



COMMERCE REPORT

FISCAL YEAR 2018





BROWARD COUNTY
VICE MAYOR
DALE V.C. HOLNESS

BROWARD COUNTY
MAYOR
MARK D. BOGEN

Port Everglades is a service of the Broward County Board of County Commissioners: (L-R) Tim Ryan, District 7; Barbara Sharief, District 8; Michael Udine, District 3; Nan H. Rich, District 1; Vice Mayor Dale V.C. Holness, District 9; Mayor Mark D. Bogen, District 2; Steve Geller, District 5; Lamar P. Fisher, District 4; Beam Furr, District 6.



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FY2018 COMMERCE REPORT

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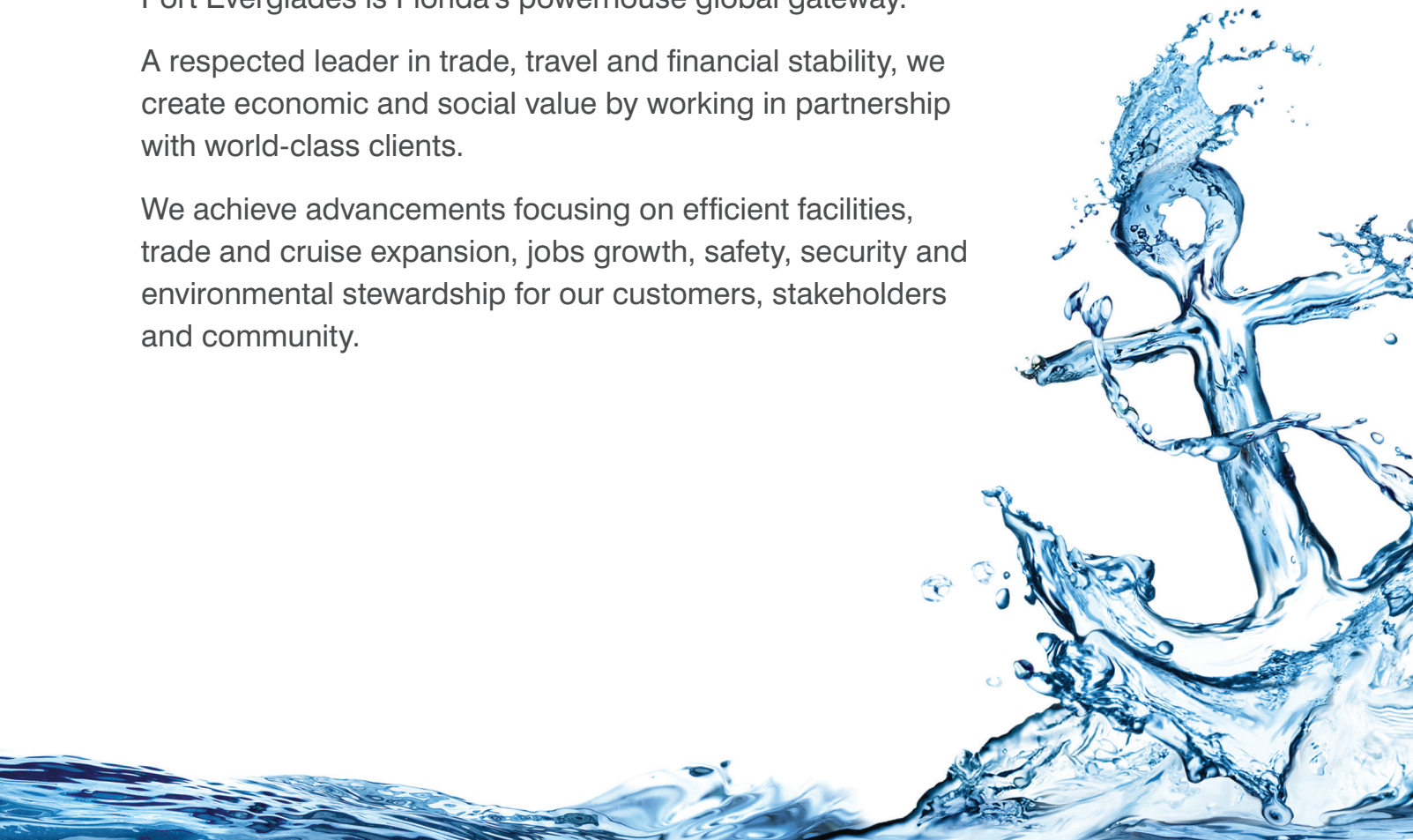
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MISSION STATEMENT

Port Everglades is Florida's powerhouse global gateway.

A respected leader in trade, travel and financial stability, we create economic and social value by working in partnership with world-class clients.

We achieve advancements focusing on efficient facilities, trade and cruise expansion, jobs growth, safety, security and environmental stewardship for our customers, stakeholders and community.



PORT EVERGLADES FUELS BROWARD COUNTY'S ECONOMY

FY2018 Overview

Broward County's Port Everglades continued an upward path of steady growth in Fiscal Year 2018, which ended September 30, 2018.

Operating revenue for FY2018 reached a record high at \$167,996,115, which is 4 percent higher than the \$161,733,028 generated in FY2017. Operating expenses amounted to \$103,969,738, for a gross margin of \$64,026,377.



MESSAGE FROM THE MAYOR

Evolution is underway at Broward County's Port Everglades. I see it every time I fly over the Port from Fort Lauderdale-Hollywood International Airport. It's incredible to be part of this growth and to see projects that were once only visions come to life.

Port Everglades updates its Master/Vision Plan every 2-4 years to reanalyze and update market trends, changes in cruise, cargo shipping and petroleum industries, local planning initiatives, evolving technology and other drivers affecting the port.

This in-depth analysis provides a market-driven and environmentally sustainable roadmap for guiding cost-feasible capital investments over the next 20 years.

The Plan is currently being updated with input from residents, Port businesses and other related stakeholders. As the mayor of Broward County and one of nine elected members of the Board of County Commissioners, I look forward to reviewing and voting to approve Port Everglades' 20-Year Master/Vision Plan update in the coming fiscal year.

I encourage you to become part of the process. You can share your ideas and thoughts with our Port staff at PortMasterPlan@broward.org or by attending a public meeting. Evolution is exciting and well-planned growth benefits us all.

A handwritten signature in black ink that reads "Mark Bogen". The signature is fluid and cursive, with the first name "Mark" being more prominent than the last name "Bogen".

Mark Bogen
Mayor, Broward County

Revenue increased year over year in all major business sectors. Revenue generated from cruise operations increased 6.7 percent from \$55,874,688 in FY2017 to \$59,596,111 in FY2018. Petroleum revenue increased by 3.9 percent from \$34,733,092 in FY2017 to \$36,079,665 in FY2018. Containerized cargo generated \$35,182,449 in revenue during FY2018, which amounts to a 3 percent increase over FY2017's revenue of \$34,155,505. Bulk and break bulk cargoes grew 2.4 percent from \$8,095,393 in FY2017 to \$8,289,818 in FY2018.

As a self-supporting Enterprise Fund of Broward County, Florida government, the Port does not rely on local tax dollars for operations. All revenue is generated through user fees that are used for port operations and construction.

MESSAGE FROM THE COUNTY ADMINISTRATOR

From the bananas you eat to the clothing you wear and the gas that fuels your car, Port Everglades keeps the wheels of our economy rolling.

Economic activity at Port Everglades injects nearly \$34 billion into our local and state economy, and generates \$1.1 billion in state and local taxes, according to the most recent economic impact study performed by Martin Associates (conducted for Fiscal Year 2018). The same study notes that the 13,000-plus people who work directly for businesses that support the Port earn more than half-a-billion-dollars in direct wages and salaries. Those businesses in turn made \$654.6 million in local purchases.

Port Everglades is a Broward County asset that directly benefits the entire community and region through job creation and economic growth. So the next time you shop for groceries, gasoline or even plan to take a cruise vacation, remember that Port Everglades is your seaport and your powerhouse economic engine.



Bertha Henry
County Administrator





GLOBAL VISION

With more than \$1 billion worth of infrastructure improvements underway or scheduled over the next five years, the Port's bold moves to transform and modernize our operational environment is evident. Decisions we have made herald current and projected revolutionary changes in our markets. Port leadership in implementing dramatic infrastructure investments has energized our customers to position their companies to be cruise and cargo market leaders.

We have aggressively collaborated with Port customers on partnerships where private sector technology and innovation combine with public sector incentives to achieve mutual goals resulting in for instance; the planning, designing, building and operating state-of-the-art facilities for the safe and efficient offloading, storage and distribution of bulk petroleum products; and a Logistics Center designed to provide a modern, efficient, and secure environment for cargo activity including U.S. Customs and U.S. Department of Agriculture inspection services. The Center will also be the new home of the Foreign-Trade Zone (FTZ) No. 25 at Port Everglades, allowing FTZ tenants improved cash flow, avoidance of duties, and lower tariff rates.

In the following pages you will read about progress on the Southport Turning Notch Extension, Super Post-Panamax cranes on order, Cruise Terminal 25, and our Navigation Improvements Project. Our challenge during this period of progress is to support customers with minimal disruptions during construction. On the 10-year horizon we will invest an additional \$600 million on improvements across all business sectors. For the community, this bold growth translates to economic stability as more jobs and greater wages are created, and more tax dollars are generated.

So, please pardon our progress, as we implement our global vision to maintain Port Everglades' position as one of the most progressive and busiest cargo, cruise and petroleum ports in the USA, benefiting our customers and supporting the enviable quality of life we all enjoy in Broward County.

A stylized, handwritten signature in blue ink, reading "Glenn Wiltshire".

Glenn Wiltshire, Port Everglades
Acting Chief Executive & Port Director





IN MEMORY OF STEVEN M. CERNAK

Steven M. Cernak was a loving husband, father, and grandfather and a devoted friend. Through more than three decades of public service, Steve dedicated his career to improving and promoting progress across communities in Florida, Texas, New York, and New Jersey.

Steve served as the Chief Executive of Port Everglades starting in 2012, and many important historic milestones were reached under his leadership. He grew the Port's operating revenue by 17.5 percent and oversaw the construction of new cruise facilities and the start of the largest capital

improvement project in the Port's history. Steve received accolades from leadership at all levels of government and throughout the maritime industry. In February 2019, the American Association of Port Authorities (AAPA) recognized Steve as the recipient of its 2019 Cruise Award and he was named as one of the *South Florida Business Journal's* 250 Power Leaders. Steve was the immediate past Chairman of the AAPA and immediate past Chairman of the Florida Ports Council.

Prior to his role in Broward County, Steve was the CEO and Chief Engineer at the Port of Galveston, TX. During his tenure in Galveston, revenues doubled, and it became the top cruise home port in the Gulf of Mexico. His proactive response to the catastrophic damage at the Port from Hurricane Ike in 2008 allowed cargo operations to resume in just eight days and cruise operations to resume in 50 days.

Steve started his career as an engineer at the Port Authority of New York and New Jersey. Throughout his accomplished career, Steve's ethos was to treat people with empathy and respect. It was this lesson he most frequently imparted, knowing that with a foundation of kindness, even the most difficult obstacles could be overcome.

Steve was quick to say that his greatest accomplishment was the family he built together with his devoted wife of more than 40 years, Cindy. He was the proud father of two children, Steven and Kimberly.

There was no greater love in Steve's life than his grandchildren, Diego and Mateo. He was quick to share pictures of the boys with anyone who crossed his path, even if they didn't ask. Diego, shared with Poppy a love for ice cream, building blocks and laying train tracks, activities they shared together at every opportunity. And, his heart expanded exponentially when he learned he would welcome a third grandchild later this year. His last words and smile were reserved for that baby, for whom he said, "I love you."

PORT EVERGLADES INVESTS IN THE FUTURE



Port Everglades has experienced significant growth in the past two decades, becoming one of Florida's leading economic powerhouses and a gateway for international trade and cruise vacations.

For the last five years, Port Everglades has exceeded one million TEUs (20-foot equivalent units, the industry's standard container measurement) in containerized cargo. Petroleum throughput is also increasing as Florida's population continues to swell – surpassing New York in 2014 as the third most populated state in the nation.

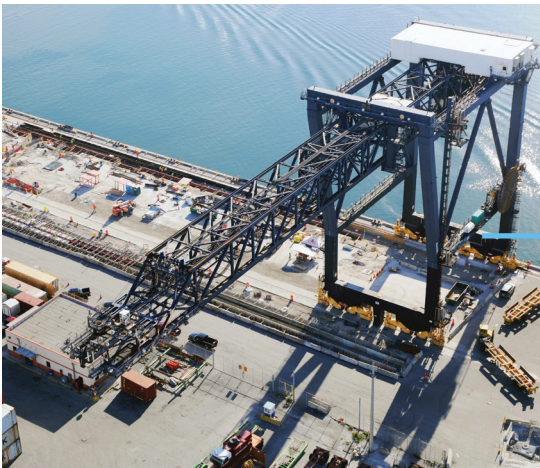
To help meet those future demands, Port Everglades is updating its comprehensive Master/Vision Plan,

which is revised on a regular basis so that its five-year Master Plan, and 10 and 20-year Vision Plan horizons stay current with industry trends and technology advances. This commitment to planning - both physical and financial - has made Port Everglades one of the top containerized cargo ports in the United States, one of the top three cruise ports in the world and the primary distribution fuel hub of South Florida.

Ongoing capital improvements and expansion ensure that Port Everglades is ready to handle future growth in container, cruise and petroleum traffic. Over the next 10 years, Port Everglades will spend more than \$1.5 billion on infrastructure improvements.

The State of Florida Department of Transportation has awarded Port Everglades more than \$38.4 million in grants to support capital improvements including new Super Post-Panamax gantry cranes, deepening and widening the navigation channels, and widening Slip 1 for petroleum vessels.

New cargo berths and Super Post-Panamax gantry cranes are in store for the Port Everglades Southport Container Complex. The \$471 million expansion, the largest infrastructure project in the Port's history, will provide up to five new cargo berths by lengthening the existing Southport Turning Notch (deep-water turn-around area) for cargo ships from 900 feet to 2,400 feet. The project began in FY2018 and is expected to be completed and operational by 2023.



Part of this expansion project includes installing crane rail infrastructure for new Super Post-Panamax gantry cranes. In FY2018, the Port issued a notice to proceed for manufacturing the first three low profile Super Post-Panamax gantry cranes at Shanghai Zhenhua Heavy Industries Co., Ltd. Inc. (ZPMC) in China. The cranes are scheduled for delivery in early 2020 at a cost of \$13.8 million each. The overall project also includes planned upgrades to the existing gantry cranes, as well as an option to purchase three additional ZPMC cranes.

To further enhance ship traffic at Port Everglades, the U.S. Army Corps of Engineers is moving forward with a progressive plan to deepen the Port's navigation channels from 42 feet to 48-50 feet and widen narrower sections of the channel for safe vessel passage. The project is currently in the preconstruction engineering and design phase, having received Congressional authorization in December 2016.

PORT EVERGLADES

INVESTS IN THE FUTURE

Deeper channels are needed to safely accommodate increasingly larger cargo ships, especially those already coming from Europe and South America that must be lightly loaded due to the existing water depth. The Port Everglades Navigation Improvements Project addresses environmental concerns and will utilize innovative approaches to coral restoration and protection. Construction will take place in multiple phases and is expected to be completed in 2025, at an estimated cost to date is \$437.8 million.

Port Everglades is the primary seaport for receiving petroleum products for 12 counties in South Florida, including jet fuel for four international airports. To increase petroleum receiving capacity, the Port, in conjunction with the petroleum industry, is redeveloping Pier 1 through the widening of Slip 1 by approximately 150 feet and installing new offloading facilities. Construction has begun on a new manifold system that will be built by the Port's petroleum partner, Vecenergy. This is the first step of a multi-phase effort. The project is anticipated to be completed by 2026.

In a public-private partnership, Port Everglades and CenterPoint Properties broke ground in June 2019 on the nearly 300,000-square-foot Port Everglades International Logistics Center (ILC). The ILC, which began land clearing in FY2018, is designed to provide a modern, efficient, and secure environment for cargo activity. Located in the Southport cargo area, the ILC will contain warehousing, refrigerated warehouse, office space, and cross-docking facilities, which will enhance the services available to shippers using Port Everglades. When completed in Spring 2020, the ILC will also be the new home for Foreign-Trade Zone No. 25.

Port Everglades expects that multi-million-dollar investments in cruise terminal and transportation facilities will generate returns that benefit passengers and all Port users. Some improvements will be visible as soon as guests arrive at the Port's entrance.





The Port is taking an innovative approach to help guide drivers to their destination. A new wayfinding signage system that combines functionality with art will use multiple colors and images of herons, fish and palms to create an intuitive and colorful visual map for port visitors to find cruise terminals and parking garages. The new signage will be installed in 2020.

To make parking a breeze for cruisers using Cruise Terminals 2 and 4, a new 1,888-space parking garage is currently being built on the west side of Terminal 4. Cruisers will have direct access from the parking garage to Cruise Terminal 2 without being exposed to the elements through an elevated passageway.

The 2019-2020 cruise season will kick off with the arrival of the *Sky Princess*, the newest ship in Princess Cruises' Royal Class fleet. This innovative ship will call Cruise Terminal 2 home, which is the prototype terminal for Carnival Corporation's Ocean Medallion Service — wearable-technology that enables passengers to seamlessly connect to enhanced services before and after they cruise.



In a public-private partnership, Carnival Corporation made a multi-million-dollar investment in technology and aesthetics to transform Cruise Terminal 2 into the first facility in the world specially equipped for its Ocean Medallion.

Port officials worked with Royal Caribbean Cruises Ltd. and Celebrity Cruise Line to completely remodel and expand Cruise Terminal 25. The project required demolishing two smaller terminals to expand the total square footage by 83 percent to 157,800 square feet. With a cost of approximately \$120 million, the new facility is the largest financial investment Port Everglades has made in a cruise terminal. (See more on page 12)

Stay current with our expansion projects and investments at porteverglades.net.

CONTAINERIZED, BULK AND BREAK BULK CARGOS

MILESTONES

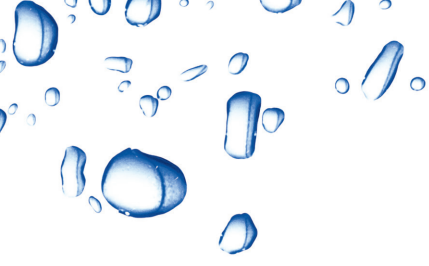


Port Everglades reached a record high in containerized cargo in Fiscal Year 2018, with 1,108,465 TEUs (20-foot equivalent units, the industry's standard container measurement) moving through the Port. This was a 3 percent year-over-year increase and the fifth consecutive year that the Florida seaport exceeded one-million TEUs. Port officials attribute the growth to Florida's increasing consumer population and shipping activity from Northern Europe.

Horizon Terminal Services, LLC is driving more automotive business to Port Everglades with a new long-term lease on 8.67 acres in Midport where the company plans to invest \$630,000 for an auto processing facility that would create a minimum of 25 local direct jobs. Since Horizon's lease began in January 2018, nearly 30,000 new vehicles have been shipped through Port Everglades.

Produce importer Sol Shipping Services is growing its business at Port Everglades with approval of a five-year lease on a 7-acre site. Sol's operations, primarily shipping melons from Central America to South Florida, are estimated to support 246 direct, induced and indirect jobs in the Broward County area, with a total annual wage and salary income impact of more than \$16.3 million. In addition to the value of the cargo, local businesses will receive more than \$22.5 million in sales revenue from providing services for the ocean cargo activity. Sol's cargo activity, guaranteeing at least 16,000 container moves annually, is also expected to generate nearly \$1.7 million in state and local tax revenue.

Port Everglades received the first shipment of Colombian Hass avocados into the United States. The shipment marks the culmination of years of work by Colombia to gain access to the lucrative U.S. market.



Southport Phase IXb was completed June 29, 2018, adding approximately 18 acres of new container yard on the west side of McIntosh Road. King Ocean relocated its Southport terminal to this site, which was necessary to move forward on the Southport Turning Notch Extension.



Port Everglades negotiated modified leases with Southport terminal operators Florida International Terminal (FIT), Crowley Liner Services, Inc (Crowley), and King Ocean to support their operations during the Southport Turing Notch Extension construction. These leases, approved by the Broward County Commission on October 12, 2018, allows the three terminal operators to temporarily or permanently modify their footprints in order to sustain and potentially grow operations during the construction period.

Port Everglades negotiated a one-year lease with A.G. Royce Metal Marketing, LLC, d/b/a Concrete Reinforcing Products (CRP) for 3.94 acres of land in Southport.

Saving time and money, U.S. Customs and Border Protection (CBP) in Port Everglades implemented a new process to allow shippers to submit original vehicle export documentation electronically in lieu of delivering physical copies to the local CBP trade office. The electronic validation program, which is the first of its kind anywhere in the country, is offered in Port Everglades to exporters needing to ship used vehicles from South Florida to destinations throughout the Caribbean, Central America and beyond. Long-time Port Everglades cargo shipping customers, Crowley Maritime Corp., AFL International Logistics Group and King Ocean were critical players in developing this new process, which has been extended to all ocean carriers serviced by Port Everglades.

NYK Line's Magellan Straits Express began service to Port Everglades and is the only direct Ro/Ro service in South Florida to South America, Central America and Mexico.

CRUISE MILESTONES



Port Everglades, in partnership with Royal Caribbean Cruises, LTD., completed the \$120 million-plus renovation of Cruise Terminal 25 in November 2018 to welcome Celebrity Cruises newest and most futuristic cruise ship *Celebrity Edge*. The project also included a roadway redesign to significantly improve traffic circulation in Midport. A naming ceremony for the *Celebrity Edge* was held in early December. The ship's Godmother was Malala Yousafzai, Pakistani activist for female education, and the youngest Nobel Prize laureate.





Two new Mobile Elevating Gangways (MEGs) were installed at Cruise Terminal 18 to replace the MEGs first installed in 2009. They were placed in service and used for the debark/embark of cruise passengers of *Harmony of the Seas* and *Allure of the Seas* on July 14 and 15, 2018.



Public Art was installed in five cruise terminals (2, 21, 26, 25, 29) and the Midport Garage. New art installations are in progress for Eller Drive and Spangler Blvd. entry canopies and checkpoint booths, roadway medians and roundabouts. A vibrant mural on the Harbormaster Tower can be viewed from land and on the water, Cruise Terminal 25 VIP area, and the Midport Garage.



PORT EVERGLADES MILESTONES



Port Everglades staff and consultant Bermello Ajamil & Partners (B&A) kicked off a series of stakeholder, environmental and public outreach meetings to commence the third update to the Port Everglades 20-Year Master/Vision Plan. B&A has completed the first two of five elements of the Plan – Existing Conditions and Market Assessments.



The Port and Broward County's Environmental Planning & Community Resilience Division co-sponsored the purchase and installation of a real-time device developed by National Oceanic and Atmospheric Administration (NOAA) to measure water levels and other meteorological information at the Port. The Port Everglades Physical Oceanographic Real-Time System (PORTS®) device provides valuable data for daily Port operations and for long-term storm and climate change preparedness.



In conjunction with the U.S. Environmental Protection Agency (EPA), Port Everglades released a first-of-its-kind report titled "EPA and Port Everglades Partnership: Emission Inventories and Reduction Strategies." The report describes how EPA and the Port developed baseline emission inventories for nitrogen oxides and particulate matter, and other harmful pollutants that result from typical port operations. The EPA report evaluates the potential emissions reduction benefits of deploying cleaner technologies and more efficient operational strategies.

Port Everglades won an award from the National Association of Counties (NACo) for its Upland Wetlands Habitat project.



During Fleet Week 2018 — April 29 through May 6 — Port Everglades welcomed the *USS Detroit*, *USS Kearsarge* and the *USCGC Confidence*.

Broward County and Integration Point, Inc., entered into an agreement to implement a Foreign-Trade Zone (FTZ) software solution as approved by the Broward County Commission on June 5, 2018. Coordination meetings with all FTZ users have begun, and implementation is expected to be completed in January of 2020.

Port Everglades secured more than \$2.25 million in U.S. port security grants to advance firefighting capabilities and enhance the seaport's security infrastructure. The FY 2018 Port Security Grant Program awards were announced by the U.S. Department of Homeland Security's Federal Emergency Management Agency. The program was funded at \$100 million, and more than 36 ports received direct grants.

Port Everglades was the host site for an industry-led oil spill emergency response full-scale exercise with Seacor Holdings Inc. and the U.S. Coast Guard on July 24 and 25, 2018. The exercise involved multiple Federal, State and local agencies and private organizations responding to a scenario simulating a major cargo spill from an oil tanker in Port Everglades.

The 820-foot-long *Aretea* called Port Everglades in 2018, delivering nearly 600,000 barrels of jet fuel to



supply South Florida's four international airports. At 114,000 dwt, the *Aretea* is one of the largest petroleum tankers to dock at the Port. The Port recently began construction on a capital project to widen Slip 1, the primary slip used for receiving refined petroleum products, by 175 feet to improve operations and accommodate even larger vessels than the *Aretea*.

A Memorandum of Understanding was signed between Port Everglades and Flagler Global Logistics for development of an intermodal logistics center at CCP Central in northern Miami-Dade County.

Florida has made a substantial investment in its ports and strategic intermodal system. Facilities such as the one being developed at CCP Central will help to leverage this investment. Port Everglades will benefit from the new inland logistics/distribution center through the services offered, including fumigation, cold chain logistics of perishables and handling of apparel and high-value electronics. Through this MOU with Flagler Global Logistics, Port Everglades will be able to expand its logistics capabilities and further its position as a global gateway.

Port Everglades entered into a Memorandum of Understanding (MOU) with the Port of Limón, Costa Rica, as part of its International Sister Seaport Program. Costa Rica is the Port's eighth largest trading partner by volume.

Port Everglades Waterborne Commerce Chart for the Ten Fiscal Years 2018 through 2009 (Audited)

FISCAL YEAR	2018	2017	2016	2015
Operating Revenue¹	\$ 167,996,115	\$ 161,733,028	\$ 162,596,496	\$ 153,450,795
Expenses	\$ 103,969,738	\$ 88,738,213	\$ 83,269,230	\$ 79,844,421
Gross Margin	\$ 64,026,377	\$ 72,994,815	\$ 79,327,266	\$ 73,606,374
TOTAL WATERBORNE OPERATING REVENUE	\$ 140,916,169	\$ 134,172,097	\$ 135,185,504	\$ 127,584,116
Cruise Revenue	\$ 59,596,111	\$ 55,874,688	\$ 55,322,611	\$ 52,314,661
Containerized Cargo Revenue	\$ 35,182,449	\$ 34,155,505	\$ 36,703,322	\$ 34,846,800
Petroleum Revenue	\$ 36,079,665	\$ 34,733,092	\$ 34,868,376	\$ 32,749,162
Bulk Revenue	\$ 3,617,433	\$ 2,950,864	\$ 3,418,513	\$ 2,827,139
Break Bulk Revenue	\$ 4,672,385	\$ 5,144,529	\$ 3,804,004	\$ 3,671,874
Lay-In Revenue ²	\$ 1,768,126	\$ 1,313,419	\$ 1,068,678	\$ 1,174,480
Navy Revenue ²	\$ -	\$ -	\$ -	\$ -
TOTAL SHIP CALLS	4,214	4,029	3,959	3,768
Cruise Ships	858	846	876	889
Container Ships	2,120	1,987	1,887	1,680
Cargo Ships	270	243	222	218
Petroleum Tankers/Barges	572	594	593	581
Navy/USCG ²	-	-	-	-
Other (Bunkers/Tugs/Lay-In) ²	394	359	381	400
TOTAL CRUISE PASSENGERS	3,870,342	3,863,662	3,826,415	3,773,386
Single Day	128,934	125,410	145,866	151,157
Multi-Day	3,741,408	3,738,252	3,680,549	3,622,229
TOTAL CONTAINERIZED CARGO (tons)^{3, 4}	7,365,755	7,226,433	6,692,690	6,693,446
TEUs Loaded	830,082	792,995	739,326	749,876
TEUs Total	1,108,465	1,076,912	1,037,226	1,060,507
TOTAL PETROLEUM (tons)^{3, 6}	16,704,803	16,492,838	16,223,101	15,743,265
Barrels	118,124,294	116,750,337	114,750,795	111,308,509
TOTAL BULK (tons)³	1,337,159	1,220,147	1,428,763	1,234,305
Bulk Cement	665,164	665,307	715,752	702,600
Dry Bulk	681,994	546,325	699,712	517,137
Liquid Bulk (Non-petroleum)	8,515	8,515	13,299	14,568
TOTAL BREAK BULK (tons)^{3, 4, 5}	327,139	362,353	336,777	330,647
Steel/Coils/Rebar	177,384	262,464	246,875	236,722
Other Break Bulk	149,755	99,889	89,902	93,925
TOTAL VEHICLES & YACHTS (tons)^{3, 4, 5}	140,806	107,841	95,856	108,826
Trucks/Trailers	18,405	19,490	19,932	26,131
Tractors	5,503	7,717	15,648	27,232
Yachts/Boats	69,774	63,276	52,972	49,514
Autos	46,966	17,198	7,238	5,872
Buses	158	160	66	77
TOTAL WATERBORNE COMMERCE (tons)³	25,734,855	25,301,771	24,681,331	24,001,663

¹FY 2013 through 2018 Operating Revenue is adjusted to exclude Property Damage Recoveries, considered Non-Operating Revenue.

²FY 2014 through 2018 Navy revenue and vessel calls are included in Lay-in Revenue and Other vessel calls respectively.

³Tonnage is measured in 2,000-pound short tons.

⁴Vehicles & Yachts tonnage is presented in detail in its own section for informational purposes, but this tonnage is accounted for in other areas above.

⁵Break Bulk tons include 25,237 equivalent units or 37,908 tons of vehicles & yachts and 3,738 equivalent units or 6,866 tons of other break bulk cargo.

⁶Petroleum does not include truck and rail volumes. FY 2018 Total Petroleum volume including Truck & Rail is 17,433,963 tons; 123,404,236 barrels.

2014	2013	2012	2011	2010	2009
\$ 153,193,953	\$ 146,824,451	\$ 142,931,312	\$ 139,177,090	\$ 124,653,452	\$ 114,441,818
\$ 79,416,801	\$ 74,937,974	\$ 72,146,510	\$ 73,405,360	\$ 73,950,966	\$ 73,235,677
\$ 73,777,152	\$ 71,886,477	\$ 70,784,802	\$ 65,771,730	\$ 50,702,486	\$ 41,206,141
\$ 128,432,403	\$ 125,866,644	\$ 122,018,332	\$ 118,021,876	\$ 103,312,041	\$ 92,665,832
\$ 59,422,144	\$ 62,152,647	\$ 60,159,964	\$ 56,754,102	\$ 45,724,190	\$ 37,428,549
\$ 33,019,453	\$ 31,670,506	\$ 31,321,019	\$ 31,669,031	\$ 29,473,963	\$ 28,711,223
\$ 29,363,512	\$ 27,530,193	\$ 25,656,369	\$ 25,771,885	\$ 25,486,535	\$ 23,537,174
\$ 2,814,888	\$ 1,701,037	\$ 2,003,023	\$ 1,378,516	\$ 925,567	\$ 1,090,407
\$ 2,766,579	\$ 2,130,060	\$ 1,552,505	\$ 1,283,503	\$ 872,967	\$ 886,826
\$ 1,045,827	\$ 569,175	\$ 1,078,394	\$ 806,288	\$ 467,858	\$ 736,089
\$ -	\$ 113,026	\$ 247,058	\$ 358,551	\$ 360,961	\$ 275,564
3,970	3,850	4,000	4,183	4,079	4,251
877	772	838	969	1,015	1,007
1,860	1,872	1,867	1,861	1,830	1,980
191	188	194	180	113	105
564	591	618	630	661	683
-	14	16	26	29	34
478	413	467	517	431	442
4,001,354	3,600,636	3,757,320	3,952,843	3,674,226	3,139,820
121,321	90,909	68,298	288,740	360,018	302,866
3,880,033	3,509,727	3,689,022	3,664,103	3,314,208	2,836,954
6,529,771	6,045,588	5,944,513	5,787,961	5,216,831	5,204,103
735,572	663,410	655,046	621,632	552,781	551,862
1,013,344	927,572	923,600	880,999	793,227	796,160
15,176,595	15,330,225	14,830,384	15,325,199	15,483,856	15,337,063
107,204,234	108,377,053	104,819,812	108,262,845	109,380,437	108,356,216
1,300,532	884,908	973,191	531,572	511,467	566,820
633,530	534,469	613,051	375,050	264,211	306,727
651,566	337,239	346,976	141,189	234,068	246,988
15,436	13,200	13,164	15,333	13,188	13,105
266,420	191,752	120,812	94,921	69,960	67,462
190,173	116,448	53,055	27,180	15,192	15,523
76,247	75,304	67,757	67,741	54,768	51,939
106,505	134,506	166,237	180,986	181,169	172,361
28,662	30,416	28,222	28,112	34,105	40,903
33,019	50,247	76,163	83,337	79,210	65,255
40,200	43,744	55,198	60,812	54,396	53,871
4,180	5,310	4,307	7,253	12,972	11,314
444	4,789	2,347	1,472	485	1,018
23,273,318	22,452,473	22,116,275	22,087,515	21,640,144	21,503,720

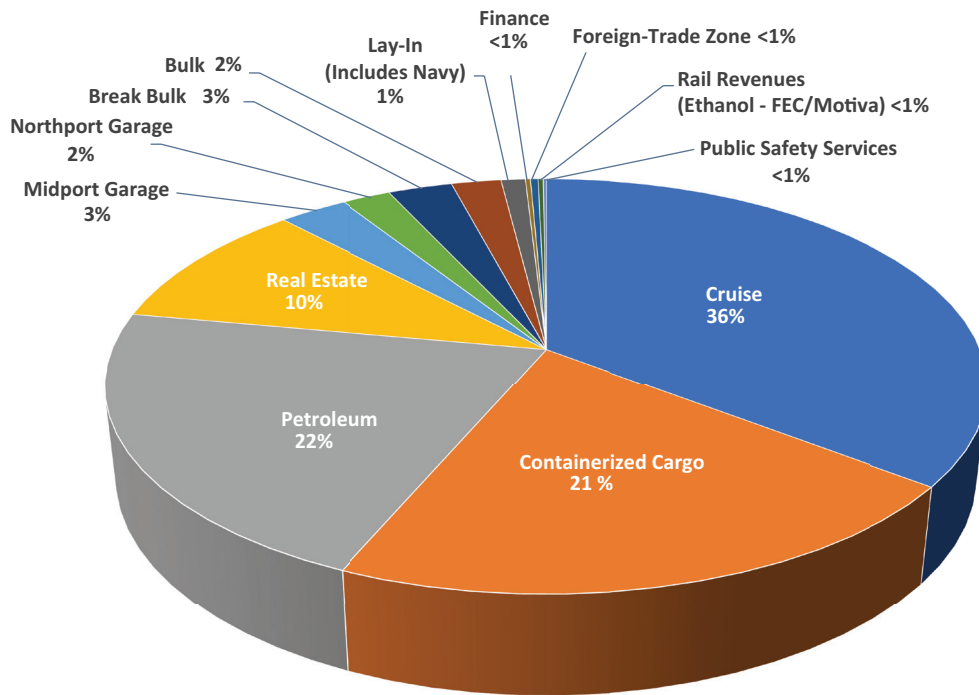
Local and Regional Economic Impacts Generated by Port Everglades

Port Everglades is an economic powerhouse for Broward County and the state of Florida. The cruise, cargo and petroleum industries provide jobs and inject money into our community, region and state. According to a study produced by nationally recognized maritime research company Martin Associates, Port Everglades generates more than \$34 billion in business activity and supports 231,579 jobs.

FY2018			
CATEGORY	CARGO	CRUISE	TOTAL
JOBS			
Direct	7,306	5,821	13,127
Induced	5,592	3,032	8,624
Indirect	5,607	4,053	9,660
Related User Jobs	200,168	NA	200,168
TOTAL JOBS	218,673	12,906	231,579
PERSONAL INCOME (1,000)			
Direct	\$358,249	\$172,847	\$531,097
Induced	\$711,627	\$296,634	\$1,008,260
Indirect	\$267,141	\$128,995	\$396,137
Related User Jobs	\$7,668,872	NA	\$7,668,872
TOTAL PERSONAL INCOME	\$9,005,890	\$598,476	\$9,604,366
VALUE OF ECONOMIC ACTIVITY (1,000)			
Business Services Revenue	\$1,830,680	\$1,973,891	\$3,804,571
Related User Output	\$30,140,158	NA	\$30,120,158
TOTAL VALUE OF ECONOMIC ACTIVITY	\$32,970,838	\$1,973,891	\$33,944,729
LOCAL PURCHASES (1,000)			
	\$564,097	\$180,339	\$744,436
STATE & LOCAL TAXES (1,000)			
Direct, Induced & Indirect	\$135,408	\$67,169	\$202,577
Related User Taxes	\$992,712	NA	\$992,721
TOTAL STATE & LOCAL TAXES	\$1,128,120	\$67,169	\$1,195,289

Source: Martin Associates

Port Revenue Center Contributions FY2018



Source: Port Everglades

Operating Revenue FY2018	Revenue	% of Total Revenue
Cruise	\$ 59,596,111	35.5%
Containerized Cargo	\$ 35,182,449	20.9%
Petroleum	\$ 36,079,665	21.5%
Real Estate	\$ 16,946,173	10.1%
Midport Garage	\$ 5,030,649	3.0%
Northport Garage	\$ 3,572,040	2.1%
Break Bulk	\$ 4,672,385	2.8%
Bulk	\$ 3,617,433	2.2%
Lay-in (Includes Navy)	\$ 1,768,126	1.1%
Finance	\$ 367,299	0.2%
Foreign-Trade Zone	\$ 554,934	0.3%
Rail Revenues (Ethanol - FEC/Motiva)	\$ 372,297	0.2%
Public Safety Services	\$ 236,556	0.1%
Total	\$167,996,117	100.0%

Source: Port Everglades

Top Trading Partners for Containerized Cargo

Total TEUs

	Trade Partner	TEUs	Short Tons	\$ Value
1	Guatemala	101,825	793,984	\$ 2,537,513,684
2	Honduras	101,779	781,515	\$ 5,154,091,406
3	Dominican Republic	70,923	548,970	\$ 3,653,987,371
4	Brazil	45,740	554,953	\$ 1,526,381,800
5	Colombia	42,959	412,721	\$ 1,202,171,404
6	Bahamas	38,456	397,642	\$ 940,360,333
7	Panama	37,376	356,361	\$ 1,063,336,371
8	Costa Rica	37,370	283,387	\$ 930,107,305
9	Netherlands Antilles	27,042	299,253	\$ 883,825,861
10	Virgin Islands	26,900	218,216	\$ 1,074,811,047

Source: PIERs, Loaded TEUs

Export TEUs

	Trade Partner	TEUs	Short Tons	\$ Value
1	Guatemala	46,896	276,918	\$ 1,470,014,065
2	Honduras	44,364	300,165	\$ 2,473,729,994
3	Dominican Republic	42,180	342,926	\$ 1,993,690,905
4	Bahamas	27,162	197,841	\$ 661,314,338
5	Panama	26,198	213,809	\$ 826,382,710
6	Netherlands Antilles	26,182	236,986	\$ 807,634,200
7	Virgin Islands	23,195	161,108	\$ 702,098,074
8	Costa Rica	21,072	120,062	\$ 648,805,806
9	Colombia	15,377	120,022	\$ 516,266,314
10	Brazil	15,351	99,482	\$ 1,014,282,742

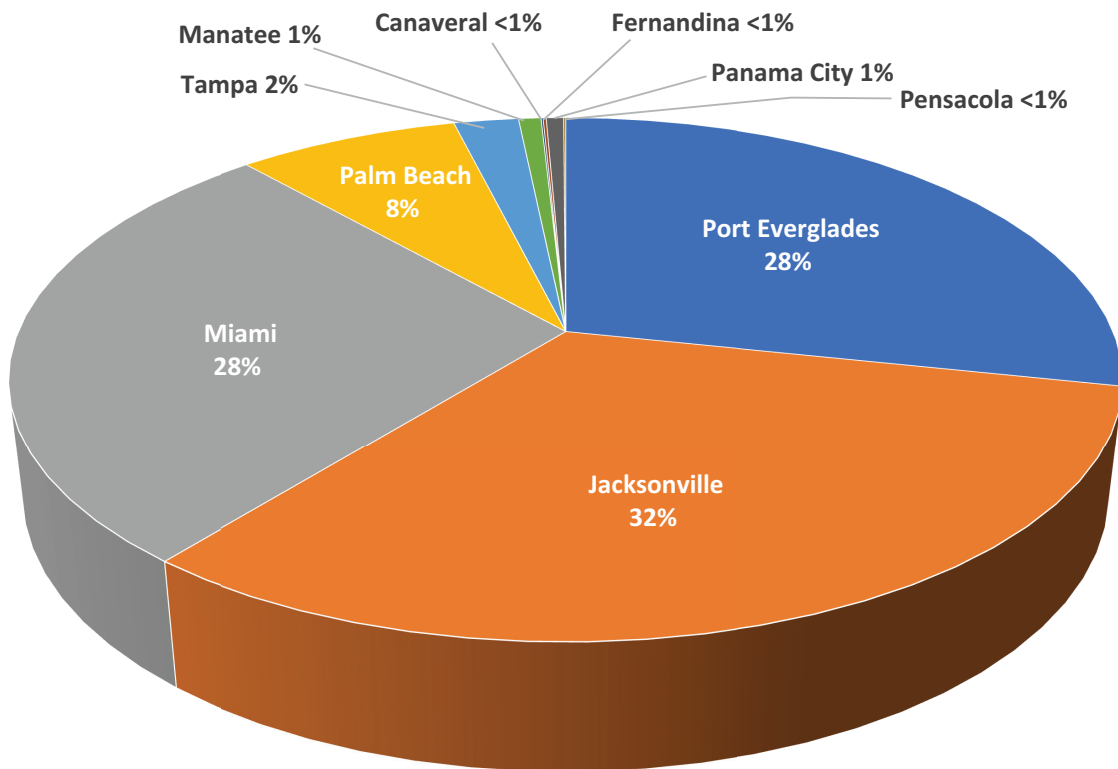
Source: PIERs, Loaded TEUs

Import TEUs

	Trade Partner	TEUs	Short Tons	\$ Value
1	Honduras	57,415	481,350	\$ 2,680,361,412
2	Guatemala	54,929	517,067	\$ 1,067,499,619
3	Brazil	30,389	455,471	\$ 512,099,058
4	Dominican Republic	28,742	206,043	\$ 1,660,296,466
5	Colombia	27,582	292,699	\$ 685,905,090
6	Italy	21,743	264,121	\$ 390,004,192
7	Spain	18,100	296,035	\$ 484,156,309
8	Costa Rica	16,298	163,325	\$ 281,301,499
9	Germany	12,356	107,353	\$ 370,983,881
10	Belgium	11,554	114,907	\$ 265,798,209

Source: PIERs, Loaded TEUs

Containerized Cargo TEU Activity by Florida Ports



Source: PIERs

Florida Port Rankings by TEUs - FY2018

Port	TEUs	Market Share
Jacksonville	1,270,479	32.5%
Port Everglades	1,108,465	28.3%
Miami	1,083,949	27.7%
Palm Beach	299,466	7.7%
Tampa	87,526	2.2%
Manatee	30,419	0.8%
Canaveral	2,770	0.1%
Fernandina	4,161	0.1%
Panama City	23,565	0.6%
Pensacola	2,846	0.1%
Total Ports	3,913,645	100.0%

Containerized Cargo Performance in Key Markets in TEUs

Tradelane	Port Everglades	Palm Beach	Jacksonville	Miami	Charleston	Savannah	Grand Total
Caribbean	252,960	155,233	34,022	163,979	8,079	38,242	652,515
Central America	301,740	5	11,902	200,128	32,742	87,572	634,090
East Coast South America	63,693	1,308	55,182	1,291	61,620	42,100	225,194
Indian Sub-Continent	1,141		2,631	6,525	104,286	211,352	325,935
Mediterranean	47,779	14	794	71,996	90,686	318,901	530,169
Middle East	2,876		2,039	8,682	30,242	170,513	214,352
Northeast Asia	201	-	187,898	192,721	569,553	1,643,885	2,594,258
Northern Europe	44,451	34	5,742	40,774	525,640	360,163	976,805
Others	2,914	10,110	536,328	3,592	75,921	67,894	696,760
Southeast Asia	211		59,171	54,672	180,227	379,917	674,198
West Coast South America	89,651		1,478	50,437	78,648	44,318	264,532
Grand Total	807,616	166,704	897,189	794,797	1,757,645	3,364,856	7,788,808

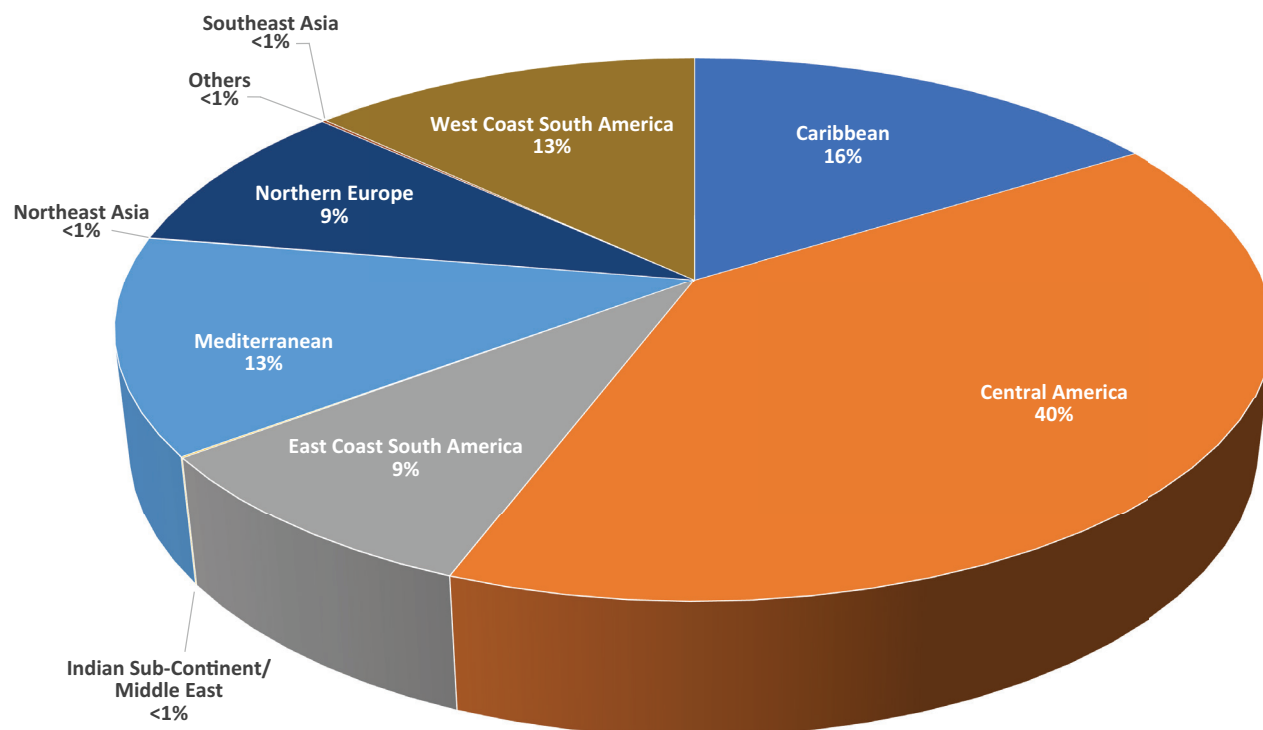
Source: PIERs, Loaded TEUs

Containerized Cargo Performance in Key Markets in Short Tons

Tradelane	Port Everglades	Palm Beach	Jacksonville	Miami	Charleston	Savannah	Grand Total
Caribbean	2,387,353	1,403,942	379,347	1,614,991	93,262	429,448	6,308,343
Central America	2,427,745	27	115,426	1,652,290	378,551	906,586	5,480,626
East Coast South America	678,315	8,998	537,227	10,691	682,809	546,963	2,465,002
Indian Sub-Continent	26,745		33,669	106,436	1,126,235	2,081,871	3,374,956
Mediterranean	681,997	83	10,181	927,154	990,498	3,522,961	6,132,873
Middle East	29,294		16,306	72,057	299,084	1,506,818	1,923,558
Northeast Asia	1,797	6	1,535,324	1,773,212	5,479,392	15,003,600	23,793,330
Northern Europe	402,832	318	81,904	397,446	4,290,790	3,412,223	8,585,513
Others	18,493	116,573	3,843,200	26,592	758,725	809,991	5,573,573
Southeast Asia	4,576		462,628	611,819	1,679,819	3,788,742	6,547,583
West Coast South America	851,356		15,267	478,686	882,621	549,226	2,777,155
Grand Total	7,510,501	1,529,947	7,030,479	7,671,373	16,661,785	32,558,429	72,962,514

Source: PIERs, Loaded Tons

Top Tradelanes by Total Loaded TEUs



Source: PIERs

Total Loaded TEUs

Tradelane	Loaded TEUs	Market Share
Caribbean	58,423	16.1%
Central America	143,455	39.6%
East Coast South America	32,294	8.9%
Indian Sub-Continent/Middle East	239	0.1%
Mediterranean	46,588	12.9%
Northeast Asia	157	0.0%
Northern Europe	33,196	9.2%
Others	461	0.1%
Southeast Asia	22	0.0%
West Coast South America	47,145	13.0%
Total	361,980	100.0%

Source: PIERs

Total Export Loaded TEUs

Tradelane	Loaded TEUs	Market Share
Caribbean	252,960	31.3%
Central America	301,740	37.4%
East Coast South America	63,693	7.9%
Indian Sub-Continent/Middle East	4,017	0.5%
Mediterranean	47,779	5.9%
Northeast Asia	201	0.0%
Northern Europe	44,451	5.5%
Others	2,914	0.4%
Southeast Asia	211	0.0%
West Coast South America	89,651	11.1%
Total	807,616	100.0%

Source: PIERs

Total Import Loaded TEUs

Tradelane	Loaded TEUs	Market Share
Caribbean	194,537	43.7%
Central America	158,285	35.5%
East Coast South America	31,398	7.0%
Indian Sub-Continent/Middle East	3,778	0.8%
Mediterranean	1,190	0.3%
Northeast Asia	44	0.0%
Northern Europe	11,255	2.5%
Others	2,453	0.6%
Southeast Asia	189	0.0%
West Coast South America	42,506	9.5%
Total	445,636	100.0%

Source: PIERs

Top Containerized Commodities

Total TEUs

	Commodity	TEUs	Short Tons	\$ Value
1	Apparel	64,398	440,320	\$ 6,849,171,220
2	Machinery	60,883	686,642	\$ 3,615,509,612
3	Other Food Products	55,620	510,075	\$ 1,054,226,918
4	Motor Vehicles	44,253	132,826	\$ 837,633,406
5	Beverages	38,502	487,241	\$ 456,070,340
6	Steel Products	28,024	301,043	\$ 664,872,665
7	Paper	25,238	258,463	\$ 345,760,428
8	Vehicle Parts	22,160	142,711	\$ 438,042,687
9	Lumber	22,125	263,404	\$ 229,428,872
10	Textiles	20,440	179,890	\$ 1,081,381,634

Source: PIERS

Export TEUs

	Commodity	TEUs	Short Tons	\$ Value
1	Other Food Products	47,084	438,397	\$ 932,519,157
2	Machinery	46,709	278,246	\$ 2,379,802,918
3	Motor Vehicles	42,662	127,415	\$ 813,965,911
4	Apparel	23,887	201,783	\$ 2,599,794,376
5	Steel Products	21,949	229,114	\$ 554,166,026
6	Vehicle Parts	19,360	126,810	\$ 347,987,951
7	Textiles	16,697	146,514	\$ 941,751,863
8	Paper	15,201	137,887	\$ 190,027,763
9	Furniture	11,780	60,190	\$ 219,606,700
10	Industrial Chemicals	11,650	104,443	\$ 239,016,713

Source: PIERS

Import TEUs

	Commodity	TEUs	Short Tons	\$ Value
1	Apparel	40,512	238,538	\$ 4,249,376,844
2	Beverages	29,455	384,912	\$ 358,493,873
3	Lumber	15,996	190,110	\$ 170,507,109
4	Machinery	14,174	408,396	\$ 1,235,706,694
5	Glass/Ceramic	12,969	258,389	\$ 170,732,860
6	Aluminum & Non Ferrous	12,476	106,746	\$ 572,750,515
7	Aggregates	12,069	299,187	\$ 121,490,728
8	Panel Products	10,533	155,157	\$ 119,594,628
9	Paper	10,037	120,576	\$ 155,732,665
10	Other Manufactured Plastic Products	9,221	71,278	\$ 228,908,506

Source: PIERS

Perishables by Port

Top 10 U.S. Refrigerated Ports FY2018 – TEU Moves

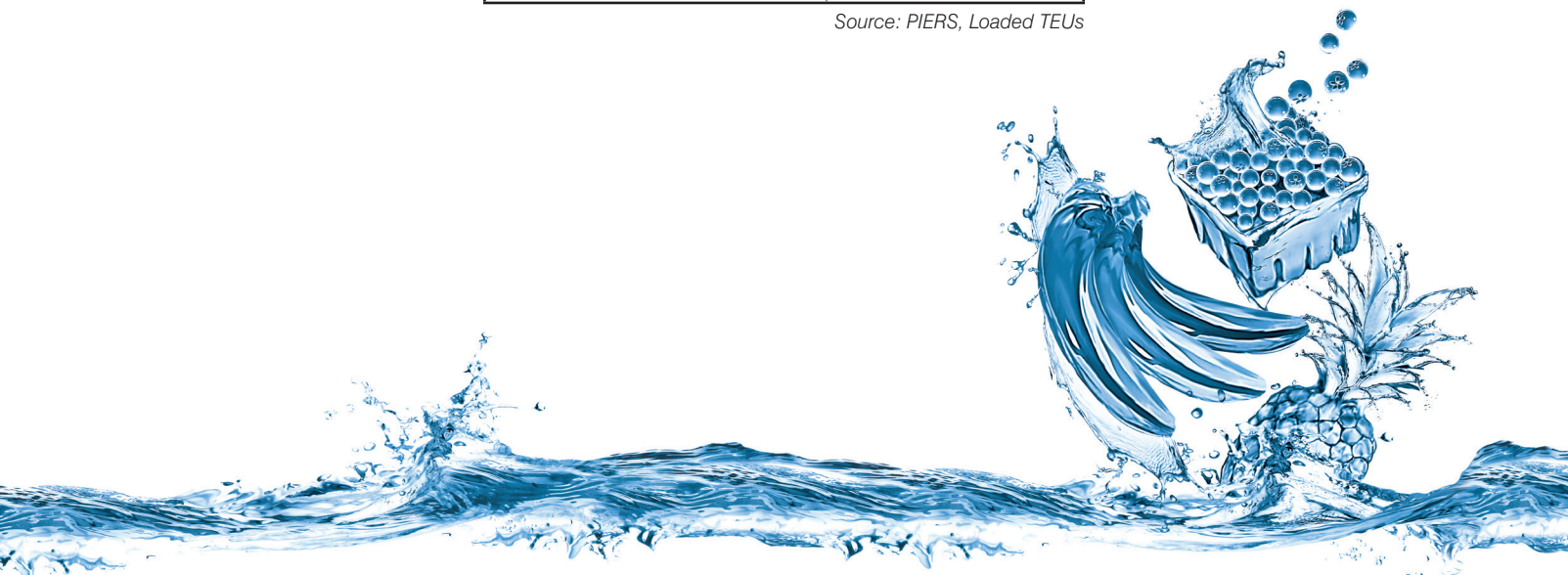
U.S. Port	FY2018
New York, NY	271,166
Los Angeles, CA	194,879
Wilmington, DE	168,193
Philadelphia, PA	160,364
Oakland, CA	160,343
Long Beach, CA	154,382
Port Everglades, FL	146,022
Savannah, GA	126,071
Seattle, WA	116,081
Jacksonville, FL	105,763

Source: PIERs, Loaded TEUs

Top Florida Refrigerated Ports FY2018 – TEU Moves

Florida Port	FY2018
Port Everglades	146,022
Jacksonville	105,763
Miami	70,103
West Palm Beach	26,367
Manatee	21,018
Panama City	5,086
Tampa	4,901
Port Canaveral	2,271
Pensacola	977

Source: PIERs, Loaded TEUs

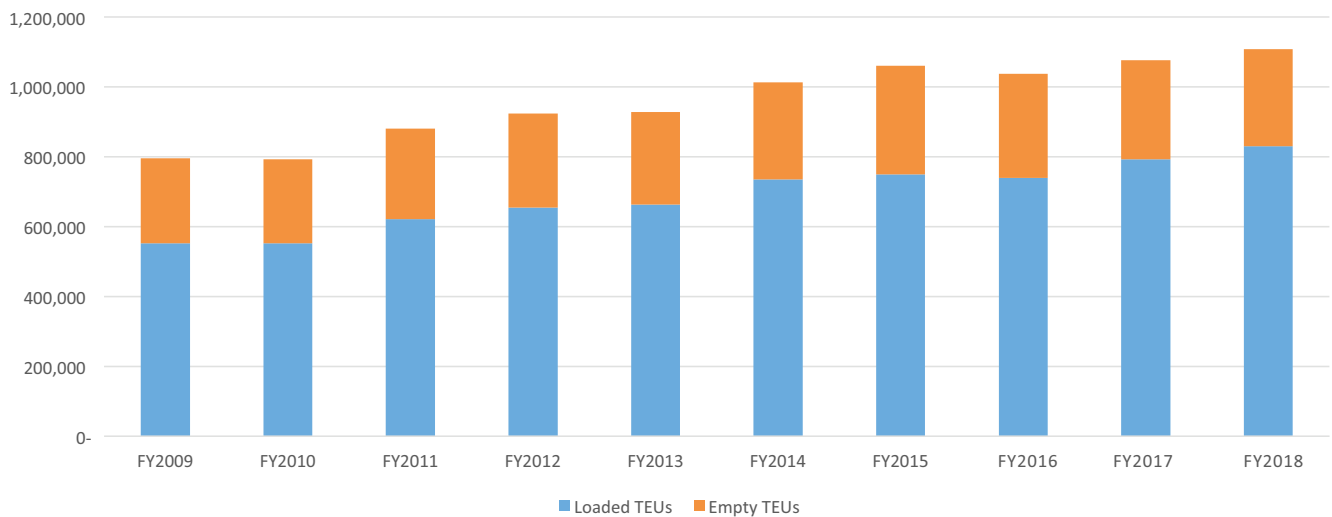


Port Everglades Monthly TEU Report - FY2018 vs. FY2017

	FY2018	FY2017	Gain (Loss):	% Change
October	85,339	82,930	2,409	3%
November	92,603	93,297	(694)	-1%
December	100,865	104,590	(3,725)	-4%
January	90,879	92,772	(1,893)	-2%
February	92,937	90,032	2,905	3%
March	100,726	102,981	(2,255)	-2%
April	98,896	92,803	6,093	7%
May	91,014	87,056	3,958	5%
June	89,777	83,669	6,108	7%
July	81,482	83,929	(2,447)	-3%
August	91,721	86,838	4,883	6%
September	92,225	76,015	16,210	21%
Total FY:	1,108,465	1,076,912	31,552	3%

Source: Port Everglades

Historical Cargo TEU Activity Fiscal Years 2009 – 2018



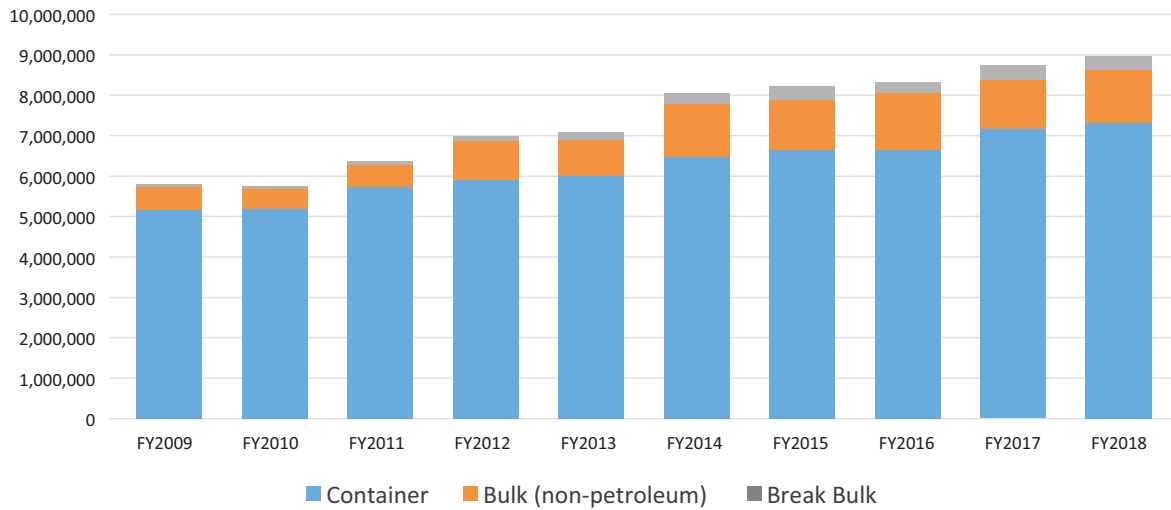
Source: Port Everglades

Historical Cargo Tonnage Activity

Containerized, Bulk, Break Bulk

Fiscal Years 2009 – 2018

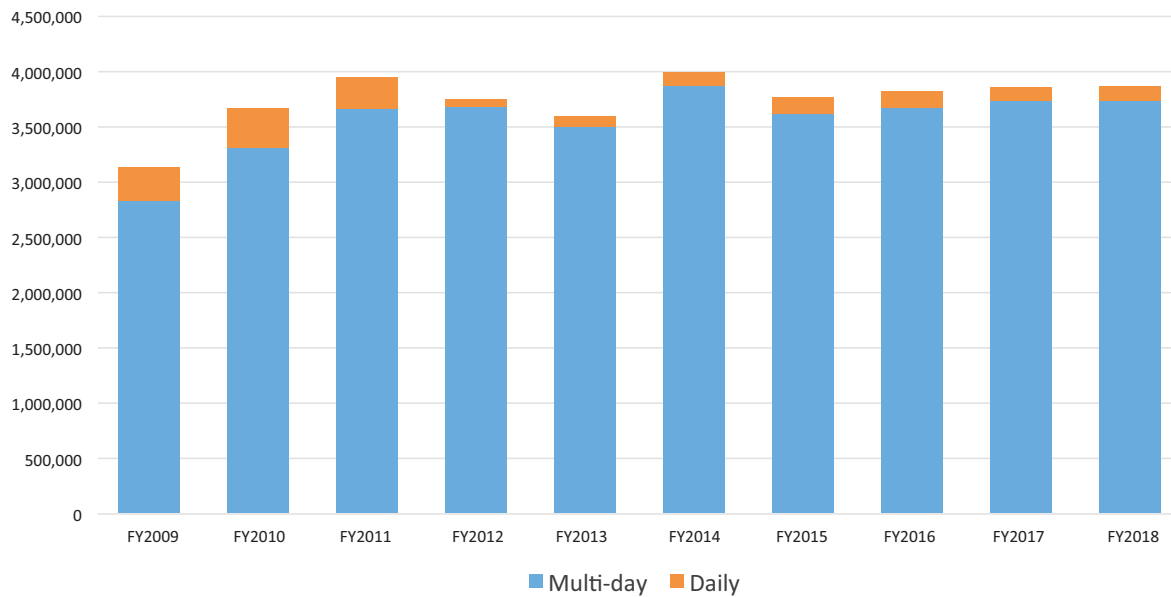
(Measured in short Tons)



Source: Port Everglades

Historical Cruise Passenger Activity

Fiscal Years 2009 – 2018



Source: Port Everglades

Port Everglades Petroleum Report

Petroleum Volume by Product
FY2018 vs. FY2017
(Volume in Barrels)

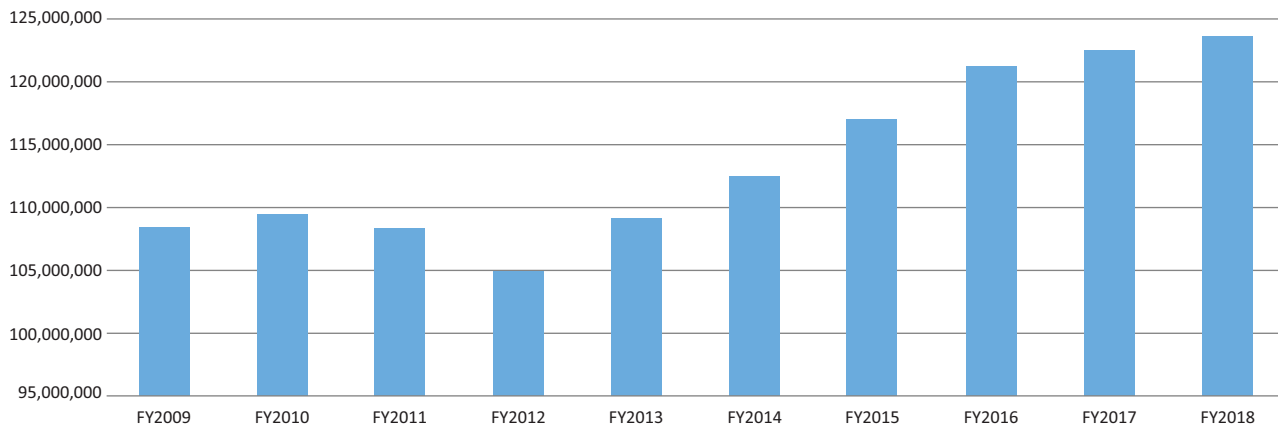
PRODUCT	FY 2018	FY 2017	%Change
Asphalt	697,575	371,259	88%
Aviation Gasoline	226,216	213,752	6%
Crude Oil Loaded	540,650	470,568	15%
Diesel Fuel	16,300,246	15,741,886	4%
Ethanol	2,084,580	1,633,434	28%
Fuel Oil	2,688,290	2,683,242	0%
Gasoline	61,283,620	63,268,372	-3%
Jet Fuel	33,893,580	31,982,450	6%
Propane	409,537	385,375	6%
Truck & Rail - Ethanol	5,113,427	5,415,909	-6%
Truck & Rail - Other	166,515	141,406	18%
Total	123,404,236	122,307,652	

Note: Numbers are rounded

Source: Port Everglades

Historical Petroleum Activity

Fiscal Years 2009 – 2018
(Volume in Barrels)



Source: Port Everglades



porteverglades.net

