

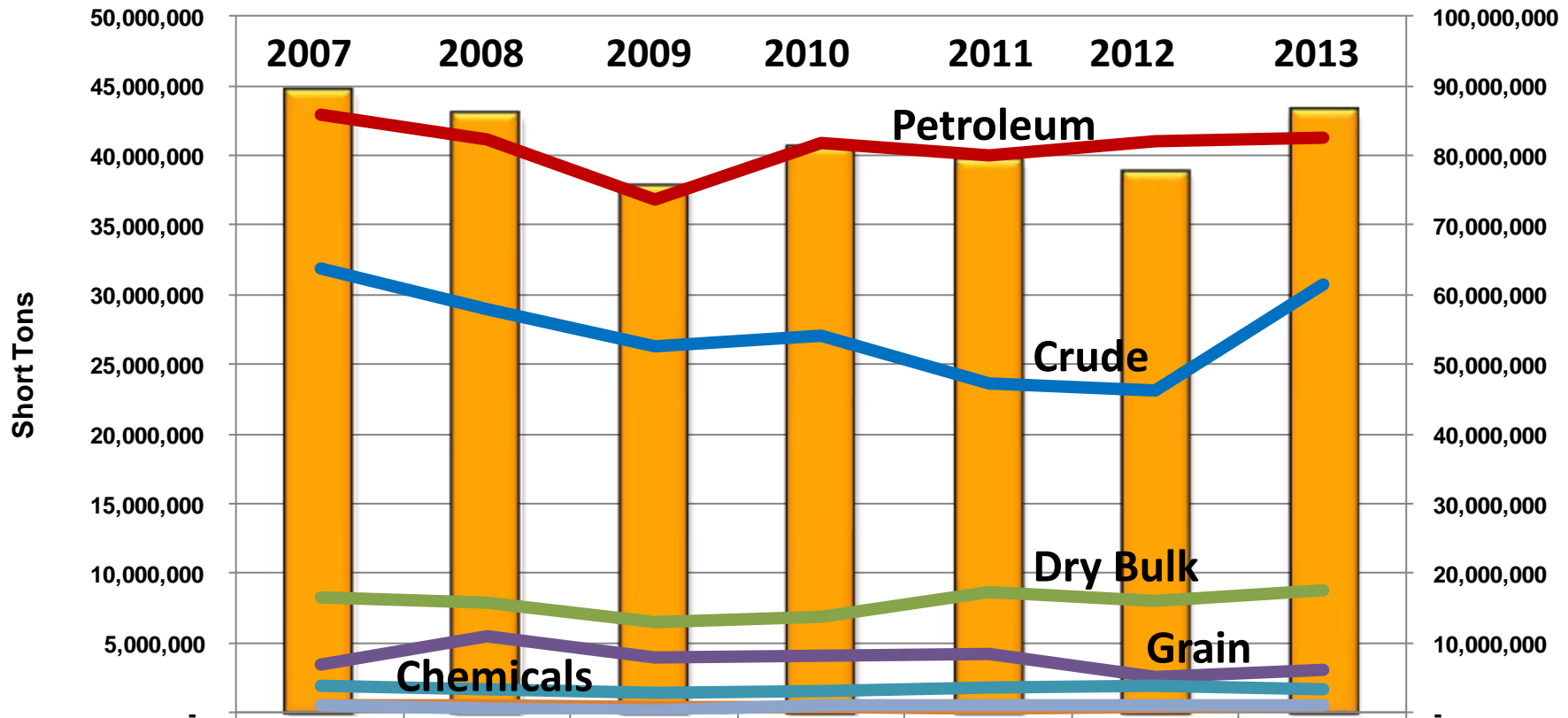
Project 2020 Strategic Planning Process



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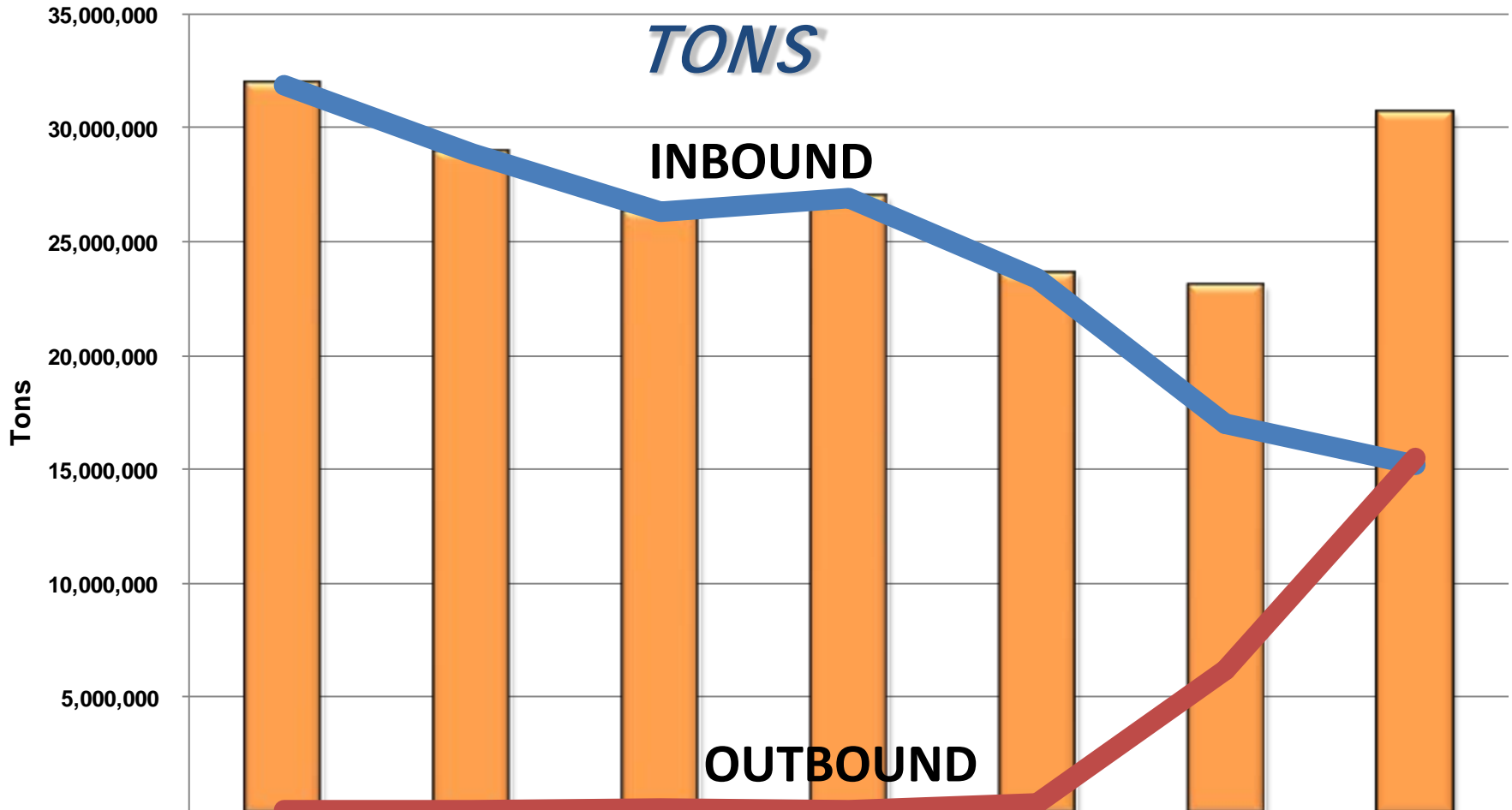


Tonnage By Commodity: 2007-2013A



	2007	2008	2009	2010	2011	2012	2013A
TOTAL	89,319,694	85,859,440	75,471,948	81,152,854	79,188,092	77,618,736	86,300,803
PETROLEUM	42,956,015	41,139,848	36,884,615	40,859,637	40,062,625	41,068,085	41,221,639
CRUDE	31,937,624	28,920,766	26,333,206	26,999,780	23,634,396	23,120,806	30,734,077
DRY BULK	8,241,554	7,891,343	6,443,658	6,866,446	8,692,368	7,939,684	8,705,050
BULK GRAIN	3,377,386	5,423,867	3,951,347	4,113,277	4,214,821	2,578,847	2,989,615
CHEMICAL	1,848,875	1,630,019	1,410,028	1,468,244	1,743,708	1,966,012	1,710,426
BREAK BULK	445,204	552,590	317,993	339,259	306,631	390,967	496,183
LIQUID BULK	513,036	301,007	131,100	506,211	533,543	554,336	443,812

Crude – Inbound vs. Outbound: 2007-2013A



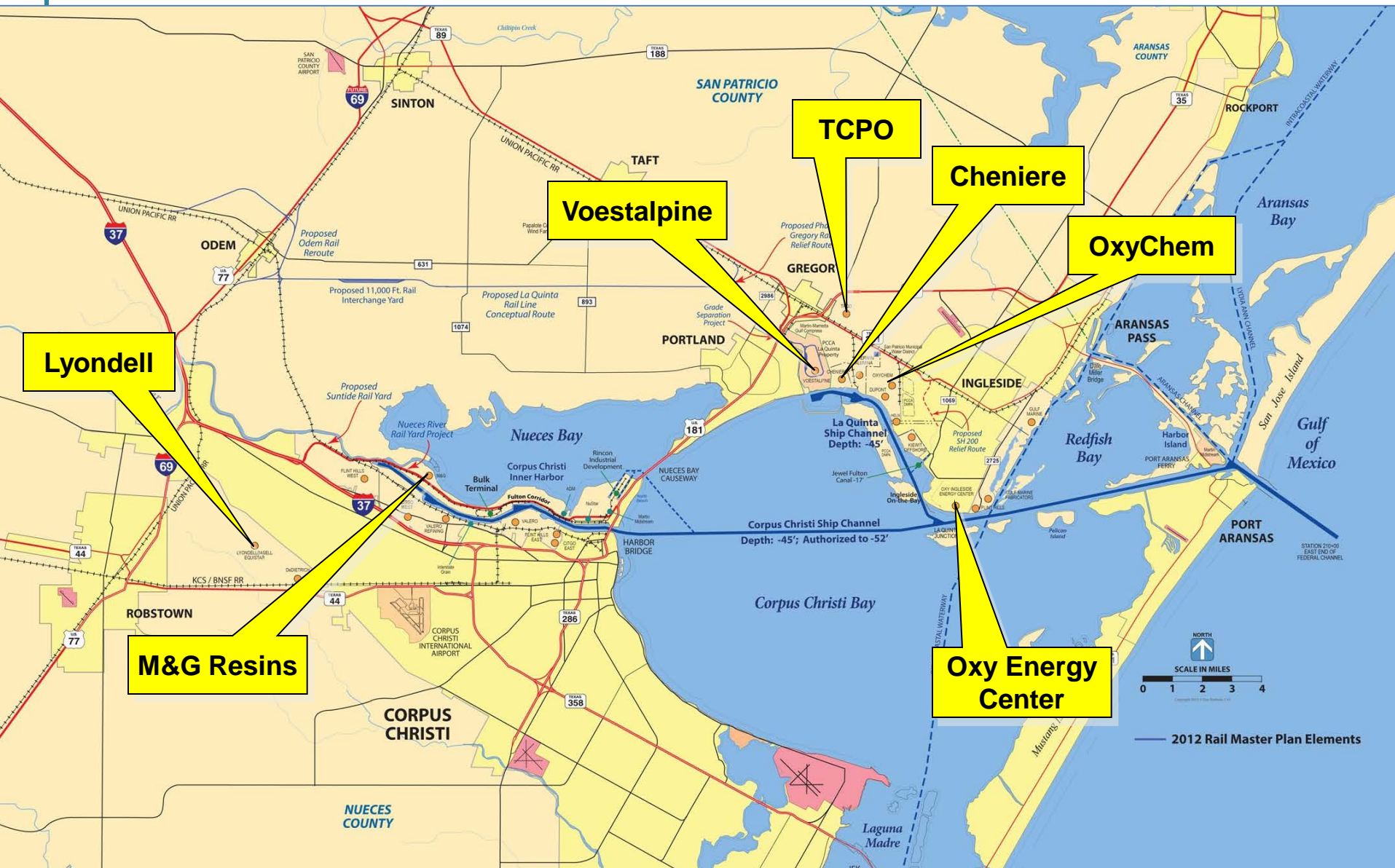
	2007	2008	2009	2010	2011	2012	2013A
Total	31,937,624	28,920,766	26,333,206	26,999,780	23,634,396	23,120,806	30,734,077
Inbound	31,914,358	28,888,730	26,282,732	26,953,027	23,349,025	16,980,037	15,214,237
Outbound	23,266	32,035	50,474	46,753	285,371	6,140,768	15,519,841

Impacts of Shifting Cargo Movements

- Higher demand for dock space
- Increasing ship/barge wait times
- Greater harbor congestion
- Conversion of facilities to higher value use
- Marketplace pressure to make decisions that may have a very long impact on public assets



New Developments



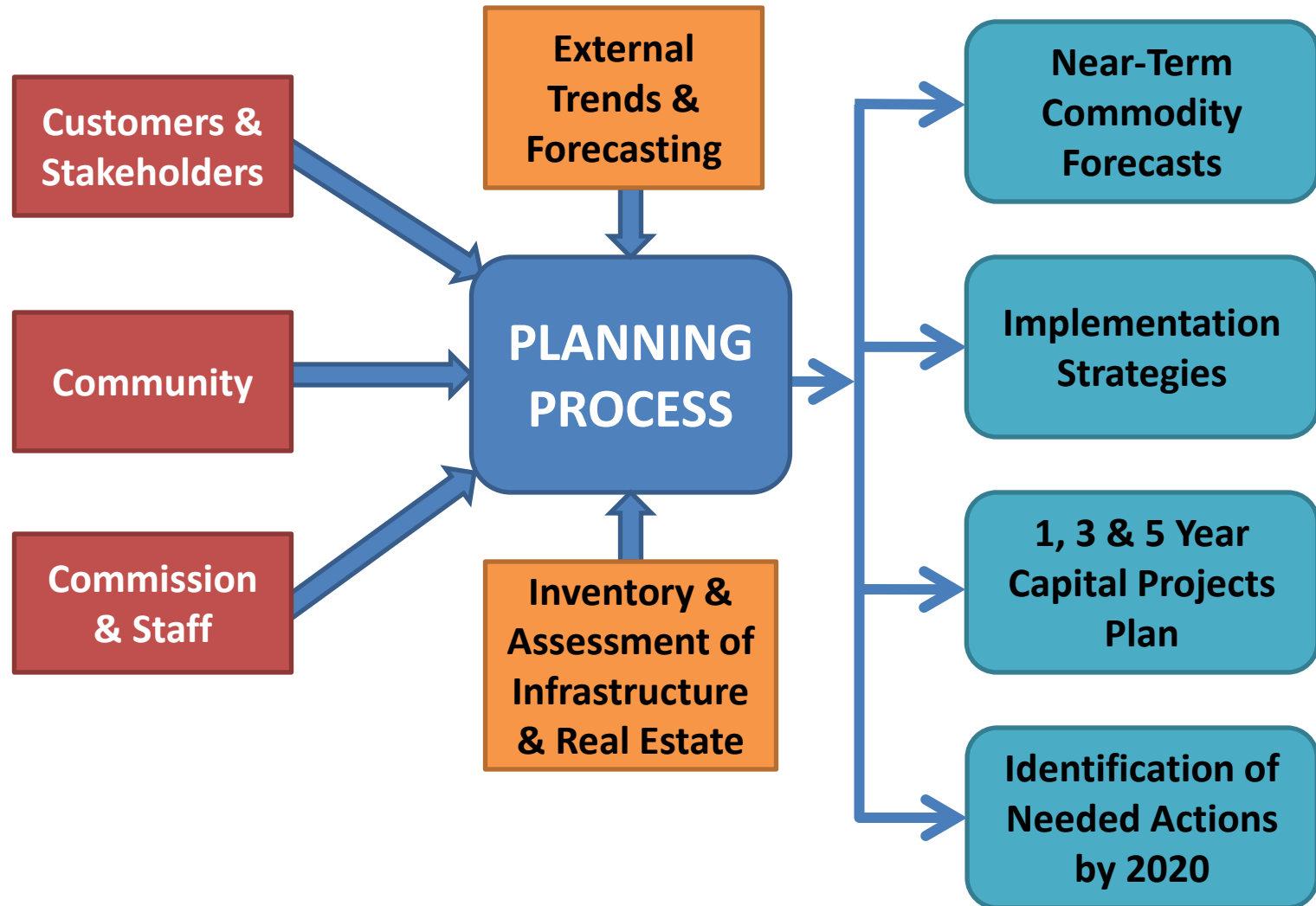
Time to Take a Fresh Look

- **Strategic Plan needed to assess this period of fast-paced change and opportunity**
- **Plan components**
 - Strengths, weaknesses and opportunities analysis for South Texas
 - Commodity forecasts
 - Assessment of current assets
 - Identification of objectives to be completed in a 7-year horizon
- **Planning will help guide decisions**
 - Budgeting; Capital and Operating
 - Leasing, land use and potential for highest and best use
 - Preservation of sites and corridors for future development

The Planning Team

- **Port Authority staff and commissioners**
- **Consultants**
 - Rich Stroot – Team leader and rail specialist
 - Jim Shiner, P.E. – Infrastructure and real estate assessment
 - Paul Rolniak, EAI, Inc – Energy industry analysis and forecasting
 - Dr. Hoegemeier - Transportation economist
 - Dave Hallberg – Freight trends analysis
 - Don Rodman – Compilation of plan elements and document development

PCCA Strategic Planning Process



Concerns Being Voiced by Port Community

- **Water supply reliability**
- **Electric power capacity, short and long term**
- **Workforce availability**
- Housing availability
- Near-channel industrial site options
- Dock availability and vessel delays
- One way and daylight only requirements
- Lack of multi-carrier rail service
- Forced delays in slip maintenance dredging
- Concern about maintaining air attainment status

Your Input

- **Encouraging Port customer participation**
 - Meet with users individually
 - Sharing development plans
 - Users suggesting initiatives to improve operational efficiency and reduce conflicts
 - Providing insights about potential marketplace trends

