



Port Everglades Master/Vision Plan Update

3rd Tenant & Stakeholder
Meeting

November 21, 2013

Agenda

- Project Process Overview
- Summary of the Market Assessments
- October 30th Charrette Summary
- Industry Trends
- Assessment of Projects



Master/Vision Plan Update Process

- Phase I - End of September 2013 **COMPLETED**
 - Existing Conditions Assessment
 - Market Assessment
 - Business Line Forecasts (with and without 50ft of water)
 - Community and Stakeholder Meetings
- **Phase II - March/April 2014**
 - Plan Development (Terminal Design Trends, Cargo Operational Enhancement Opportunities, Facility Needs Assessment, Conceptual Planning Studies, 20-Year Vision Plan, Parking, and Rail and Truck Traffic)
 - Strategy Development (Master Plan Development & Financial Strategy)
 - Final Plan
 - Plan Implementation
 - Executive Summary
 - Community and Stakeholder Meetings
- Phase III - March/April 2014
 - 3-D Computer Animated Video

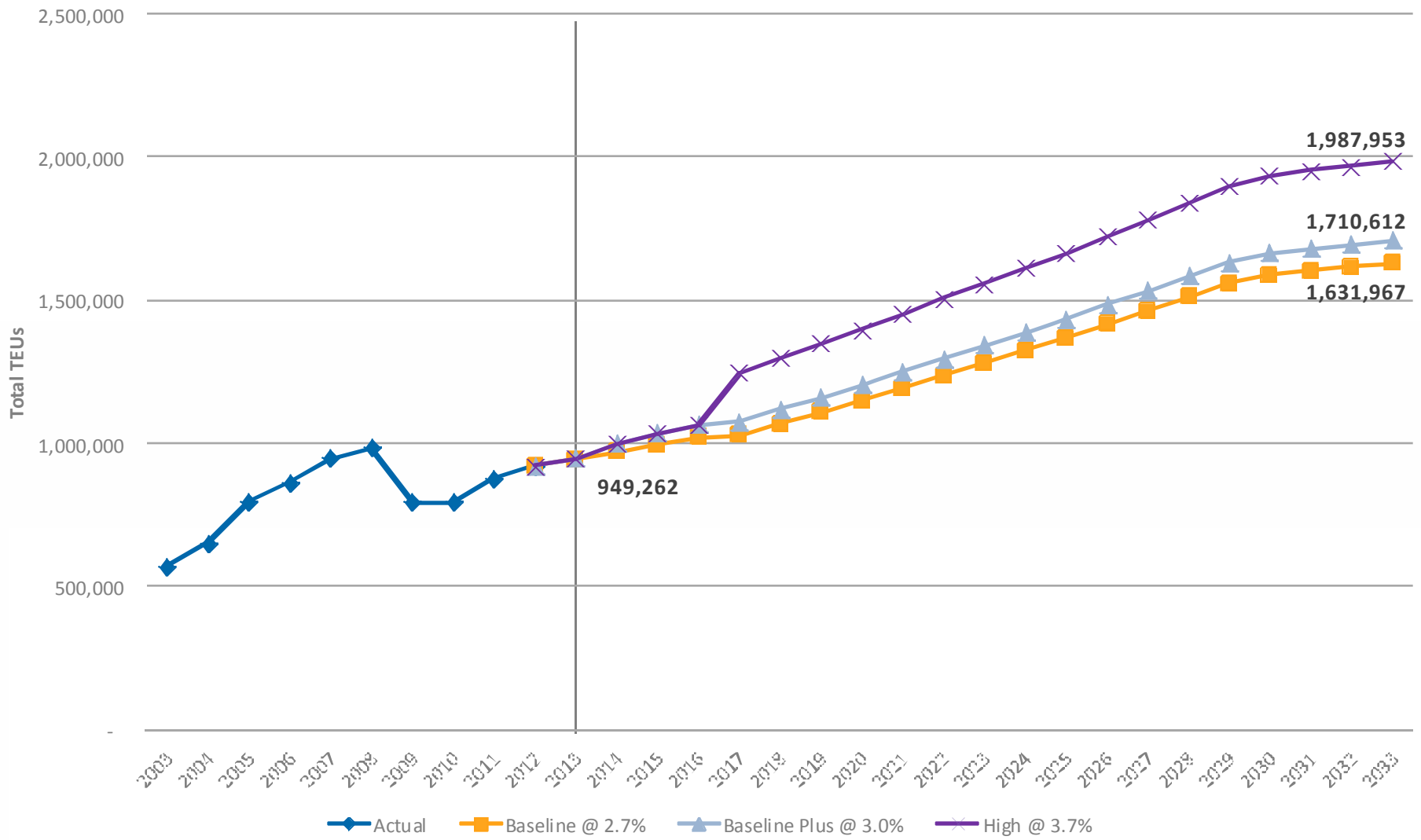


Master/Vision Plan

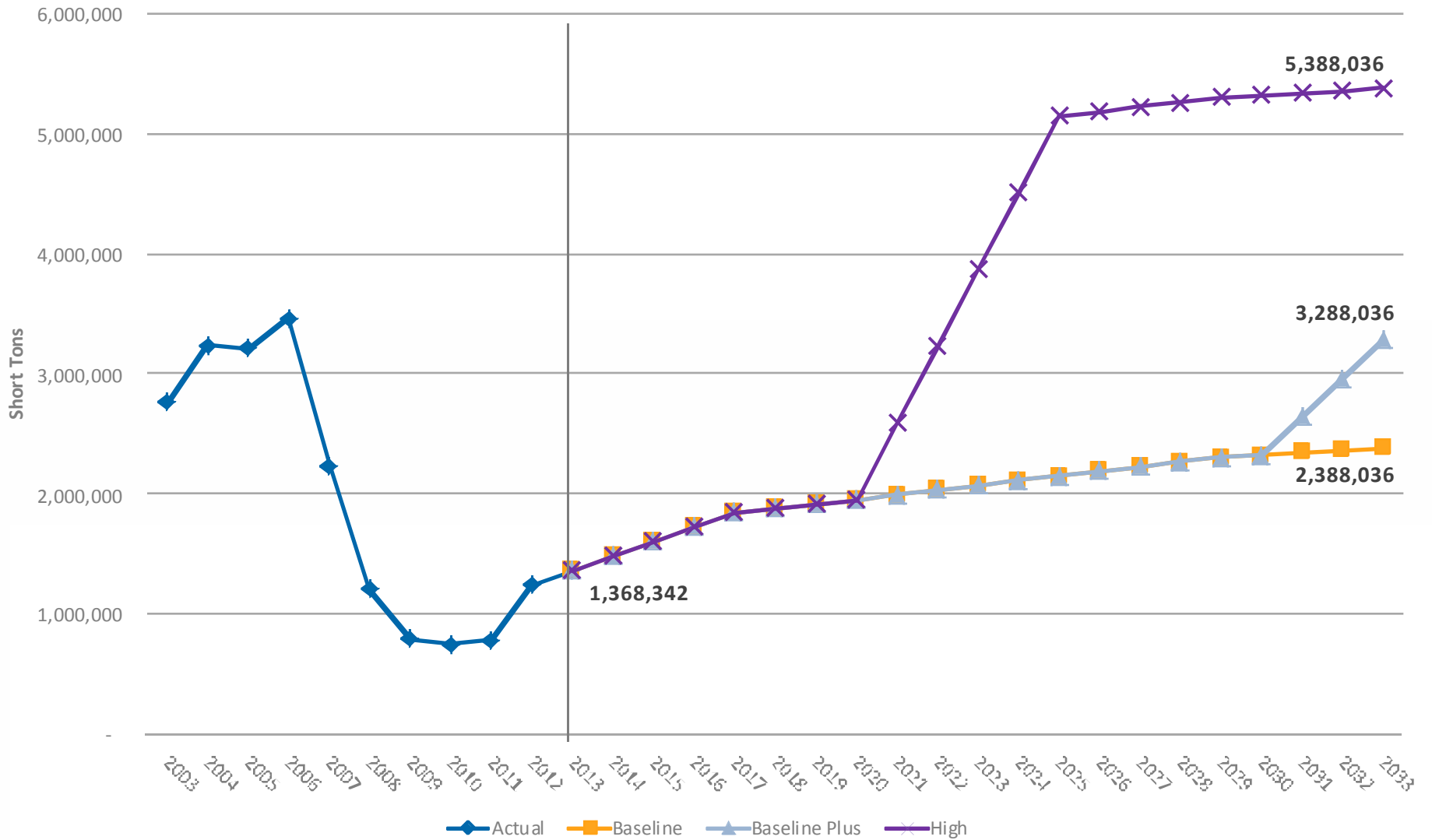
SUMMARY OF THE MARKET ASSESSMENTS



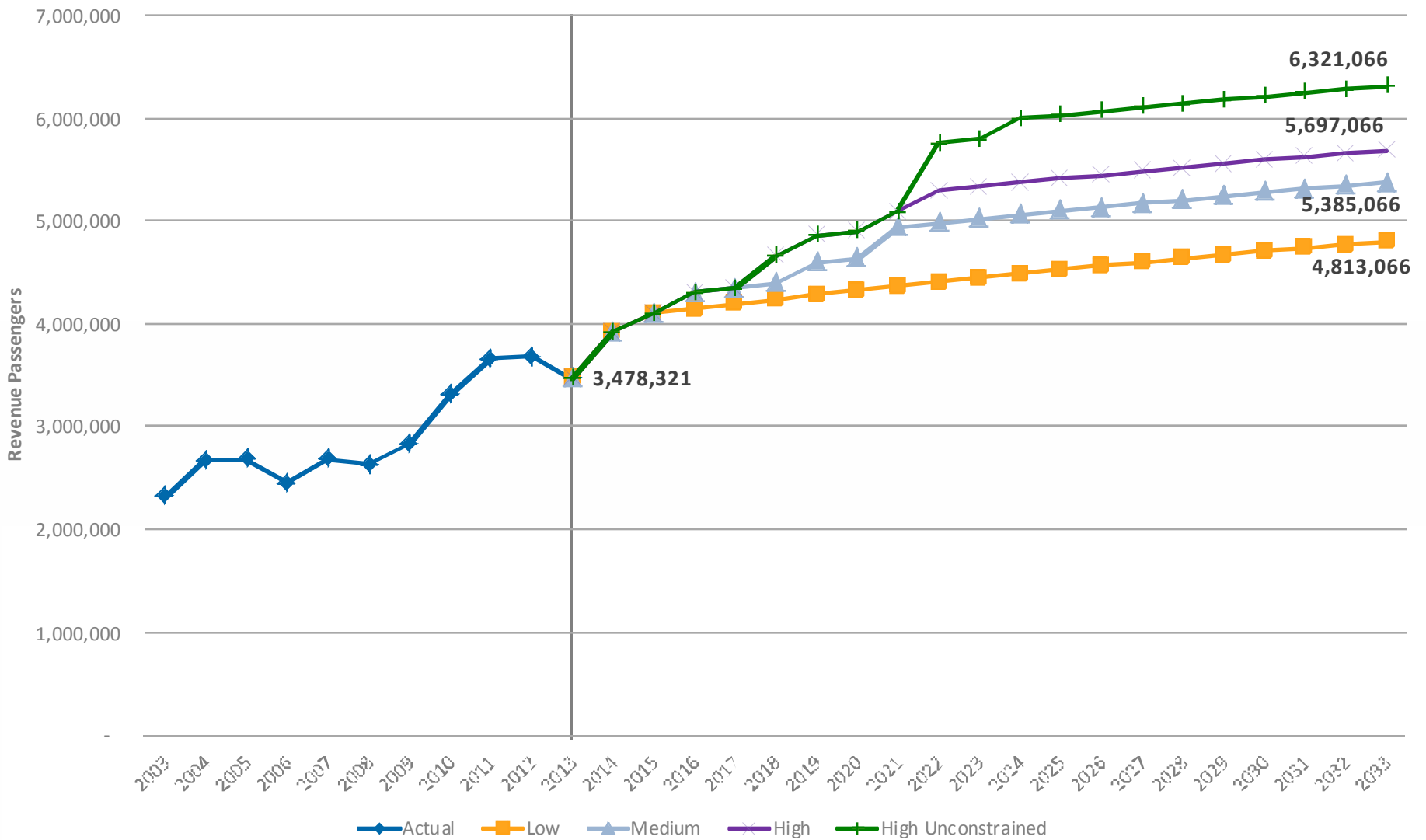
Containers



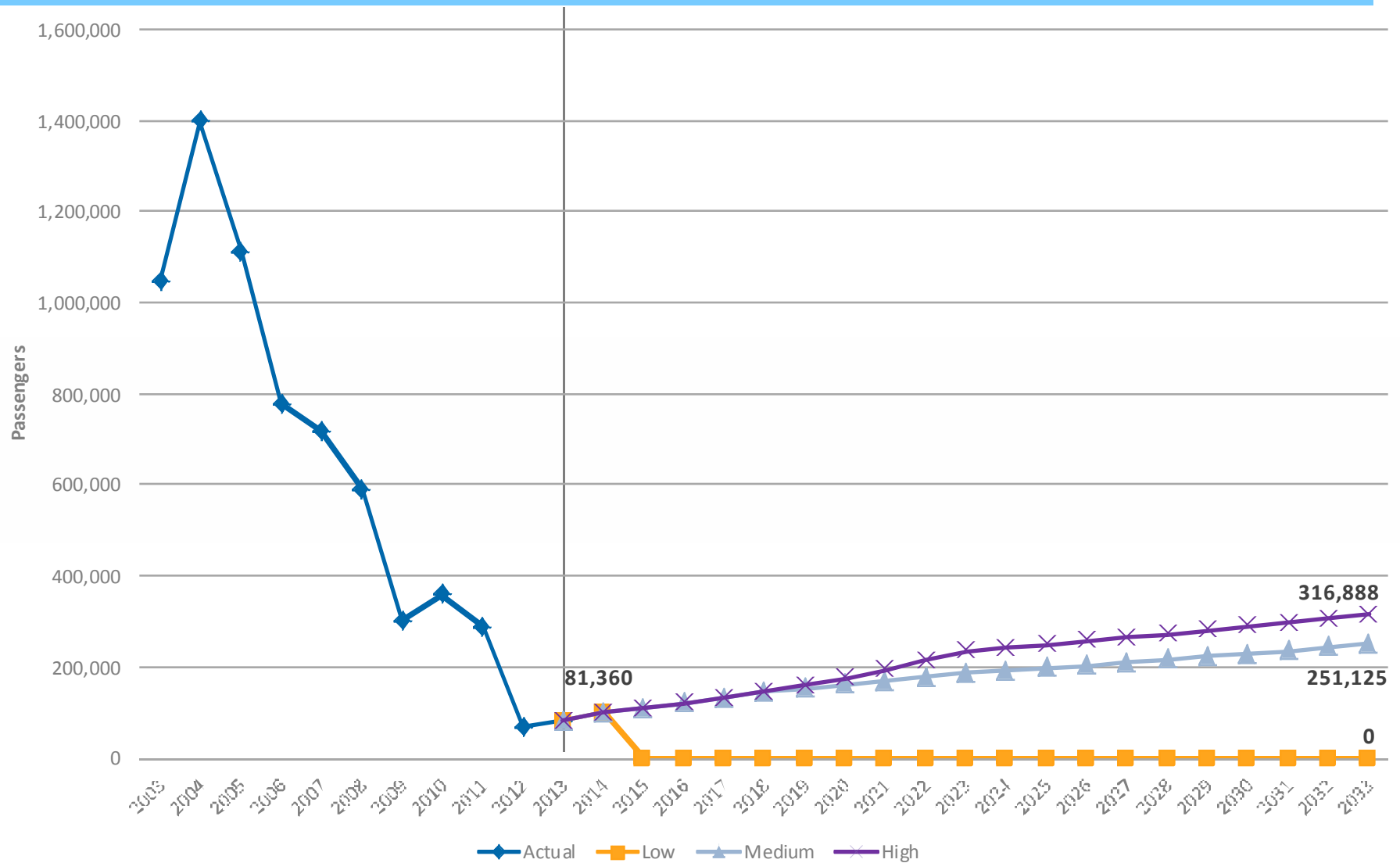
Dry Bulk, Break Bulk, Yachts and Vehicles



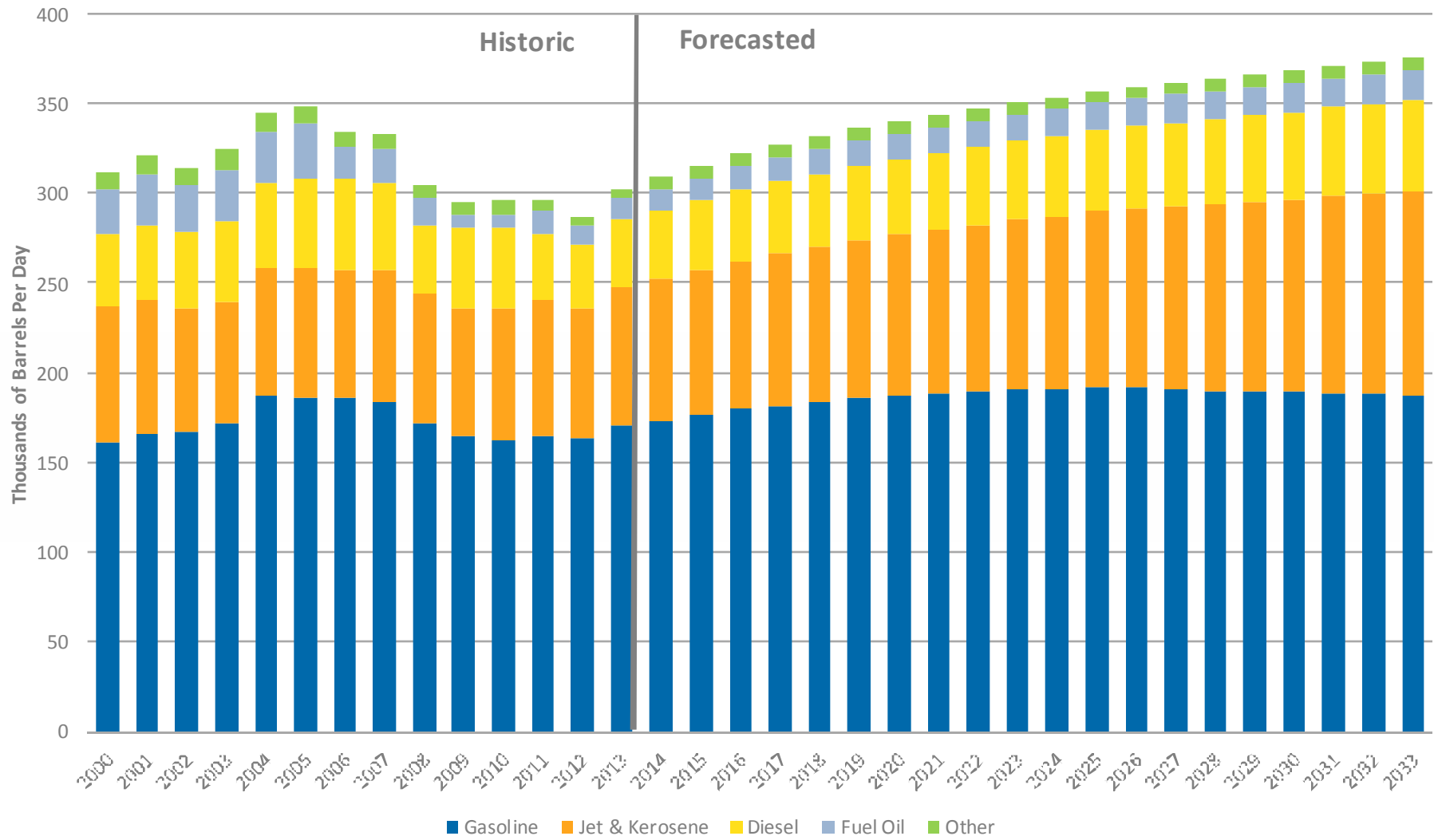
Multi-day Cruise Passengers



Single-Day Cruise Passengers



Petroleum



Source: Port Everglades (2000-2012), USACE, DOE, IHS Estimates Note 2013 utilizes fiscal year 2013 data to April provided by Port Everglades



Plan Development

CHARRETTE SUMMARY



Cargo	Cruise	Petroleum
<ul style="list-style-type: none"> Aggregate Storage and access West of ICTF 	<ul style="list-style-type: none"> North Spangler Parcel for Taxi staging 	<ul style="list-style-type: none"> North Spangler Parcel for Truck Staging or Other Distribution
<ul style="list-style-type: none"> Molasses Parcel for Neo-Bulk Storage or Other 	<ul style="list-style-type: none"> Molasses Parcel for staging (Northport will not be staging) 	<ul style="list-style-type: none"> Molasses Parcel for Potential New Use
<ul style="list-style-type: none"> Ro-Ro Operations at Notch and Berth 5 	<ul style="list-style-type: none"> Midport Garage for bus staging 	<ul style="list-style-type: none"> Modernized Manifold System
<ul style="list-style-type: none"> Tracor Basin Partial or Total Fill (~6ac) – Cargo Operations 	<ul style="list-style-type: none"> Tracor Basin Partial or Total Fill (~6ac) – Cruise Operations 	<ul style="list-style-type: none"> Achieve 15,000-20,000 barrels/hr
<ul style="list-style-type: none"> McIntosh Road Capacity and Access Gate Efficiency 	<ul style="list-style-type: none"> Cruise Terminals 21, 22/24, 25 consolidation 	<ul style="list-style-type: none"> Above Ground Pipelines

Cargo	Cruise	Petroleum
<ul style="list-style-type: none"> ■ Container Yard Improvements – Densification ■ Dynergy Property Utilization ■ Berth 33 Length and Aggregate Berth ■ FPL Return ■ Maximization of Berth 14/15 – Analysis Needed ■ Southport Footprint – Future Allocation of Available Parcels 	<ul style="list-style-type: none"> ■ Berth 19 & 20 Opportunity, Upland & Basin - Midport Optimization ■ Analysis of Multi-Level Cruise Operations ■ Scheduling Diversification ■ Sufficient Growth Potential for Full Range of Cruise Ships 	<ul style="list-style-type: none"> ■ Standardized/ Interchangeable Berths – Depth, Width, Loading Arms, Concurrent Operations ■ FPL Return ■ Dynergy Property Utilization ■ Maximization of Berth 14/15 – Analysis Needed

Port-Wide

- Internal Port Traffic Circulation – Overall Analysis Based on Current and Future Volumes
- Security Gates Capacity – Adequate for the Future? E.g., Lanes, Flows, Operations, etc.
- Future Allocation of Available Parcels for Port Growth
- Resolution of Proprietary Berth Use by Port Tenants and Identification for Shared Use
- LNG/CNG Bunkering
- Acceptable Relocation of Tugs
- Operations During Construction
- Airport Operational Impacts – Air Draft



Plan Development

INDUSTRY TRENDS



Industry Trends to Consider in Phase II

■ Cruise terminals

- Larger footprint to accommodate newest ships
- Multi-level operations
- Multiple boarding bridges
- Simultaneous embarkation and debarkation
- Use of lower level for staging/parking
- Consolidated terminals and CBP operations

■ Container terminals

- Densification through use of RTGs/RMGs
- Consolidated facilities for more efficient access/security
- Off-site empty storage
- Fewer ships using ships' gear

■ LNG bunkering

■ Shore power

■ Renewable Energy Development (“Green” Technology)



Plan Development

PROJECT ASSESSMENT



		Sector	Project
Northport	1.	CRUISE	<ul style="list-style-type: none"> Northport Cruise Complex Expansion (Slip 2, Berth 5, CT 4, Parking)
	2.	PETROLEUM	<ul style="list-style-type: none"> Slip 1 and Slip 3 (Berths 7/8, 9/10, 12/13, 14/15)
	3.	NEOBULK	<ul style="list-style-type: none"> Berth 5/ Ro-Ro Ramp/ Cargo Yard PEV Parcel
	4.	NEOBULK	<ul style="list-style-type: none"> Berth 14/15 / Cargo Yard FPL Parcel
Midport	5.	CRUISE	<ul style="list-style-type: none"> Pier 19/20 Construction Midport Cruise West “Berth 18 Extension” Tracor Basin (Partial or Total Fill) <ul style="list-style-type: none"> Berth lengthening and Cruise Terminal 29 expansion Midport Cruise East “Consolidation”
	6.	CRUISE	
	7.	CRUISE	
	8.	CRUISE	
	9.	CONTAINER	<ul style="list-style-type: none"> New Berth 19 (Contingent on 18 Extension)
	10.	CONTAINER	<ul style="list-style-type: none"> Tracor Basin (Partial or Total Fill) <ul style="list-style-type: none"> Berth lengthening and container yard expansion Southport Container Yard Connectivity
Southport	11.	CARGO	<ul style="list-style-type: none"> McIntosh Gate 19.9 Acre Parcel Aggregate Berth & Storage Berth 33 Reconfiguration
	12.	CONTAINER	
	13.	DRYBULK	
	14.	CONTAINER	

Cruise Densification



▲ Singapore



▲ New York

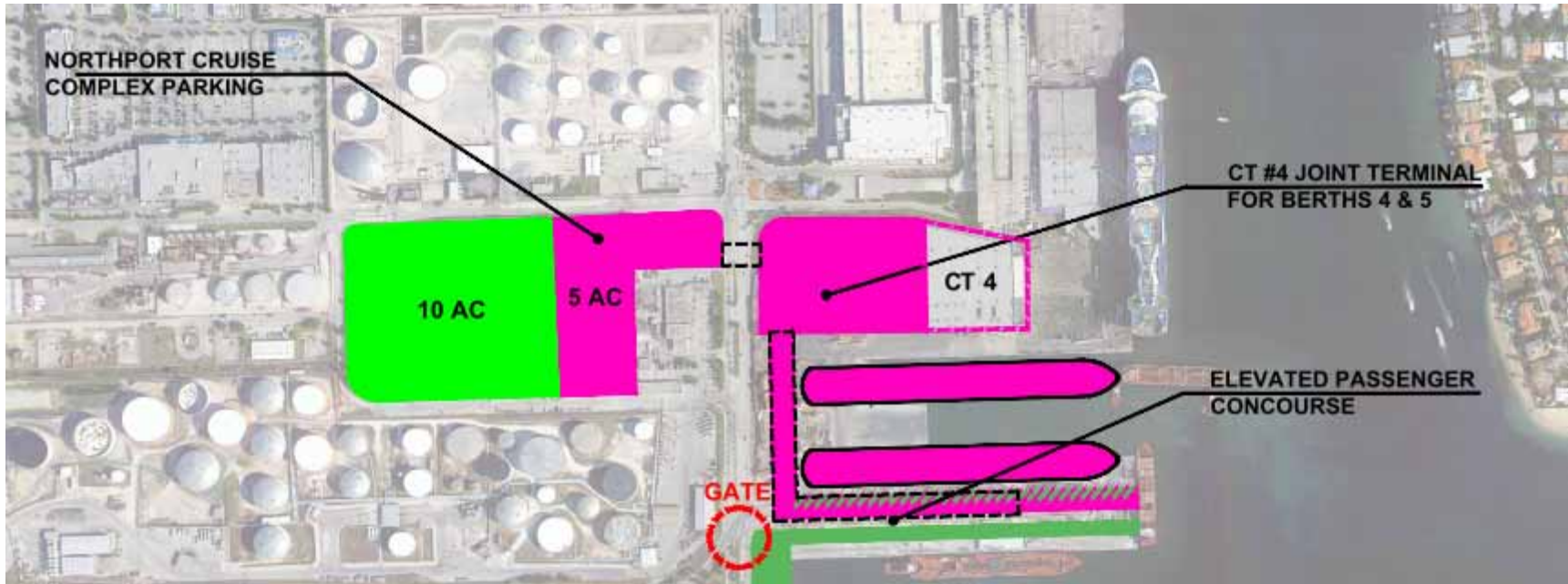


© Gambee

▲ Nassau

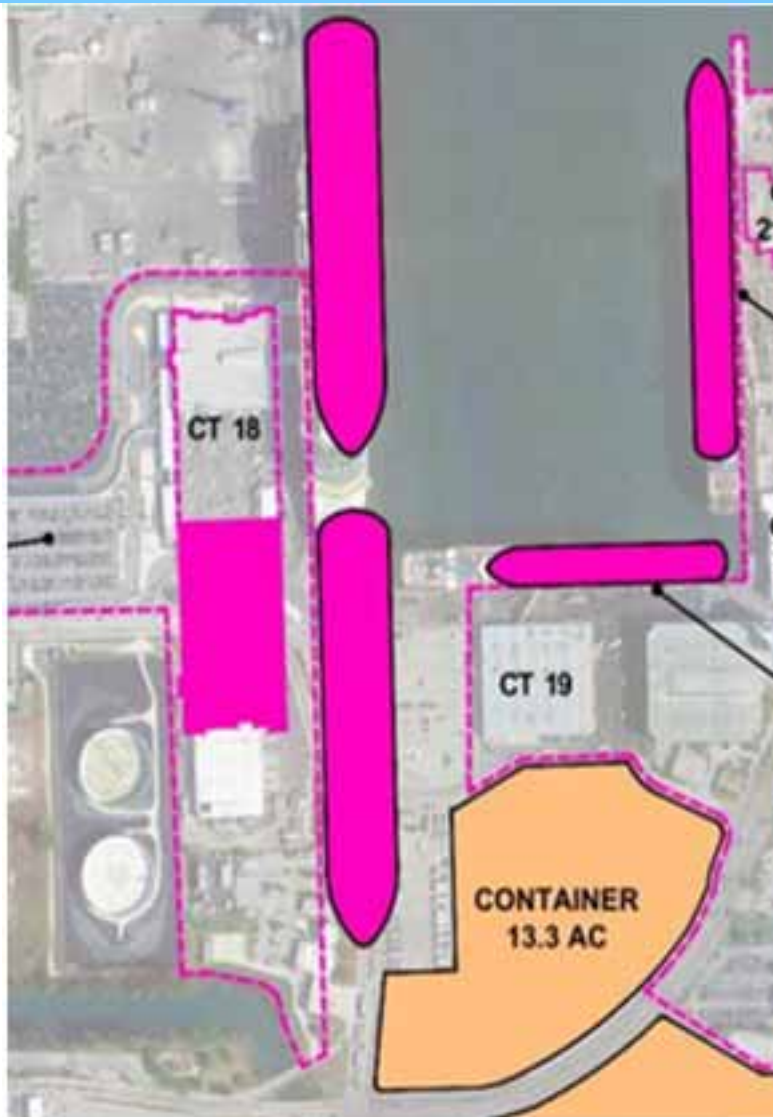
❖ NOT BEING CONSIDERED FOR FURTHER STUDY

Northport Cruise Complex Expansion



❖ **NOT BEING CONSIDERED FOR FURTHER STUDY**

Berth 18 Extension



Cost

Berth 18 Extension (New Berth 19)	\$101.2
Rebuild Berth 19	(\$5.3M)
	<hr/>
	\$95.8M
Terminal 18 Expansion	TBD
	<hr/>

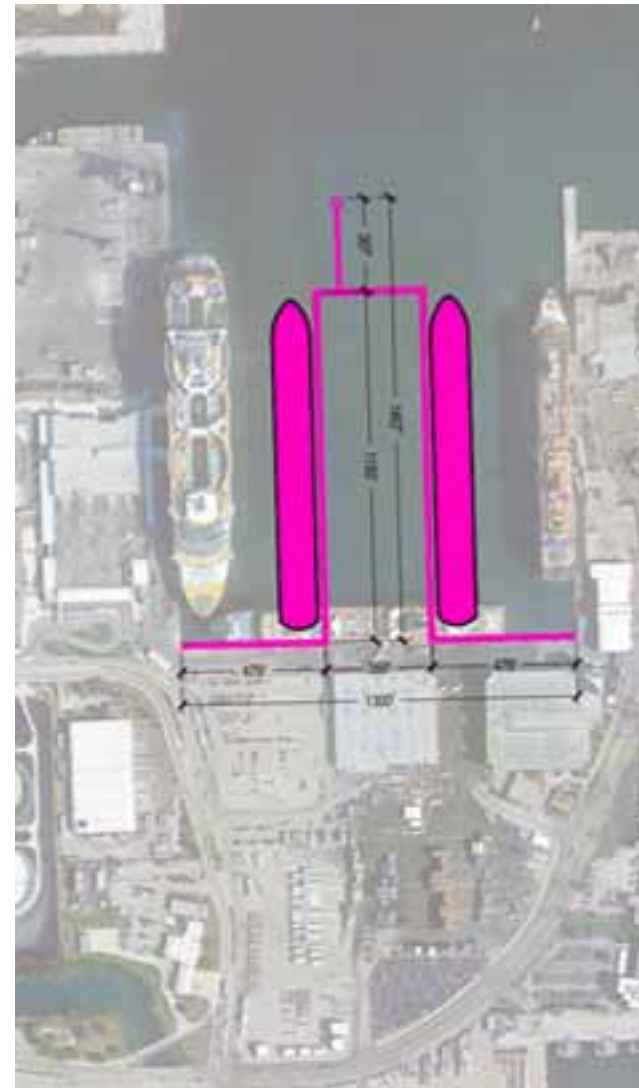
Revenue Considerations

- Cruise (Berth 18 Extension)
 - Oasis-Class: one year-round sailing
 - Vista-Class: one year-round sailing
 - Seasonal Sailings
- Cruise (New Berth 19 – Midweek Sailing)
- Container (New Berth 19 – 13.3ac)
- Neobulk (New Berth 19 -13.3ac)

❖ ADVANCING IN THE PLAN FOR FURTHER STUDY

Midport Cruise Pier 19/20

- Replacement of Berth 19/20 with two pier berths capable of berthing Dream- and Vista-Class vessels
- Requires expansion to Terminal 19 and elevated passenger concourse



❖ ADVANCING IN THE PLAN FOR FURTHER STUDY

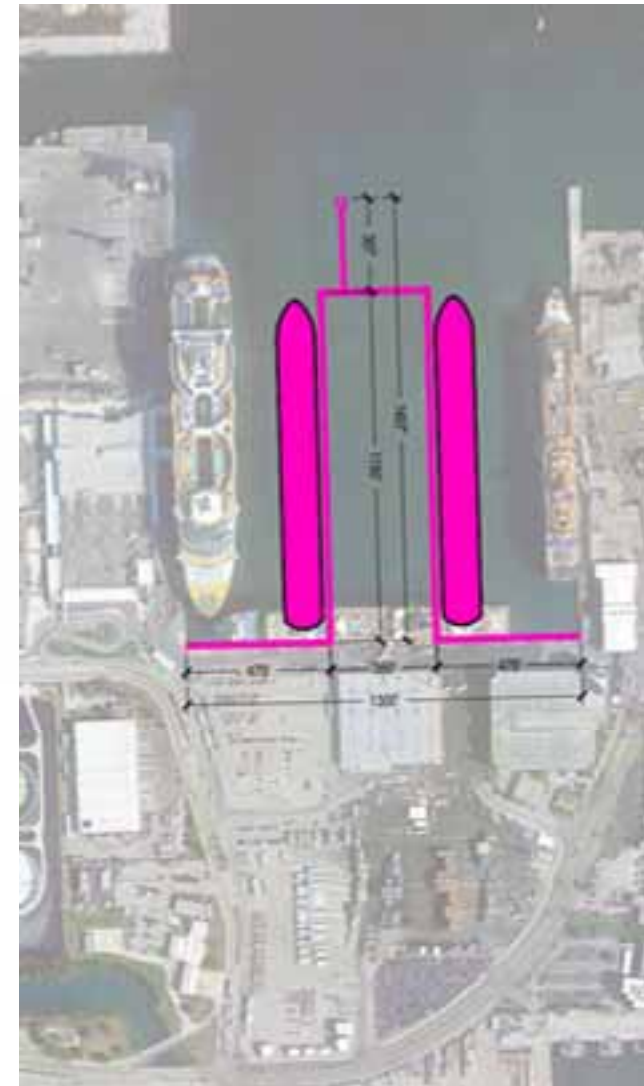
Midport Cruise Pier 19/20

Cost

Pier 19/20	\$118.5M
Rebuild Berth 19	(\$4.7M)
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	\$113.9M
Terminal 19/20 Expansion (with Concourse)	TBD
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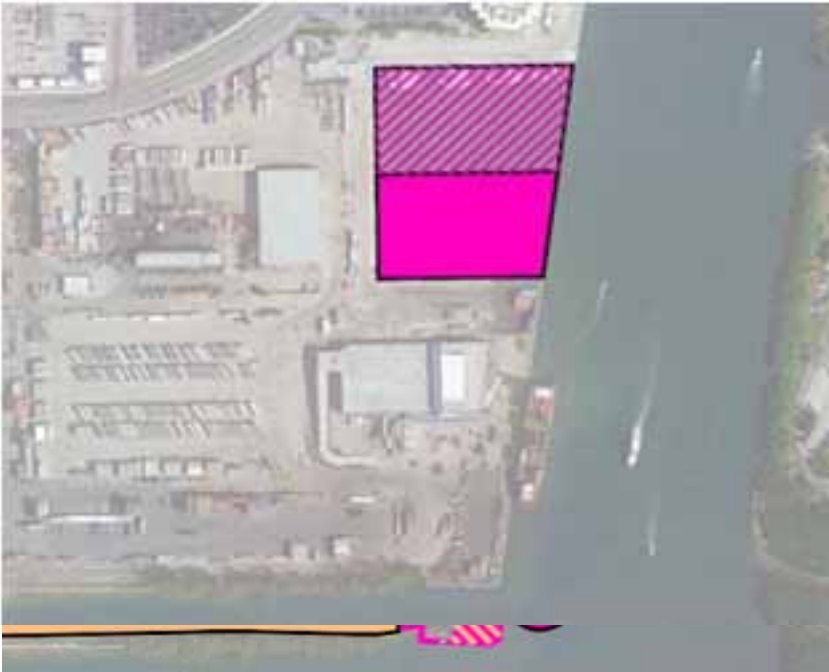
Revenue Considerations

- Cruise (Pier 19/20)
 - Dream-Class: one year-round sailing
 - Vista-Class: one year-round sailing
 - Seasonal Sailings
- Container (New Berth 19 - 16ac)



❖ ADVANCING IN THE PLAN FOR FURTHER STUDY

Tracor Partial and Total Fill



Revenue Considerations

- Berth 29 Lengthening
- Cruise
 - Larger Vessel at CT 29
 - More efficient ops at Berth 29
 - Connectivity to Midport Cruise East
- Container
 - Container Yard (+/- 6ac)
 - Connectivity to Southport
 - Increased berth length

Cost

Partial	New	\$51.2M	Total	New	\$62.4M
	Rebuild	(\$19.8M)		Rebuild	(\$19.8M)
		<u>\$31.5M</u>			<u>\$42.7M</u>

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	3.	NEOBULK	<ul style="list-style-type: none"> Berth 5/ Ro-Ro Ramp/ Cargo Yard PEV Parcel
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Midport	5.	CRUISE	<ul style="list-style-type: none"> Pier 19/20 Construction
	6.	CRUISE	<ul style="list-style-type: none"> Midport Cruise West “Berth 18 Extension”
	7.	CRUISE	<ul style="list-style-type: none"> Tracor Basin (Partial or Total Fill) <ul style="list-style-type: none"> Berth lengthening and Cruise Terminal 29 expansion
	8.	CRUISE	<ul style="list-style-type: none"> Midport Cruise East “Consolidation”
	9.	CONTAINER	<ul style="list-style-type: none"> New Berth 19 (Contingent on 18 Extension)
	10.	CONTAINER	<ul style="list-style-type: none"> Tracor Basin (Partial or Total Fill) <ul style="list-style-type: none"> Berth lengthening and container yard expansion Southport Container Yard Connectivity
Southport	11.	CARGO	<ul style="list-style-type: none"> McIntosh Gate
	12.	CONTAINER	<ul style="list-style-type: none"> 19.9 Acre Parcel
	13.	DRYBULK	<ul style="list-style-type: none"> Aggregate Berth & Storage
	14.	CONTAINER	<ul style="list-style-type: none"> Berth 33 Reconfiguration

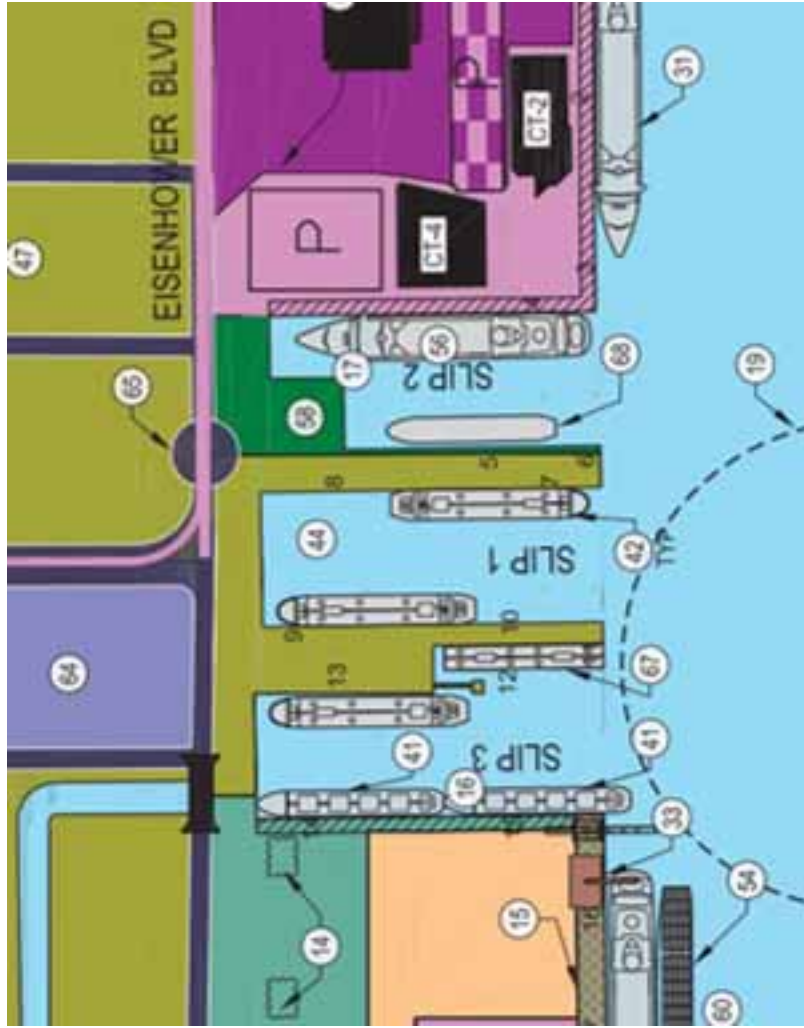
Petroleum Berths 7-13



- 3 redundant berths with an optional 4th berth
 - Depth
 - Width
 - Loading arms
 - Concurrent operations

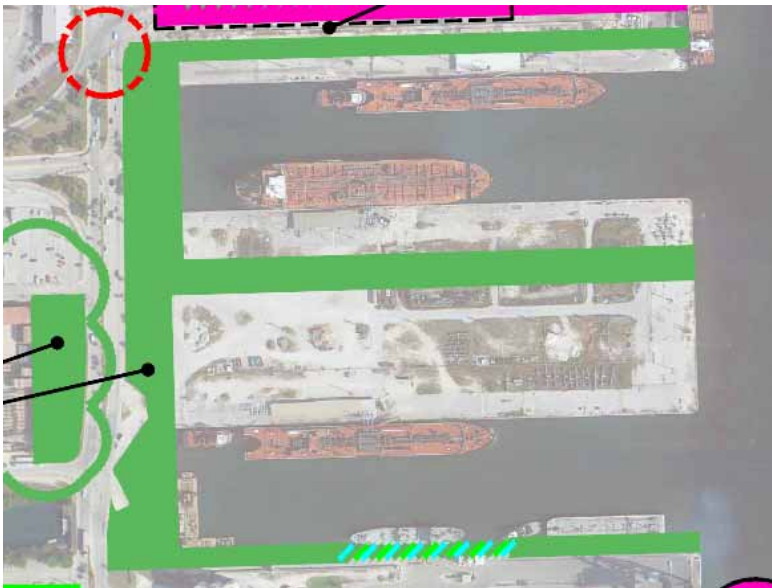


Current 20-Year Master Plan Northport Berths



❖ ADVANCING IN THE PLAN FOR FURTHER STUDY

Petroleum Manifold (Berths 7-13)



Partial Preliminary Cost

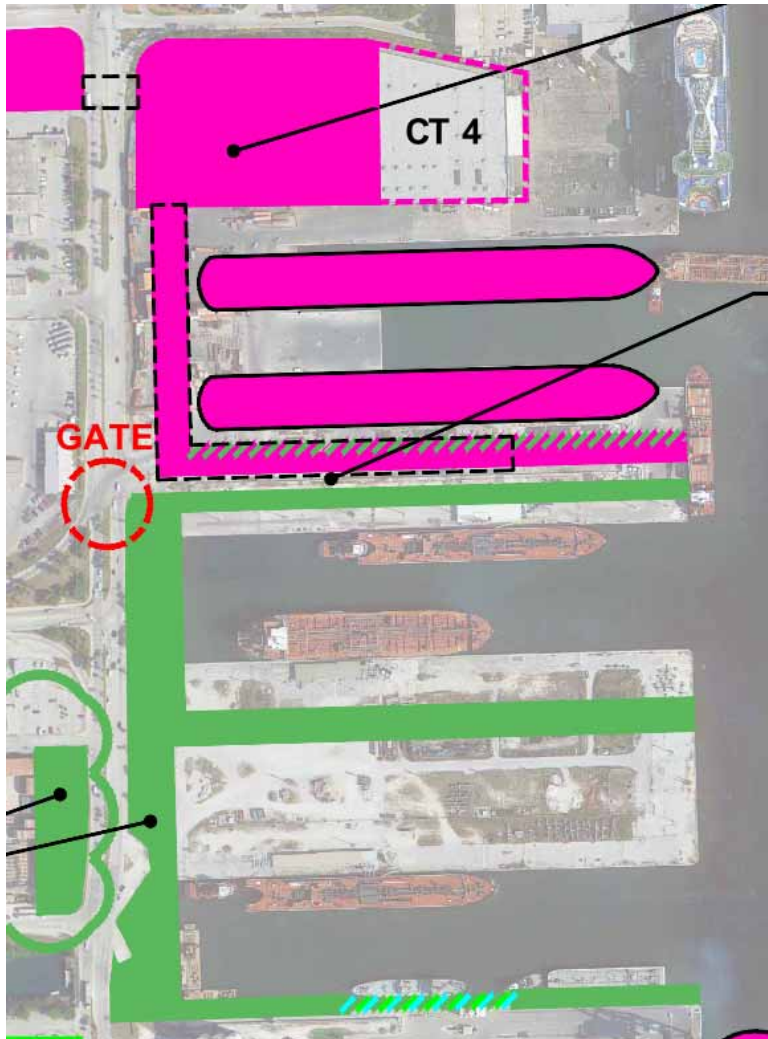
Piping/Manifolds	\$15-20M
Pumps (6)	\$2.3M
Switchseat/Pumps Control	\$1.0M
Pump Controls	\$0.5M
Unloading Arms (12)	\$1.5M
	<hr/>
	\$20.3-25.3M

Revenue Considerations

- 2012 Operating Revenues: \$25.7M
- 15,000-20,000 barrels/hr
- Two Pipelines
 - Distillate Fuels
 - Residual Fuels

❖ Berth Reconfiguration for Petroleum Berths will Advance for Further Study

Northport Berths 5-14



Cost

Berths 5-14	\$376.8M
Rebuild Berths 5-14	(\$112.3M)
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	\$264.5M

Revenue Considerations

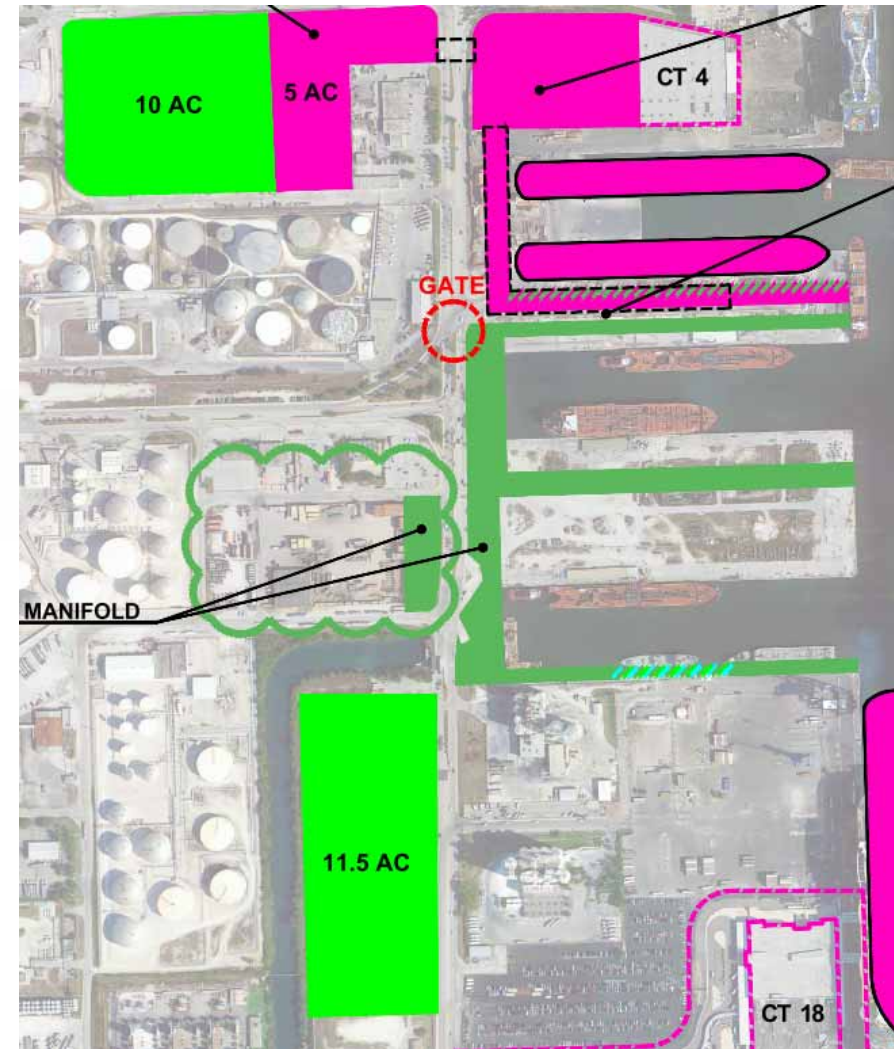
- Cruise Berth 5
- Petroleum Berths 7-13
- Cement Berth 14/15
- Neo Bulk Berths 5, 14/15

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❖ ADVANCING IN THE PLAN FOR FURTHER STUDY

Neobulk Opportunities

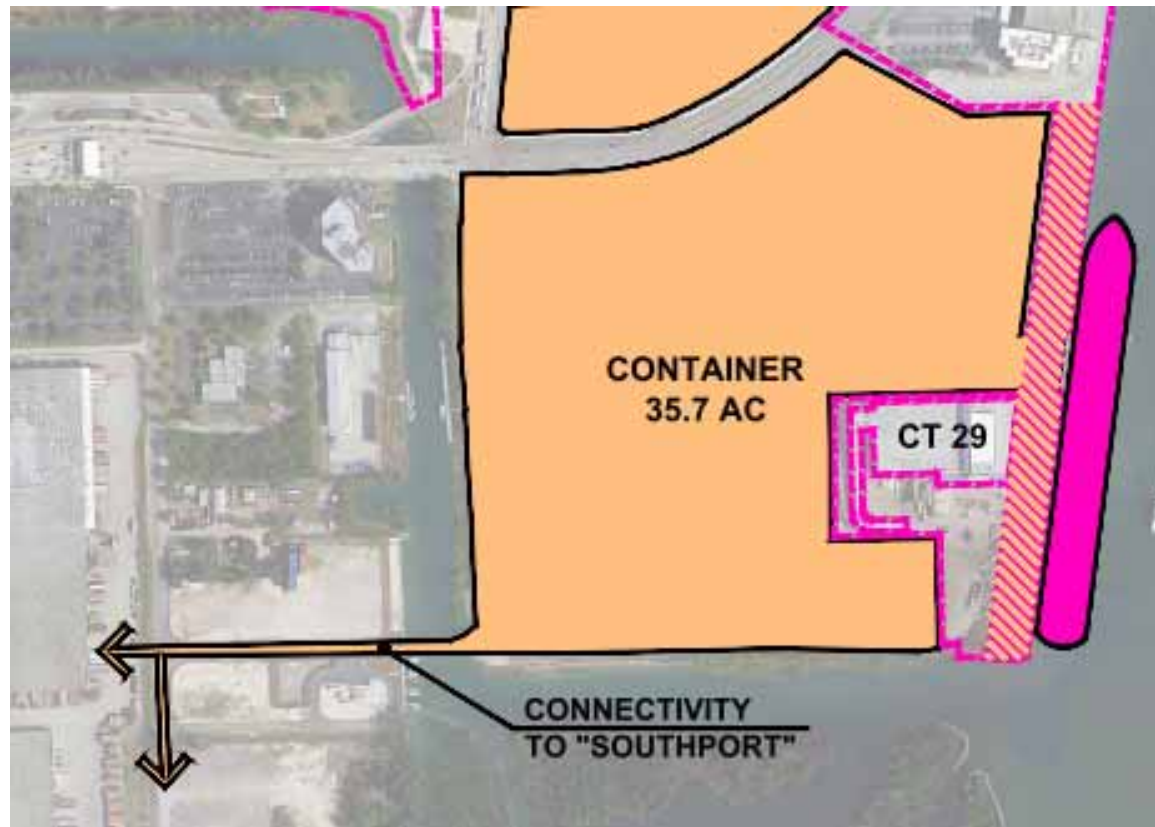
- Berth 5 - Storage yard at PEV PM parcel
- Berth 14/15 - Storage yard at FPL parcel



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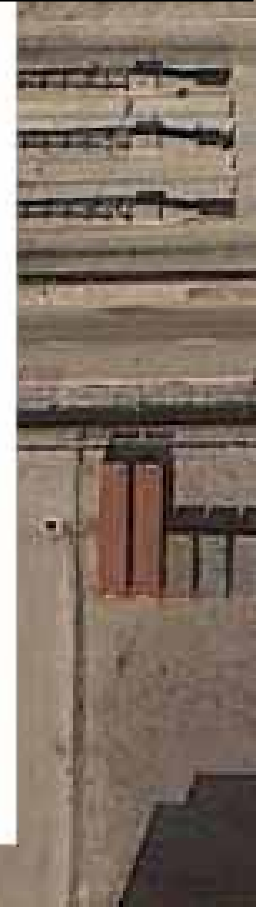
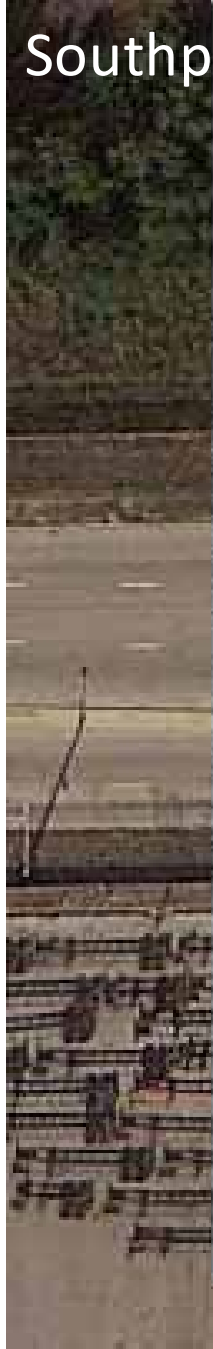
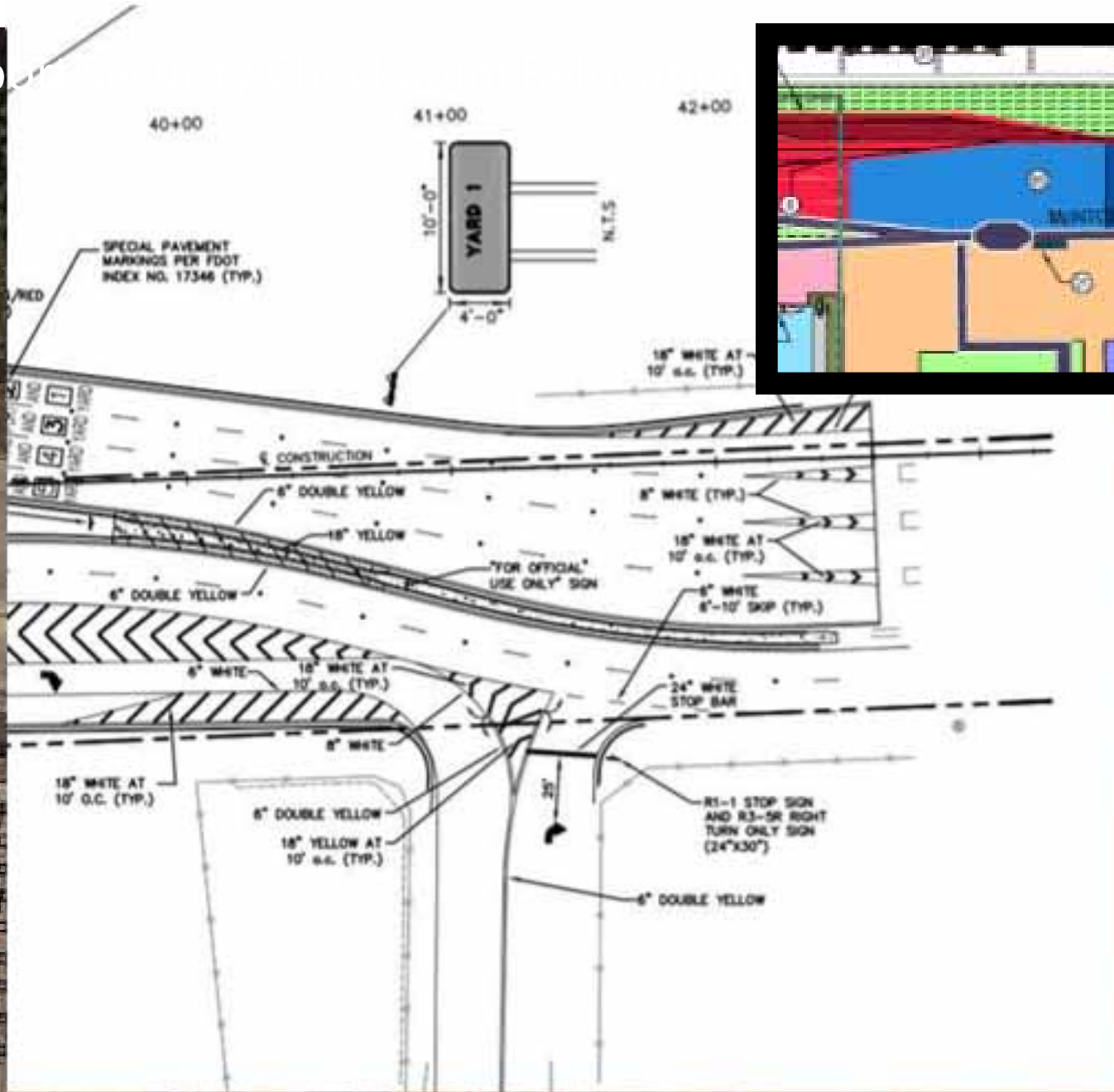
❖ ADVANCING IN THE PLAN FOR FURTHER STUDY

Midport Container Yard

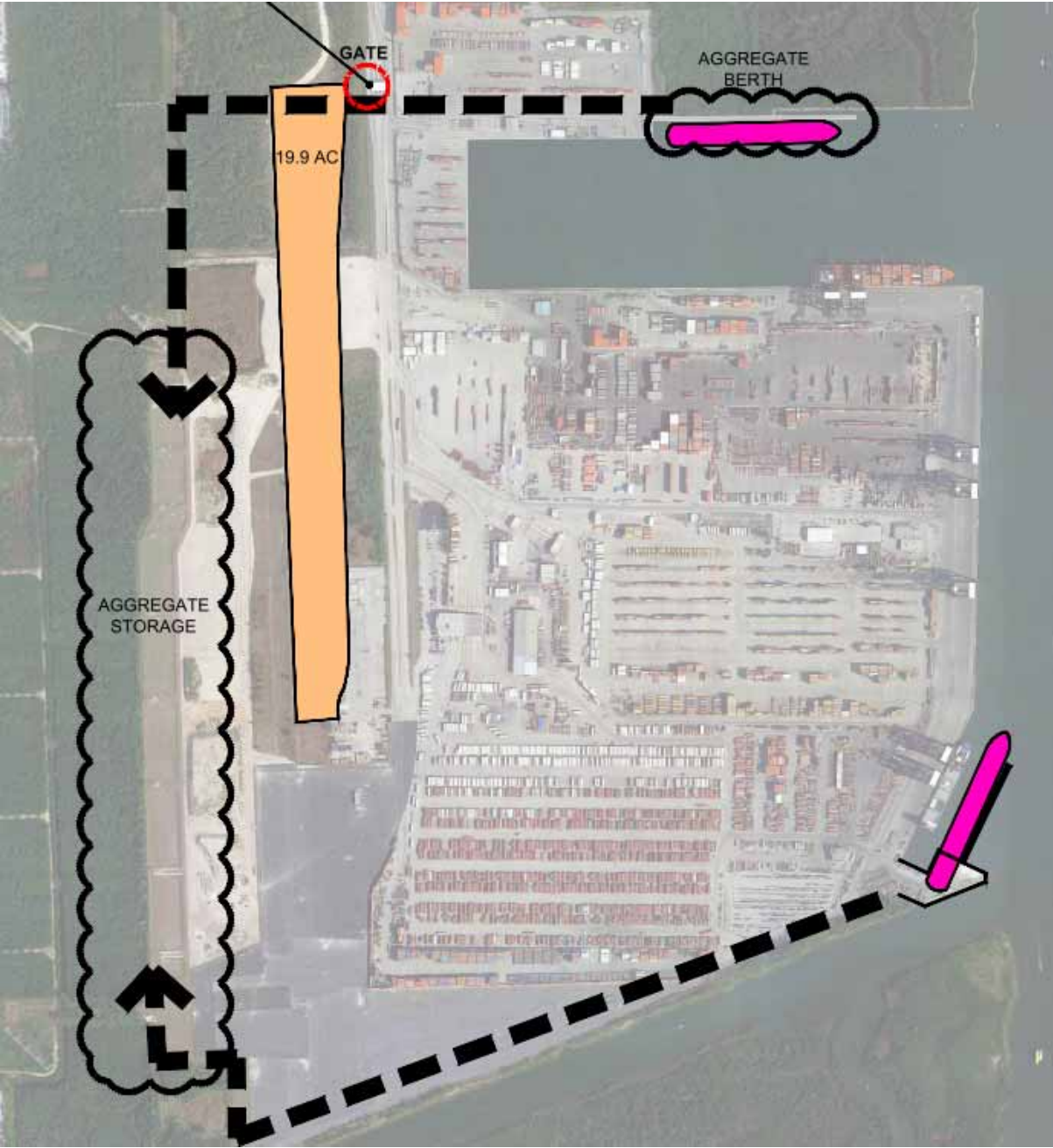


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❖ ADVANCING IN THE PLAN FOR FURTHER STUDY

Berth 33 Reconfiguration



- Greater operating flexibility
- Cost savings on crane articulation
- Contiguous berth length 31-33 2,850ft (Berth 33 850ft)

Cost

New Berth 33	\$53.8M
Rebuild Berth 33	(\$22M)
	<hr/>
	\$31.8M

Projects Advancing for Further Study

		Sector	Project	Status
Northport	1.	CRUISE	<ul style="list-style-type: none"> Northport Cruise Complex Expansion (Slip 2, Berth 5, CT 4, Parking) 	Not Advancing
	2.	PETROLEUM	<ul style="list-style-type: none"> Slip 1 and Slip 3 (Berths 7/8, 9/10, 12/13, 14/15) 	Advancing
	3.	NEOBULK	<ul style="list-style-type: none"> Berth 5/ Ro-Ro Ramp/ Cargo Yard PEV Parcel 	Advancing
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	10.	CONTAINER	<ul style="list-style-type: none"> Tracor Basin (Partial or Total Fill) <ul style="list-style-type: none"> Berth lengthening and container yard expansion Southport Container Yard Connectivity 	Advancing
Southport	11.	CARGO	<ul style="list-style-type: none"> McIntosh Gate 	Advancing
	12.	CONTAINER	<ul style="list-style-type: none"> 19.9 Acre Parcel 	Advancing
	13.	DRYBULK	<ul style="list-style-type: none"> Aggregate Berth & Storage 	Advancing
	14.	CONTAINER	<ul style="list-style-type: none"> Berth 33 Reconfiguration 	Advancing



Project Development
NEXT STEPS



Port Everglades Master/Vision Plan Update Contact Person and Email

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