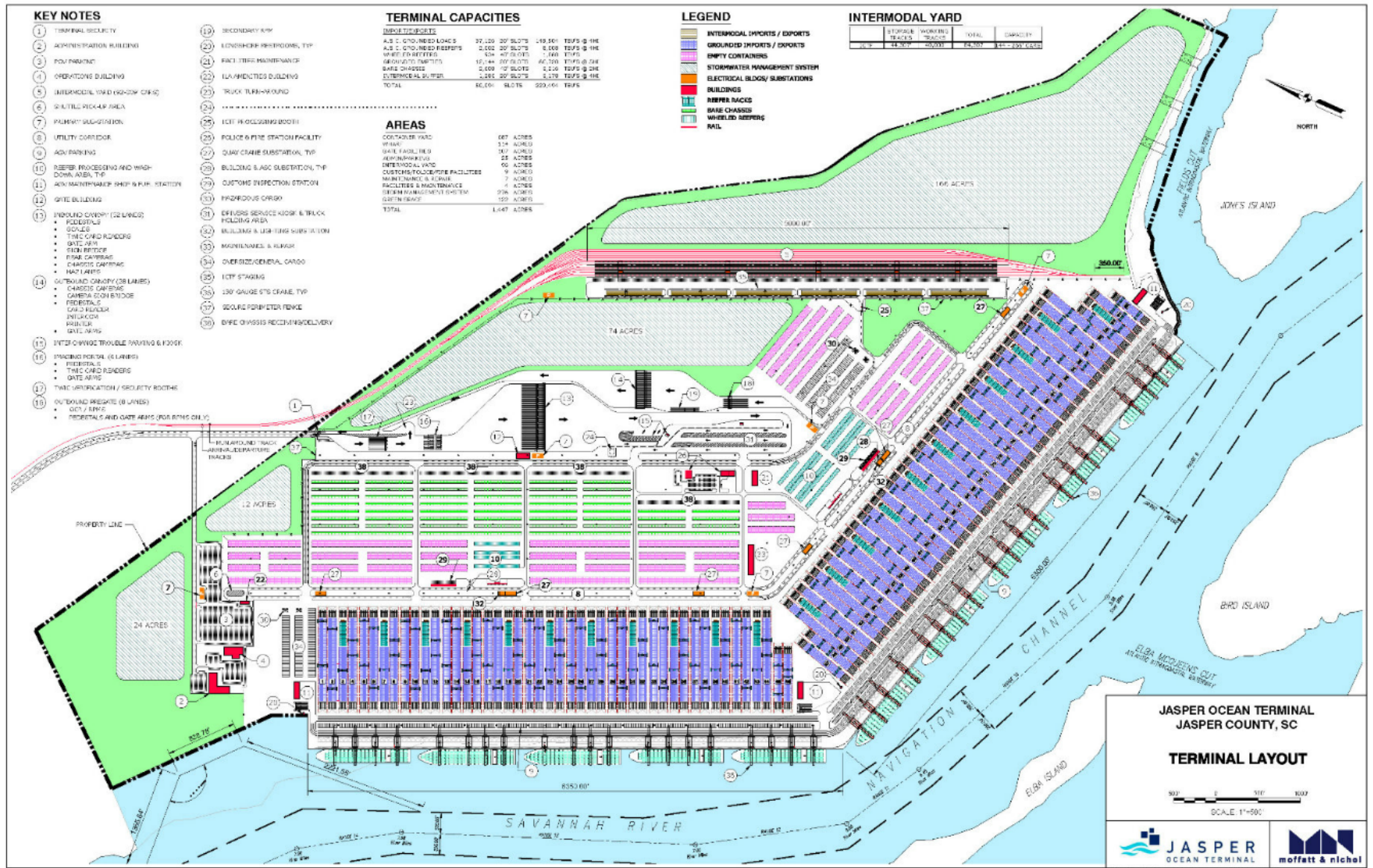


# Additional Points Going Forward

- Value Proposition Needs to Drive More Revenue
- Significant Staff Retirements Ahead
- Engaging Trident Technical College with Help in Training
- Develop Barge Feasibility for Inner Harbor Rail Container Moves
- Occupy New Office in December 2018
- Develop Succession Plan for Senior Executives
- Finalize Leatherman Terminal Design
- Simulate 18,000 TEU Ship in Charleston Harbor
- Selling or Disposing of Non-operated Real Estate



# Jasper Ocean Terminal





# Thank You.

