

Maryland Freight Summit

The seal of the Port of Baltimore is a circular emblem. It features a blue outer ring with the words "PORT OF" at the top and "BALTIMORE" at the bottom in white capital letters. In the center of the seal is a yellow silhouette of a three-masted sailing ship. Below the ship, the year "1706" is inscribed in a light blue font.

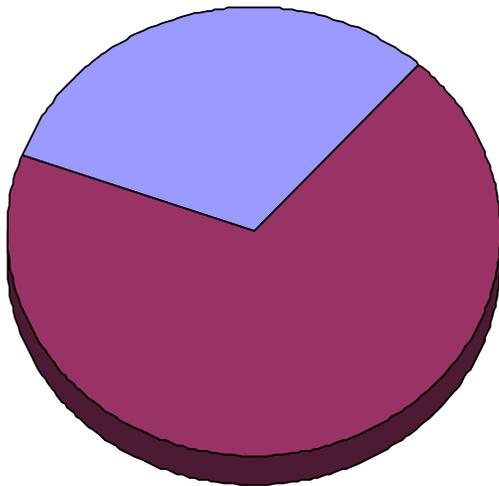
The Importance of MIZOD in a Competitive and Growing Port of Baltimore

**Presented by
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Deputy Executive Director
Maryland Port Administration
September 14, 2009**

Foreign Cargo Handled at Port of Baltimore 2008

Total Port Activity

General Cargo

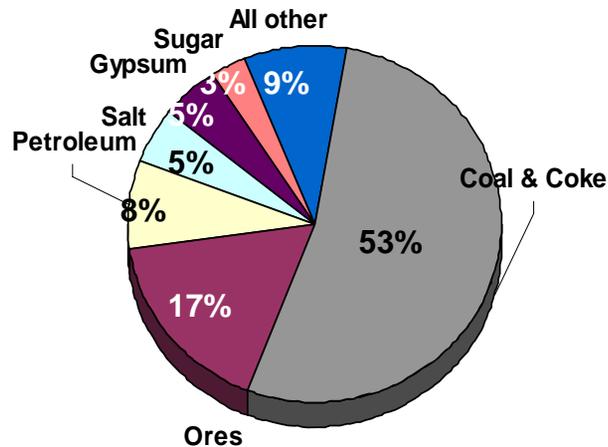


Bulk

33.9 Million Tons

(includes 800,000 tons domestic container cargo)

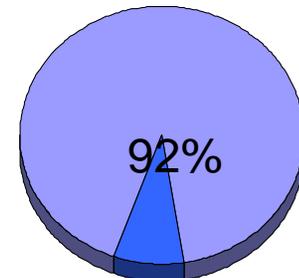
Bulk Cargo (All Private Terminals)



24.1 Million Tons

General Cargo

MPA
Facilities

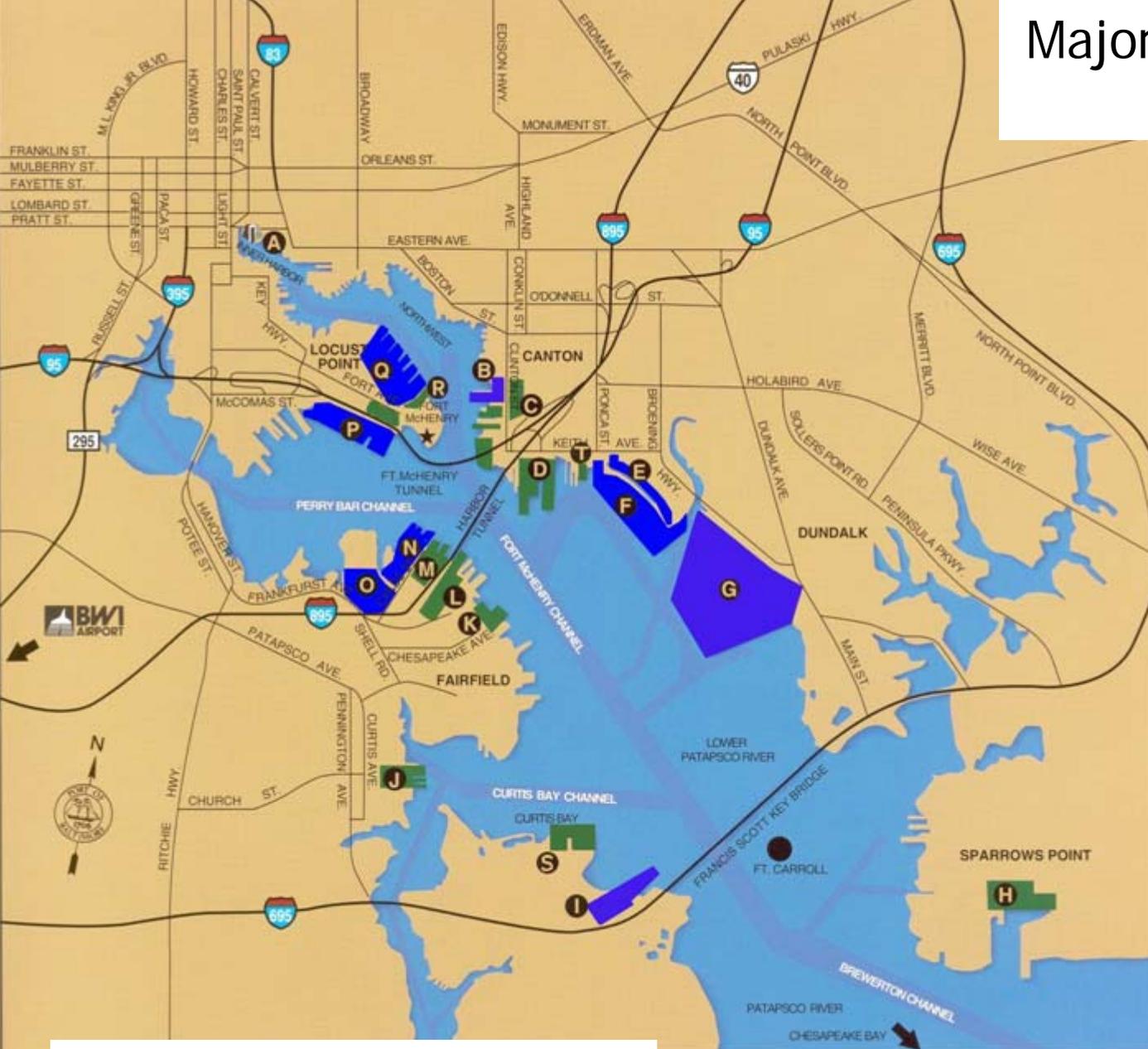


Private
Facilities

9.7 Million Tons

(includes 800,000 tons domestic container cargo)

Major Port of Baltimore Terminals



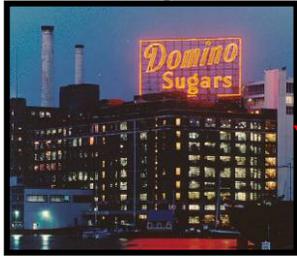
- A** World Trade Center Baltimore
- B** Clinton Street Marine Terminal
- C** Rukert Terminals Corporation
- D** Consolidation Coal Sales Co. Marine Terminal
- E** Intermodal Container Transfer Facility (I.C.T.F.)
- F** Seagirt Marine Terminal
- G** Dundalk Marine Terminal
- H** Chesapeake Bulk Stevedores
- I** Hawkins Point Terminal
- J** CSX Coal & Ore Piers/Curtis Bay Co. Bayside Coal Pier
- K** Chesapeake Terminal
- L** ST Services
- M** Atlantic Terminal
- N** Fairfield Auto Terminal (Toyota)
- O** Masonville Marine Terminal
- P** South Locust Point Marine Terminal
- Q** North Locust Point Marine Terminal
- R** Baltimore Metal & Commodities Terminal
- S** U.S. Gypsum
- T** National Gypsum

Private Terminals (36)

Public Terminals (9)

Diverse Cargo - Example Private Facilities

Sugar



Domino Sugar

Breakbulk



Steinweg

Vehicles



Amports

Cargo and Facilities



Salt



Rukert

Coal



**Consolidation
Coal**

Iron ore



**Severstal / Sparrows
Point**

Diverse Cargo - Public MPA Facilities

Forest Products



North Locust Point

Forest Products



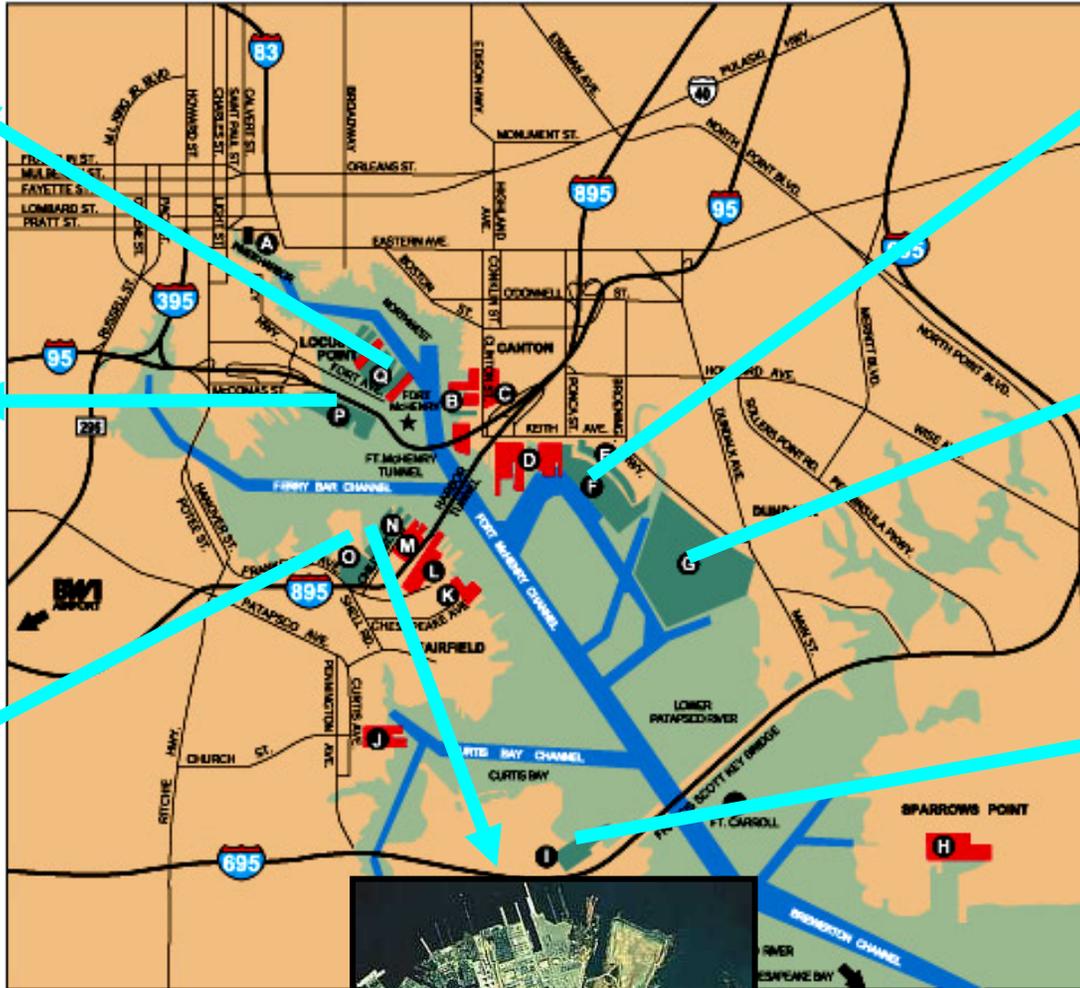
South Locust Point

Vehicles



Masonville

Cargo and Facilities



**Vehicles
Fairfield**



Containers



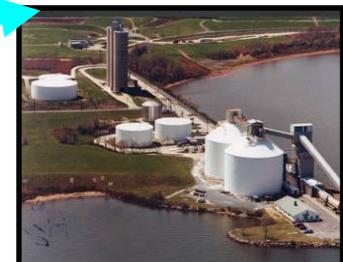
Seagirt Marine Terminal

Multiple Uses



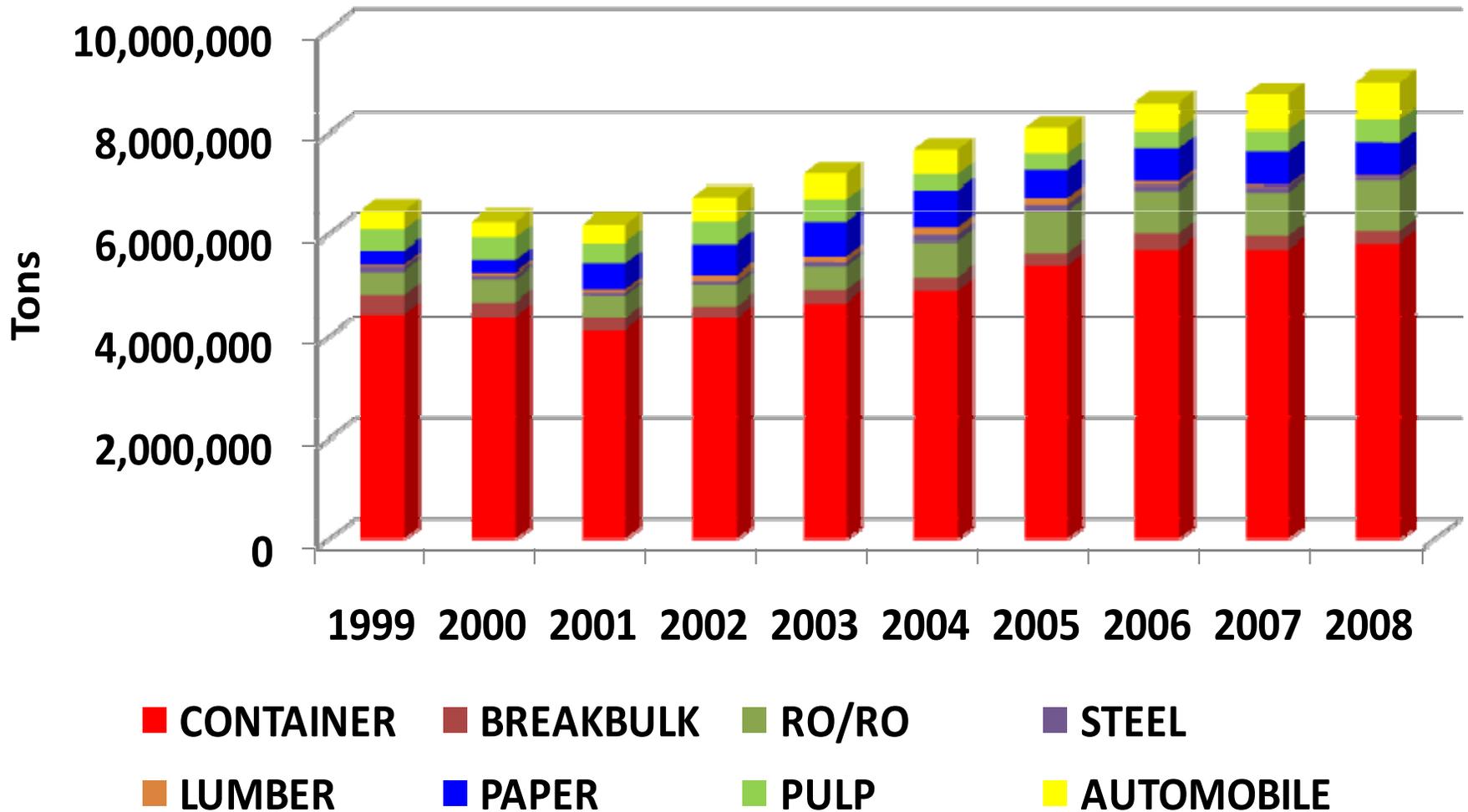
Dundalk Marine Terminal

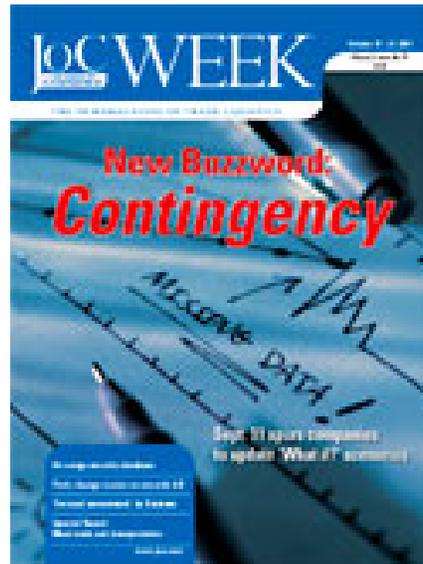
Aluminum Ore



Hawkins Point Terminal

Cargo Composition and Growth at MPA Terminals





Cruise



Rankings



- ❖ The Port of Baltimore remains number one among 360 U.S. ports for handling:
 - ❖ roll on/roll off cargo
 - ❖ trucks
 - ❖ imported forest products
 - ❖ imported sugar
 - ❖ imported gypsum
 - ❖ imported iron ore

- ❖ The Port of Baltimore is ranked second in the U.S. for:
 - ❖ exported autos
 - ❖ imported salt
 - ❖ imported aluminum

- ❖ Overall the Port of Baltimore is ranked 12th nationally for value of foreign cargo (\$45B) and 14th for foreign cargo handled (33M tons).



The Port of Baltimore generates considerable economic impact to the region.

- 50,200 Jobs in Maryland are dependent upon cargo and vessel activity at the Port.
 - 16,500 Direct jobs
 - 33,700 Induced and Indirect jobs
- \$3.6 billion in personal wage and salary income.
- \$1.9 billion in Business Revenues.
- \$1.3 billion in Local Purchases.
- \$388 million in State and local taxes per year.

- An additional 68,300 Jobs are related to, but not considered dependent upon Port activity.

Neighboring Ports are very competitive for our business.



The City's Maritime Industrial Zone Overlay District (MIZOD) has helped the Port, especially private marine terminals.

- Underlying Zoning is “Heavy Industrial”.
- Deep water (18’), with RR or Hwy access.
- Planned Unit Developments (PUD’s) are not allowed.
- Taverns & live entertainment not allowed.
- Office, Hotel, Commercial uses are not permitted, unless as an accessory use.
- The MIZOD is in effect until 2024.

Baltimore City Maritime Industrial Overlay District



The success of Baltimore City's Inner Harbor....



Pedestrian Promenade

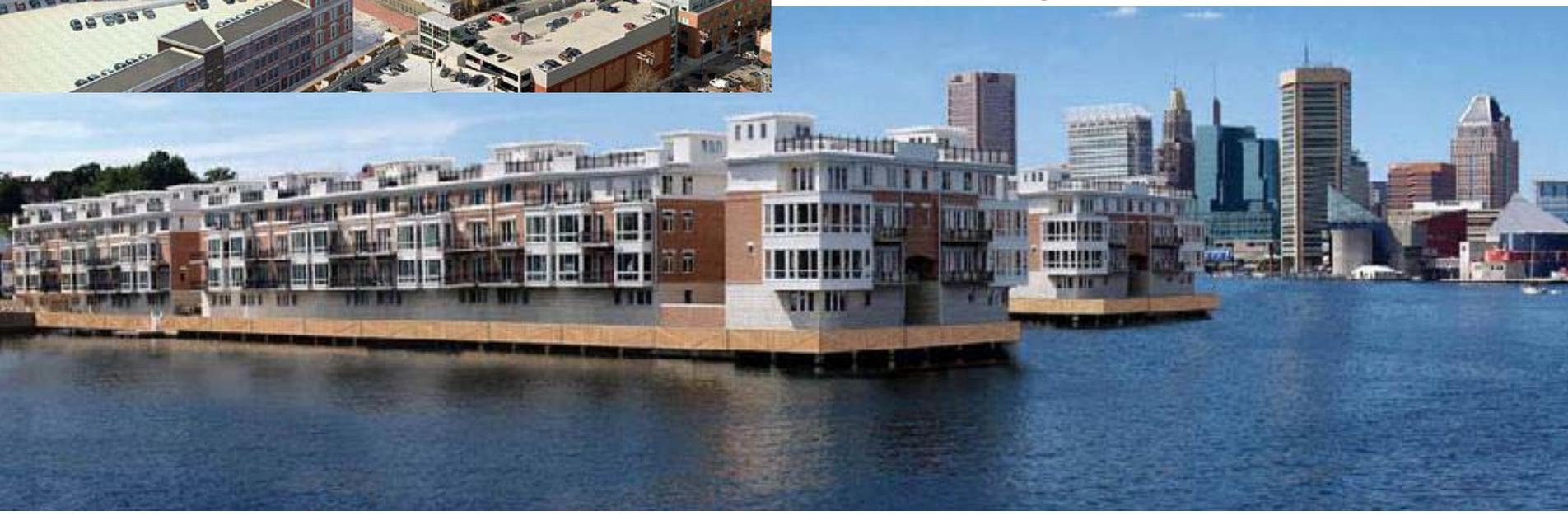


Commercial retail, restaurants

...has spurred other waterfront development, such as:



- Inner Harbor East
(Commercial Mixed Use)
- Key Highway (Condominiums)



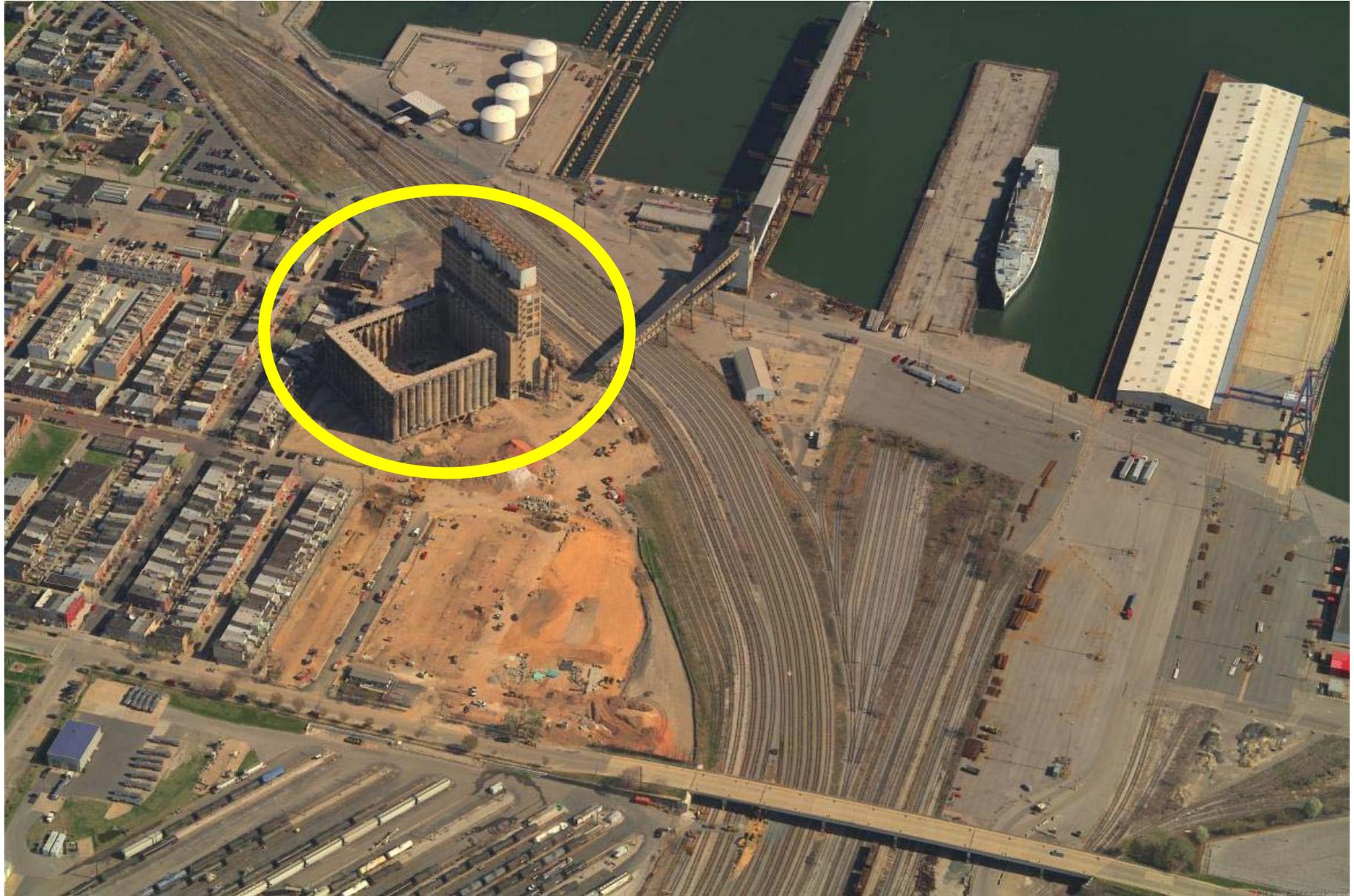
- Tide Point Office Complex



Westway
Molasses

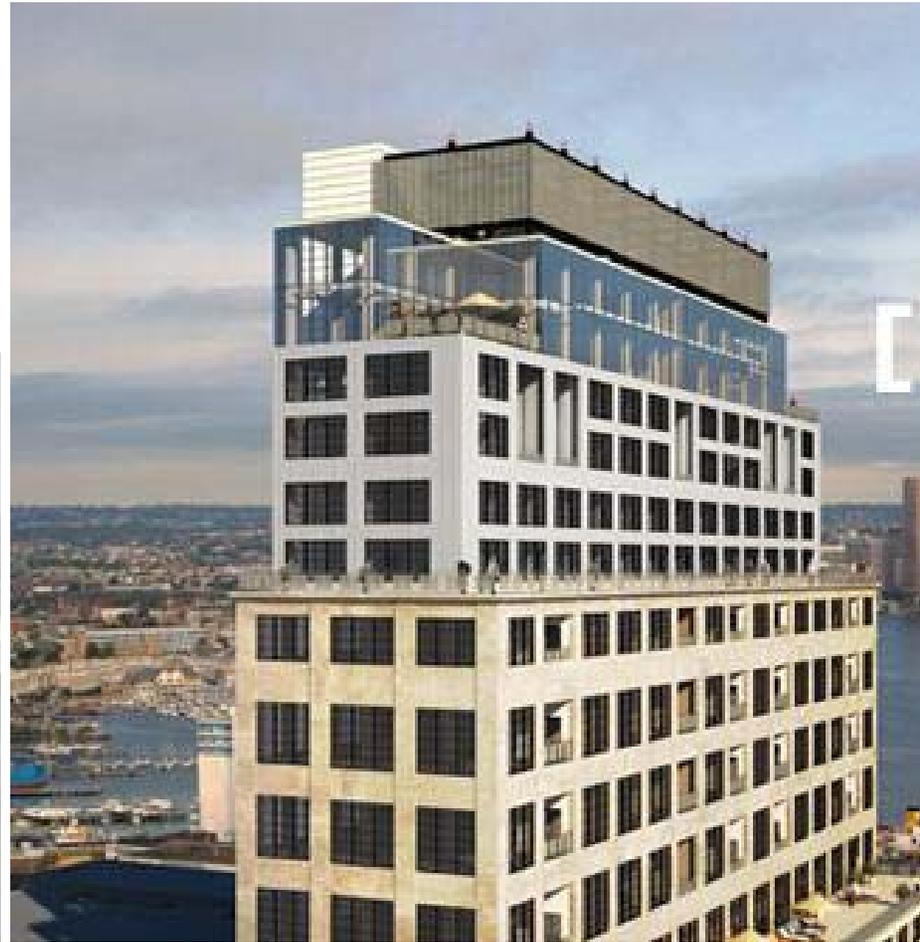
Domino
Sugar

- Silo Point Condominiums



- Silo Point Condominiums

Artist's Rendering



- Canton Crossing Office/Condo Complex



Why MIZOD Is Important to the Port's Future

- MIZOD is critically important because it supports an industry that can only operate on deepwater (and cannot be relocated elsewhere).
- Every East Coast State with a port is trying to attract the Port of Baltimore's business and MIZOD sends an important message to the global marketplace that we want port business in Baltimore.
- Major global companies want to be in the Port for the long term, as demonstrated by long-term agreements and private investments on the public marine terminals.
- The Port of Baltimore generates 50,000 well paying jobs, and is one of the most significant contributors to the economy of Baltimore City and the State of Maryland.

Why MIZOD is Important to the Port (Cont'd)

- Private terminal operators have invested heavily in the past.
 - \$200M in capital improvements in the next 5 to 6 years,
 - \$50M in annual manufacturing infrastructure related expenses.
- Over the past 10 years, the State of Maryland has invested nearly \$700 million in the Port of Baltimore.
- Over the next 6 years, the State of Maryland plans to invest over \$600 million in the MPA's Capital Program.
- The federal government invests nearly \$50 million annually in the Port of Baltimore, and that investment is at risk if the business starts to decline.
- The City's Comprehensive Master Plans calls for sustainable sectors. The Port industry provides sustainable, long-term jobs and economic activity as evidenced by its age of over 300 years, its continued growth and its resiliency.

In Conclusion:

- Freight is a land intensive business...and dedication of waterfront land is particularly important for international trade and maritime freight. MIZOD preserves and takes advantage of the City's deep-water assets.
- Land use, and all the infrastructure to accommodate freight, requires a long-term view. In the absence of long-term planning, there may not be sufficient land and infrastructure to handle freight effectively and efficiently to be competitive.
- For a City, State or a Region to succeed in freight, there really needs to be a collective Vision at all levels and functional areas. MIZOD is a success story of this cooperation to stabilize and enhance the maritime industry and freight movement.