PORT OF MIAMI



Bill Johnson, Port Director AAPA – Trends in Cruising

February 18, 2009



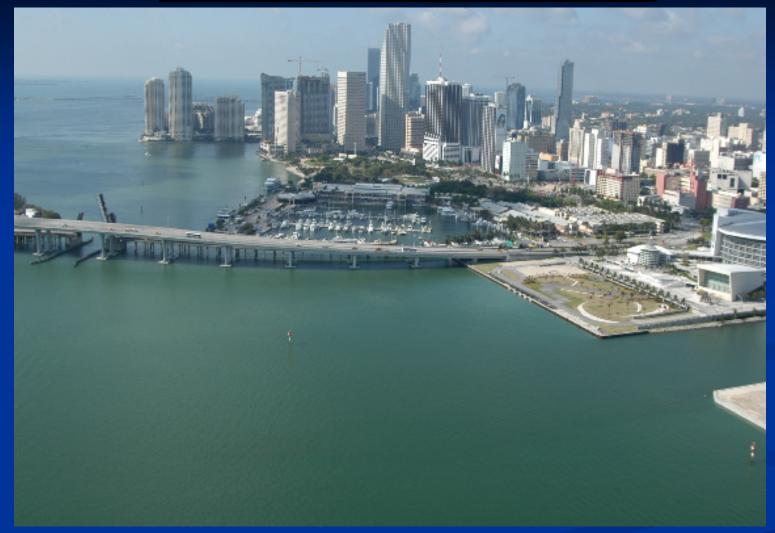
About The Port of Miami



Cruise Capital of the World – 4.1 Million PAX
Cargo Gateway of the Americas



Economic Impact - 2007



Second Largest Economic Engine in Miami-Dade County
 176,000 Jobs
 \$17 Billion Annually



World's Leading Cruise Lines

>POM offers a choice of popular multi-day cruises.

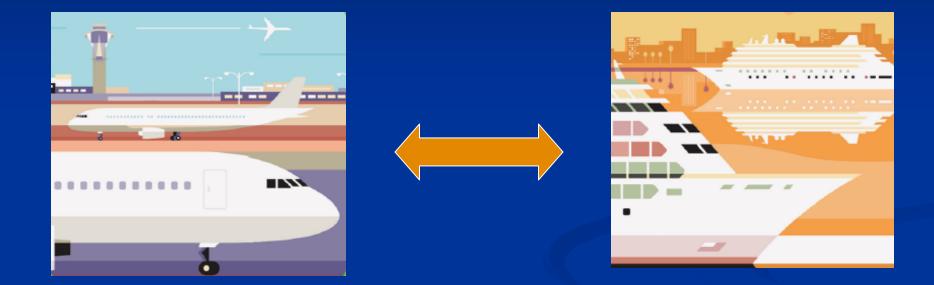
We are proud to be home to the world's most distinguished cruise lines:



POM hosts 24 of the world's finest cruise ships representing 10 cruise lines, four of which have their world headquarters in Miami-Dade County.



<u>Economic Linkage</u> Airport - Seaport



Of the 4 million cruise passengers that visit the Port of Miami a year, 60% fly in.



Main Challenges

at

Competition
Infrastructure Improvements
Port Passenger Fees and Services
Security Costs
Fluctuating Oil Prices
World-wide Economic Factors

Cruise Vessel Development

	Passengers	Drafts	Air Drafts	Ship Displacement (In Thousands Grt.)
1960 ' s	400-500	Uр То 30	-	18
400 FEET				
1970 ' s	600	20-36	-	20
500 FEET				
1980 ' s	1200-2000	26-30	140-175	80
800 FEET				
+1990' s	2600-3800	26-34	160 190	00.450
900-1050 FEET	2000-3000	20-34	160-180	90-150
+2000's				
	3500-5000	30-34	+/- 200	150-180
1050-1300 FEET Copyright © BEA International 2005				

Cruise Industry Trends Impacting Infrastructure

Waterside:

Berthing
Fenders
Bollards
Bulkheads/Piers
Water Supply
Provisioning
Gangways
Fueling

Landside:

- >Ingress/Egress
- ➢Roadways
- ➢Parking
- ≻Terminals
- ≻Customs
- >Transport from
 - Airports
- >Attractions
- ≻Shopping

Services: →Security →Stevedoring →Trash



Building For The Future



Sustainable Capital Improvement Program

Partnering Long-Term Contracts > Sustainable Development Community Involvement

Security Enhancements



PROJECT

Cruise Projects

ESTIMATED COST

COMPLETION DATE

- Cruise Terminals D&E
 Upgrades/Finalization
 Provisioning Warehouse
- Cruise Terminals F & G
 A/C Phase 1
 CBP Consolidation
- Cruise Terminals Renovations
- Parking Garage D
- Wharf Access Gates
- > 2035 Master Plan Update

\$62 million \$7.8 million \$7 million

\$860,230

\$1.2 million

\$19 million

\$15 million

\$2 million

\$1.3 million

October 2007 October 2009 November 2009

> May 2009 October 2009

> > October 2009 B & C

October 2009

December 2009

Summer 2011



Accomplishments

<u>2007</u>

 October/November 2007– Opening of two new ultra-modern cruise Terminals D & E

2008

December 2008 – Execution of a 10-year berthing agreement between Miami-Dade County and Norwegian Cruise Line (NCL).

<u>2009</u>

January 2009 – NCL and POM announced the new F3 ship, the Norwegian Epic – the cruise line's largest and most innovative Freestyle Cruise ship, which will sail year-round to the Caribbean from the Port of Miami beginning Summer 2010.



Two New Cruise Terminals



Terminals D & E together include 175,000 square feet of PAX processing area and 55,700 feet for intermodal/baggage handling including integrated security and inspection functions.



<u>New Ultra-Modern Entrance</u>

front lines



Paying tribute to international trade pioneers

inthi was not always the "Gateway to the Americas," one of the nation's leading Customs districts for international trade with more than \$79 billion in annual imports and exports.

With a tip of the hat to those who pioneered that growth over the last half century and more, the Florida Foreign Trade Association unveiled its new tribute to them at the entrance to the Port of Miami last month.

The multi-year effect to establish the statue was led by, among others, FFTA President Ralph Puga, Gene Rodriguez, Jose Perez Jones of Scaboard Marine, Jorge Rovinsa of Plorida Stevenoring as well as the Port of Miami and the Florida Department of Transportation.



Port of Mami Director Bill Johnson speaks at the concomy unvailing the new bibute to the early loaders of the international trade community in Mami.

The Port of Miami in conjunction with various government and industry partners developed a world-class entrance feature that symbolizes the Port's past, present and future commerce.



Security



The Port of Miami is recognized as one of Florida's leading ports in safety and security.



<u>GMCVB – POM Cruise Programs</u>



Besides offering a great homeport, Miami offers vacationers the opportunity to extend their stay with a wide variety of cultural and professional attractions, sporting events, dining, shopping, and energizing beaches.



THANK YOU



For more information about the Port of Miami please visit our website at: www.miamidade.gov/portofmiami

