

AAPA Miami

February 20-21, 2019



Ports America Cruise Locations

(Excludes Joint Ventures in Norfolk, Port Everglades and Miami)

Manhattan
(Manhattan Cruise Terminal)



Brooklyn
(Brooklyn Cruise Terminal – Pier 12)



Los Angeles
(World Cruise Center)



Seattle
(Bell Street Cruise Terminal T66)



Boston
(Flynn Cruiseport)



New York Cruise Terminals

Manhattan Cruise Terminal (MCT)

Pier 88, 90, 92



- Located on Manhattan's West Side between 48th and 52nd Street on the Hudson River
- Three homeport berths at Piers 88 and 90
- One overflow berth at Pier 92 for coast wise arrivals only
- Year round homeport to NCL
- Seasonal homeport to CCL, AIDA, MSC, Disney, and many more

Brooklyn Cruise Terminal (BCT)

Pier 12



- Located in the Red Hook section of Brooklyn on the Buttermilk Channel on the East River
- One homeport berth
- Seasonal homeport to Cunard's Queen Mary 2 and Princess

Pier 88 is the only facility that can accommodate turnaround operations of 5k+ passenger vessels

Design Plans

Pier 90

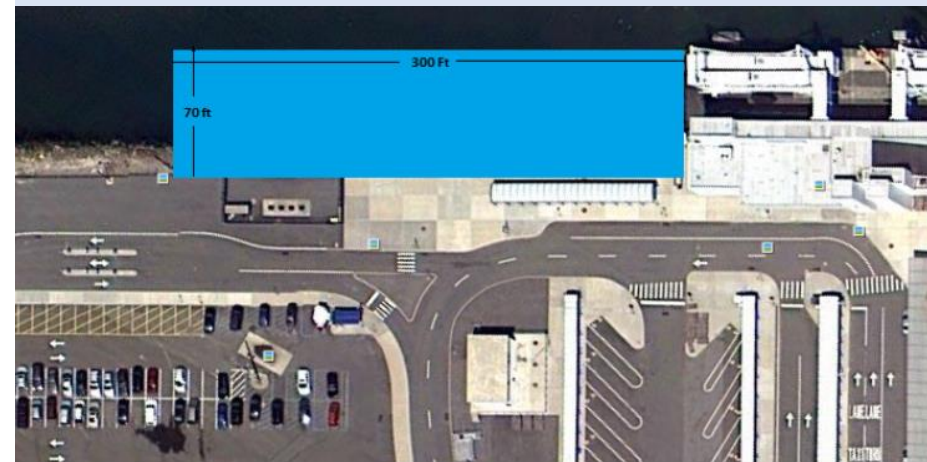
Manhattan Cruise Terminal Improvements



- North side service apron
- Two passenger boarding bridges
- Interior upgrades to improve passenger circulation, security, check-in, etc.
- Technology improvements, guest amenities

Pier 12

Brooklyn Cruise Terminal Improvements



- Extension of existing service apron
- Two passenger boarding bridges
- Interior upgrades to improve passenger circulation, security, check-in, etc.
- Ground transportation area improvements for more efficient traffic flow, pick up and drop off

Ports America's 40M capital investment plan for MCT Pier 90 and BCT Pier 12 will provide the infrastructure required to serve the larger vessels today and into the future

Operating Model



NYCEDC

- Ports America executed a long-term agreement with the New York City Economic Development Corporation (NYCEDC) to lease and operate Manhattan the Cruise Terminal and the Brooklyn Cruise Terminals through 2029
- Ports America is the exclusive provider of services including: Porterage, stevedoring, security, parking, and other services
- Ports America also provides ancillary services such as event leasing/management and military and yacht dockings
- The successful partnership with the NYCEDC and our cruise line partners allows for an efficient, standardized approach at both facilities generating substantial growth in cruise volumes and provides for an optimal guest experience

Current Challenges Associated with BIGGER Ships

Seattle

- Site specific operational plans were developed and necessary equipment procured to prepare for the challenges associated with NCL Bliss (5k PAX vessel) at T-66:
 - Lack of luggage laydown space, narrow dock space with numerous obstructions (boarding bridge legs), tidal conditions (all loading/discharge performed by mobile dock cranes, limited receiving space/GTA)
- NCL Bliss (5k pax) largest vessel ever to perform turnaround operations in Seattle commenced in June with weekly service to Alaska

Manhattan

- NCL Escape (sister ship to Bliss) largest vessel ever to perform turnaround operations in NYC commenced year-round service from Manhattan Cruise Terminal (MCT) in April
- Carnival Horizon (5k PAX) commenced seasonal turnaround operations at MCT in May
- Both vessels are limited with docking options and can only be accommodated at Pier 88 Berth 2 at MCT at this time

Current Challenges Associated with BIGGER Ships Cont.....

Los Angeles

- NCL Bliss will reposition to Los Angeles this coming Friday and commence weekly service to Mexico commencing (Due to navigational issues at T-93, NCL must use T-91 which is undersized)
- Los Angeles Operations team developed an interim plan and invested in an adjacent tent to T-91 to perform screening and PAX embark to accommodate NCL as well as larger Princess vessels

Summary

- The inaugural season for the NCL Bliss in Seattle was a huge success. NCL has opted to 'double-down' in 2019 by deploying the NCL Joy (sister ship) to run weekly Alaska service with Bliss from Seattle
- Joy AND Bliss will also move to Los Angeles for weekly service starting Fall 2019
- Ports America's infrastructure and resources are now routinely stretched to their limits, **however**, we consistently run our operations safely and efficiently providing Best-in-Class service to the biggest vessels afloat

In Summary

- The cruise lines are building much **BIGGER** ships; most U.S. cruise facilities are not equipped to handle them properly. Some ports are already receiving ships that hold 5k+ passengers but won't have the ability to expand the footprint available to service them
- Significant capital investments are being made in many cruise terminals today to support the demand of the cruise lines to deploy more and **BIGGER** ships
- Investment alone won't meet the demands of the cruise lines (efficient movement of guests through both embark/debark process, ground transportation, baggage & stores, ensure on-time sailing)
- Strong collaboration with all stakeholders to ensure infrastructure investment meets capacity needs for 20+ years in current and new cruise markets, solid processes that **MUST** always strive for improvement, and the implementation of cutting edge technology to increase efficiency and enhance the guest experience are critical to the continued growth and success of the industry

