



PORTMIAMI™

Richard de Villiers
Chief of Staff



AFRICA TRADE
Development Center



MIAMI-DADE
COUNTY

About PortMiami



Prior to the Pandemic,
PortMiami was on track to **exceed 7 million cruise passengers.**

The sector generated **\$7 billion/40,000 jobs a year** from ground/air transportation, food/beverages, lodging, manufacturing, agriculture, travel agencies, hotels, and more.

OUTLOOK
FY2022 3,900,000
FY2023 7,000,000
CRUISE PASSENGERS past 6 years

FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
4,980,000	5,340,000	5,419,000	6,824,000	3,477,516 Pandemic	252,099 Pandemic

252,099 PASSENGERS
CRUISE




Cruise Terminal LEED Certifications



CT V – Virgin Voyages
Completed February 2022
LEED GOLD Certified



CT F – Carnival Cruise Line
Estimated completion date of Fall 2022
LEED Silver Certification Expected



CT B – Norwegian Cruise Line
Completed Summer 2021
LEED GOLD Certified



CT A – Royal Caribbean
LEED Certified
Completed Winter 2018



CT AA – MSC Cruise Line Shared Terminal
Estimated completion date of Winter 2024
LEED Silver Certification Expected



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Shore Power Shared Capacity Five Terminals

What does this mean?

- Power will be provided to one of the two vessels at the shared capacity terminals (CT A and B, CT F and V and CTAA – MSC Shared Terminal).
- We will have 3 dedicated feeders for shore power to provide power.
- There will be a 'switch' to direct which terminal will receive power.

February 17, 2021

JOINT STATEMENT REGARDING SHORE POWER AT PORTMIAMI

We are proud to announce today that Miami-Dade County, Florida Power & Light and six leading cruise ship companies operating at PortMiami, Carnival Corporation, Disney Cruise Line, MSC Cruises, Norwegian Cruise Line Holdings, Royal Caribbean Group, and Virgin Voyages, have agreed to work together on the most effective way to bring shore power, also known as "cold ironing," to the Dante B. Pascall Port of Miami-Dade. Shore power enables ships to turn off their diesel engines and connect to local electric power that travels to the ship from a specially designed transformer at the dock through a sophisticated system of cables, circuit breakers and control circuits. This may represent a significant financial investment by all involved, and despite the financial and other challenges posed by the current COVID-19 pandemic, we all agree that shore power is the right investment for a climate-resilient future for PortMiami, Miami-Dade County and Florida. There are many details and issues to be addressed going forward, including Port infrastructure investments, ship configurations, financing, and a timeline for availability of electrical power infrastructure. Today is the first crucial step to begin this process by receiving the commitment from the public and private sectors to move this environmental initiative forward to combat climate change and work toward an initial installation as expeditiously as possible and eventually a full rollout in the years to come.

A working group with representatives of the signatories hereto will be formed, under the auspices of the Office of the Mayor of Miami-Dade County, to work on this important task. The goal is to give PortMiami the distinction of not only being the Cruise Capital of the World, but also a leader in resiliency and clean energy efforts as the first seaport in the State of Florida and the south-eastern United States to provide shore power hook-up.

Miami-Dade County

Daniella Levine Cava
Daniella Levine Cava, Mayor

Carnival Corporation

Arnold Donald
Arnold Donald, President & CEO

MSC Cruises (USA) Inc.

Rick Sasso
Rick Sasso, Chairman

Royal Caribbean Group

Richard Fain
Richard Fain, Chairman & CEO

Florida Power & Light

Eric Silagy
Eric Silagy, President & CEO

Disney Cruise Line

Thomas Mazloum
Thomas Mazloum, President

Norwegian Cruise Line Holdings Ltd.

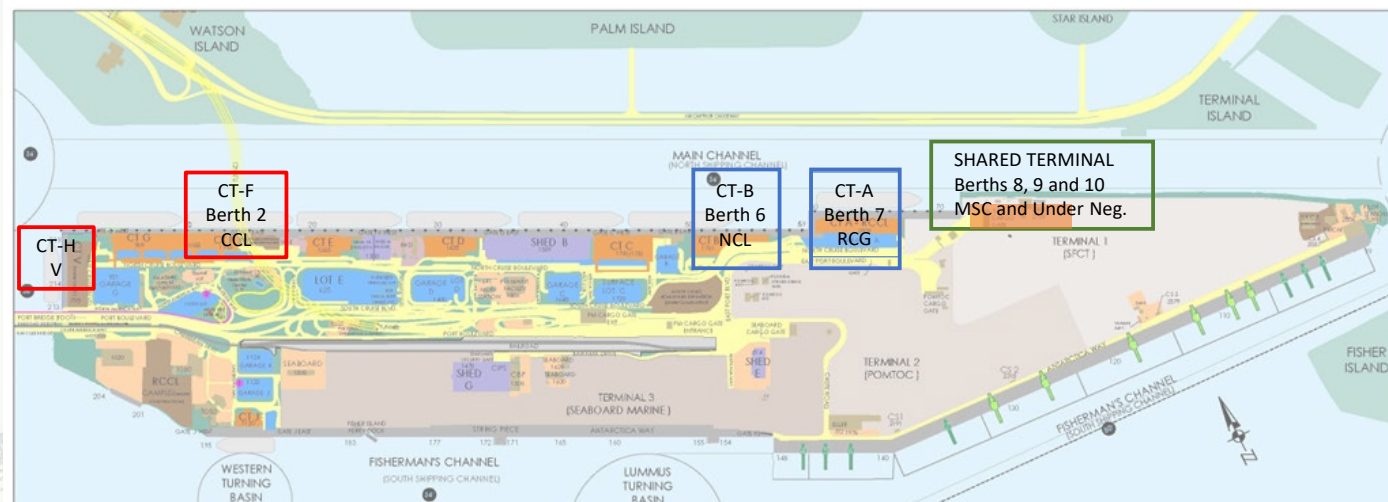
Frank Del Rio
Frank Del Rio, President & CEO

Virgin Voyages

Tom McAlpin
Tom McAlpin, President & CEO



Shared Shore Power – based on preferential berthing



CRUISE

Despite the Pandemic, Cargo numbers continue to exceed expectations with a recorded **1.25 million TEUs, up 17.6%**, making it the busiest year in cargo activity in PortMiami's history. The Port has surpassed the 1 million TEU mark for seven consecutive years.

OUTLOOK
FY2022 1,200,000 TEUs
FY2023 1,356,393 TEUs



TEUs past 6 years

FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
1,028,155	1,020,192	1,083,586	1,120,913	1,066,738	1,254,062

1,254,062 TEUs

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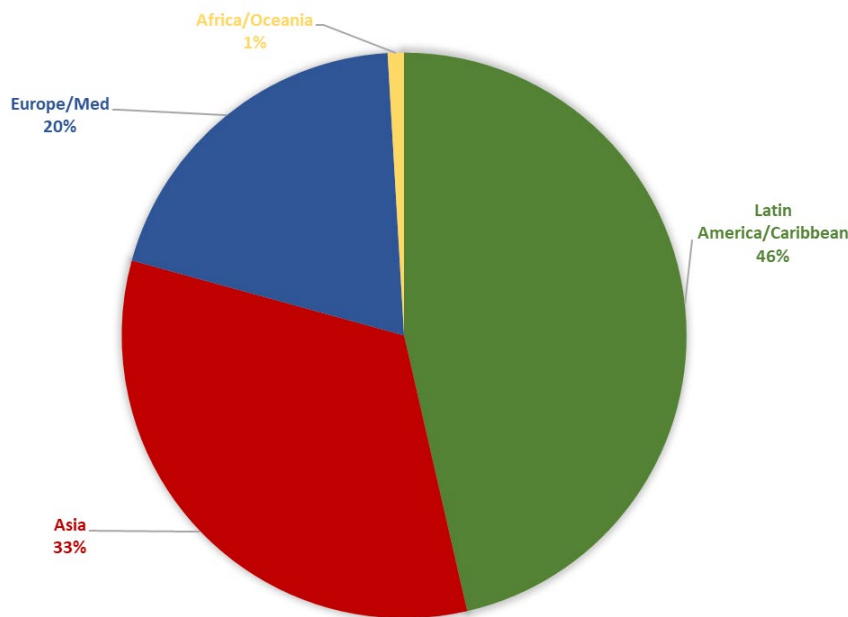
PORTMIAMI

Market Share by Region

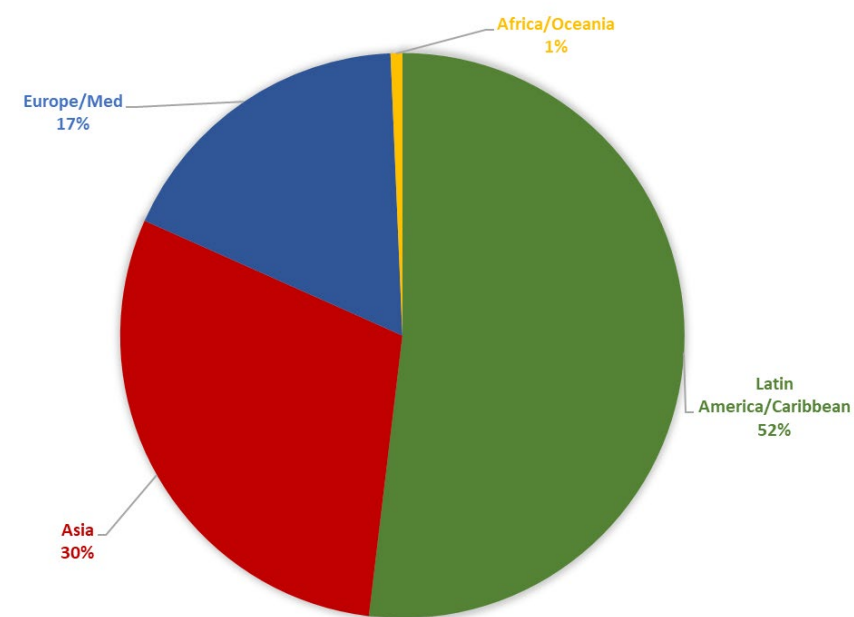
#1 Port in Florida
and #2 in North
America for
efficient container
performance.

Source: World Bank
Group and S&P Global
Market Intelligence

PORTMIAMI MARKET SHARE BY REGION FY2020



PORTMIAMI MARKET SHARE BY REGION FY2021



- Latin America /Caribbean recorded a performance high of **25%** or **117,912 TEUs** over FY2020 and earned **6%** additional market share (from 46% in FY2020 to 52% in FY2021)
- Asia reported an increase of **15%** or **52,088 TEUs** over FY2020, but there was a loss of 3% market share (From 33% in FY2020 to 30% in FY2021)
- Europe/Mediterranean reported an increase of **7%** or **17,336 TEUs**, but there was a loss of 3% market share (20% in FY2020 to 17% in FY2021)

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Regional Trade - Asia



Asia Services

PEX3

Singapore
Vung Tau, Vietnam
Hong Kong
Shekou, China
Ningbo, China
Shanghai, China
Busan, Korea
Houston
Mobile
New Orleans
Tampa
Miami
Singapore

TP18

Ningbo, China
Shanghai, China
Busan, Korea
Panama Canal
Houston
Mobile
Miami
Freeport

TP17

Shekou, China
Hong Kong
Yantian, China
Vung Tau, Vietnam
Singapore
Newark
Charleston
Savannah
Miami
Freeport, Bahamas
Tanjung Pelepas, Malaysia

Chesapeake Bay Express (CBX)

Yantian, China
Ningbo, China
Shanghai, China
Busan, South Korea
Norfolk
Savannah
Charleston
Miami

Countries

- China increased 8,456 TEUs or **7.84%**
- Vietnam increased 7,590 TEUs **30.73%**

Commodities

- Furniture increased 14,225 TEUs or **38.62%**
- Vehicle Parts increased 7,075 TEUs or **64.86%**
- Plastic/Rubber increased 4,848 TEUs or **26.12%**
- Machinery increased 4,591 TEUs or **14.83%**

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Europe Services

Countries

- Germany increased 2,181 TEUs or **29.20%**
- Netherlands increased 1,591 TEUs or **15.55%**
- Italy increased 1,545 TEUs or **4.08%**
- Spain increased 1,365 TEUs or **4.78%**

Commodities

- Beverages increased 4,482 TEUs or **17.17%**
- Vehicle Parts increased 4,255 TEUs or **42.73%**
- Furniture increased 2,792 TEUs or **34.65%**

AL6- AMERIGO

Algeciras, Spain
Fos Sur Mer, France
Genoa, Italy
La Spezia, Italy
Barcelona, Spain
Valencia, Spain
New York
Norfolk
Savannah
Miami
Algeciras, Spain

Trans-Atlantic 6 (TA6)

Sines, Portugal
Algeciras, Spain
Barcelona, Spain
Gioia Tauro, Italy
Naples, Italy
La Spezia, Italy
Valencia, Spain
Veracruz, Mexico
Altamira, Mexico
Houston
New Orleans
Miami
Freeport, Bahamas

Victory Bridge

Le Havre, France
Antwerp, Belgium
Rotterdam, Netherlands
Bremerhaven, Germany
Charleston
Miami
Veracruz, Mexico
Altamira, Mexico
Houston
Le Havre, France
New Orleans

ZCT- Turkey

Mersin
Yarimca, Izmit
Izmir, Aliaga
New York
Savannah
Miami
Houston



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Regional Trade – Latin America & Caribbean



Countries

- Honduras increased 25,374 TEUs or **42.39%**
- Dominican Republic increased 20,781 TEUs or **39.08%**

Commodities

- Fruits & Vegetables increased 26,685 TEUs or **39.22%**
- Vehicle Parts increased 25,227 TEUs or **145.91%**
- Apparel/Textiles increased 23,483 TEUs or **33.82%**

Latin America & Caribbean Services

Miami-North Central America

Miami
St. Tomas, Guatemala
Puerto Cortes, Honduras
Miami

Miami-Colombia

Miami
Barranquilla, Colombia
Cartagena, Colombia
Santa Marta, Colombia
Barranquilla, Colombia
Miami

Miami-W Coast S America

Cartagena, Colombia
Kingston, Jamaica
Panama City, Florida
La Guaira, Venezuela
New Orleans, Louisiana
Port La Fito, Haiti
Houston, Texas
Puerto Cabello, Venezuela
Brooklyn, N.Y
Miami, Florida
Manzanillo, Panama

CAGEMA Main Liner Loop 2-

Kingston, Jm
Point Lisas, Tt
Saint George's, Gd
Fort De France, Mq
Bridgetown, Bb
Castries, Lc
Campden Park, Vc
Kingston, Jm

Miami- Eastern Caribbean

Phillipsburg, St. Maarten
Antigua, St. Johns
Basseterre, St. Kitts
Point Lisa, Trinidad
Bridgetown, Barbados
Georgetown, Guyana
Paramaribo, Suriname
Point Lisa, Trinidad
Kingston, Jamaica
Miami

Miami South C. America

Miami
Puerto Limon, Costa Rica
Manzanillo, Panama
Panama City, Panama
Puerto Limon, Costa Rica
Port Everglades
Miami

Miami-Haiti-

Miami
Port La Fito, Haiti
Miami

Miami-Jamaica

Miami
Kingston, Jamaica
Montego Bay, Jamaica
Miami

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Top 10 Countries

OVERALL		TEU
1	CHINA	115,885
2	HONDURAS	85,272
3	DOMINICAN REPUBLIC	73,953
4	GUATEMALA	44,206
5	ITALY	37,202
6	VIETNAM	32,214
7	PERU	31,582
8	SPAIN	29,645
9	EL SALVADOR	28,660
10	JAMAICA	27,794

IMPORTS		TEU
1	CHINA	112,689
2	HONDURAS	43,125
3	DOMINICAN REPUBLIC	37,422
4	ITALY	34,272
5	VIETNAM	30,085
6	SPAIN	27,301
7	GUATEMALA	27,042
8	PERU	21,288
9	TURKEY	21,059
10	ECUADOR	17,080

EXPORTS		TEU
1	HONDURAS	42,147
2	DOMINICAN REPUBLIC	36,531
3	JAMAICA	23,257
4	EL SALVADOR	17,984
5	GUATEMALA	17,165
6	COLOMBIA	13,781
7	TRINIDAD AND TOBAGO	12,202
8	HAITI	12,000
9	PANAMA	11,336
10	PERU	10,294

Total Trade -Top 10 Countries FY2020 vs FY2021

- ✓ The first 3 countries (China #1, Honduras #2, and Dominican Republic #3) kept the same rank
- ✓ Guatemala from #5 to #4
- ✓ Italy from #4 to #5
- ✓ Vietnam From #8 to #6
- ✓ Peru from #10 to #7
- ✓ Spain from #6 to #8
- ✓ El Salvador from #13 to #9
- ✓ Jamaica from #7 to #10
- ✓ *Turkey – no longer in the top 10 – El Salvador its place

Imports - Top 10 Countries FY2020 vs FY2021

- ✓ China kept the same rank #1
- ✓ Honduras from #4 to #2
- ✓ Dominican Republic kept the same rank #3
- ✓ Italy From #2 to #4
- ✓ Vietnam from #7 to #5
- ✓ Spain from #5 to #6
- ✓ Guatemala from #6 to #7
- ✓ Peru from #9 to #8
- ✓ Turkey from #8 to #9
- ✓ Ecuador kept the same rank #10

Exports - Top 10 Countries FY2020 vs FY2021

- ✓ The first 4 countries (China, Honduras, Dominican Republic, and Italy) kept the same ranking
- ✓ El Salvador from #7 to #5
- ✓ Guatemala from #5 to #6
- ✓ Colombia From #8 to #7
- ✓ Trinidad & Tobago from #6 to #8
- ✓ Panama from #11 to #9
- ✓ Peru from #14 to #10
- *Taiwan and Costa Rica – no longer in top 10

Significant Increases

- Honduras added 25,374 TEUs or an increase of 42.39% over FY2020
- Dominican Republic added 20,781 TEUs or an increase of 39.08% over FY2020
- El Salvador added 10,358 TEUs or an increase of 56.02% over FY2020

Top 10 Commodities

OVERALL		TEU
1	FRUIT & VEGETABLES	120,249
2	APPAREL & TEXTILES	116,778
3	MACHINERY	95,525
4	FURNITURE	91,082
5	VEHICLE PARTS	75,708
6	PLASTICS & RUBBER	56,359
7	IRON-STEEL-ALUMINUM	53,168
8	PAPER & WOOD	45,168
9	BEVERAGES	43,883
10	PREPARED FOODS	36,628

Top 10 Commodities FY2020 vs FY2021

- ✓ The first 3 commodities kept the same ranking
- ✓ Furniture from #5 to #4
- ✓ Vehicle Parts from #8 to #5
- ✓ Plastic/Rubber From #7 to #6
- ✓ Iron/Steel/Aluminum from #4 to #7
- ✓ Paper & Products from #6 to #7
- ✓ Beverages and Prepared Foods kept the same ranking #9 and #10

IMPORTS		TEU
1	FRUIT & VEGETABLES	91,508
2	APPAREL & TEXTILES	78,598
3	FURNITURE	67,249
4	MACHINERY	60,571
5	PLASTICS & RUBBER	40,975
6	BEVERAGES	36,253
7	IRON-STEEL-ALUMINUM	27,017
8	MINERALS	26,995
9	CERAMICS & GLASS	26,152
10	PAPER & WOOD	22,710

Top 10 Commodities FY2020 vs FY2021

- ✓ Vehicles parts from #5 to #1
- ✓ Apparel/Textiles and Machinery kept the same ranking, #2 and #3
- ✓ Fruits & Vegetables From #6 to #4
- ✓ Iron/Steel/Aluminum from #1 to #5
- ✓ Furniture from #10 to #6
- ✓ Paper & Products from #4 to #7
- ✓ Prepared Foods and Plastics kept the same ranking
- ✓ Consolidated Cargo #7 and #10

EXPORTS		TEU
1	VEHICLE PARTS	59,716
2	APPAREL & TEXTILES	38,180
3	MACHINERY	34,954
4	FRUIT & VEGETABLES	28,741
5	IRON-STEEL-ALUMINUM	26,150
6	FURNITURE	23,832
7	PAPER & WOOD	22,458
8	PREPARED FOODS	17,915
9	PLASTICS & RUBBER	15,384
10	CONSOLIDATED CARGO	13,253

Top 10 Commodities FY2020 vs FY2021

- ✓ The first 2 commodities kept the same ranking
- ✓ Furniture from #4 to #3
- ✓ Machinery from #3 to #4
- ✓ Plastics/Rubber from #6 to #5
- ✓ Beverages From #5 to #6
- ✓ Iron/Steel/Aluminum from #8 to #7
- ✓ Minerals from #9 to #8
- ✓ Ceramics & Glass from #7 to #9
- ✓ Paper & Products kept the same ranking #10

2021 Significant Increases

- Vehicles Parts added 36,047 TEUs or an increase of 90.04% over FY2020.
- Furniture added 33,802 TEUs or an increase of 58.89% over FY2020
- Fruits & Vegetables added 23,534 TEUs or an increase of 24.31% over FY2020.
- Apparel/Textiles added 20,695 TEUs or an increase of 21.50% over FY2020



PORTMIAMI

Refrigerated Cargo

#1
Port in Florida
for refrigerated
cargo and for
international
cargo.

Source: World Bank
Group and S&P Global
Market Intelligence

Recently, there has been a paradigm shift from break-bulk reefer cargo to refrigerated containers.

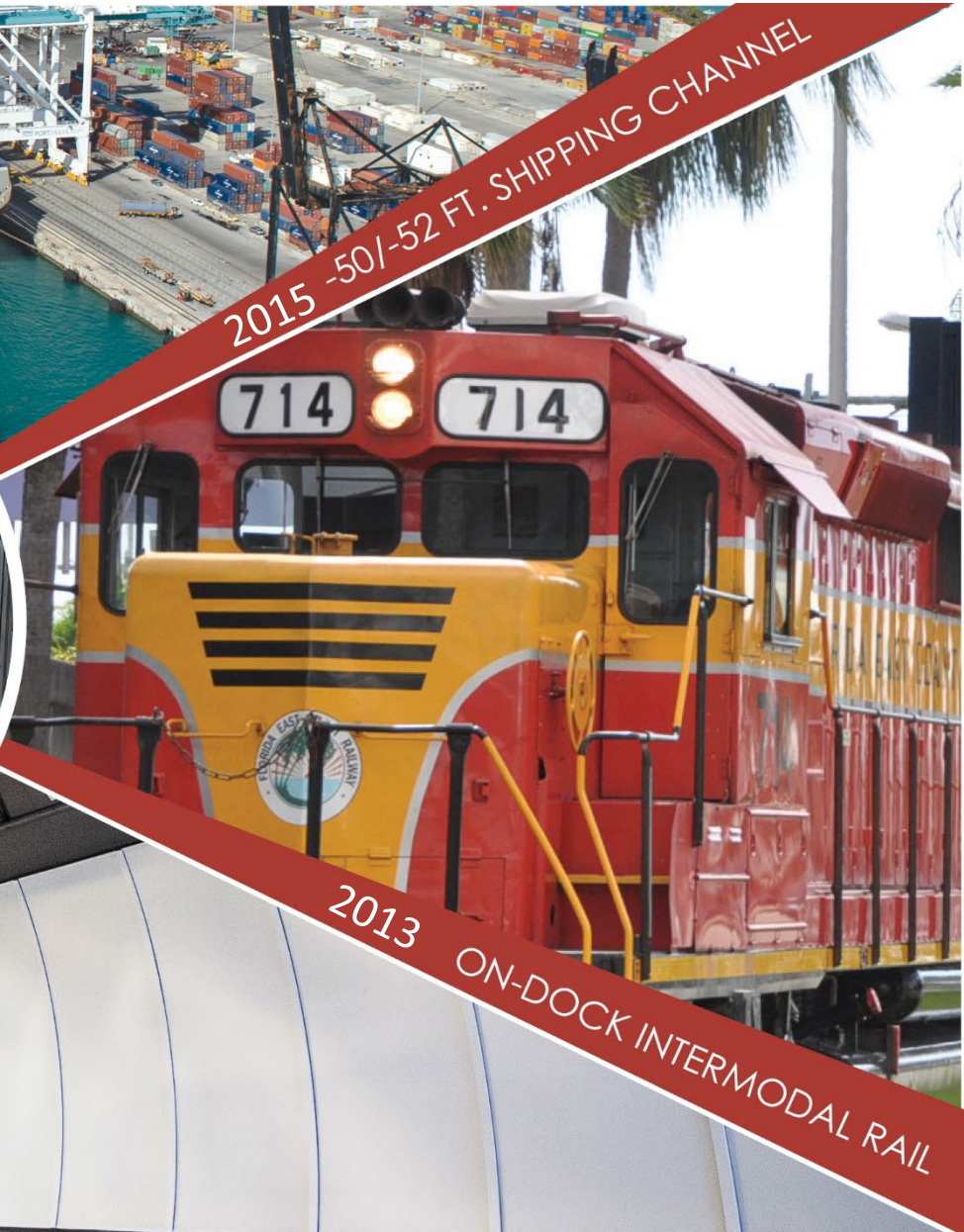
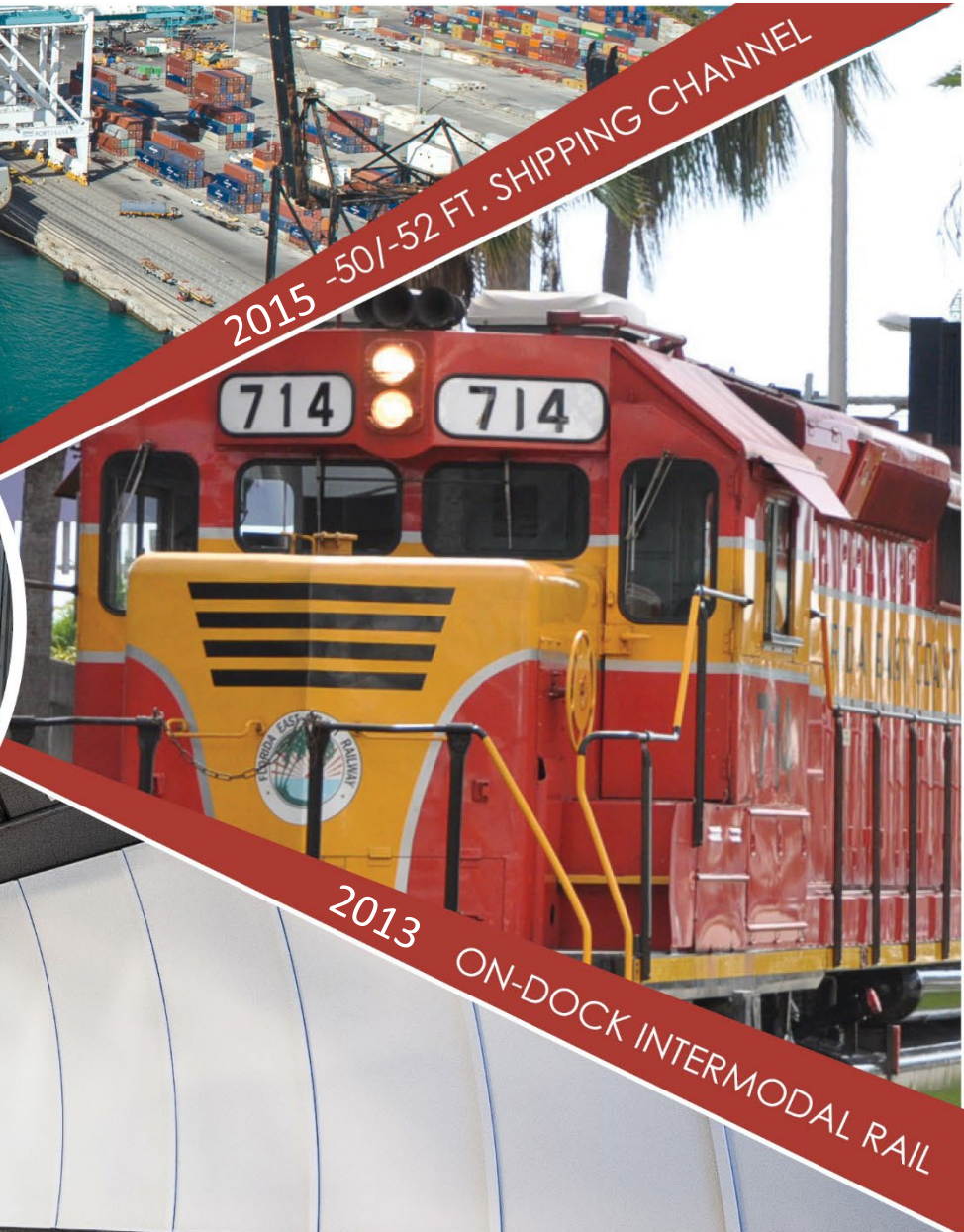


- Ocean carriers are focused on developing refrigerated container technology to extend shelf-life and providing traceability.
- Product proximity to consumers is at a premium, providing expanded opportunities for produce to enter SE ports.
- USDA has revised their regulations to allow certain products to directly enter ports below the 39th parallel (Cold Treatment).
- The majority of fruit & vegetable imports come from Latin America & the Caribbean – providing PortMiami with a significant geographical and service advantage.
- There is an anticipated demand for more than 3 million sq. ft. in modern reefer warehouse space in Miami-Dade County.

Source: Barbara Pimentel, Director of Operations for SPR Cold Storage & Distribution, former Director of FCBF

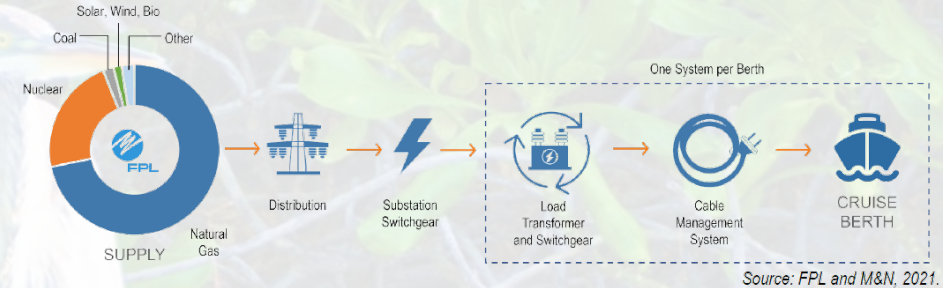
CARGO

Thanks to Our County's Past Infrastructure Investments





PORTMIAMI
netzero



PortMiami has embarked on the development of a **visionary and transformational program to develop the nation's first end-to-end net zero carbon emission supply chain** in line with the County's 2030 50% emissions reduction goal, while also working towards the County's economic development goals.

- The Infrastructure Investment and Jobs Act (IIJA) is an unprecedented opportunity: A \$1.2 trillion package with **\$17.5 billion dedicated to ports**.
 - **RAISE grant announcement** - \$16M for Cargo Mobility Optimization and Resiliency Project
- **Diesel Emission Reduction Act (DERA) Grant** for shore power infrastructure from the EPA awarded in the amount of **\$2 million**.



Sister Seaports Program

In 1998, the Miami-Dade County Board of Commissioners passed a resolution establishing PortMiami's International Sister Seaports Program which helps ports collaborate on the exchange of information and ideas with the aim of increasing both cargo and cruise trade.



Present and Future Capital Development

Terminal G
Royal Caribbean
Cruise Line
Expansion
BCC 2022
Completion
2026

Terminal F
Carnival
Cruise Line
Completion
November 2022

Shore
Power
Winter
2023

Shore
Power
Winter
2023

Terminal B
Norwegian
Cruise Line
Opened
July 2021

Terminal A
Royal
Caribbean
Cruise Line

Shore
Power
Winter
2023

Terminals
AA/AAA
MSC
(shared with Royal
Caribbean Group)
Fall 2023

Shore
Power
Winter
2023

Berth 10
Completion
Winter 2028

FPL Substation
Expansion
Completion
2023

Bulkhead Expansion Berths 1-6
Start 2023 Completion Summer 2028

Terminal V
Virgin Voyages
Opened
February 2022

Shore
Power
Winter
2023

North
Cruise Blvd.
Extension
Phase III
Flyover
Completion
September 2023

Cargo Gate
Traffic Circle
Completion
April 2022

Electric
Rubber-Tyred
Gantry (ERTG)
Infrastructure
Improvements
Phase II
Completion
October 2024

SFCT Garage
Completion
2023

Seaboard Wharf Improvements
Completion 2023

Royal
Caribbean
Group
Campus Expansion
Parking Garage
Offices
Completion
2024

Bulkhead
& Berth
Rehabilitation
Phase I
Completion
January 2024
Phase II
Completion
January 2025

4/5 New
Electric
Gantry Cranes



