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
POM offers a choice of popular multi-day cruises.

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

- Carnival
- Royal Caribbean
- Norwegian Cruise Line
- Seadream Yacht Club
- Celebrity Cruises
- ResidenSea
- Oceania Cruises
- Azamara
- Crystal Cruises
- Fred. Olsen 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.
Of the 4 million cruise passengers that visit the Port of Miami a year, 60% fly in.
Main Challenges

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

<table>
<thead>
<tr>
<th>Ship Displacement (In Thousands Grt.)</th>
<th>Passengers</th>
<th>Drafts</th>
<th>Air Drafts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1960's</strong></td>
<td>400-500</td>
<td>Up To 30</td>
<td>-</td>
</tr>
<tr>
<td><strong>400 FEET</strong></td>
<td>600</td>
<td>20-36</td>
<td>-</td>
</tr>
<tr>
<td><strong>1970's</strong></td>
<td>1200-2000</td>
<td>26-30</td>
<td>140-175</td>
</tr>
<tr>
<td><strong>500 FEET</strong></td>
<td>2600-3800</td>
<td>26-34</td>
<td>160-180</td>
</tr>
<tr>
<td><strong>800 FEET</strong></td>
<td>3500-5000</td>
<td>30-34</td>
<td>+/- 200</td>
</tr>
<tr>
<td><strong>1050-1300 FEET</strong></td>
<td></td>
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<tr>
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<td>160-180</td>
</tr>
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<td><strong>+2000's</strong></td>
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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
- Community Involvement
- Sustainable Development
- Security Enhancements
# Cruise Projects

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>ESTIMATED COST</th>
<th>COMPLETION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cruise Terminals D&amp;E</td>
<td>$62 million</td>
<td>October 2007</td>
</tr>
<tr>
<td>Upgrades/Finalization</td>
<td>$7.8 million</td>
<td>October 2009</td>
</tr>
<tr>
<td>Provisioning Warehouse</td>
<td>$7 million</td>
<td>November 2009</td>
</tr>
<tr>
<td>Cruise Terminals F &amp; G</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A/C – Phase 1</td>
<td>$860,230</td>
<td>May 2009</td>
</tr>
<tr>
<td>CBP Consolidation</td>
<td>$1.2 million</td>
<td>October 2009</td>
</tr>
<tr>
<td>Cruise Terminals</td>
<td>$19 million</td>
<td>October 2009</td>
</tr>
<tr>
<td>Renovations</td>
<td></td>
<td>B &amp; C</td>
</tr>
<tr>
<td>Parking Garage D</td>
<td>$15 million</td>
<td>October 2009</td>
</tr>
<tr>
<td>Wharf Access Gates</td>
<td>$2 million</td>
<td>December 2009</td>
</tr>
<tr>
<td>2035 Master Plan Update</td>
<td>$1.3 million</td>
<td>Summer 2011</td>
</tr>
</tbody>
</table>
Accomplishments

2007
- 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).

2009
- 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.
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.
The Port of Miami is recognized as one of Florida’s leading ports in safety and security.
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