

VISION 2025



Maryland Port Administration



I am proud to present *Vision2025*, a comprehensive document prepared for the leaders and citizens of the State of Maryland, customers of the Port of Baltimore, and the senior leadership and employees of the Maryland Port Administration.

Vision2025 presents a set of broad strategic visions pursuant to the mission of the Maryland Port Administration as the agency guides the Port through the next two decades.

The Port of Baltimore is an important economic asset to the State of Maryland. It must continuously improve to remain a vibrant and integral part of the global economy. While shifting trade patterns and industry consolidations offer new opportunities, they present challenges as well. It is extremely important that we chart a thoughtful yet bold course to well position Maryland and the Port of Baltimore for

the future. Part of that mission must include aggressive enhancements to port security in order to deter terrorism and protect our citizens and valuable infrastructure.

The Port of Baltimore has played a vital role throughout 300 years of Maryland history. The principles outlined in this *Vision2025* document will provide the guidance necessary to ensure that, by working together, our port will remain strong and continue to serve the citizens of Maryland for generations to come.

Sincerely,

Martin O'Malley
Governor

Maryland Port Administration

VISION2025

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INTRODUCTION

The Maryland Port Administration (MPA) has prepared *Vision2025* for MPA employees, customers of the Helen Delich Bentley Port of Baltimore, and for the leaders and citizens of the State of Maryland. This plan presents a set of broad strategic visions pursuant to the mission of the MPA. These visions will focus the efforts of the MPA as it guides the Port through the next two decades.

Vision2025 marks the initial step of the MPA's strategic planning cycle. This cycle entails the completion, periodic revision, and implementation of a series of increasingly detailed plans.

Vision2025 paints a broad picture of the MPA in the year 2025. The visions articulated in this plan are challenging; however, with good planning and the focused and efficient use of organizational resources, they are practical and attainable.

- The **Strategic Plan** will cover approximately the first half of the time period established by *Vision2025*, and will define more specific goals and ways to achieve them. This document will provide a proactive framework for the MPA to more fully capitalize upon its opportunities.
- The **Terminal Development Plan** is to be completed after the **Strategic Plan** and will be critical in the implementation stage of that plan. This plan will itemize and prioritize the capital projects required for the MPA to achieve its mission.
- A **Project Plan** will be prepared for each project as the time comes for its implementation, as detailed in the **Terminal Development Plan**. This plan ensures that projects are completed correctly and efficiently, within the established budget and timeframe.
- **Capital Budget Planning**, completed through the Maryland Department of Transportation (MDOT) Consolidated Transportation Planning (CTP) program or other funding vehicles, ensures that the financial resources are available to complete required projects, as detailed in the **Terminal Development Plan**.

To guarantee the efficacy of the strategic planning process, plans will periodically be revisited for updating and revision. This will ensure that the plans remain current in light of unexpected changes and events, and that they are usable "living" documents.



PORT OF BALTIMORE TERMINAL MAP

MPA Public Terminals

Private Terminals

- | | |
|---|---|
| A. World Trade Center | K. Chesapeake Terminal |
| B. Clinton St. Marine Terminal | L. NuStar Energy, L.P. |
| C. Rukert Terminals Corporation | M. Atlantic Terminal |
| D. CNX Marine Terminals, Inc. | N. Fairfield Auto Terminal |
| E. Intermodal Container Transfer Facility | O. Masonville Marine Terminal |
| F. Seagirt Marine Terminal | P. South Locust Point Marine Terminal |
| G. Dundalk Marine Terminal | Q. North Locust Point Marine Terminal |
| H. Kinder Morgan/Chesapeake Bulk | R. Baltimore Metal & Commodities Terminal |
| I. Hawkins Point Terminal | S. U.S. Gypsum |
| J. Chesapeake Bay Piers | T. National Gypsum |

II • MISSION AND VISION

The Port is an economic engine for Greater Baltimore, the State of Maryland, and the Mid-Atlantic region as a whole. It is a major contributor to the economy in the provision of employment and income to individuals; revenues to businesses engaged in handling, shipping, and receiving cargo; tax revenues to State and local governments; and customs fees to the federal government. Additionally, it provides Maryland's shippers and consignees with a means of competitively getting their goods to the marketplace in a timely fashion.

As such, the Maryland General Assembly created the Maryland Port Administration in 1956 and charged the agency with the following mission:

The Mission of the Maryland Port Administration is to stimulate the flow of waterborne commerce through the State of Maryland in a manner that provides economic benefit to the citizens of the State.

Further, the Maryland Port Commission articulated the following guiding principles to be applied in the fulfillment of this mission:

- Aggressively promote the capabilities and resources of the Port, both internationally and within the U.S.A.
- Develop and maintain state-of-the-art facilities
- Ensure that the navigable waters in the State are safe for efficient commercial navigation
- Provide customers with prompt, courteous, and dependable service
- Operate in a cost-effective and environmentally sensitive manner
- Operate at all times with a commitment to quality throughout the entire organization, and foster an environment that supports a diverse workforce

This mission is to be achieved in a work environment where employees are recognized as one of the MPA's most valuable resources, by contributing their skills, knowledge, and creativity to continuously improve the overall organization.

In marketing and promoting the Port, and facilitating trade through the Port, the MPA supports the private sector and private port facilities in addition to its own public cargo facilities and operations. Likewise, in undertaking and assuring improvements and maintenance of the Port's navigational channels, the MPA supports both private and public port facilities.

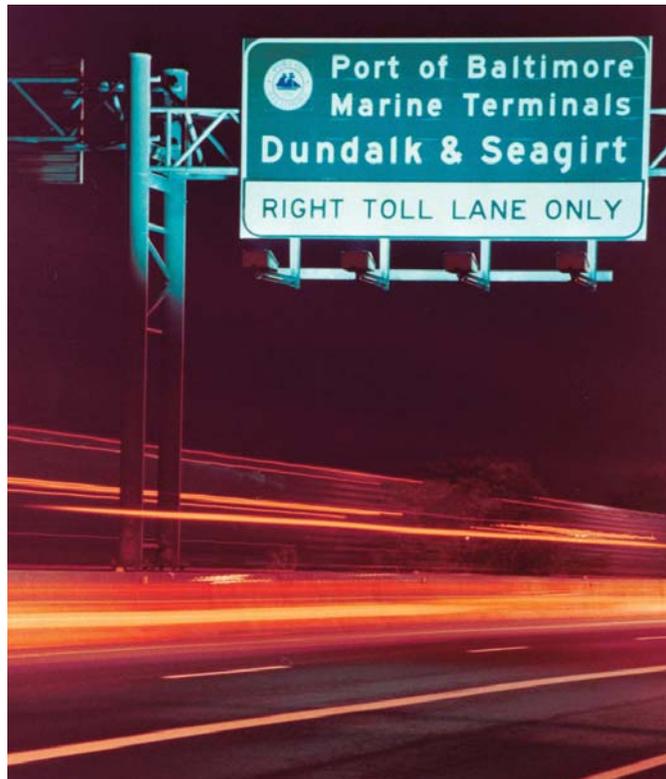


VISION

The vision statement of the Maryland Port Administration presents a broad picture of expectations for the agency and the Port over the next two decades. It is vitally important that this vision be conveyed internally within the MPA and externally to customers, labor leaders, private companies operating in the Port, and leaders and citizens of the State of Maryland. This broad *Vision2025* statement, when coupled with the more specific visions discussed in Section IV, presents the expectations for the MPA through the year 2025.

Vision2025: The Maryland Port Administration shall:

- **capitalize on Port business opportunities;**
- **provide, manage, and promote competitive, secure, state-of-the-art terminals capable of efficiently handling diverse cargoes;**
- **leverage mutually supporting public and private sectors; and**
- **act as a good steward of Maryland's natural environment.**



The Port's cargo business purposely encompasses a variety of commodity markets, and the Port's competitive position is somewhat different in each.

The containerized cargo market is the largest of the general cargo categories, and is the most challenging for Baltimore. In the container market, ocean carriers may be the primary players in port selection, and proximity to the ocean has become increasingly important to them.

In other markets, like automobiles, roll-on/roll-off cargo, and forest products, port selection is more often determined by the cargo interests—manufacturers, importers, or distributors—rather than by the shipping lines. For these companies, factors where Baltimore has more advantages include proximity to inland markets, efficient highway and railroad connections, damage-free cargo handling and specialized terminal facilities.

- Baltimore has become the number one port on the East Coast for both roll-on/roll-off cargo and for imported forest products.
- Baltimore has fluctuated between second and third place nationwide in automobiles.

III • MARKET OVERVIEW

TRENDS IN THE MARITIME INDUSTRY

The world of international shipping continues to undergo changes that greatly affect how the Port competes. While there are many industry changes and developments that affect its efforts, the most significant competitive issues are:

CONSOLIDATION OF OCEAN CARRIERS IN THE CONTAINER TRADES

Over the last few years, ocean carrier service in the container business has become dominated by alliances and vessel-sharing agreements. Sharing of ship assets improves utilization, reduces operating and capital costs, and minimizes redundant investments. Increasingly, carriers in alliances and vessel-sharing agreements are using their increased size and leverage to place downward pressure on port prices through consolidated volume discounts. Over the last few years several global alliances, and many smaller ones, have formed.

LOAD CENTER OPERATIONS BY THE LARGER OCEAN CARRIERS

As ocean carriers become larger and use larger ships, they tend toward load-center operations in ports, serving fewer ports overall but concentrating more cargo in the selected hub ports. Intermodalism and point-to-point rates, mostly by rail, support these load centers. In an environment of load centering, ocean carriers tend to put great emphasis on schedule in order to reduce operating costs. Baltimore's proximity to the Midwest coupled with vessel access via Chesapeake Bay or the Chesapeake and Delaware Canal, can be an advantage to some carriers who are also calling other East Coast ports.



LARGER SHIPS

In order to take advantage of economies of scale and reduce operating costs, ocean carriers, particularly container carriers, are building larger and larger vessels. The newest container ships have capacities of over 10,000 TEUs (twenty-foot equivalent units), and the vessels are more than 1,000 feet long. Ports need deeper berths and larger cranes to service these ships and others in the capacity range of 5,000 – 8,000 TEUs. While Baltimore is fortunate to have a 50-foot channel, the deepest container berths at Seagirt today are 46 feet. The MPA is pursuing funding for a new berth at Seagirt which will have a depth of 50 feet and additional, larger cranes which can accommodate the container ships of the future.



A trend that may be evolving largely due to rapidly increasing truck and rail costs and the imbalance between U.S. imports and exports is a reduction in the number of inland points ocean carriers serve and greater emphasis on port-to-port ocean shipping. The extent to which carriers will adopt this strategy and its impacts on U.S. ports is unclear at this time. If more responsibility for inland transportation shifts from ocean carriers to U.S.-based shippers, this could improve the competitive position of inland ports like Baltimore. The MPA will continue to monitor and assess the impacts of emerging logistical trends and strategies such as this.

SINGLE-USER TERMINALS

Most container terminals on the U.S. East Coast have been built by public port authorities and are shared by a number of shipping lines which lease space from the ports. On the U.S. West Coast, it has been more common for a terminal to be developed for the exclusive use of a single shipping line or a consortium. Recent developments suggest that interest in single-user terminals may be increasing on the U.S. East Coast. This may be partially the result of the industry consolidation just discussed, which is producing a relatively small number of mega-carriers.

If these new developments indicate a trend toward dedicated leased terminals on the East Coast, it could become more challenging for Baltimore to provide the land and the terminal infrastructure needed to attract new container lines.

SIGNIFICANT FACILITY IMPROVEMENTS BY COMPETING PORTS

Major ports in the U.S. continue to make significant capital investments improving and enhancing their facilities and infrastructure. Ports that are primary competitors of Baltimore are investing in facility expansion to attract business.



CONTINUED STRONG COMPETITIVE ENVIRONMENT AMONG PORTS

The competitive environment among U.S. ports is expected to remain intense. Beyond the facility improvements mentioned, competing ports continue to make changes and/or improvements to attract business such as improved information technology services, or reduced rates and charges. Baltimore's most notable competitors are: Norfolk, New York/New Jersey, Philadelphia, Savannah, and Jacksonville.

LABOR

As the single largest cost issue for any port, it is critical to work diligently to make labor as competitive as possible. The MPA has excellent labor relations, and works together with organized labor to attract new business to the Port. Challenges remain in keeping the Port competitive, and labor will continue to have an important role. The MPA supports a professional, strong, competitive, and well trained workforce.



SECURITY

Security measures, as mandated by Congress, will consume an increasing share of the MPA's operating and capital budgets. Managing these costs while still maintaining a high level of customer service will be challenging. The level of enforcement from port to port may also become a competitive factor, as will security fees. Those ports that maintain a safe environment while avoiding delays or inconvenience to their customers may gain an advantage in the competition for cargo. In addition to several million dollars provided for homeland security by special State funds, the MPA has been successful in pursuing Federal Port Security grants. The MPA is in compliance with the mandate of the Maritime Transportation Security Act of 2002.

PASSENGER CRUISES

After the September 11, 2001 terrorist attacks, cruise lines immediately shifted cruises based in New York to other East Coast ports to which customers could drive. Since then, cruise lines have developed a new market at several East Coast ports, including Baltimore, based largely on passengers driving to departure ports relatively close to their homes rather than flying to the traditional cruise departure ports in New York or Florida. Several East Coast ports, such as Boston, Philadelphia, and Norfolk have responded to cruise lines' interest in new ports with increased marketing to cruise lines and passengers, and development of new cruise terminals.

Baltimore experienced strong growth in cruise activity in the years following 2001. In May 2006, the MPA opened the new South Locust Point Cruise Terminal (SLPCT), removing the cruise operation from the congested Dundalk Marine Terminal. The SLPCT is dedicated to cruises and provides easy access to I-95 and the Inner Harbor. Additionally, it has a separate entrance for cruise passengers and parking is immediately adjacent to the terminal building, ending the practice of mixing cargo and passengers.

The passenger cruise business is an important component of the Port of Baltimore's impact on Maryland's economy. The Baltimore-Washington area is one of the largest and wealthiest consumer markets in the country, and as such, it is a rich source of cruise passengers. The MPA continues to market Baltimore aggressively to the cruise industry and to potential cruise passengers.

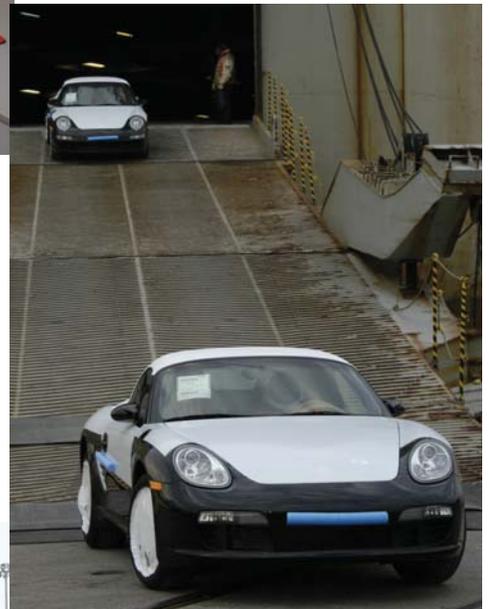


THE FUTURE

Each port has its strengths from which follows its successes. The Maryland Port Administration and the entire Baltimore maritime community continuously work to leverage the port's advantages and to create new and better reasons for business to flow through the port.

The following Section IV of *Vision 2025* puts forth a series of visionary statements for the future of the port. To achieve them the port will have to build upon its location as the closest seaboard port to the Midwest and proximity to the nation's fourth largest consumer market; its channel, highway and rail access systems; its reputation for quality cargo handling; its state-of-the-art facilities; and its high level of service to customers. But, the "port" will also have to develop new and innovative solutions that improve what is available today and are perhaps even unknown or untried at present. It is these actions that will set Baltimore apart and cause its successes to continue.





Vision2025 articulates 18 “visions.” These visions, which are organized into four sections based on the main points of the MPA vision statement, are goals that are broad in scope, to account for the long-term orientation of this plan. However, they are realistic and achievable goals, even though some will be more challenging or take longer to realize than others.

The MPA Shall Capitalize on Port Business Opportunities

Containers

Breakbulk

*Farm and construction equipment,
automobiles, forest products,
machinery, project cargo*

Passengers

The MPA Shall Provide, Manage, and Promote Competitive, Secure, State-of-the-Art Terminals Capable of Efficiently Handling Diverse Cargoes

Access

Sea, Road, Rail

Facilities

Cargo Handling, Cargo Storage

Expansion

Security

Marketing

The MPA Shall Leverage Mutually Supporting Public and Private Sectors

Public-Private Partnerships

Off-Port Business Opportunities

Intergovernmental Relations

Community Involvement

The MPA Shall Act as a Good Steward of Maryland’s Natural Environment

Mitigation

Dredged Material

Being Green

IV • THE VISION

THE MPA SHALL CAPITALIZE ON PORT BUSINESS OPPORTUNITIES:



VISION

Container shipping at MPA terminals grows at a rate faster than the average among East Coast ports.

VISION

The MPA dominates East Coast competitors in the roll-on/roll-off, auto, and forest products markets.

VISION

Cruises depart Baltimore at least twice weekly during the cruise season.

CONTAINERS

The global container market is growing rapidly, and that growth is expected to continue far into the future, as documented in several independent studies. The Port has the ability to capitalize on this growth, and claim an increased share of containers; the ability to do this will be crucial in maintaining the long-term viability of this line of business. Success in this market will require the focus of all branches of the MPA to ensure that container facilities are sufficient, access remains good, and that our customers understand that the Port is open for business as a container port.

BREAKBULK

Recent investment in breakbulk niche cargoes such as roll-on/roll-off, auto, and forest products has paid off, and the Port has become well-known for the shipment of these goods. The high level of service provided at MPA terminals must be maintained to ensure that Baltimore retains its market share even as the MPA maintains its focus on containers.

PASSENGERS

Bringing cruise ships from Florida and the Caribbean north to the relatively wealthy population of the mid-Atlantic has proven to be a wise strategy, and the recent construction of a new passenger terminal at South Locust Point is a testament to the success the MPA has had in bringing cruises and attracting passengers to the Port. However, there is still much untapped potential in this market. To fully capitalize on this investment, the MPA must work to bring additional cruises to South Locust Point.

THE MPA SHALL PROVIDE, MANAGE, AND PROMOTE COMPETITIVE, SECURE, STATE-OF-THE-ART TERMINALS CAPABLE OF EFFICIENTLY HANDLING DIVERSE CARGOES:

ACCESS

In the shipping industry time is money, and to effectively compete with other East Coast ports, the Port must be able to capitalize on landside access via road and rail.

SEA

Baltimore's 50-foot channel through the Chesapeake Bay and the 35-foot C&D Canal enable vessels to place cargo closer to the Midwest than any other East Coast port; this works in the Port's favor. This will be increasingly critical as cargo vessels continue to grow in size.

ROAD

Baltimore's location at the intersection of Interstates 70, 83, and 95 in the wealthy Mid-Atlantic region is one key advantage for the Port, and good terminal-to-highway access is another. As long as the road facilities in and around the Port are maintained to a satisfactory quality and remain relatively uncongested, good road access will continue to benefit the Baltimore port community.



RAIL

The achievement of high-cube double-stack rail capability will be key in the Port's ability to remain competitive, particularly as container traffic grows beyond the capacity of the existing road network. This is a particularly critical need as surrounding ports continue to improve their double-stack capability. The MPA, MDOT, and the greater Port community must continue to work with the railroads and U.S. Department of Transportation to secure high-cube, double-stack capability to MPA container terminals.

VISION

The MPA has sufficiently deep berths and channels available to service the most modern vessels.

VISION

The well maintained terminal-to-highway road network provides easy, congestion-free access for trucks going to and from Port of Baltimore terminals.

VISION

Rail routes to MPA container terminals have double-stack capability.

VISION

MPA terminals are able to efficiently and cost-effectively load and unload the largest vessels afloat.

VISION

The MPA efficiently uses all of its terminal space for the movement of cargo.

VISION

The MPA has an adequate supply of land acquired through purchase and conversion from dredged material placement sites to respond to new business opportunities and to support anticipated cargo growth for the next 20 years.

FACILITIES

CARGO HANDLING

As cargo volumes continue to grow globally, ports worldwide are adapting through the implementation of more efficient cargo handling processes. Efforts should continue to be made by the MPA to employ cutting-edge technology to support more expedient loading and unloading of ships and intra-terminal cargo movement. Having deep berths and modern cranes is critical.

CARGO STORAGE

To achieve optimal utilization of MPA land, on-terminal practices and policies must encourage denser storage and more productive use of terminal space. Encouraging the densest possible storage of all cargo, reducing dwell time and the amount of space used for empty containers and long-term storage, and ensuring that only the most pertinent services are provided on the terminal should be key goals for the MPA.



EXPANSION

Land for cargo operations is one of the primary products the MPA provides for customers. Unfortunately, land along the Baltimore channels is becoming increasingly difficult to obtain due to the recent boom in the waterfront housing market in the Baltimore region. While Baltimore City's Maritime Industrial Zoning Overlay District (MIZOD) is preserving land proximate to existing MPA terminals for port-related uses, the future of the Port is not solely within the Baltimore City limits. The MPA must work with the Baltimore City government to extend the existing MIZOD legislation beyond 2014, and with the Anne Arundel and Baltimore County governments to enact similar legislation in those jurisdictions. Additionally, the MPA must adopt a proactive land acquisition policy to ensure that the necessary land is acquired before conversion to non-port-related uses makes it unavailable.



SECURITY

The post-September 11th world is one in which security has become an issue of paramount importance. Many measures relating to identification, cargo inspection, and employee security training have already been put into place to ensure that cargo can be shipped through the Port of Baltimore efficiently and with confidence. The MPA must remain current with the development of new technology and compliant with new regulations to ensure the continued safety of the Port.

MARKETING

Effective international and national marketing plays a role not only in the promotion of a product or service to customers, but also in understanding customers' needs and developing products or services to meet those needs. As the MPA proceeds with plans to improve its facilities and to refocus its business strategy, successful marketing will be critical.

VISION

The MPA ensures the continued security and safety of cargo, employees, and customers at our terminals.

VISION

Effective marketing significantly contributes to the understanding of market needs, the development of facilities that match market needs, and attracting customers to the Port of Baltimore.

THE MPA SHALL LEVERAGE MUTUALLY SUPPORTING PUBLIC AND PRIVATE SECTORS:

VISION

The MPA and private parties successfully leverage each others' investments to maximize their respective returns.

VISION

Distribution and manufacturing facilities in the MPA's market area directly contribute to gains in MPA imports and exports.

PUBLIC-PRIVATE PARTNERSHIPS

In recent years the costs of construction and facility maintenance have skyrocketed, stretching the ability of the State and the MPA to provide the quality port facilities it has in the past. Additionally, heavy competition among state transportation agencies for limited funding from the Maryland Department of Transportation means that any notable increase in funding is unlikely in the near future. However, public-private partnerships make available the opportunity to capitalize on the resources of not just one, but two or more parties. Building these partnerships will expand the range of options available for facilities, and the likelihood of a return on each organization's investment will be increased.

OFF-PORT BUSINESS OPPORTUNITIES

Continued success of the Port is dependent on the continued growth of consumer markets, most particularly those in the Baltimore-Washington region and the Midwest, where regional importers and exporters will be more likely to select the Port of Baltimore for their



shipping needs. The MPA must take a proactive position in working with local and state economic development agencies and the private sector to assemble and promote sites for distribution and manufacturing. Not only will this reap cargo rewards for the Port of Baltimore, it will directly support the achievement of the MPA's mission to provide economic benefit to the citizens of Maryland.

INTERGOVERNMENTAL RELATIONS

The MPA and the Port of Baltimore operate within a system of many government agencies at the federal, state (Maryland and others), and local levels, and often, the true function of the MPA is not fully understood by them. To be fully successful in accomplishing its goals, the MPA must continue to extend an informative and cooperative hand to further develop successful working relationships with the agencies and elected officials that determine land use and transportation policies, funding allocation, and the regulatory environment. The development of intergovernmental relationships beyond those existing now will increase the success of the MPA in seeing that its needs and the needs of the Port of Baltimore are taken into account as elected officials and government agencies perform their duties and as administrations change.



COMMUNITY INVOLVEMENT

The Port operates within the context of its home state and community. The MPA, while operating as a business, is also a government agency, and ultimately the support of Maryland's citizens is essential to its continued success. Some community outreach programs have been implemented already, and have provided a good springboard for building solid relationships between the Port and the community. These efforts should be broadened to maximize the potential benefits that come with widespread support.

VISION

The MPA has a successful working relationship with numerous government agencies and elected officials at the federal, state, and local levels.

VISION

Respect, knowledge, and a mutual understanding of the needs of both the Port and the community facilitate a high level of support for the MPA.

THE MPA SHALL ACT AS A GOOD STEWARD OF MARYLAND'S NATURAL ENVIRONMENT:

VISION

Exploring new mitigation strategies allows the MPA greater flexibility in the selection of valuable mitigation projects.

MITIGATION

The Port's status as one of the major ports in the six-state Chesapeake Bay watershed places it in a critical role relating to the health of the world's largest estuary. As a result, the MPA mitigates all of its waterfront and waterside projects to ensure that the health of the Bay is maintained. The MPA should take steps to ensure that its mitigation funding is being utilized in the most effective way possible. Exploring options currently not in use by the Port such as mitigation banking and earning air quality credits will provide new opportunities to mitigate effectively.



VISION

The MPA's Dredged Material Management Plan provides for maintenance and new project dredging for 50 years through the identification of placement sites and alternative uses.

DREDGED MATERIAL

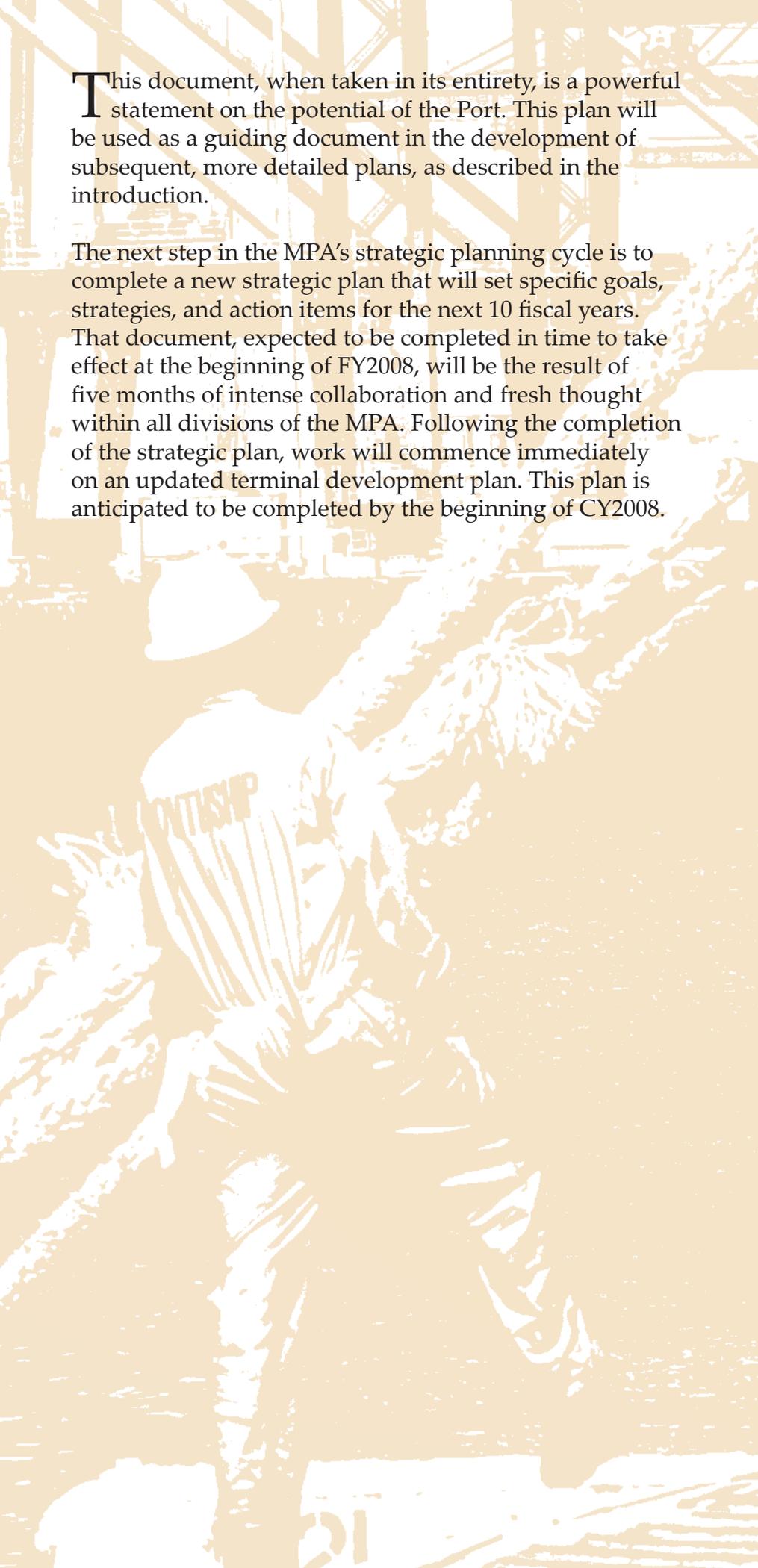
Routine dredging is required to maintain the deep-water channels that allow for the Port to exist, resulting in the perpetual challenge of finding appropriate locations for dredged material placement. Unfortunately, space is running out, and in coming years the MPA will need to find alternative ways of handling dredged material. Some options are already being explored.

VISION

Environmentally sensitive operating policies ensure that the MPA's effects on Maryland's natural environment are minimized.

BEING GREEN

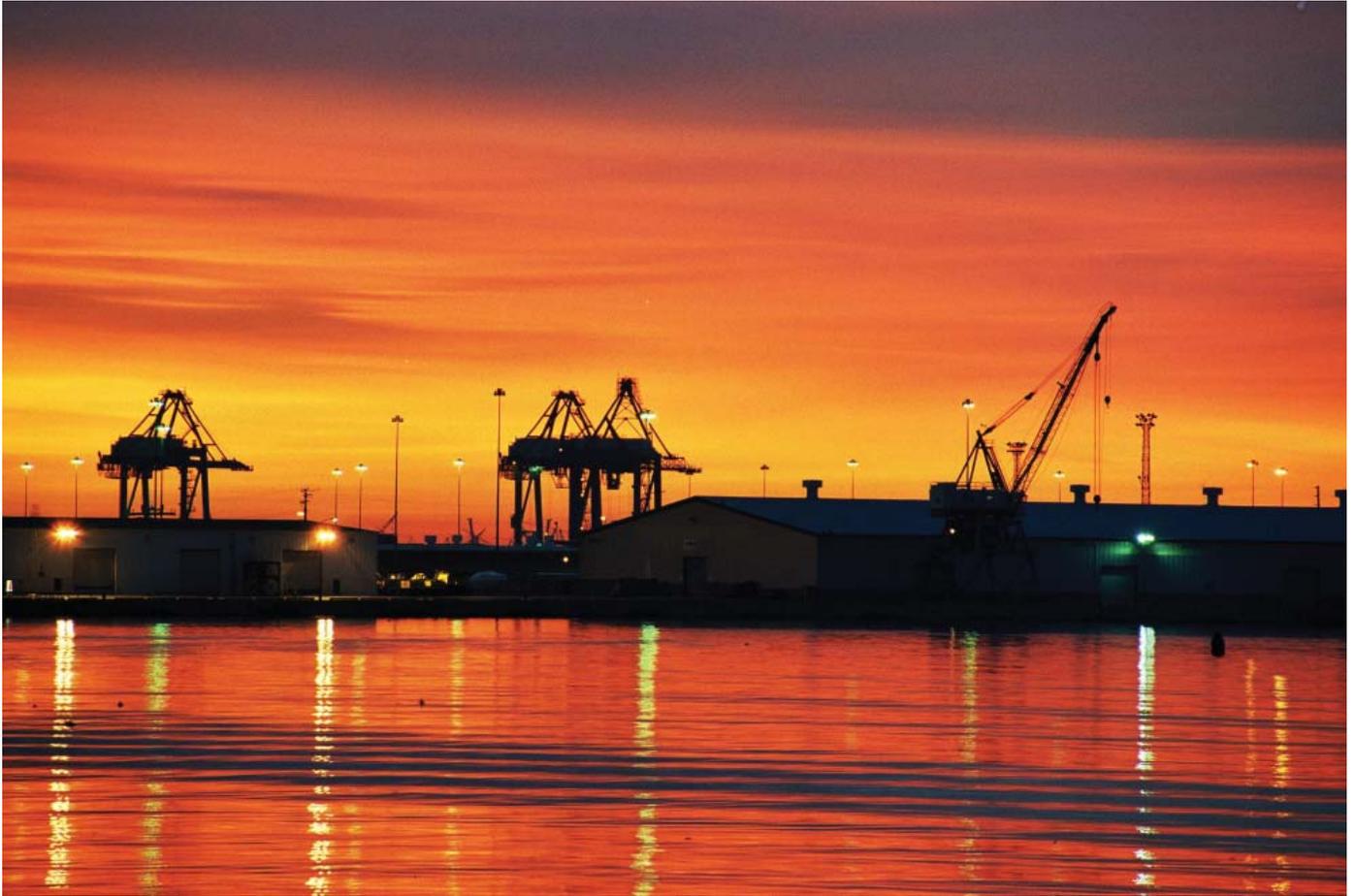
As environmental issues have become increasingly visible worldwide, related technology has provided new opportunities for organizations such as the MPA to reduce the environmental impact of their daily operations. The MPA has already begun directing itself down a greener path with the recent introduction of an environmental management system. This is a solid beginning, and with the potential adoption of environmentally-sensitive policies, the Port will have the opportunity to truly become a clean, green organization.



This document, when taken in its entirety, is a powerful statement on the potential of the Port. This plan will be used as a guiding document in the development of subsequent, more detailed plans, as described in the introduction.

The next step in the MPA's strategic planning cycle is to complete a new strategic plan that will set specific goals, strategies, and action items for the next 10 fiscal years. That document, expected to be completed in time to take effect at the beginning of FY2008, will be the result of five months of intense collaboration and fresh thought within all divisions of the MPA. Following the completion of the strategic plan, work will commence immediately on an updated terminal development plan. This plan is anticipated to be completed by the beginning of CY2008.

V • CONCLUSION



ACKNOWLEDGMENTS

WRITING, LAYOUT, AND DESIGN

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