



THE DELAWARE VALLEY
**GOODS MOVEMENT
TASK FORCE**



Our Panelists



Sean Mahoney
Director of Marketing
PhilaPort



Brendan Dugan
Assistant Executive Director/ Business Development
South Jersey Port Corporation

Delaware Valley Goods
Movement Task Force:

Delaware River Ports Forum

October 7, 2020

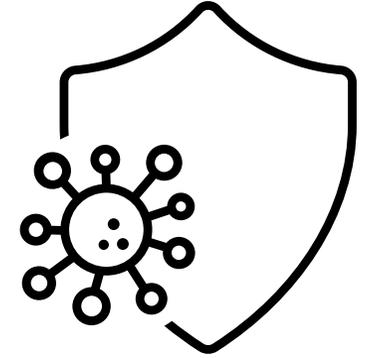


PhilaPort

THE PORT OF PHILADELPHIA



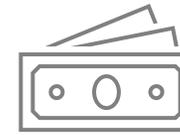
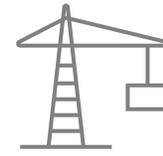
COVID – 19 Response: **“We are Open for Business”**



- ✓ Port cargo operations and throughput are normal
- ✓ Terminal operators have increased sanitary procedures:
 - ✓ Temperature checks upon entry to terminals
 - ✓ PPEs
 - ✓ Extra cleaning of equipment
 - ✓ Additional worker training on safety / health issues
- ✓ **Regular communication with Federal, state and local health and transportation officials**



PhilaPort's Marine Cargo Economic Impact Summary



- ✓ **\$15 billion** - Total impact of marine cargo activity that the port has generated for Pennsylvania in YR19
- ✓ More than **6.6 million** in cargo tonnage per year
- ✓ **\$864.9 million** - Total wages, salaries and local consumption expenditures are created in the local and regional economy by port activity
- ✓ **9,569 jobs** generated by marine cargo activity
- ✓ Local business received **\$456.8 million** of revenue
- ✓ State & local receive **\$93.5 million/year** in PhilaPort generated taxes

Did you know?

15th

Top U.S. Import Port
in the Country

7th

Largest import port
on the East Coast

2nd

In refrigerated cargo
in the Country



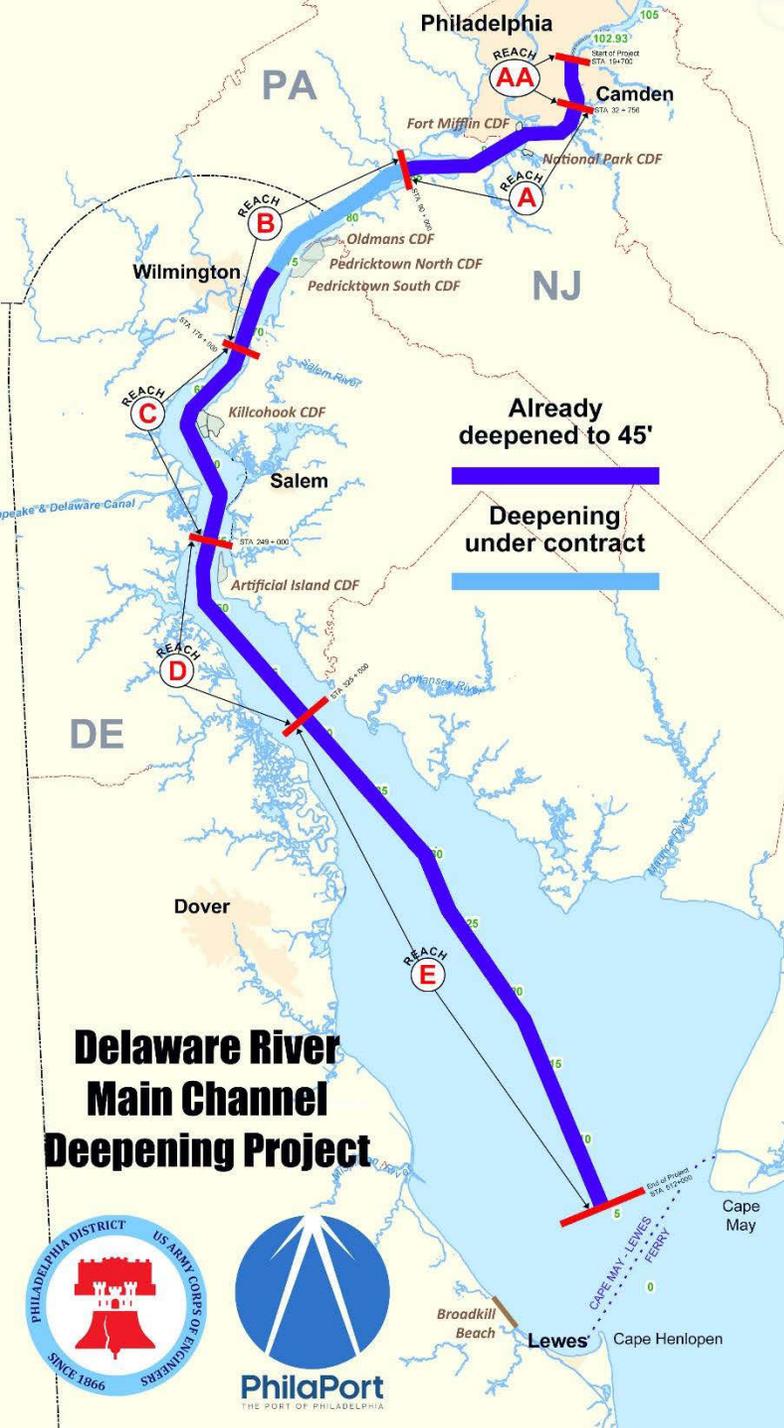
Delaware River Main Channel Deepening | PhilaPort

Project Status: **99.9% Complete**

Project Details

Current vs. Future Depth	42 ft. to be deepened to 45 ft. mean low water*
Length	103 Miles
Cost Estimate	\$480 million
Commonwealth Est. Share	\$168 million
Material	16 million cubic yards of dredge materials
Progress	99.99% Complete
Targeted Availability	November 2020

*The Delaware River has a 6 foot (1.83 meter) tide



**Delaware River
Main Channel
Deepening Project**



Flexibility: Current Vessel Capacity 12,200+ TEU

Big Ship Ready ✓





Cargoes



Cargo Statistics | PhilaPort

January-June 2020
Containers

3%

TEUs



YTD 2019

297,883

YTD 2020

305,739

January - June 2020 U.S. Container Growth (YTD)

US Trade	-10.9%	↓
US East Coast	-9%	↓
Baltimore	-8%	↓
Boston	-12%	↓
Charleston	-9%	↓
Jacksonville	-12%	↓
Norfolk	-12%	↓
NY/NJ	-8%	↓
Philadelphia	3%	↑
Savannah	-7%	↓



Breakbulk Statistics | PhilaPort

January-June 2020

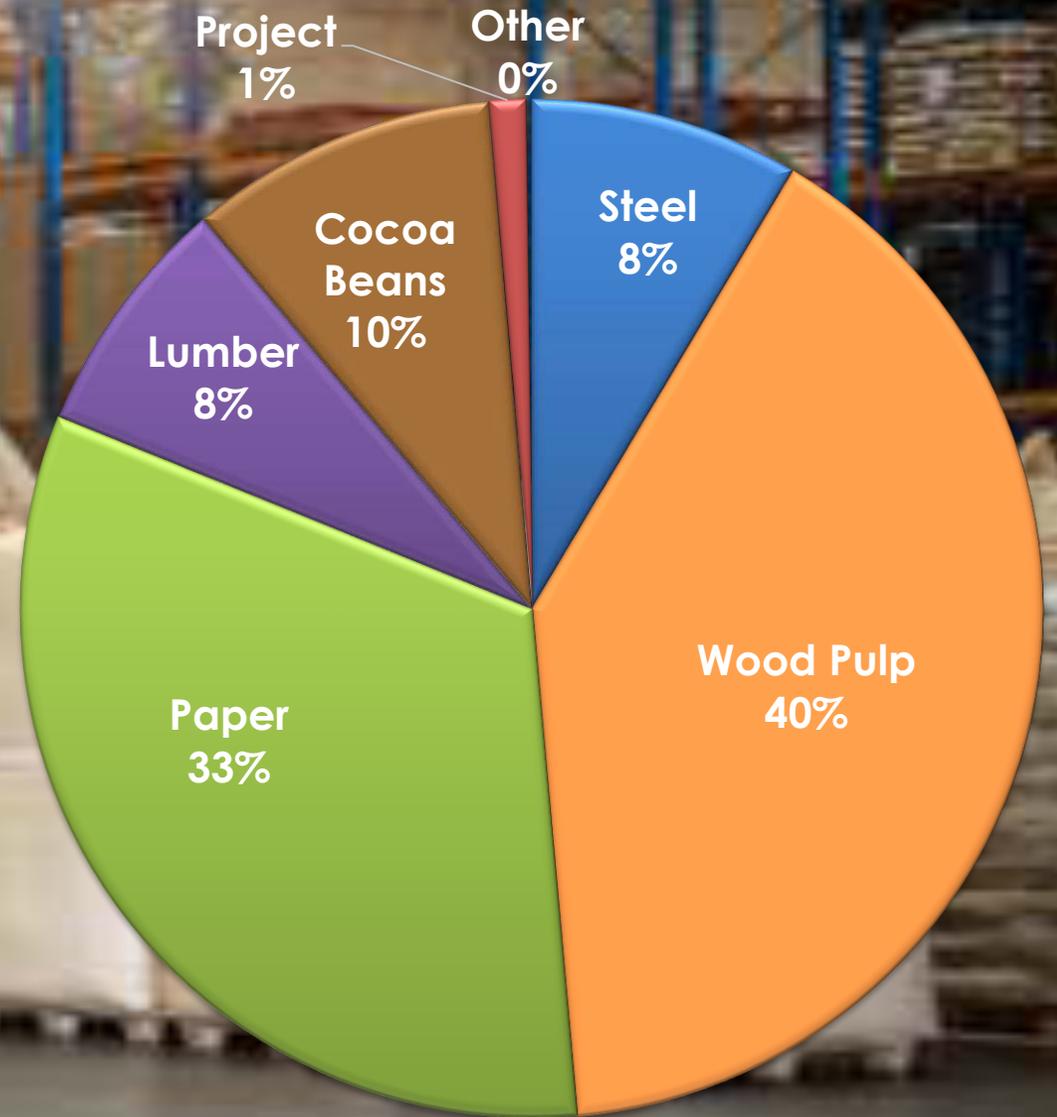
Breakbulk

4%

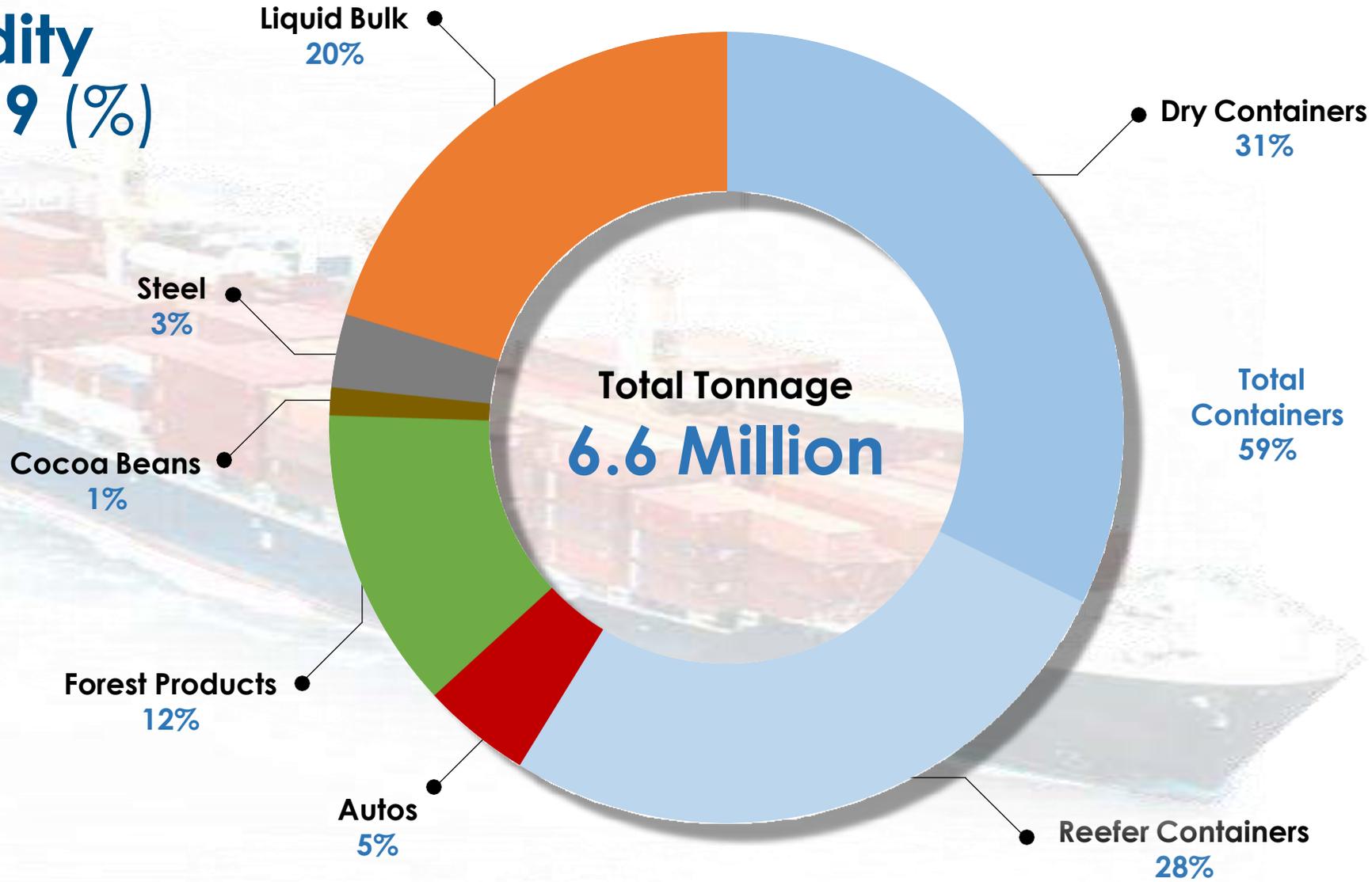


Mtons

YTD 2019	YTD 2020
670,652	697,401



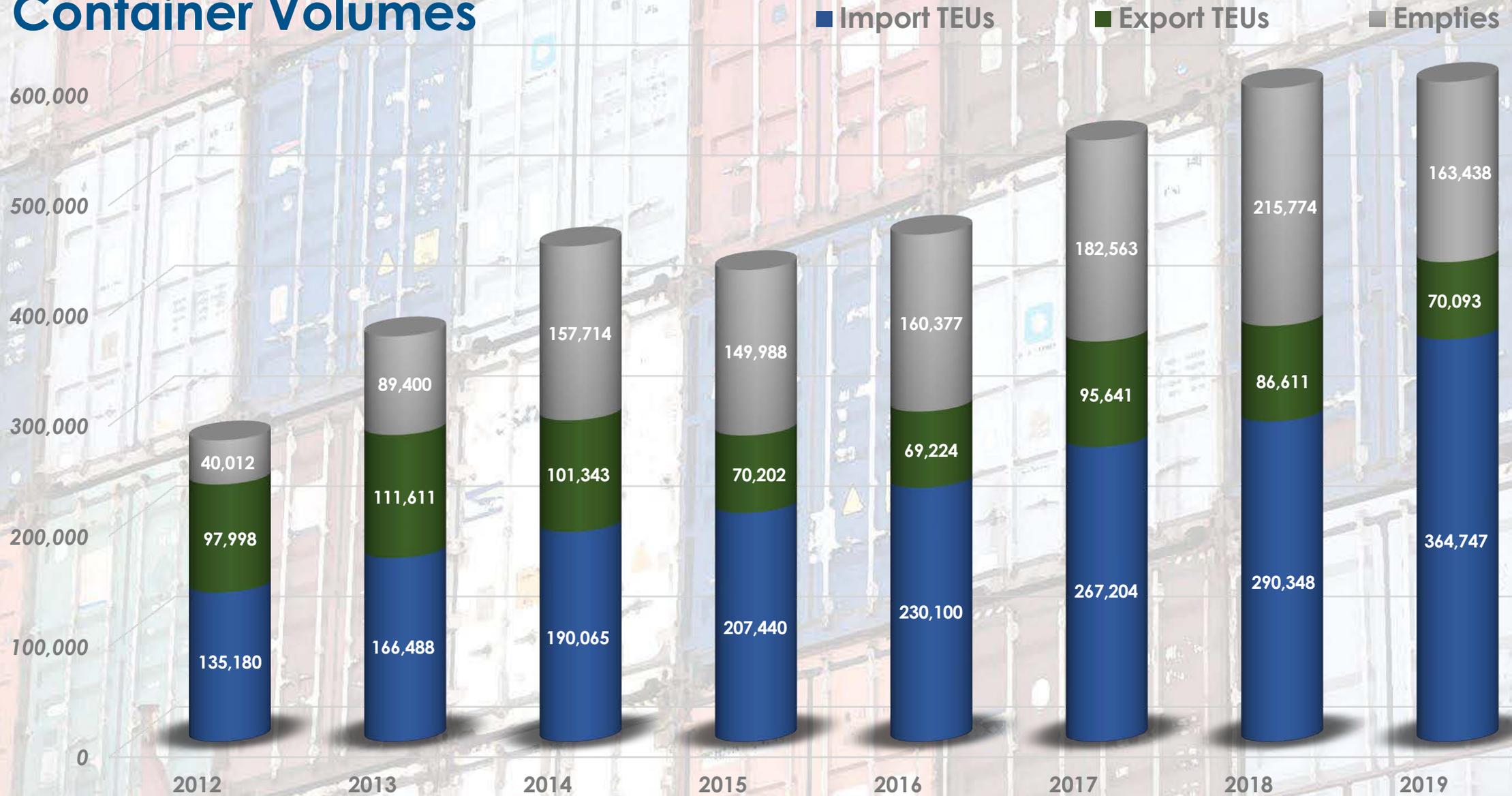
PhilaPort Cargo Commodity Tonnage for 2019 (%)



Container tonnage is 59%, compared to other commodity tonnage of 41%.

Compound Annual Growth Rate is 12% per year.

PhilaPort Container Volumes



Greater Philadelphia Ports The Global Leader in Food Cargoes

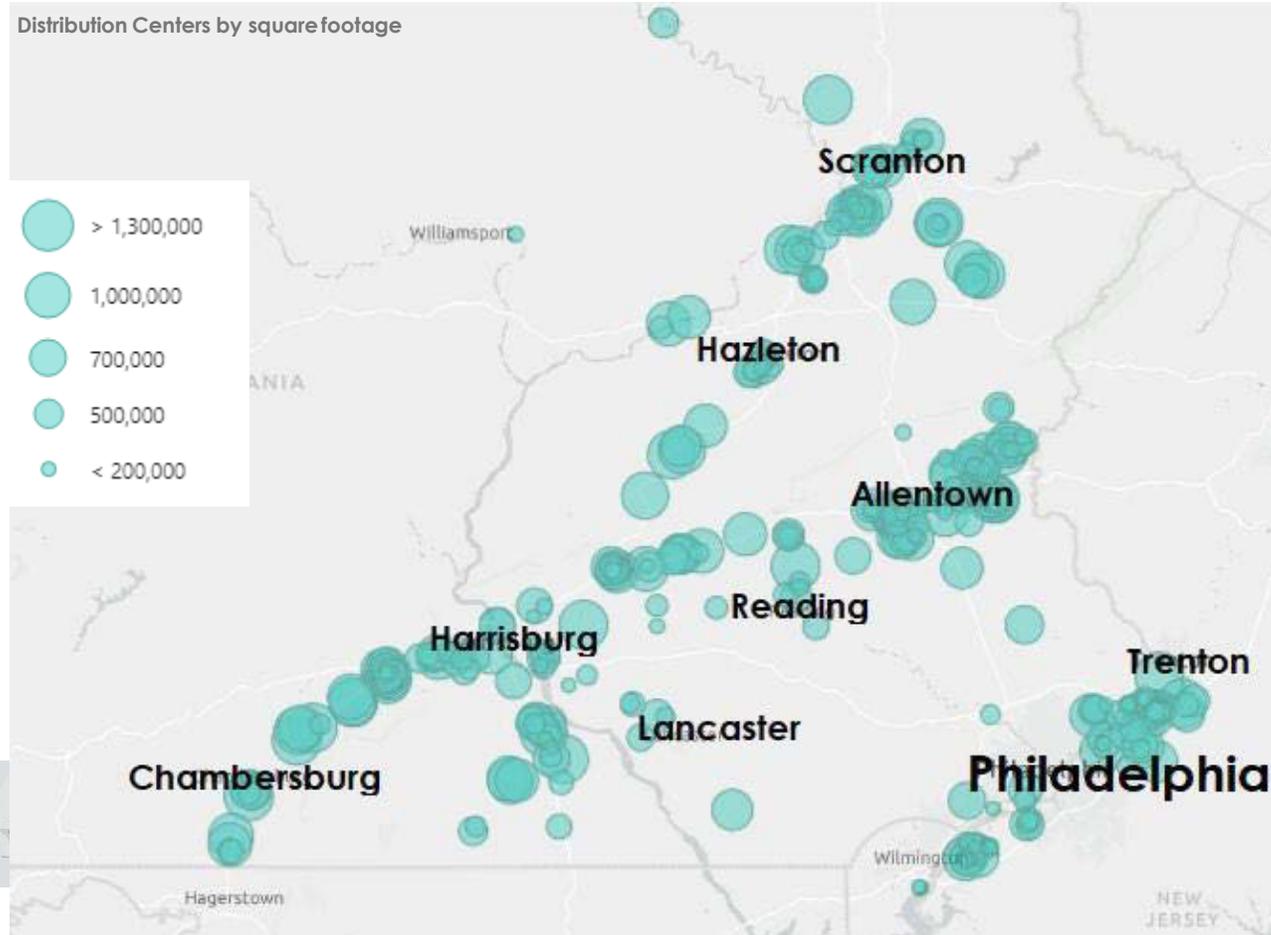
Philadelphia #1 Food Products

- \$3.6 Billion in fruit imports imported in 2019
- \$5.2 Billion of food and associated products imported into the USA in 2019



PROXIMITY

Close to Major Distribution Centers



“The Lehigh Valley is the Inland Empire of the East Coast.”

- David Egan¹

- Over 400 Distribution Centers within the PhilaPort’s immediate hinterland
- South Jersey increasingly important nationally as a Distribution Center hub for perishable and dry cargoes
- Over 335 million square feet of large distribution center space²

¹Head of Industrial & Logistics Research for the Americas, CBRE (Real Estate); The Journal of Commerce - Oct. 2016. ²Only includes distribution centers larger than 200,000 sq. Ft.



Container Trade Lanes

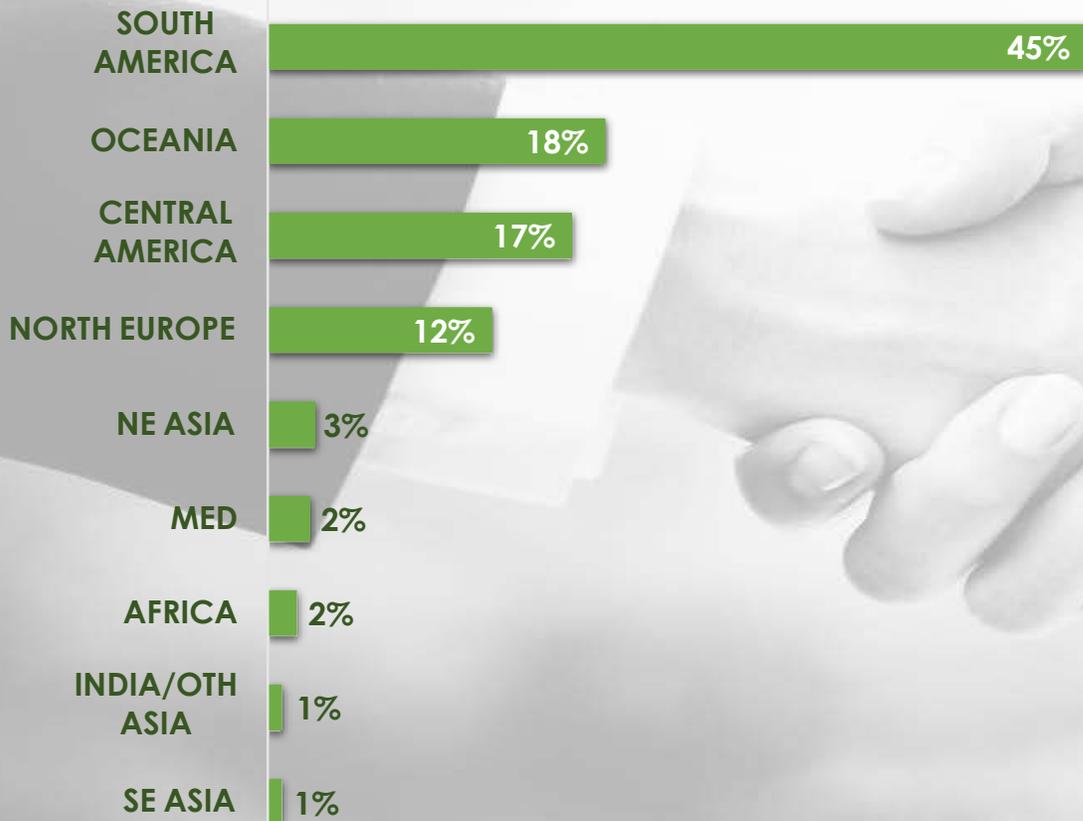


Philadelphia

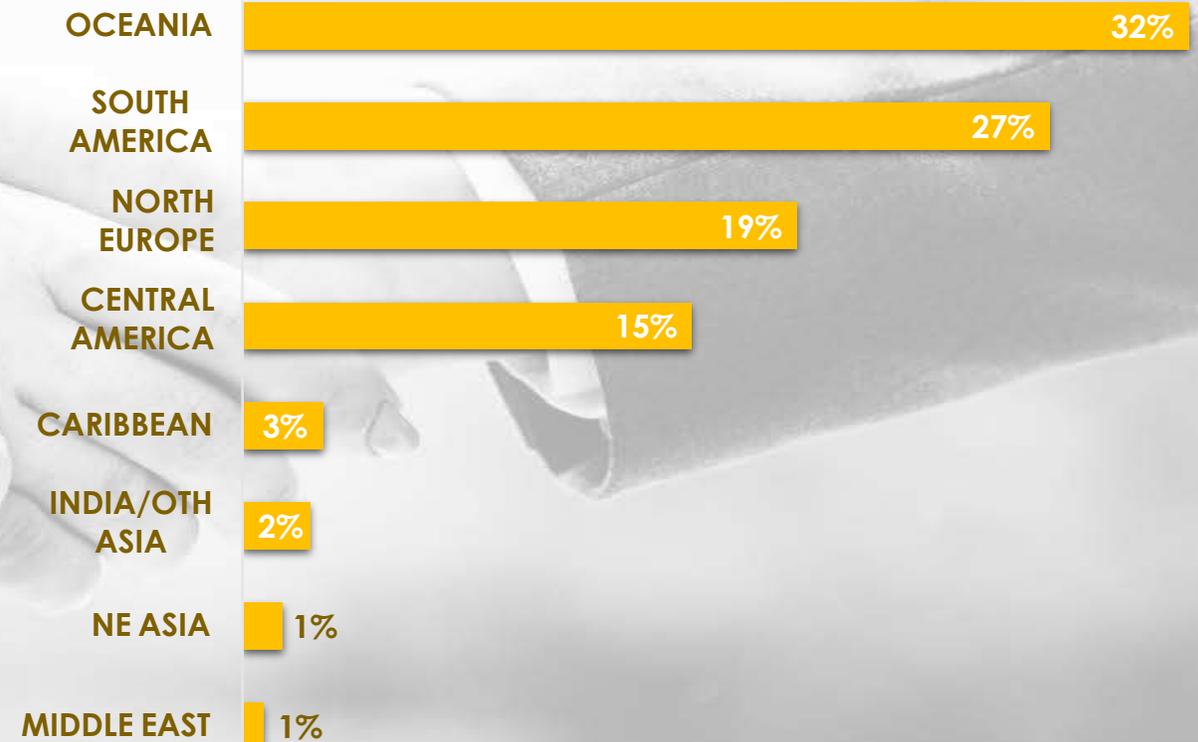
Trade Lanes 2019

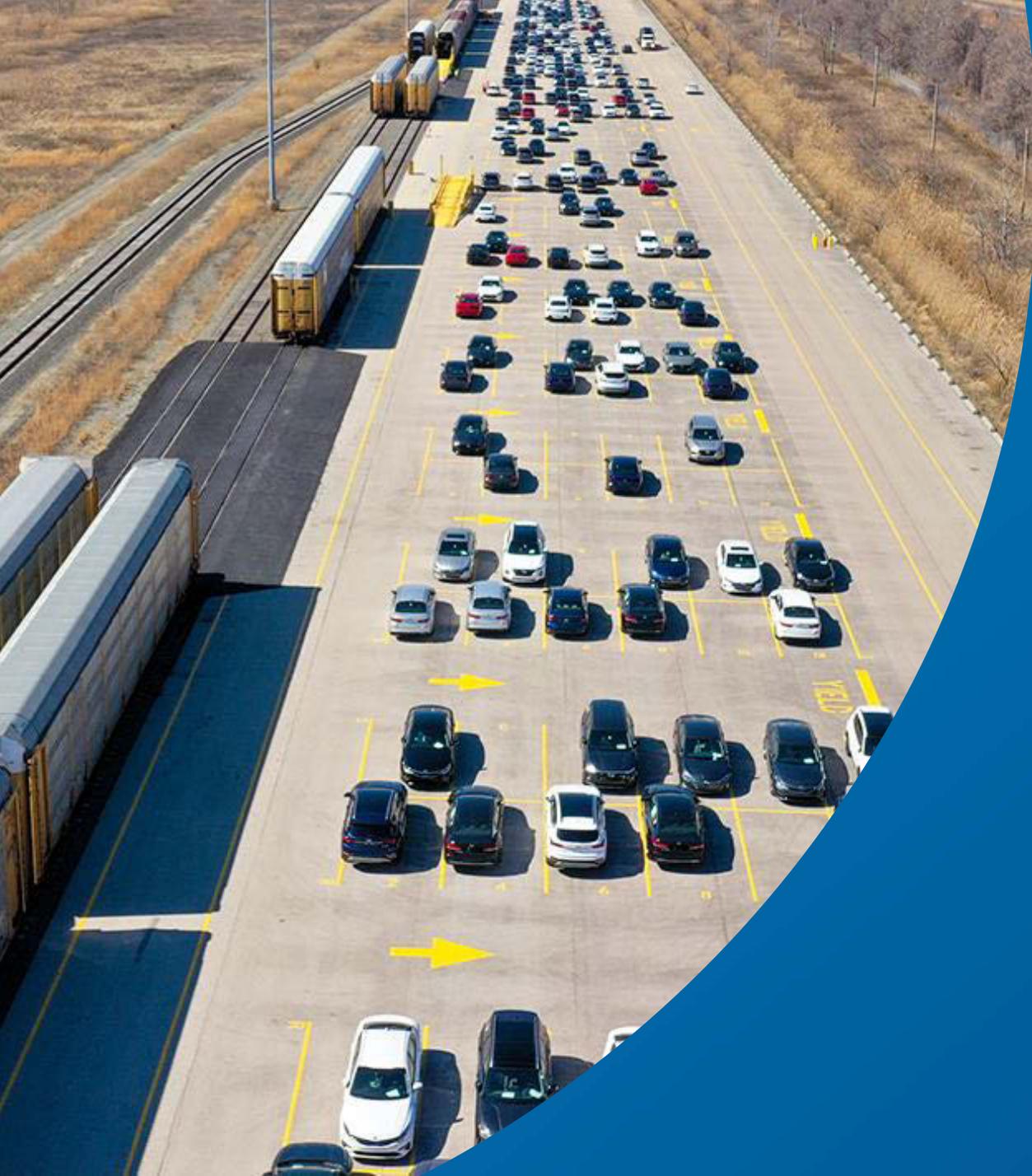
Total Trade Lanes percentage in TEUs

Imports (%)



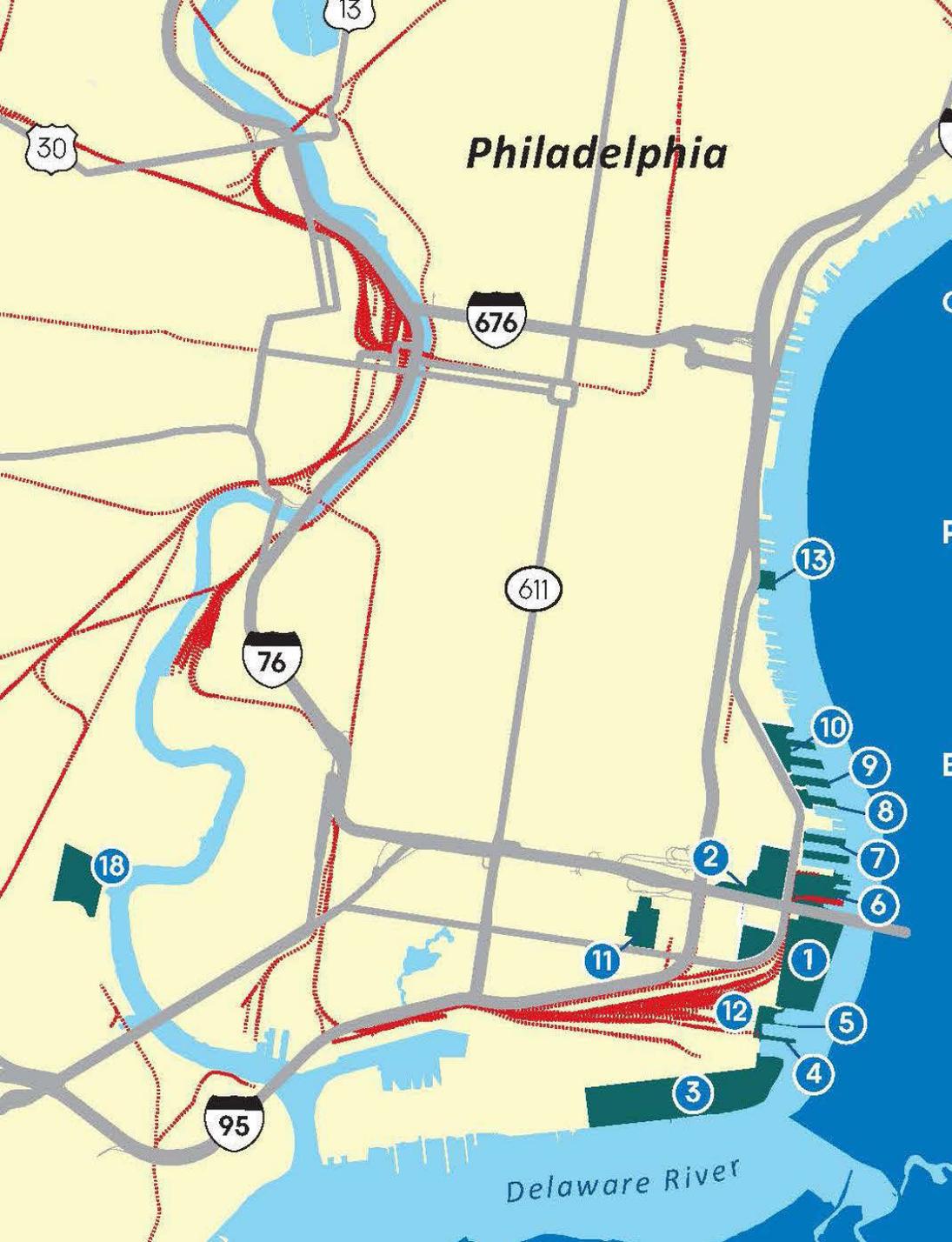
Exports (%)





Facilities





Philadelphia

Container Facilities

- (1) Packer Avenue Marine Terminal
- (6) Publicker Container Yard
- (14) Tioga Marine Terminal

Ro/Ro Facilities

- (2) Philadelphia Auto Processing Facility
- (3) Southport Marine Terminal Complex
- (5) Pier 122

Breakbulk Facilities

- (7) Pier 96, 98 & 100
- (8) Pier 84
- (9) Pier 82
- (10) Philadelphia Forest Products Center
*Pier 74, Pier 78
- (13) Piers 38 & 40
- (14) Tioga Marine Terminal

Liquid Bulk Facilities

- (4) Pier 124
- (15) Tioga Liquid Bulk Terminal

Other Properties

- (11) PhilaPort Distribution Center
- (12) Conrail Loop Track
- (16) PhilaPort Main Offices
- (17) 3200 Tioga
- (18) Philadelphia Wholesale Produce Market

PhilaPort Facilities & Terminals

THE PORT OF PHILADELPHIA

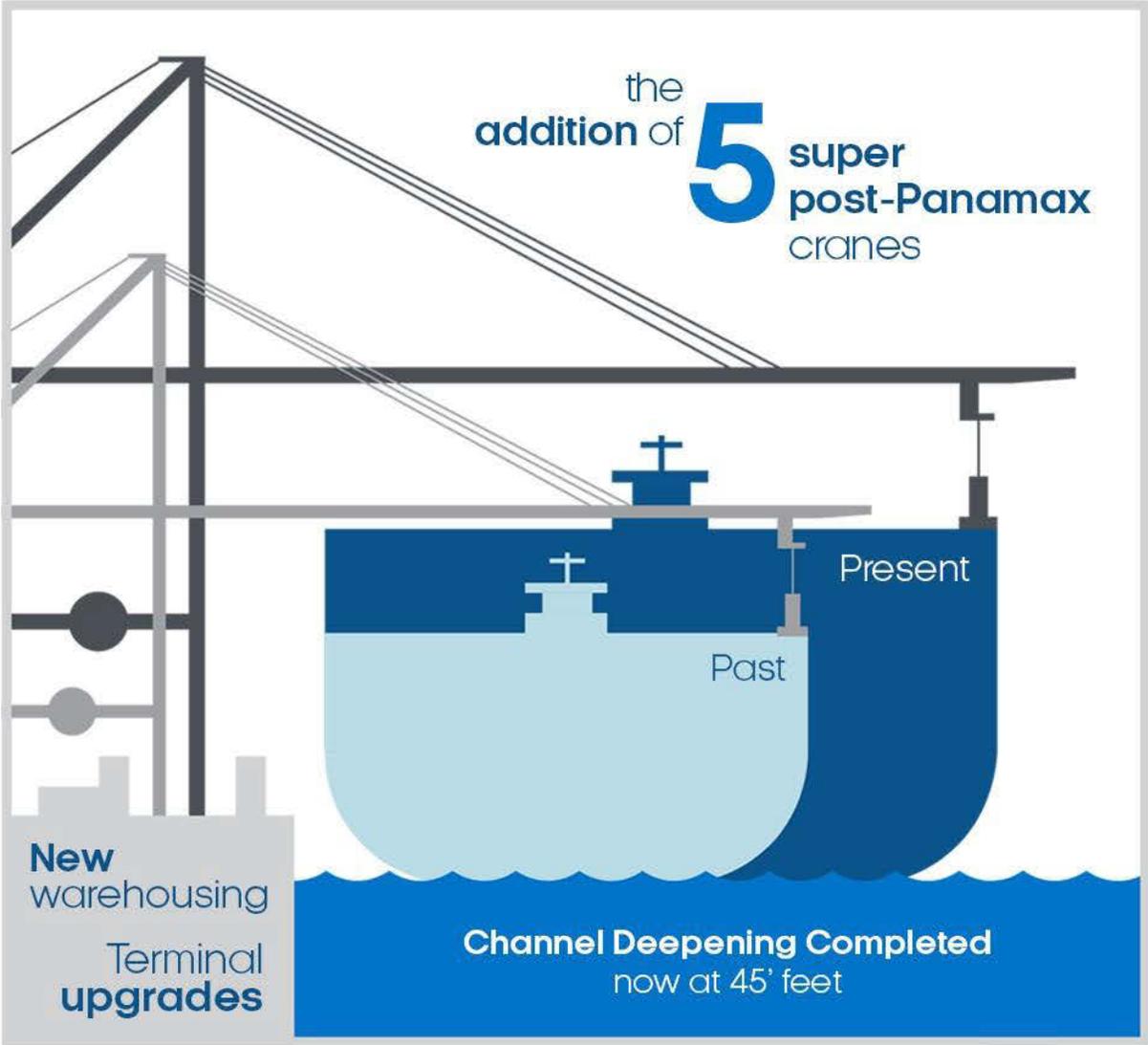


Future Development



Port Development Plan | PhilaPort

\$300 Million Investment



	Present	Future
 Containers	600,000 TEUs	900,000 TEUs
 Jobs	10,341	17,020 65% Increase
 Clean Air	Diesel Operated	Diesel to Electric
 Cars	155,000 Units	350,000 Units
 Cranes	Small Panamax	Large Super Post-Panamax
 Tax Benefit	\$69.6m Annually	\$108.4m Annually
 Forest Products* ¹	465,000 mt	540,000 mt

* Number represents pulp moving through Tioga Marine Terminal as pertains to Plan.
¹ PhilaPort handles over 1m ton of Forest Products annually.

New Warehouse | Tioga Marine Terminal



Facility Statistics

- Opened April 2020
- 100,000 ft² warehouse space
 - \$12 million investment
- Purpose-built for wood pulp (eucalyptus)
- Over 700,000 sq. ft. of warehouse space at Tioga Marine Terminal

Cargoes

- Over 1,000,000 mt of forest products move through the PhilaPort facilities
- Including 500,000 mt of wood pulp

New PhilaPort Distribution Center | Near Dock



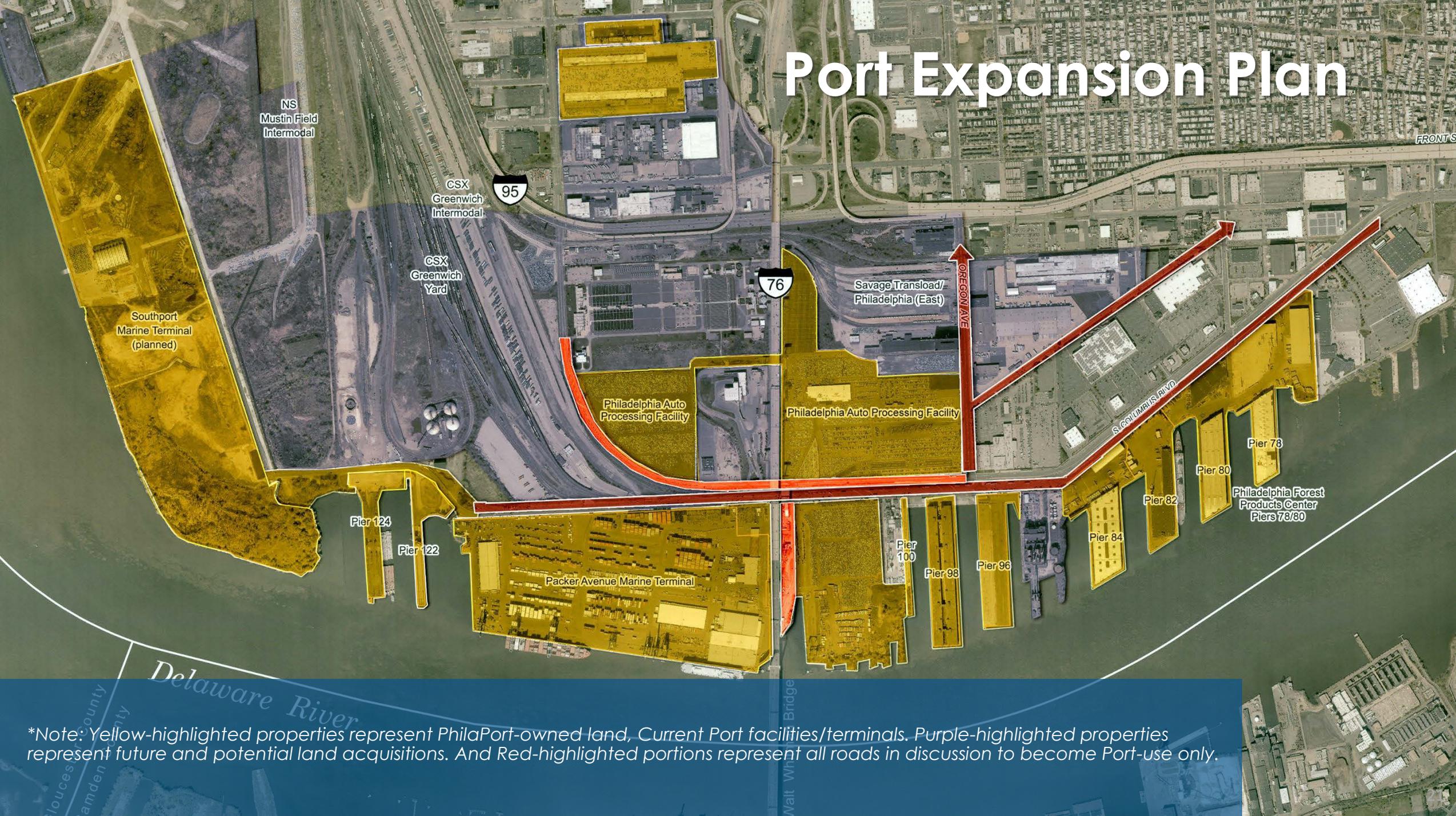
Proposed Facility Statistics

- 20 Acres
- 200,000 ft² dry food grade warehouse space
 - \$50 million investment
- Future 200,000 ft² (18,580 m²) refrigerated/freezer food grade warehouse
- 60ft high ceilings

Possible Cargoes and Services

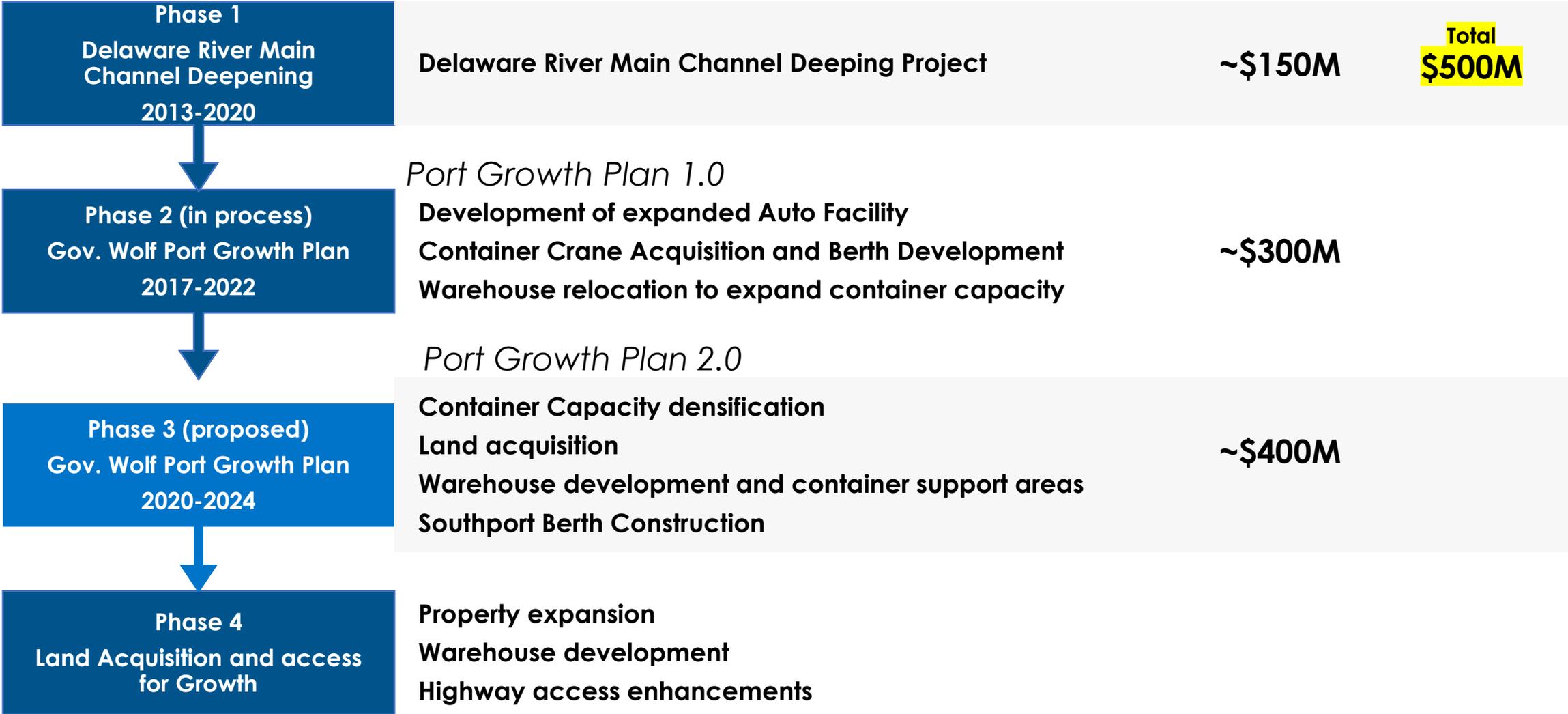
- Frozen Cargoes
- Temperature Control Cargoes
- Food Grade Dry Cargoes
- Overweight Cargoes

Port Expansion Plan



*Note: Yellow-highlighted properties represent PhlaPort-owned land, Current Port facilities/terminals. Purple-highlighted properties represent future and potential land acquisitions. And Red-highlighted portions represent all roads in discussion to become Port-use only.

PhilaPort's Continued Expansion Program





Philadelphia Energy Solutions/HILCO

Minor Parcels (14 acres)

Piers 78 - 84

Whiskey Yard

PhilaPort Distribution Center

98 Annex

Packer Avenue Marine Terminal

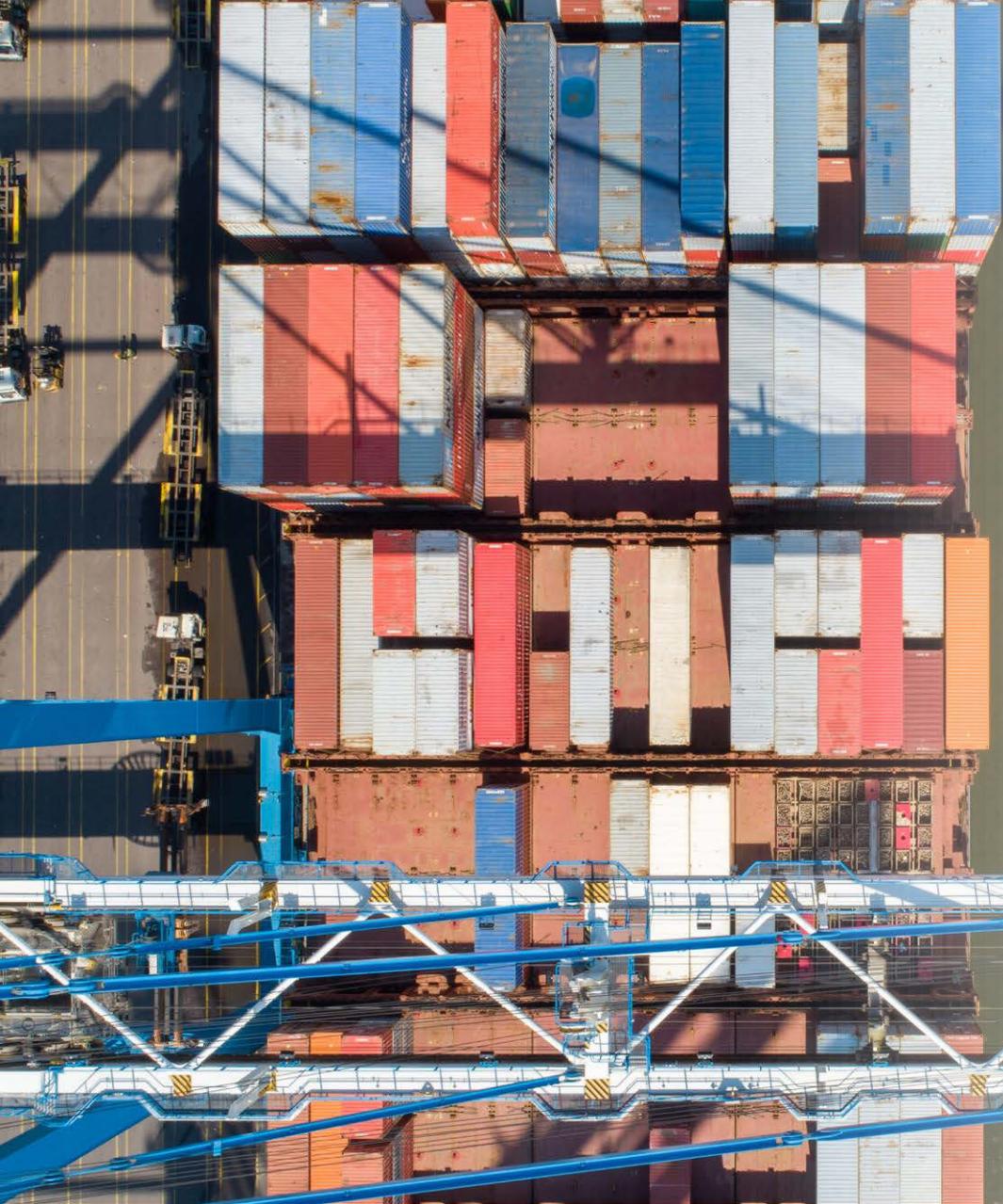
CSX Rail Yard

Pier 122 & Pier 124

Norfolk Southern Intermodal Yard

Philadelphia Navy Yard PIDC

SouthPort Auto Terminal



Thank You!



PhilaPort
THE PORT OF PHILADELPHIA

✓ Velocity ✓ Proximity ✓ Flexibility

www.philaport.com



South Jersey Port Corporation

Delaware River Port Forum

Brendan Dugan, Assistant Executive Director

October 7, 2020



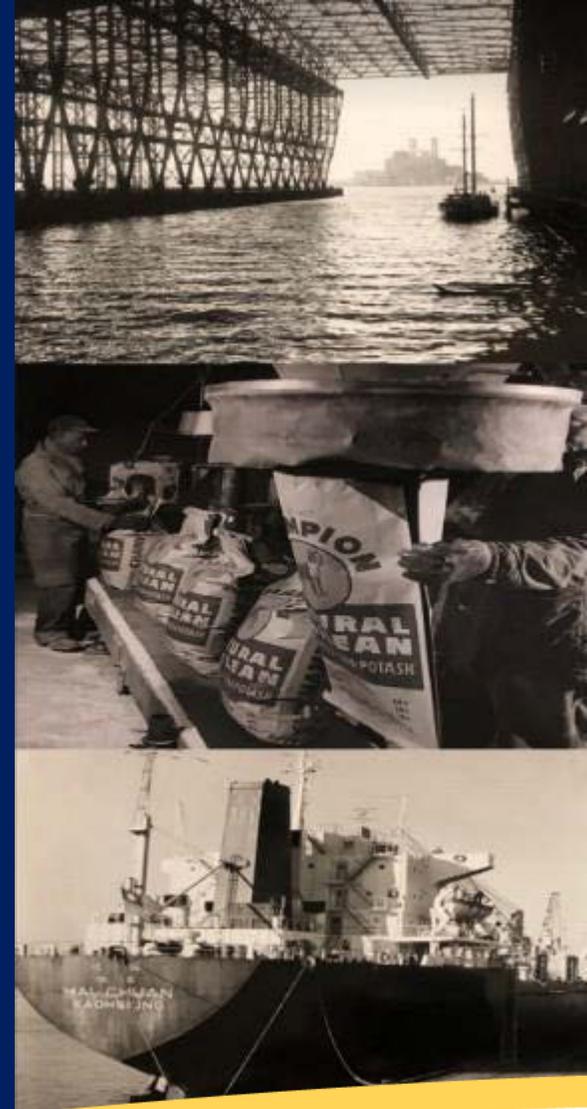
Our Mission

- Our mission is to **attract cargo and maritime-related activity** to foster economic development **create jobs.**



South Jersey Port Corporation History

- 1926 – South Jersey Port Commission created by State Legislature
- 1931 – Camden Marine Terminal (Beckett Street) opens
- 1968 – State Legislature revamps Port Commission into the South Jersey Port Corporation (SJPC)
- 1971 – Broadway Terminal opens at the former New York Shipbuilding Corporation
- 1994 – SJPC takes over Port of Salem
- 2005 – SJPC issues bonds to develop Paulsboro Marine Terminal
- 2017 – Paulsboro Marine Terminal opens for business and SJPC handles record-breaking 4.3 million tons of cargo



Our Facilities

Camden Marine Terminals:

- Balzano Marine Terminal
- Broadway Marine Terminal
- Broadway Marine Terminal – Pier 5

Salem Marine Terminal:

- Foreign Trade Zone No. 142
 - Port of Salem & Millville Airport

Paulsboro Marine Terminal:

- Paulsboro Marine Terminal



Economic Benefits

- SJPC is part of tri-state Delaware River maritime complex
 - \$77.8 Billion of Economic Activity
 - Supports 191,000 jobs
- Camden – SJPC and 40+ port-related businesses
 - Among city's largest taxpayers and employers
 - Supports 3,400+ jobs
 - \$500 million+ in payroll and business income
 - \$46 million in local, state, and federal taxes
- Recent success
 - New Tenant - John Lawrie Inc.



Products We Handle

Our cargo travels worldwide:

- Cocoa Beans – Ivory Coast, West Africa
- Wood Products - Asia
- Steel Coils – Germany, Holland, Asia
- Steel Pipe – Asia & Europe
- Steel Slabs – Brazil
- Slag – Japan, Italy
- Rock Salt - Egypt
- Gypsum – Spain
- Export Recycled Metals
 - India, SE Asia, Turkey



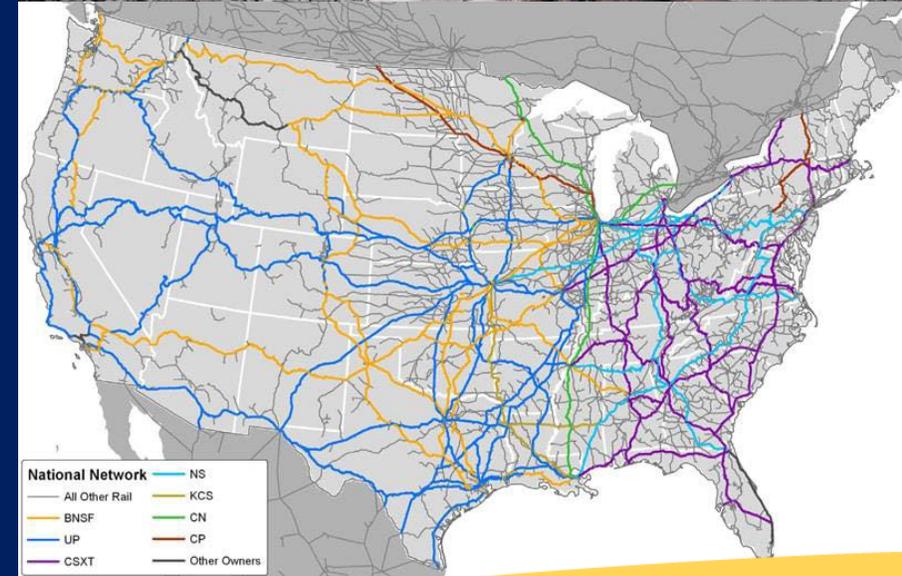
Rail Advantages and Challenges

- Advantages

- Dockside rail in Camden, Paulsboro and Salem
- \$8.5 million investment to upgrade Camden rail infrastructure
- Robust and expanding CSX & Norfolk Southern rail services to Midwest / Great Lakes regions
- Excellent interchange partnerships between Conrail and South Jersey short lines

- Challenges

- Clearance for doublestack containers and auto tri-level services
- Coordination to accommodate both freight and passenger rail



Looking to the future...

Paulsboro Marine Terminal

Building infrastructure to power New Jersey's transition to 100% Clean Energy by 2050

- Phase I Completed in 2017
- Phase II Scheduled for 2021
 - Handles weight of wind turbines, blades, and monopiles
- Dockside Rail
- Direct Access to I-295 and the regional highway network



The New Jersey Wind Port

- Nation's First Purpose Built Port
 - Marshalling Site for East Coast Offshore Wind Industry
 - Support NJ Goal of 100% Clean Energy by 2050
- Lower Alloways Creek, Salem County
 - SJPC Role
 - Biggest project in Salem County in past 50 years
- Economic Benefits
 - \$300-\$400 million wind port
 - 1,500 permanent jobs
 - Hundreds of manufacturing jobs
 - \$500 million in annual economic activity



Clean Air and Clean Environment

- Past Initiatives
 - Fleet modernization / Upgrade cranes and forklifts
 - Clean Air Communities Grant
 - Diesel Engine Retrofit and Upgrade
 - EPA Grant
- Future Initiatives
 - Fleet Modernization Program (continued)
 - Electric Cargo Handling Equipment
 - Electrification of Remaining Cranes
 - Solar Panels on Buildings
 - Potential of 1.1 million square feet



COVID-19 Status

- South Jersey Port in Full Operation
 - Maintaining the Global Supply Chain
 - Import / Export of vital raw materials
 - Continuity of Operations Plan
- Protecting Health & Safety of employees, tenants, customers
 - Open lines of communication
 - Face masks and temperature checks
 - Daily sanitization and deep cleansing twice a week
 - All staff provided hand sanitizer, disinfectant wipes, gloves & masks
 - Social distancing measures
- Coordinate with county, state and federal governments



Community Engagement

- Workforce challenges and opportunities
 - Employing local residents
 - Cooper's Ferry Partnership
 - Camden Works job postings for Camden residents
- Community-wide cleanup day
- Education / Outreach
- Coordinate with County to redirect truck traffic
- Volunteered with Heart of Camden and Mighty Writers

CAMDEN
WORKS



Thank you!

Brendan Dugan, Assistant Executive Director

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www.SouthJerseyPort.com



Office of Freight and Aviation

Promote freight and aviation considerations in the planning process to encourage the development and preservation of safe, efficient multimodal transportation systems that maximize Greater Philadelphia's position in the global economy

Improve **visibility + availability** of freight and aviation data

Educate planners and the public

Encourage **smart, multimodal** transportation systems

Inform transportation infrastructure investment

Our Approach



ENGAGEMENT/ADVOCACY

Goods Movement Task Force, Regional Aviation Committee
PA Freight Work Group, NJ Freight Advisory Committee, PA Aviation Committee
Industry Groups (PMTA, Traffic Club, NJRRA), TETC, TRB Urban Freight



REGIONAL TRENDS & PERFORMANCE

Data Collection and Development
PhillyFreightFinder – Comprehensive Freight Data Program
Regional Aviation Counting Program and Systems Planning



LOCAL TECHNICAL STUDIES & EDUCATION

Downtown Delivery Symposia, Vision Zero Fleet Subcommittee, Urban Freight Studies
Local Technical Studies: Freight Access, Grade Crossing Safety
Commodity and Supply Chain Profiles

Ongoing Projects

IN REVIEW

Hunting Park East Freight Access

 November 2020

[Full Report](#)

FINAL DELIVERABLE PREPARATION

Camden Urban Freight Strategies

 December 2020

[Full Report](#)

Freight Rail Data Improvement

 December 2020

[Technical Memo](#)

[Regional Data](#)

[Web Content](#)

Ongoing Projects

IN PROGRESS

Chester County Freight Plan - Phase I

 June 2021

Full Report

Philadelphia Truck Route Planning

 March 2021

Technical Memo

Freight Model Enhancements

 TBD

White Paper

Regional Data

UPCOMING PROJECTS

Municipal Freight Guidebook

 June 2021

Technical Memo

Regional Data

Web Content

Philly Freight Finder Data Updates

 May 2021

Technical Memo

Regional Data

Web Content

Municipal Freight Guidebook

USE ESTABLISHED FRAMEWORK AND DATA TOOLS TO **EMPOWER PLANNERS TO CONSIDER FREIGHT** IN MULTIMODAL PLANNING.

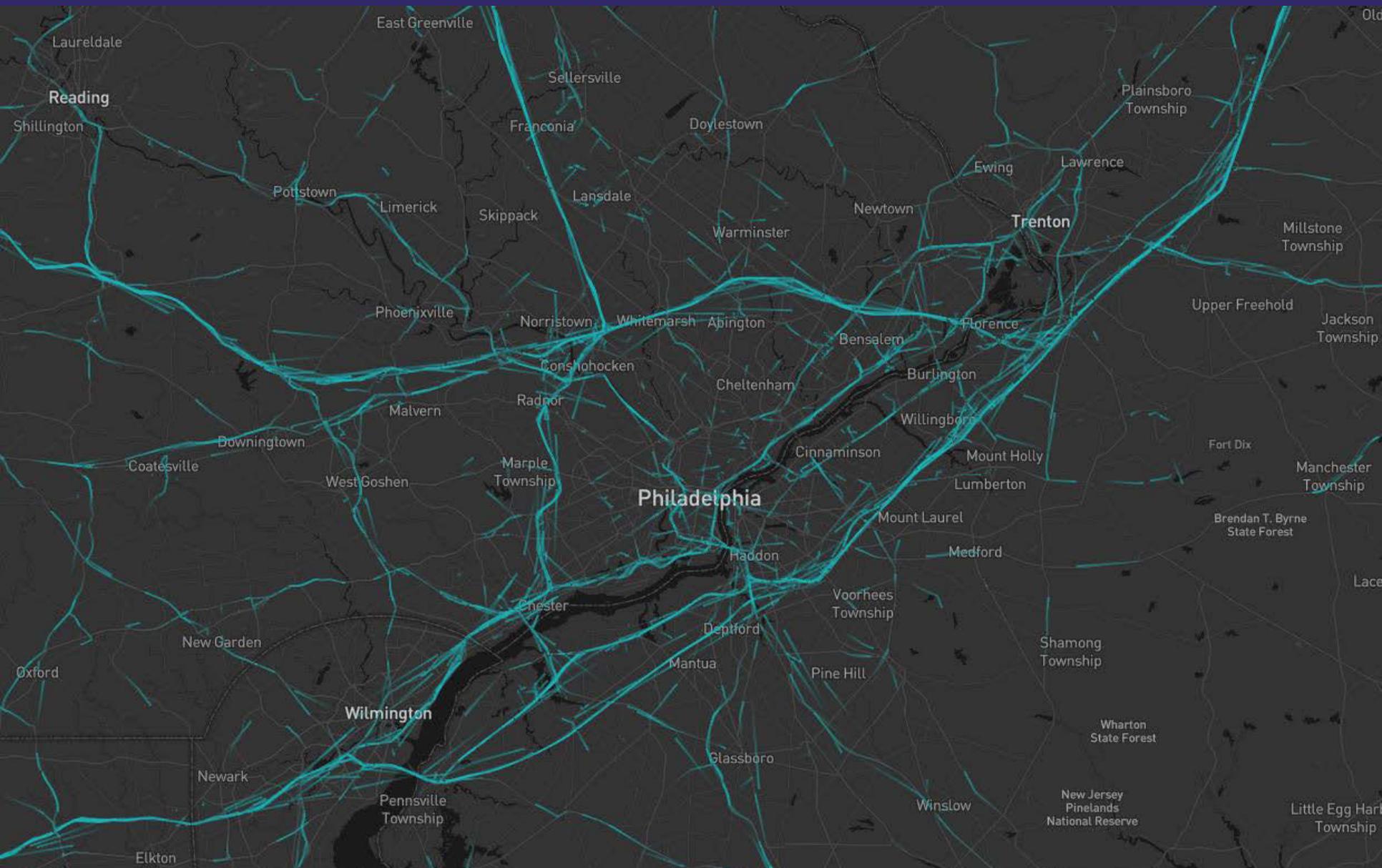
MUNICIPAL IMPLEMENTATION GUIDE

We have a framework that can be implemented across the region to help municipalities address issues related to truck activity through local action and coordination.

COLLABORATION

We see opportunities outside of DVRPC and within the agency to use the freight plans and policies we've developed to inform multimodal planning and investments in safer, more efficient transportation systems.

New Applications of Data - INRIX



SAVE THE DATE

VIRTUAL STATEWIDE FREIGHT FORUM

NOVEMBER 5, 2020

Pre-register for updates today



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- An exclusive, first-look at critical programs, plans and strategies
- Notices about current and upcoming planning initiatives
- Opportunities to share your thoughts and provide feedback through surveys, webinars and public meetings

Join the conversation

Pennsylvania's Freight Movement Plan

Join us for a full-day workshop featuring:

- Presentations on the critical role the Keystone State plays in moving freight
- State and national perspectives on future freight policies and resources
- Opportunities to share insights and provide feedback to shape the blueprint of investments and priorities

Learn • Grow • Engage

Register at:
bit.ly/MovePAReg

#MovePA2045

If you have any questions, please contact:

PennDOT Planning Network • Center for Program Development & Management
penndotplanning@pa.gov

2021 Meeting Dates

- January 13
- April 14
- July 14
- October 13