

# Strategic Master Plan Update

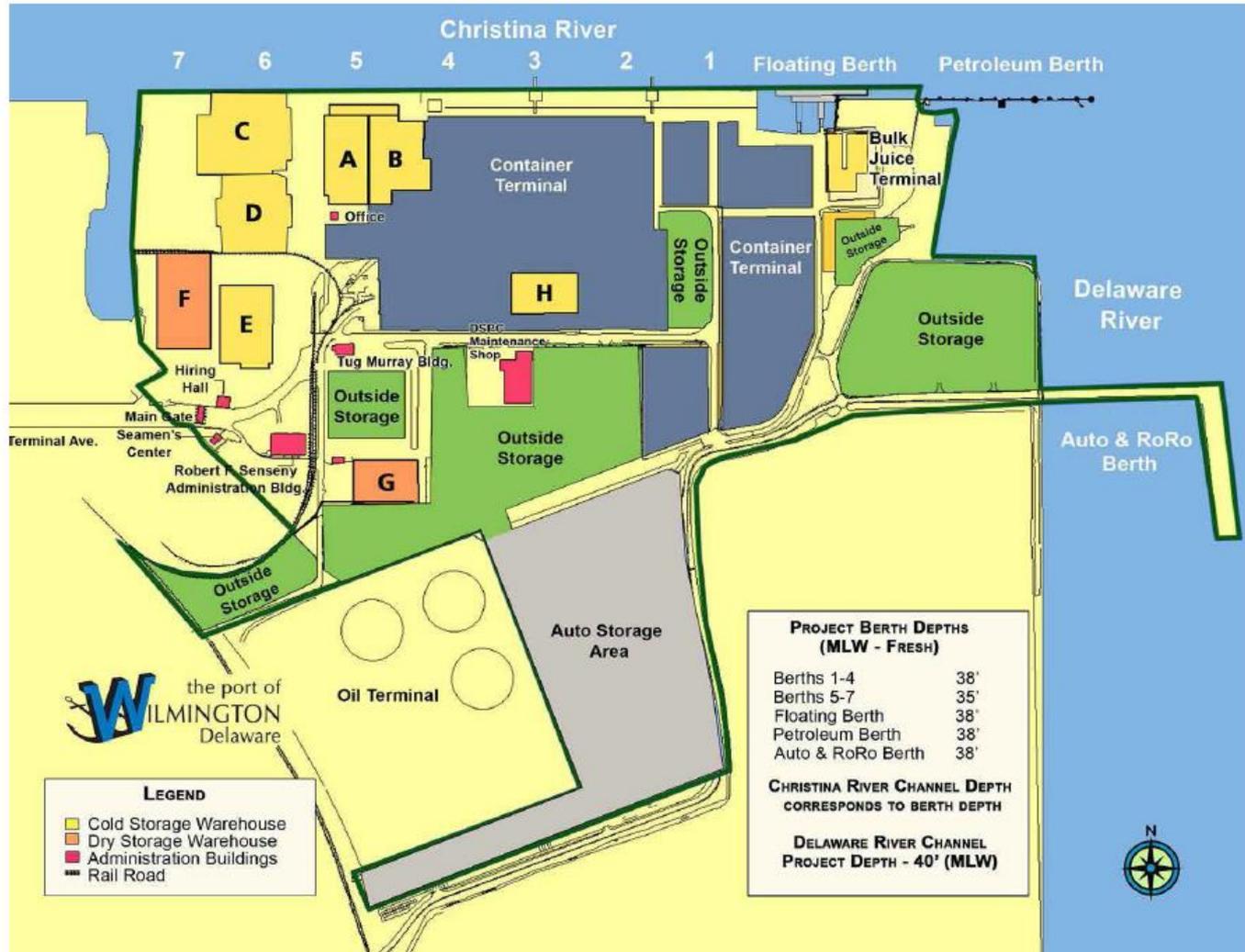
Port of Wilmington Expansion Task Force Meeting  
March 29, 2016

# Existing Port Capacity

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- ▶ Our Team met with existing tenants, customers and stakeholders to determine operational requirements and constraints of the existing facility. Key Findings:
  - ▶ A majority of Port berth activity takes place on Berths 1 – 3, including Dole, Chiquita, bulk, and other refrigerated cargo
  - ▶ With the two new cranes, the Port can accommodate an additional container user and new calls by Dole and Chiquita, but after that it will be difficult to handle further organic growth
  - ▶ The backland is also operating at-capacity for existing users, especially Dole and Chiquita.

# Port of Wilmington Facility Map



# Market Demand Forecast

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- ▶ **The Prospects for Trade Growth:**
  - ▶ Positive outlook for the next five years with volume gains in the 4% to 8% range, annually
  - ▶ Keys to upbeat short term performance are the diversity of cargoes being handled and the opportunity to serve expanded trades with a new container service
  - ▶ Longer term volume gains will be limited to 2% yearly owing to changing demographics and consumer behaviors

# Potential Expansion Sites

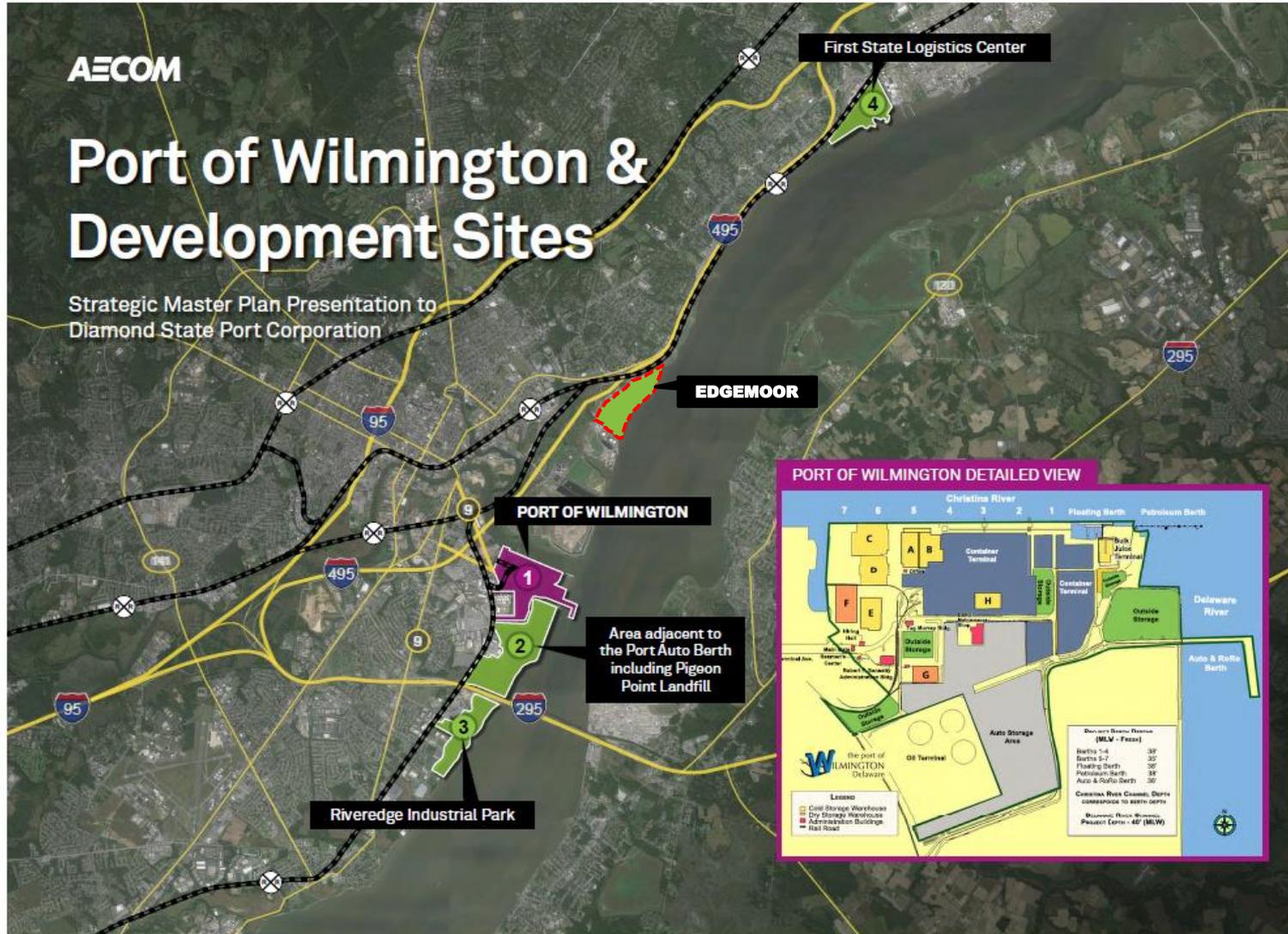
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- ▶ **Existing Port / Wilmington Harbor South**
  - ▶ Potential additional berths and/or relocated berths
  - ▶ Potential changes to current operations
  - ▶ Gate Capacity
  - ▶ Wilmington Harbor South dredge disposal site
- ▶ **First State Crossing (Claymont)**
- ▶ **Riveredge**
  - ▶ Greenfield container terminal
- ▶ **Edgemoor**
  - ▶ Former Chemours plant, recently put on market

**AECOM**

# Port of Wilmington & Development Sites

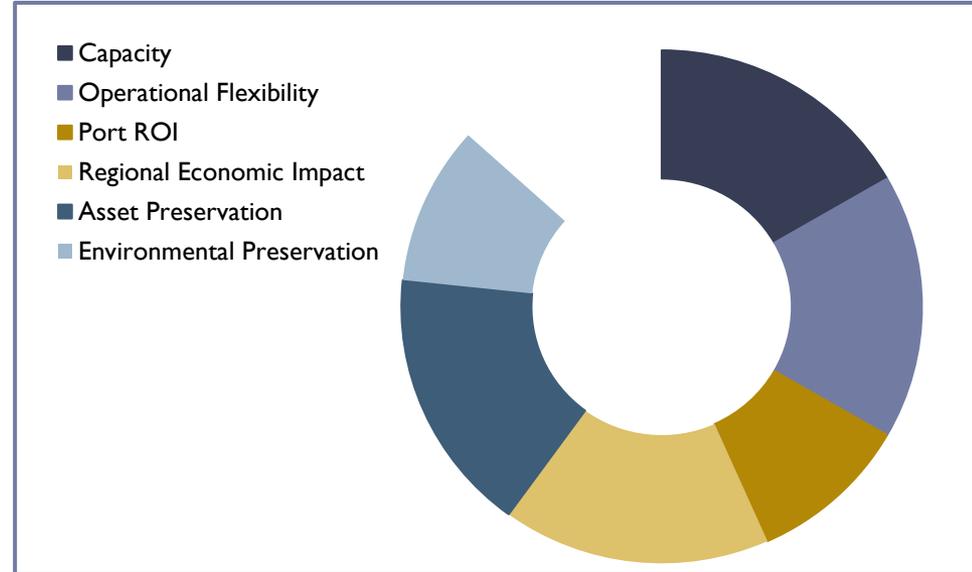
Strategic Master Plan Presentation to  
Diamond State Port Corporation



# Current Effort

## ▶ Cost/Benefit Evaluation of Expansion Alternatives

- ▶ Costs to maintain existing Port in a state of good repair
- ▶ Costs for expansion site land, development / construction, permitting, mitigation
- ▶ Capacity Improvements & Benefits – Berth and Backland
- ▶ Economic Benefits – jobs, revenue, timeframe



**Decision-Matrix**

Competitiveness		Economic		Stewardship	
Capacity	Operational Flexibility	Port ROI	Regional Economic Impact	Asset Preservation	Environmental Preservation
H	H	M	H	H	M

# Schedule

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- ▶ **Between now and April 30<sup>th</sup>**
  - ▶ Complete Cost – Benefit Analysis of each Expansion Alternative
  - ▶ Present Key Findings and Analysis
  - ▶ Develop 5-Year Capital Improvement Plan to support Strategic Development of the Port
  - ▶ Complete the 20-Year Strategic Master Plan