About The Port of Miami

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

- Carnival
- Royal Caribbean
- Norwegian Cruise Line
- Crystal Cruises
- Celebrity Cruises
- Fred. Olsen Cruise Lines
- Azamara Cruises
- Oceania Cruises

➢ 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>Passengers</th>
<th>Drafts</th>
<th>Air Drafts</th>
<th>Ship Displacement (In Thousands Grt.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>400-500</td>
<td>Up To 30</td>
<td>-</td>
<td>18</td>
</tr>
<tr>
<td>600</td>
<td>20-36</td>
<td>-</td>
<td>20</td>
</tr>
<tr>
<td>1200-2000</td>
<td>26-30</td>
<td>140-175</td>
<td>80</td>
</tr>
<tr>
<td>2600-3800</td>
<td>26-34</td>
<td>160-180</td>
<td>90-150</td>
</tr>
<tr>
<td>3500-5000</td>
<td>30-34</td>
<td>+/- 200</td>
<td>150-180</td>
</tr>
</tbody>
</table>

### Timeline:
- **1960's**: 18 passengers, drafts up to 30, air drafts not specified, ship displacement 1800 tons.
- **1970's**: 600 passengers, drafts 20-36, air drafts not specified, ship displacement 2000 tons.
- **1980's**: 1200-2000 passengers, drafts 26-30, air drafts 140-175, ship displacement 8000 tons.
- **1990's**: 2600-3800 passengers, drafts 26-34, air drafts 160-180, ship displacement 90-150 tons.
- **2000's**: 3500-5000 passengers, drafts 30-34, air drafts +/- 200, ship displacement 150-180 tons.
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
<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>TBD</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>February 2009</td>
</tr>
<tr>
<td>CBP Consolidation</td>
<td>$1.2 million</td>
<td>March 2009</td>
</tr>
<tr>
<td>Cruise Terminals</td>
<td>$19 million</td>
<td>Oct. 2009 (FDOT funding)</td>
</tr>
<tr>
<td>B &amp; C Renovations</td>
<td></td>
<td>Oct. 2009 (FDOT funding)</td>
</tr>
<tr>
<td>Parking Garage D</td>
<td>$15 million</td>
<td>September 2009</td>
</tr>
<tr>
<td>Wharf Access Gates</td>
<td>$2 million</td>
<td>September 2009</td>
</tr>
<tr>
<td>2035 Master Plan Update</td>
<td>$1.3 million</td>
<td>March 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 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 the best homeport, Miami offers vacationers the opportunity to extend their stay with a wide variety of attractions, accommodations, dining, shopping, and energizing beaches.
THANK YOU

For more information about the Port of Miami please visit our website at:

www.miamidade.gov/portofmiami