



# Pasha Group Logistics Introduction

## Omni Terminal Operations





# Company Overview

- Presenter: Stan Gabara, EVP President – Logistics and Business Development
- A Freight Management and Logistics Company Founded in 1947
- Comprised of 35 separate companies
- Committed to world class customer service and quality
- Innovator and specialist in transportation and logistics for 66 years





# Five Core Business Lines



## **Automotive Services**

- Import and export vehicle processing
- Vehicle trucking and rail distribution
- End to End supply chain management – LLP



## **Maritime Services**

- Maritime terminal management and stevedoring
- Automotive, project and break-bulk
- Vessel chartering

## **Relocation and Freight Forwarding Services**

- Military and household goods
- Global move management services



## **Military Vehicle Transportation Management**

- Movement and storage of personally-owned vehicles

## **Pasha Hawaii Lines**

- PCTC
- New “Con-ro” Container, RO/RO – PCTC under construction



# Key Automotive Locations

## **Pasha Automotive has key operations at:**

- San Diego, California, National City Marine Terminal
- Baltimore, Maryland, Dundalk Terminal
- Grays Harbor, Aberdeen, Washington State

## **Pasha Stevedoring and Terminals has key operations at:**

- San Diego, California, National City Marine Terminal
- Los Angeles, California
- Grays Harbor, Aberdeen, Washington State



# PAS and PST Full Service “On Dock”

## Vehicle Processing

- Vehicle preparation centers
- Inspection services, e.g. IQS, damage
- Predelivery services
- Body shop and water borne painting
- Paintless dent repair
- Factory retrofit– mechanical services
- Accessory Installations
- Parts management
- Automated Car wash and fallout wash
- Long term storage and programs
- Preventative maintenance Programs

## Terminal Handling / Stevedoring

- Vessel unloading and loading
- Manifest purification
- Port modifications
- Marine surveys
- Rail loading and unloading
- Railcar repair





# Process Innovations to Meet Trends in Shipping

## **Pasha Designed Programs and Processes Reducing Dwell and Increasing Velocity**

- Real-Time radio frequency tracking
- Web based performance metrics for OEM and transportation partners
- Web based railcar equipment ordering system
- Web based truck carrier load building
- On-Dock rail
- “Monroney” on demand printing program
- Design of pre - J.D. Powers inspection and programs



# Major Automotive Customers

- Acura
- Alamo-National
- America Honda
- Audi
- Avis/Budget
- Bentley
- BMW
- Case New Holland
- Chrysler
- Dollar Thrifty
- Enterprise
- Hertz
- Hino Truck
- Hyundai
- Isuzu Truck
- Kia
- Lamborghini
- Lotus
- Mazda
- Mitsubishi Fuso
- Nissan Motor Acceptance
- Porsche
- Toyota
- Volkswagen



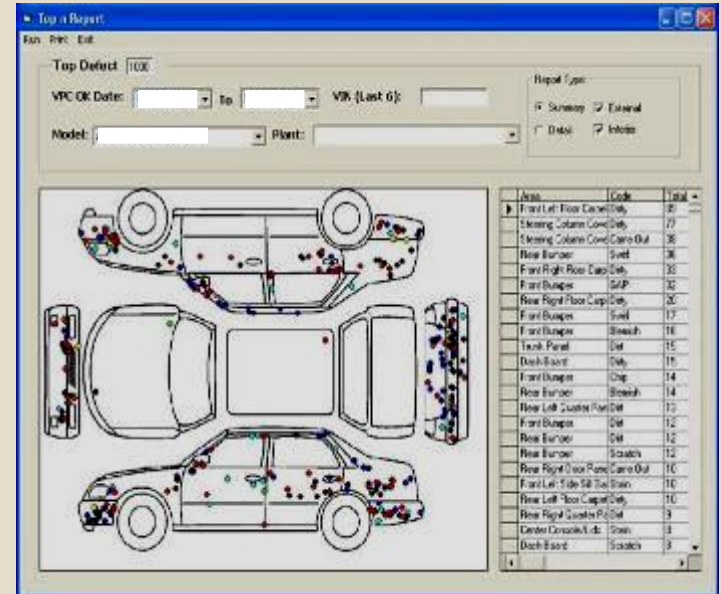


# PASHA On Track™

## Origin to Destination Tracking/Reporting

- Yard management
- Processing and dispatch
- Survey, IQS, VPC, and body shop
- Wireless handhelds (data collection)
- Metric Analysis
- Web Tracking
- Dealer Tracking Capabilities
- Sharing data with Transportation Partners

## ✓ Simple Recording of Damage



## ✓ Highlights Consistent Damage





# San Diego Features

- Launched 1990 – Renewed Terminal Operating Agreement for additional 30 years
- 180-acre facility – 325 Pasha employees
- 8.5-acres of processing facilities under cover
- 5 berths terminal with draft of 35 feet Mean Low Water
- On dock 120-rail car loading
- Tracking 370,000 confirmed for 2013
- Storage and handling capacity of 725,000 vehicles annually at 10 day dwell
- Vessel berthing capacity of 1.25 million vehicles annually
- 24 vehicle manufacturers and distributors serviced



# Why San Diego?

- Auto terminal operations becoming uncompetitive at LA/LB vs. container
- Reviewed 20 West Coast Ports
- Existing site with proximity to No. 1 new auto market
- Geography in the Supply Chain – East of Reno – closer to growing Southern US and Mexico
- Rail access to allow for railroad “Landbridge”
- Repurposed terminal – originally built as a container terminal prior to SS Deregulation
- Site was fallow for 12 years
- Scalable – went from 30 acres to 180 acres of 220 acre terminal
- Blank sheet of paper – allowed for creativity and flexibility
- Desire for new higher paying jobs, ability for new creative labor agreements
- Clean environment

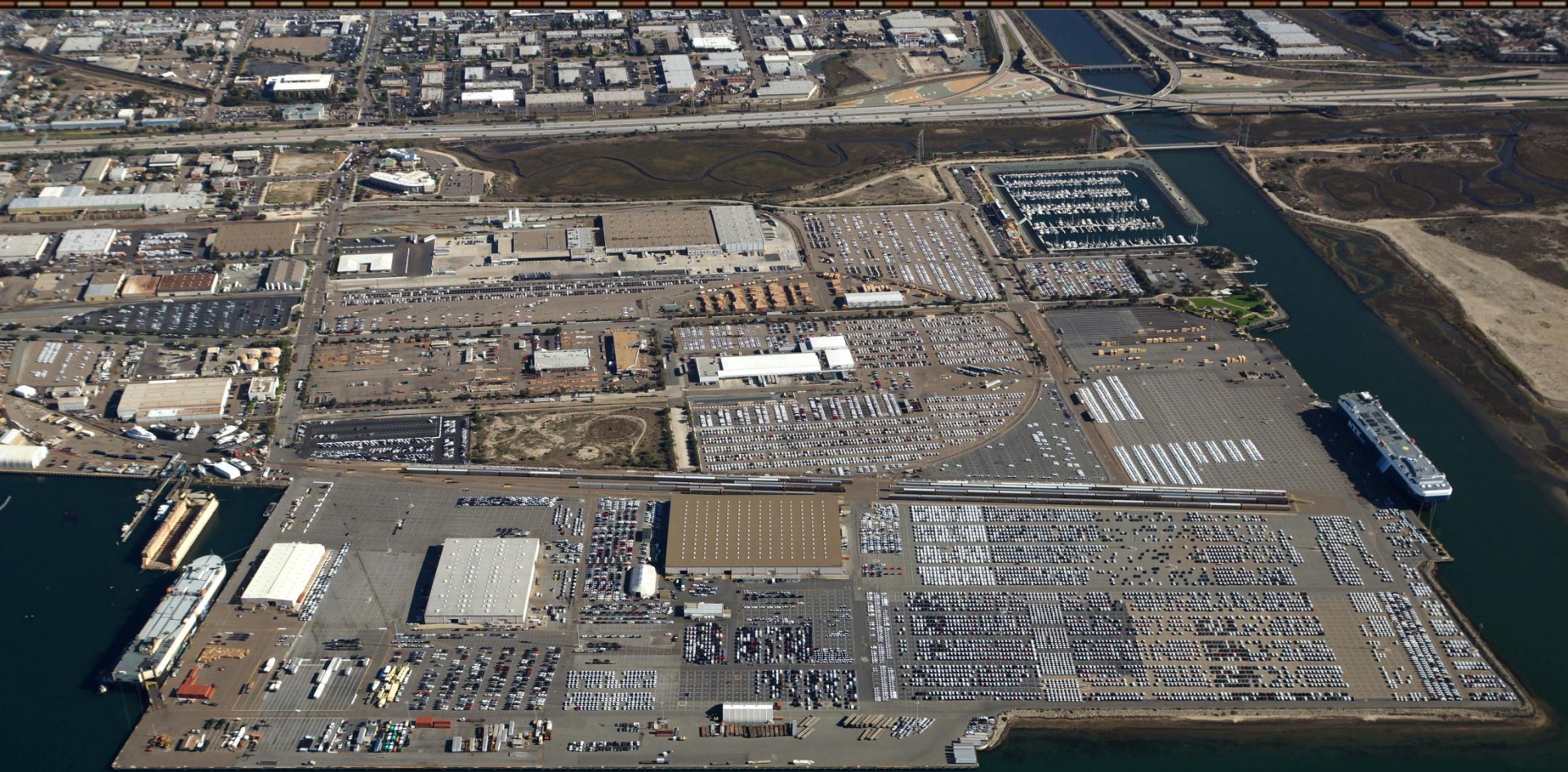


# San Diego Terminal





# San Diego Terminal





# On Dock Rail Operations







# Grays Harbor Milestones

- December 2011 – Port opens New Rail facility - \$18 million project adding 84 Multi Level spots to existing 43 greatly expanding port capacity
- December 2013 – Pasha completes \$4 million in new auto processing facilities including automated wash tunnel, drive over pits & new prep stations
- Again, full service on dock, compressed supply chain shorter access to open ocean vs. other PNW Ports
- Scalable approach – sustainable and cost effective for the long term
- 25 year agreement



# Pasha Distribution Services

## Leveraging Internally and Externally

- Fleet of 225 specialized automotive car carriers
- Extensive overland transportation network throughout North America
- In excess of 350,000 vehicle moves per year
- Lead logistics LLP/LSP activities: processing → truck → rail → ship







# PST Serving Steamship Lines

- Multiple PCTCs and PPCs calling San Diego
- PST stevedores for all lines – PAS-PST Terminal Operator
- SCC
- K-Line
- NYK
- MOL
- VWT
- GLOVIS
- Eukor
- Break-bulk
- Project cargoes

# Siem Car Carriers NAPA Service



- 2009 – NAPA Service is formed with Siem management team experience focused on providing reliable high frequency service





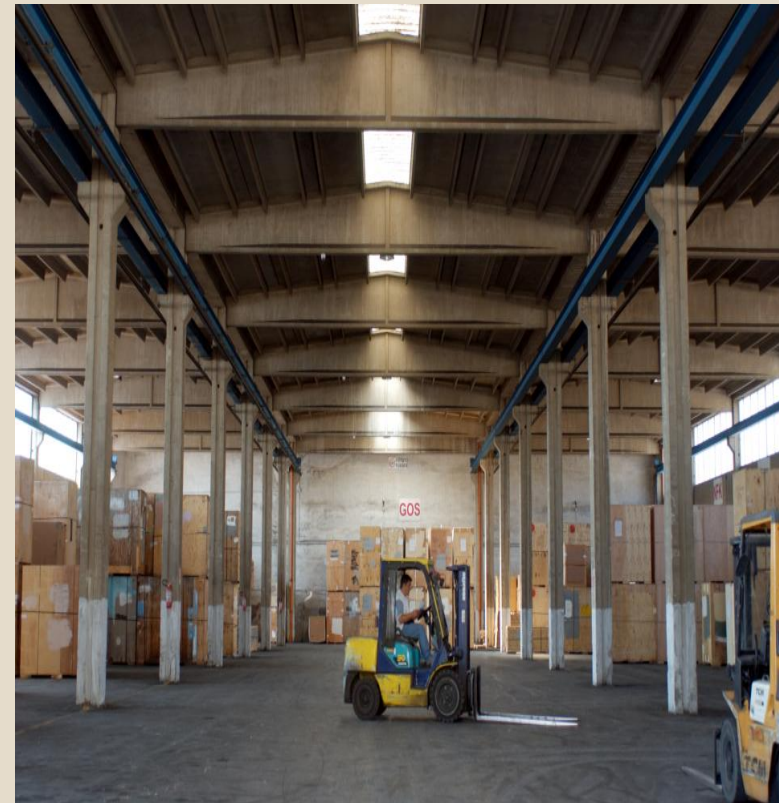
# PST – Los Angeles, California





# Global Transportation Services Locations

- **Ocean Services – Corte Madera, California**
- NVOCC and Ocean Freight Forwarder
- **Mediterranean Services - Overseas Limited, Jersey, England**
- **Relocation Services -Pasha Group AG, Switzerland**
- **Transportation Services - Mannheim, Germany**
- **Asiatic Trans-Pacific- Okinawa, Japan**
- **Pasha Group UKL – Southampton, UK**
- **Pasha Group Italian Network – Via Milano, Italy**
- **Relocation Services - Reno, Nevada**
- **Transportation Services - Chicago, Illinois**
- **Gateways, International - Seattle, Washington**





# Pasha Terminal Los Angeles





# Maritime Terminal Services

- Facilities cargo management – Omni Terminal
- Break-bulk
- Project cargoes
- Vessel Operations
- Terminal Operations
- Stevedoring





# Cargo Expertise





# Cargo Expertise – Specialty Cargo







# Cargo Expertise – RO/RO Container





# Cargo Expertise – Heavy Lift





# Cargo Expertise – Heavy Lift





# Cargo Expertise – High/Heavy





# Cargo Expertise – Innovations





# Pasha Hawaii - Jones Act Vessel Service





# Hawaii Service Profile

## *M/V Jean Anne*

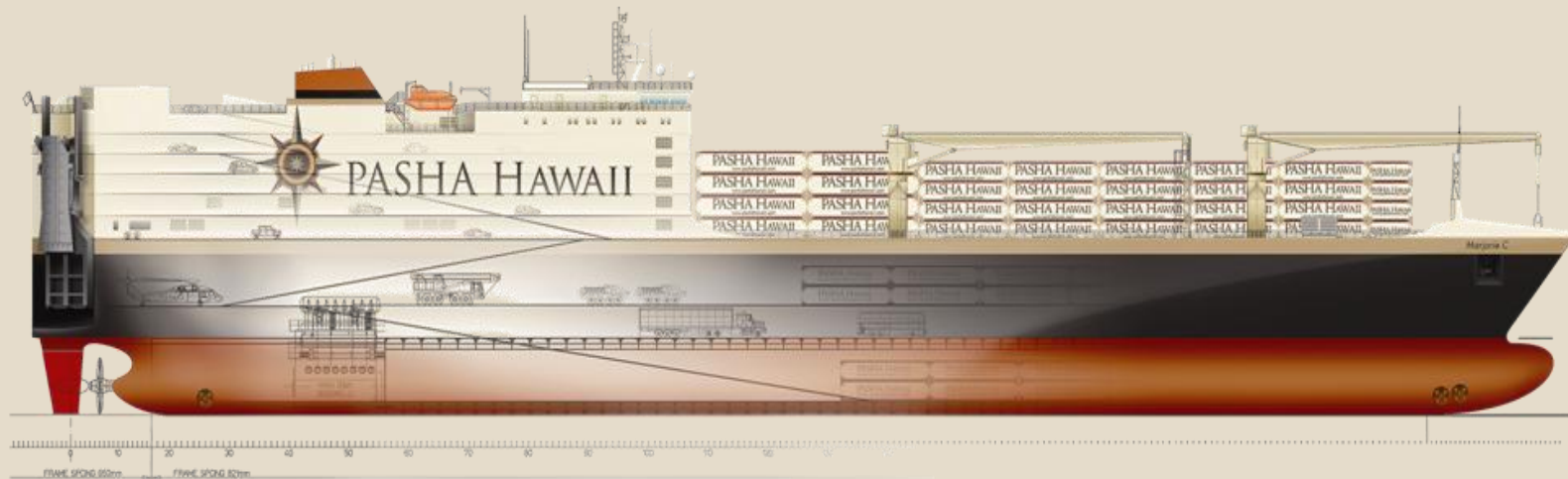
- The only Pure Car Truck Carrier in the Hawaii/Mainland Trade Lanes
- Established in 2005. US owned, US built, US flagged, Jones Act Vessel
- Three direct Port Calls from San Diego to Honolulu, Kahului and Hilo
- 
- Fortnightly Service Rotating from the Port of San Diego to the HI Ports





# Introducing the *M/V Marjorie C*

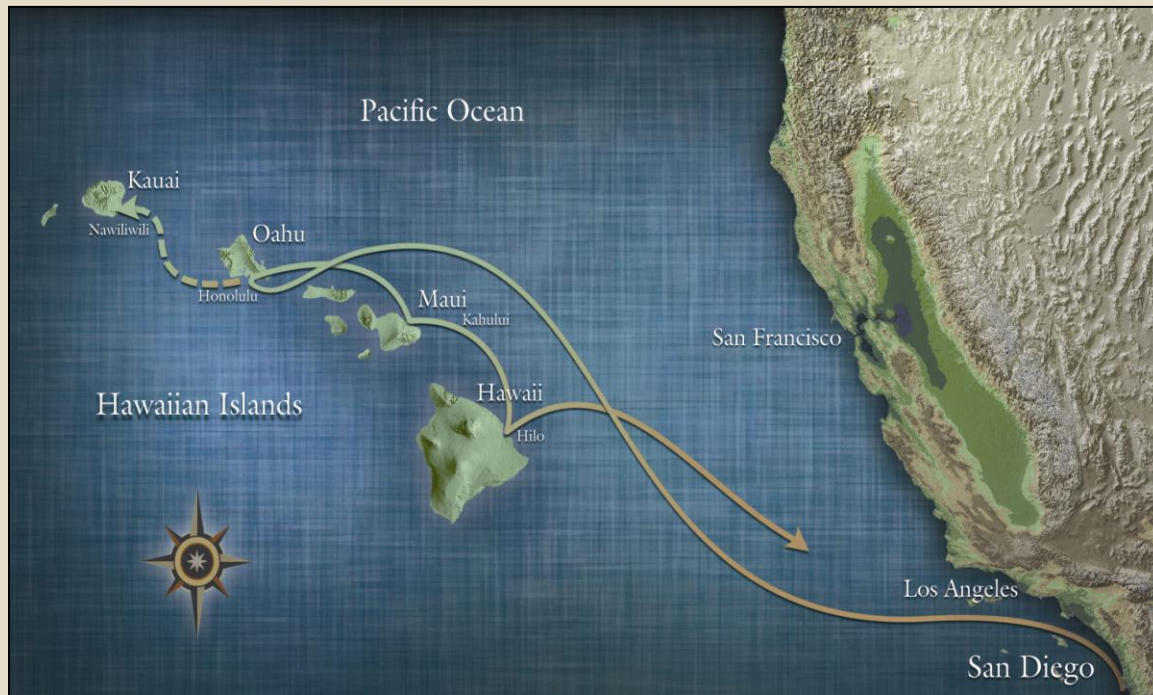
- A combination Container and Roll-On/Roll-Off Vessel, providing service between the Mainland and Hawaii.
- Service scheduled to start in the Summer of 2014
- Pasha Hawaii's Marjorie C and Jean Anne will provide weekly fully-enclosed Roll-On / Roll-Off service between the West Coast of California and Hawaii.
- OEM Service Parts Solution to Final Destination







# Marjorie C Overview



- Currently under construction at VT Halter Marine, Pascagoula, MS
- Fortnightly calls to San Diego, Honolulu, Kahului and Hilo
- Designed to service automotive, rolling cargo, container and over high and wide clients
- Flexible capability accommodating all sizes and types of rolling cargo and containers
- Environmentally responsible design, engineering, construction and operations



# Meet the *Marjorie C*





# Total Supply Chain Management

## Pasha - One manager, full accountability

- Off line inspections at plant or Port
- Trucking from railhead to port (Pasha Distribution Services)
- Processing at port (Pasha Automotive Services)
- Vessel loading/stevedoring (Pasha Stevedoring - California)
- Ocean Freight (Pasha Hawaii)
- Vessel unload (Supervised by Pasha Stevedoring - Hawaii)
- Delivery to Dealers (Pasha Distribution Services)





# Current Trends

- Short Sea Shipping – Mexico Auto Production
- Transportation capacity issues
- Producing where sold
- Currency Vehicle Exports Worldwide





# Thank You

