



Port Everglades Master/Vision Plan Update

Port Everglades Association Meeting
May 2, 2025

Agenda

- Market Assessment Recap
- Summary of Charettes
- Key Takeaways
- Top Project Ideas from the Port Community

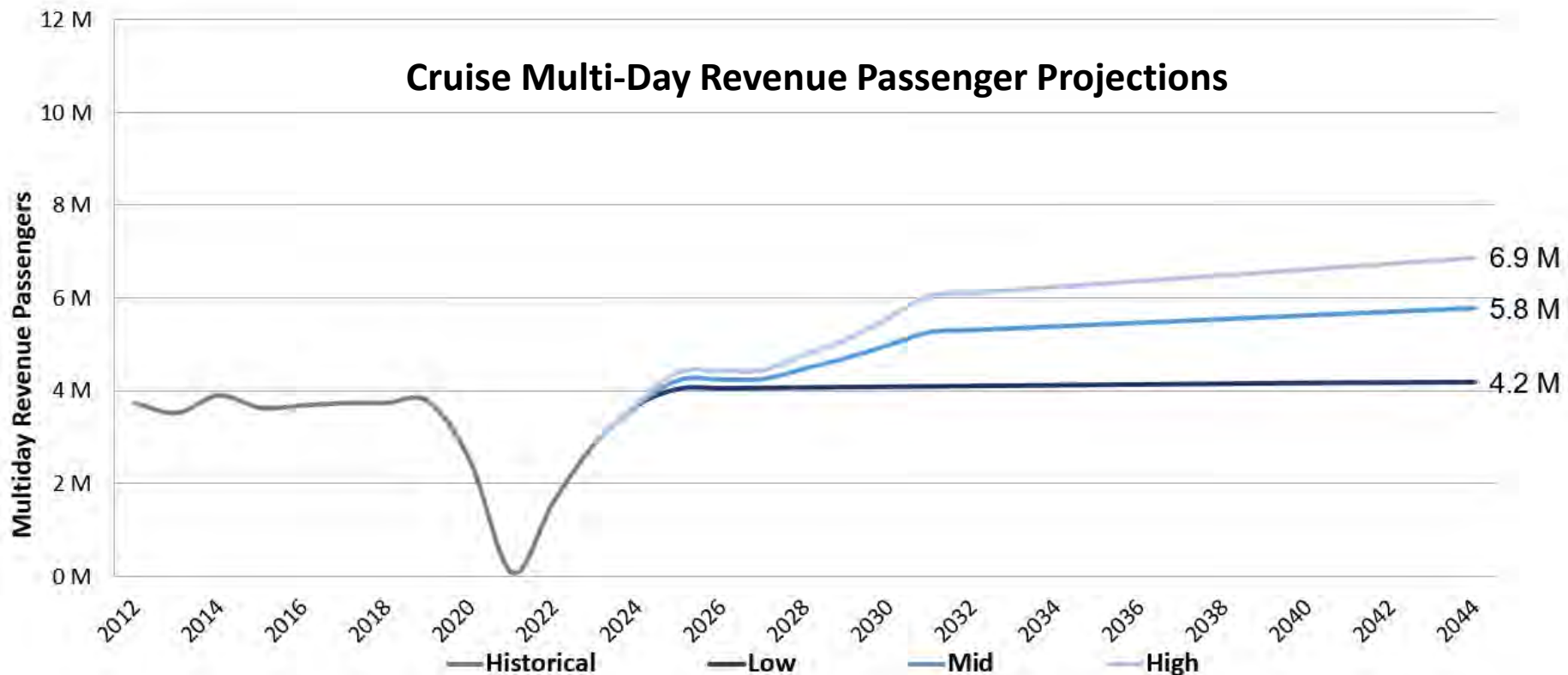


Market Assessment Recap



Cruise Market Assessment

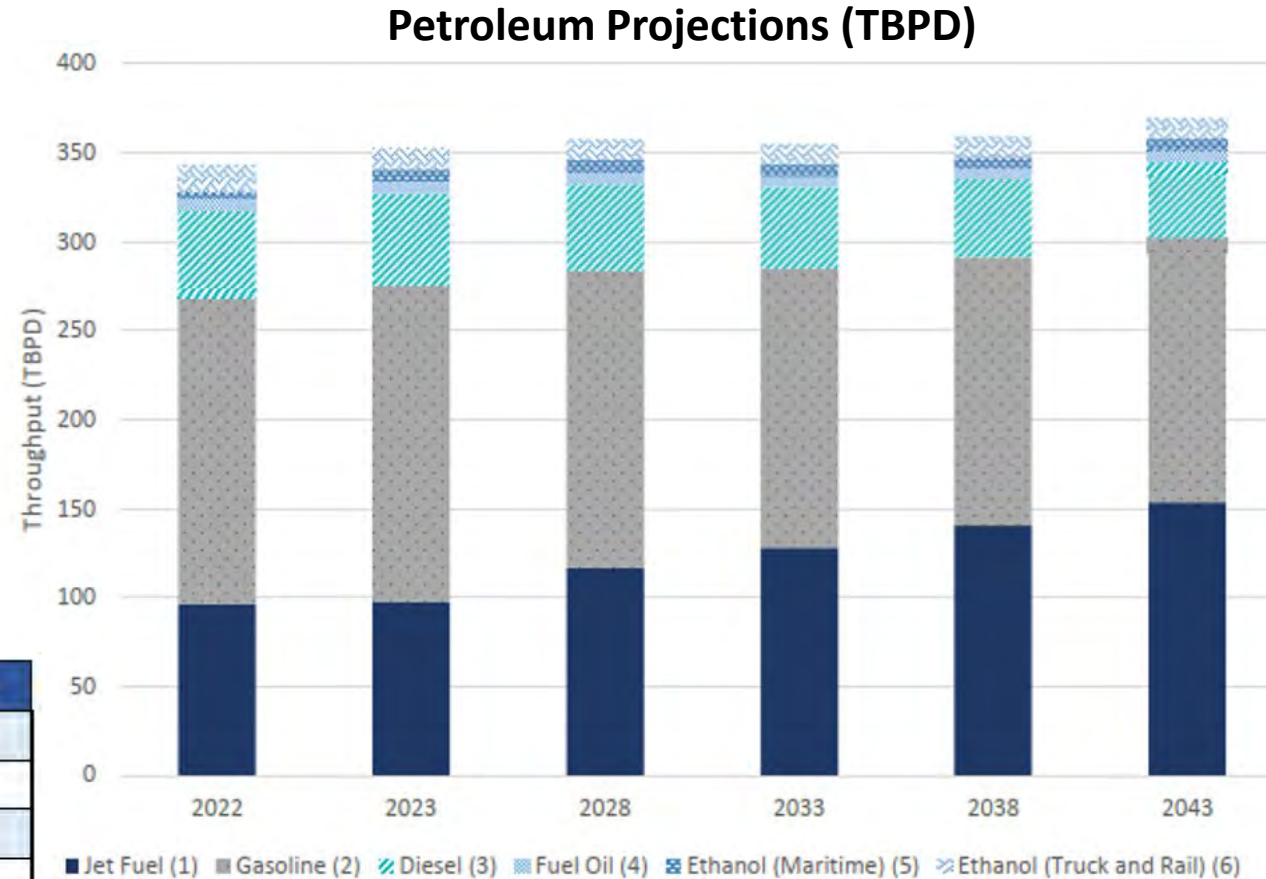
- 42% of global capacity in the Caribbean
 - 31M global passengers in 2023; forecasted to grow to 60-72M passengers in 20 years
 - >80 new ships on order, largest share to be deployed to the Caribbean
- Port Everglades is a significant gateway to Caribbean
 - 4.0 M passengers for 2024; forecast of >6M passengers by 2044



Energy Market Assessment

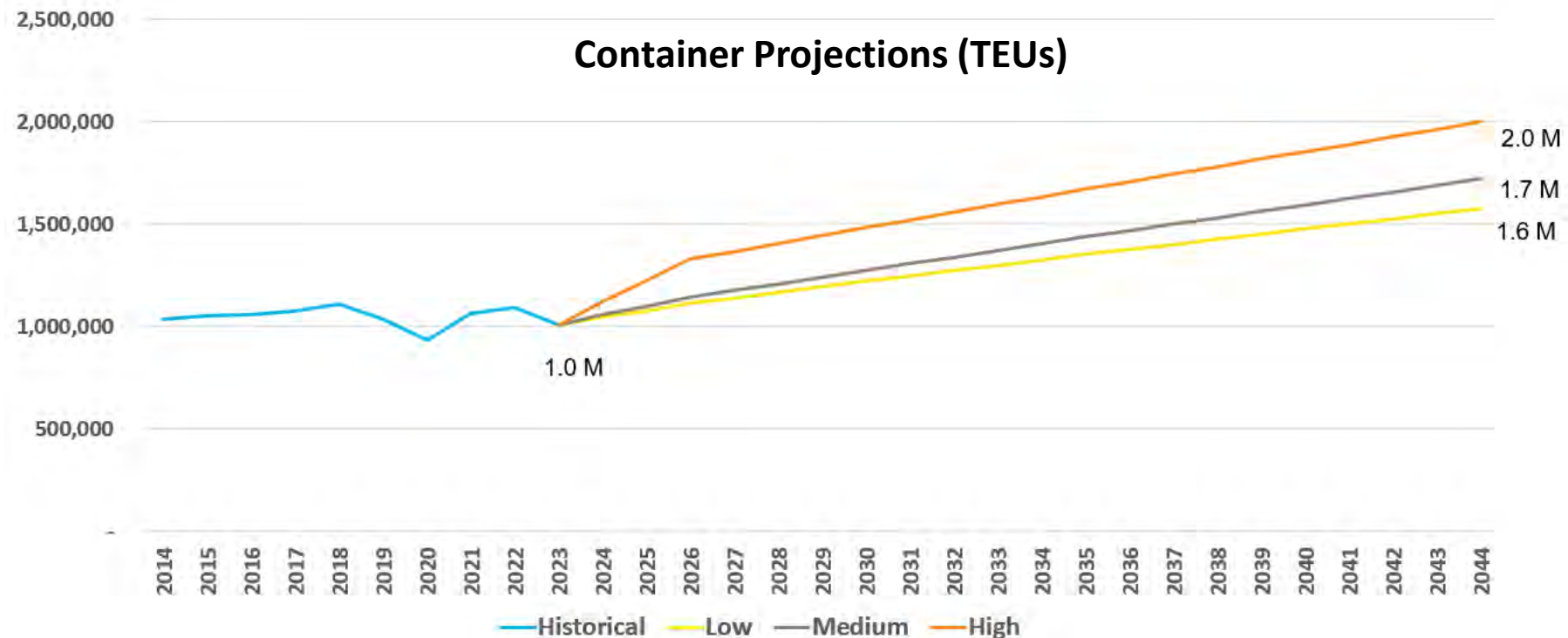
- 129.9 Million Barrels in FY 2023
 - >350,000 barrels/day – 224 barges, 382 tankers
- Petroleum will remain constant near-term
 - Jet fuel will increase near-term and long-term
- Larger tankers will deliver petroleum imports
- LNG & methanol bunkering needs will increase

Commodity	2022	2023	2028	2033	2038	2043
Jet Fuel	96	98	116	128	140	153
Gasoline	172	177	167	157	151	148
Diesel	50	52	49	46	44	43
Fuel Oil	6	7	6	6	6	5
Ethanol (Maritime)	4	7	7	7	7	7
Ethanol (Truck and Rail)	15	12	12	12	12	12
Total	343	353	357	356	360	368



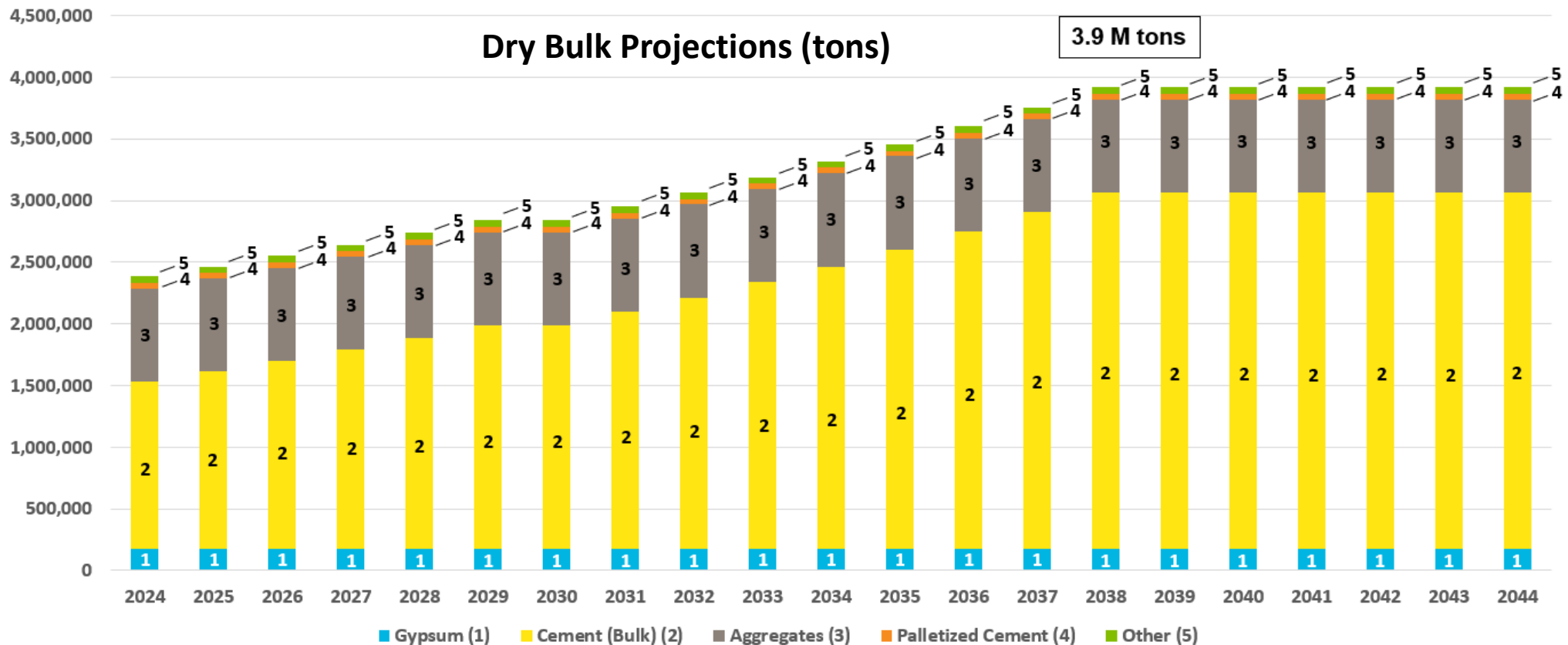
Container Market Assessment

- 1.01M TEUs in FY2023 – Peaked in 2018, has not fully recovered from COVID-19
 - 6.37M tons; 1.3M tons of perishable imports
- Several services relocated out-of-state to be closer to Beneficial Cargo Operators (BCOs)
- Continued growth on the Caribbean, Central American and South American trade lanes
- Future Container Growth – Mexican, Northern European, Mediterranean, and Asian Services



Non-Container Market Assessment

- Cement dominates – forecasted growth from 1.2M in 2023 to 2.6M by 2036
- Increased supply of Canadian stone and aggregates
- Break Bulk Import (steel), Yacht Tonnage & Auto Units – minimal/no growth forecasted

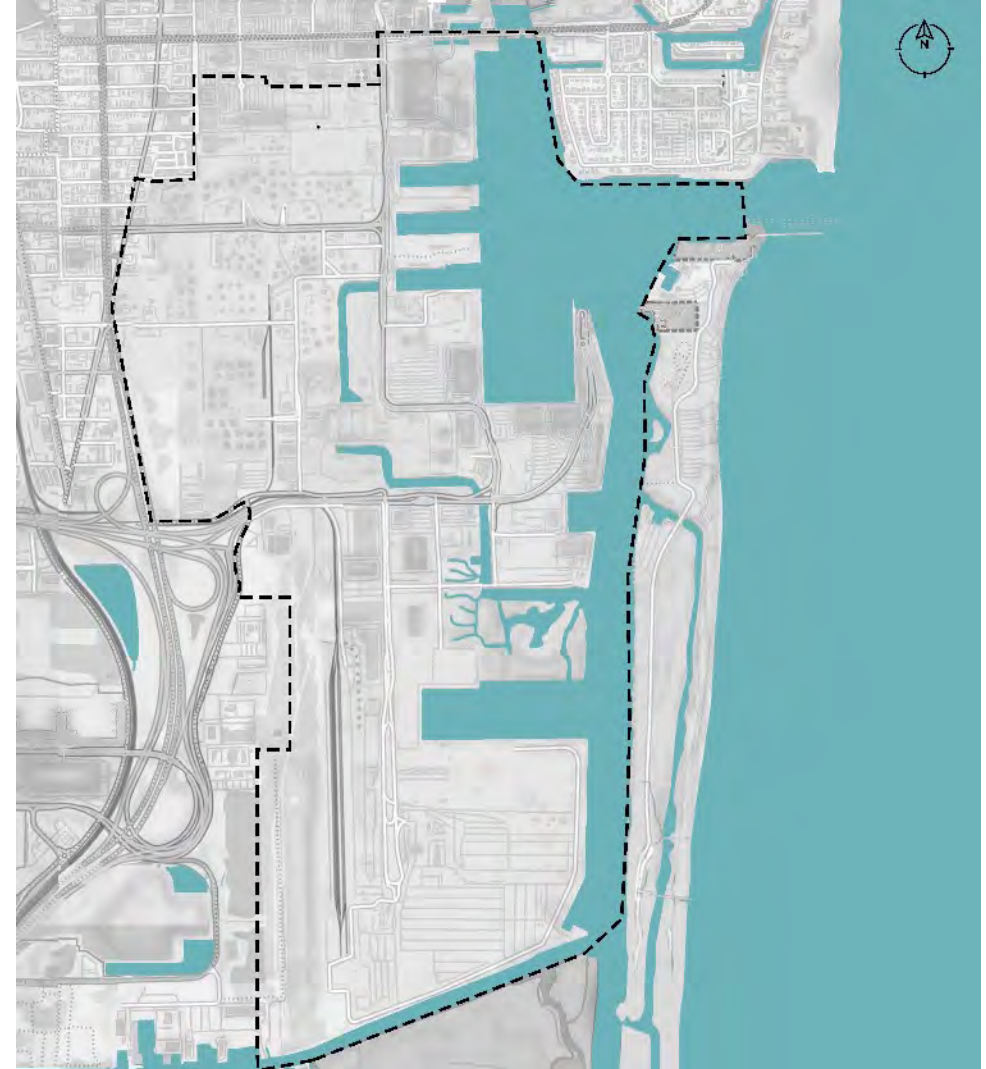


Summary of Charettes

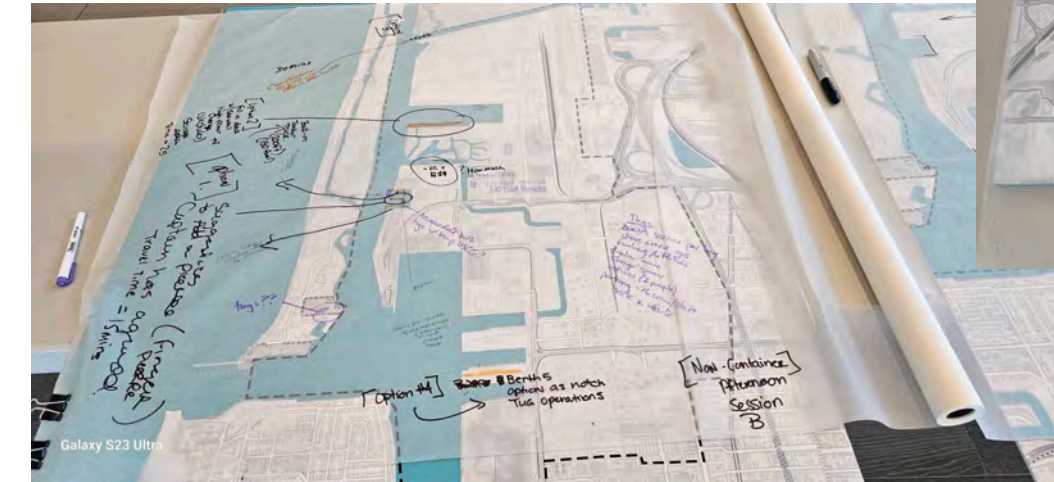


Overview

- Four Business Line Charettes
 - Energy
 - Non-Containerized Cargo
 - Cruise
 - Containerized Cargo
- Market Assessment Recap
- Presented Project Ideas from the Port Community
 - Existing Conditions & Market Assessments
 - Interviews, meetings, etc.
- “Working” Session
 - Discussion about potential projects and ideas
 - Sketches with new ideas
- Final (5th) Combined Charette
 - Presented summary of business line charettes



Charettes



Key Takeaways

- Perimeter Gates & Traffic
 - Security vs traffic control functions – need, eliminate or change
 - Congestion into and within the Port
- Berthing Conflicts
 - Availability of berths
 - Conflicts between vessel types
- Big Ship Readiness
 - Larger cruise ships and container ships
 - Increasing sizes of dry bulk and tanker ships
- Accommodating Future Growth
 - Landside space availability and conflicts
 - Smaller terminals/cargo being “squeezed”
 - Consolidation and optimization of terminals and cargo types
- Construction Impacts
 - Slip-1 widening & main channel deepening/widening
 - USCG, Tugs, Tankers Relocation

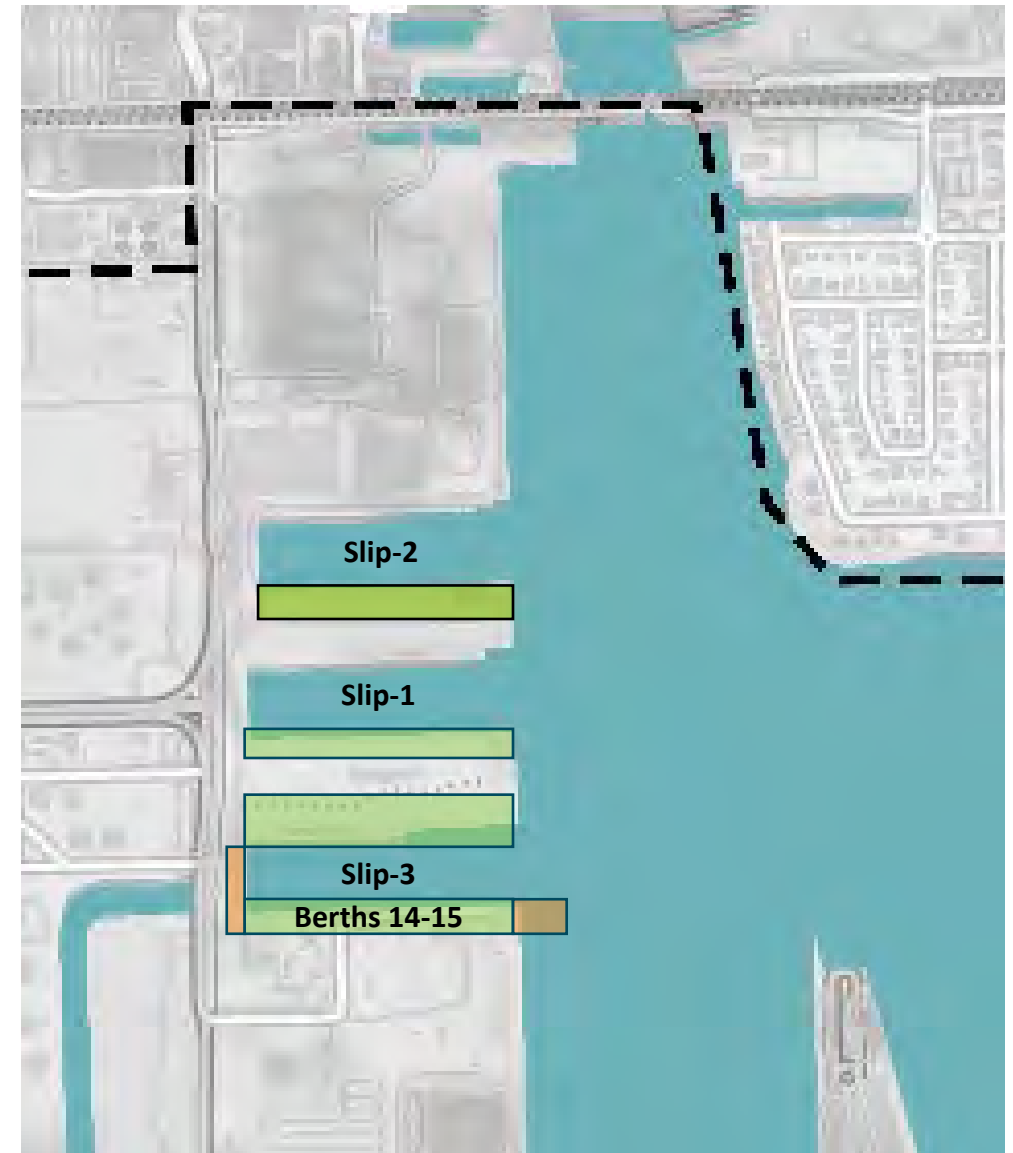


Top Project Ideas



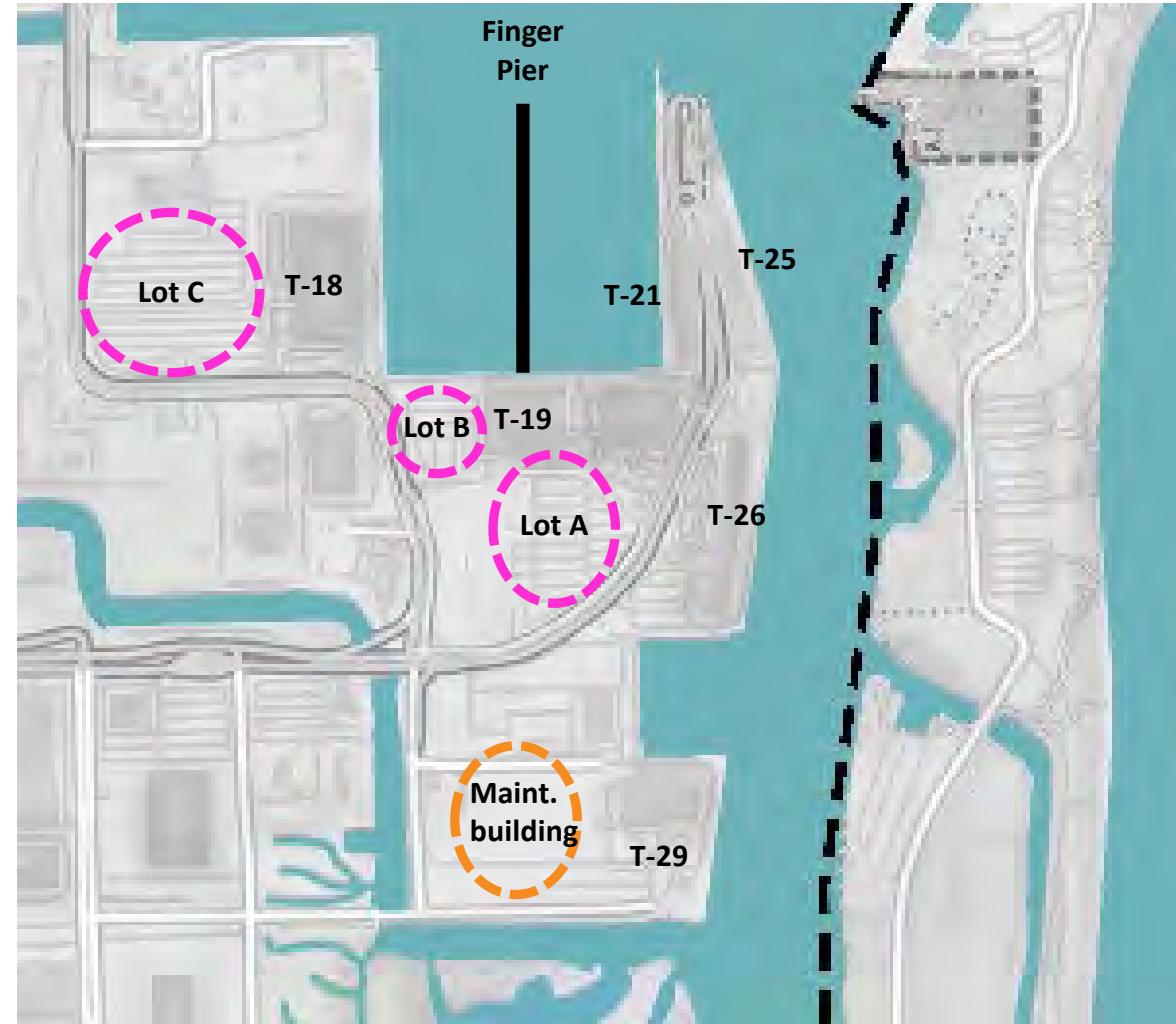
Project Ideas from the Port Community - Northport

- Slip-1 Widening (current project)
- Slip 2 Widening project
 - Accommodate concurrent operations, cruise and breakbulk
- Slip-3 Widening
 - Accommodate larger tankers and cement ships
 - Berth 15 pier extension (east) and/or Berth 14 cut (west) to accommodate two ships
- Berths 14-15 Cement Terminal Upgrades & Expansion
 - All terminals to be operated with pneumatic offloading systems
 - Future expansion of silo storage
 - Improved access at one of the terminals
 - Beautification: art on silos surfaces



Project Ideas from the Port Community - Midport

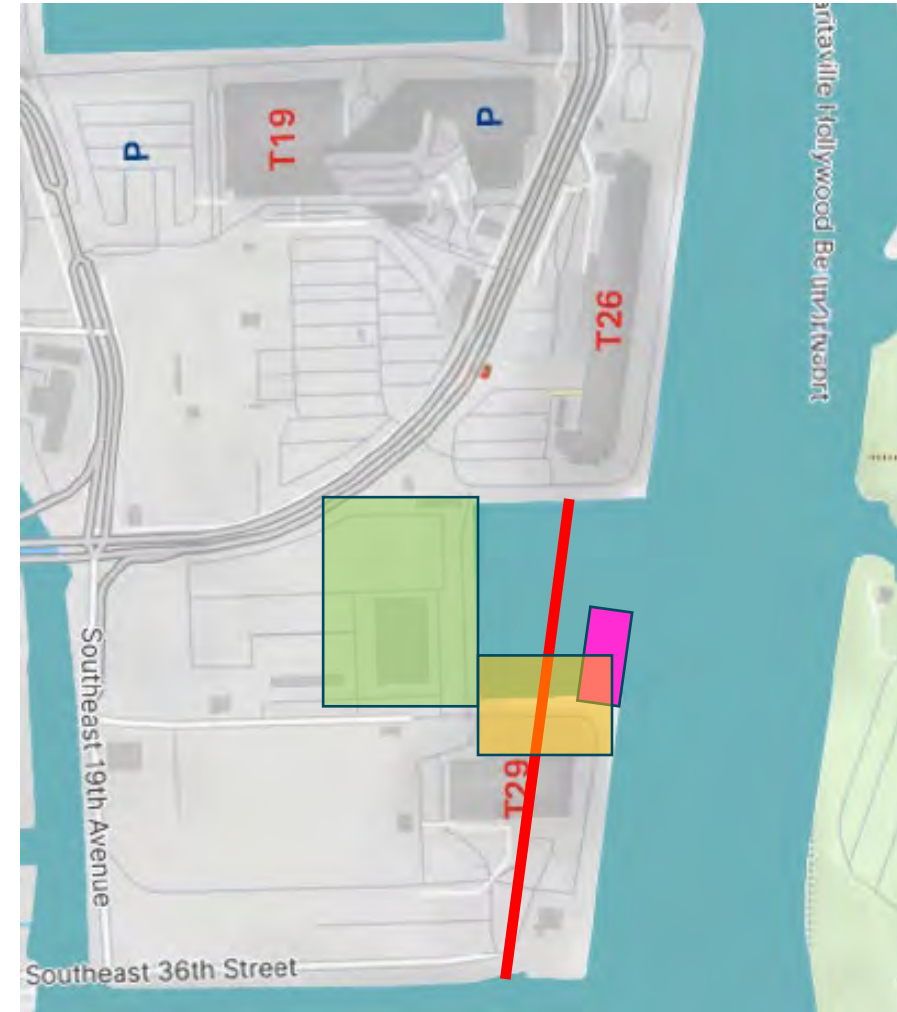
- Cruise Terminal 18
 - Terminal replacement, improved GTA
- Cruise Terminal 19
 - Terminal replacement, improved GTA
- Cruise Berth 19 Finger Pier
 - Provide another mega-ship berth
- Cruise Terminal 21
 - Terminal replacement, apron widening, larger GTA
- Cruise Terminal 25
 - Big ship readiness (wider apron), larger GTA
- Cruise Terminal 29
 - New terminal development with GTA, parking structure
- New Parking Structures
 - Parking Lots A, B & C



Project Ideas from the Port Community – Tracor Basin

- USCG Relocation (orange)
 - Temporary during reconfiguration of existing station for main channel construction
 - South side – berthing and upland facilities
- Tugs
 - Potential partial relocation to accommodate USCG
 - Potential future relocation to Turning Notch
- Cruise Terminal 29 for Oasis Class (red) (*)
 - Cut/fill to accommodate wider ship
- Cruise Terminal 29 for Quantum Class (purple)
 - Pier extension to eliminate mooring dolphin and mooring lines across the Basin
 - Half or full fill of the Basin
 - RORO Ramp in SW corner
- Basin Extension/Cut (green)
 - Accommodate Balearia
- Mooring Dolphin South of Berth 29 (*)

(*) projects not to move further



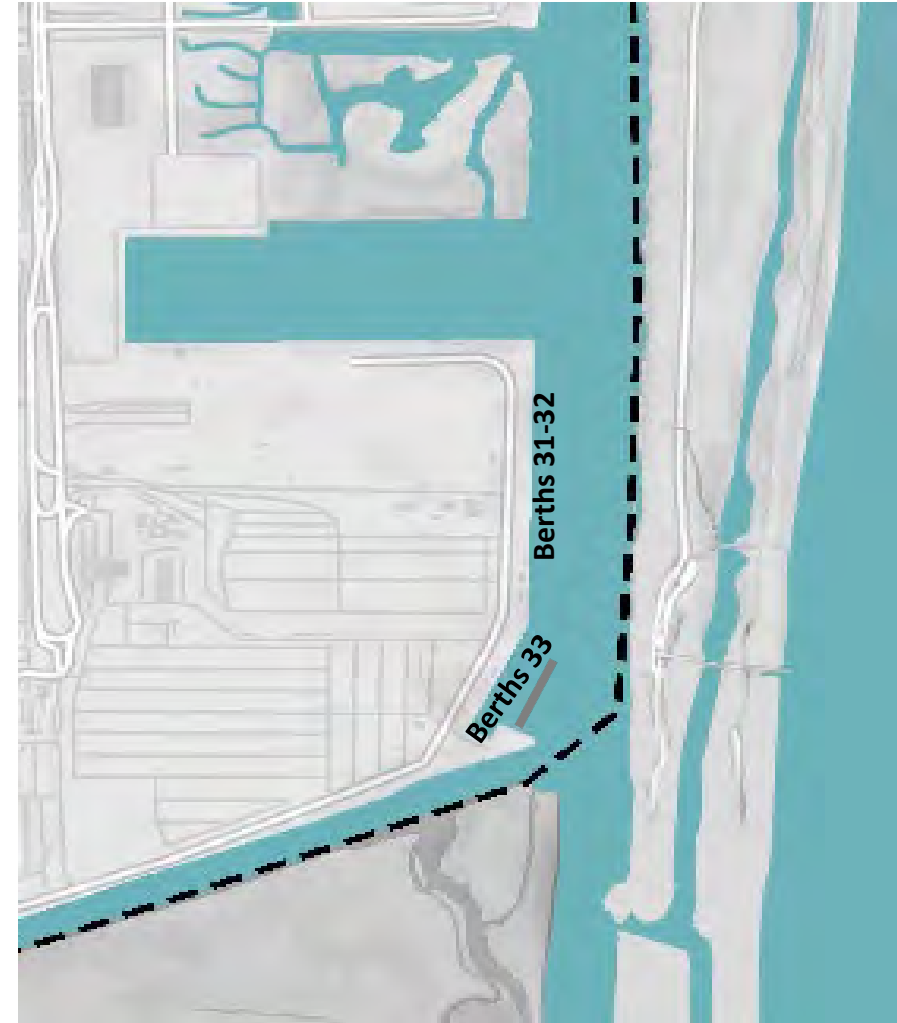
Project Ideas from the Port Community – Turning Notch

- Berth 30E Potential Uses
 - Only containers, add STS cranes
 - Only breakbulk
 - Only ferry
 - Only cruise
 - Ferry + containers (extending ramp to the west)
 - Ferry + cruise (multimodal terminal) (*)
- Berths 30F/G
 - Lay berth for container ships (upgrade wall)
 - Relocation of tugs – provide floating docks or fixed pier
- Berth 30D
 - Break bulk storage
 - Container berth – add STS cranes; Hyde and other smaller ships
- Berths 30A/B/C
 - Add STS cranes
 - Berth 30C sugar delivery (ships gear to trucks)



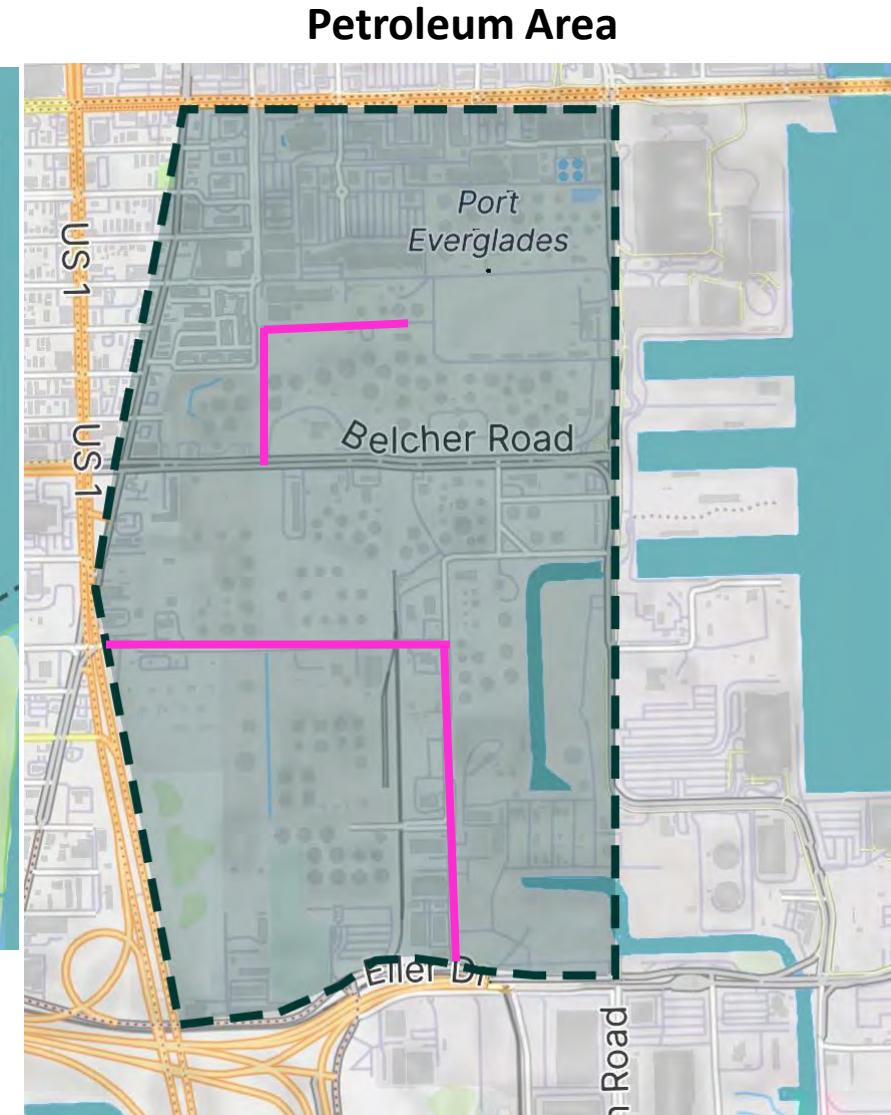
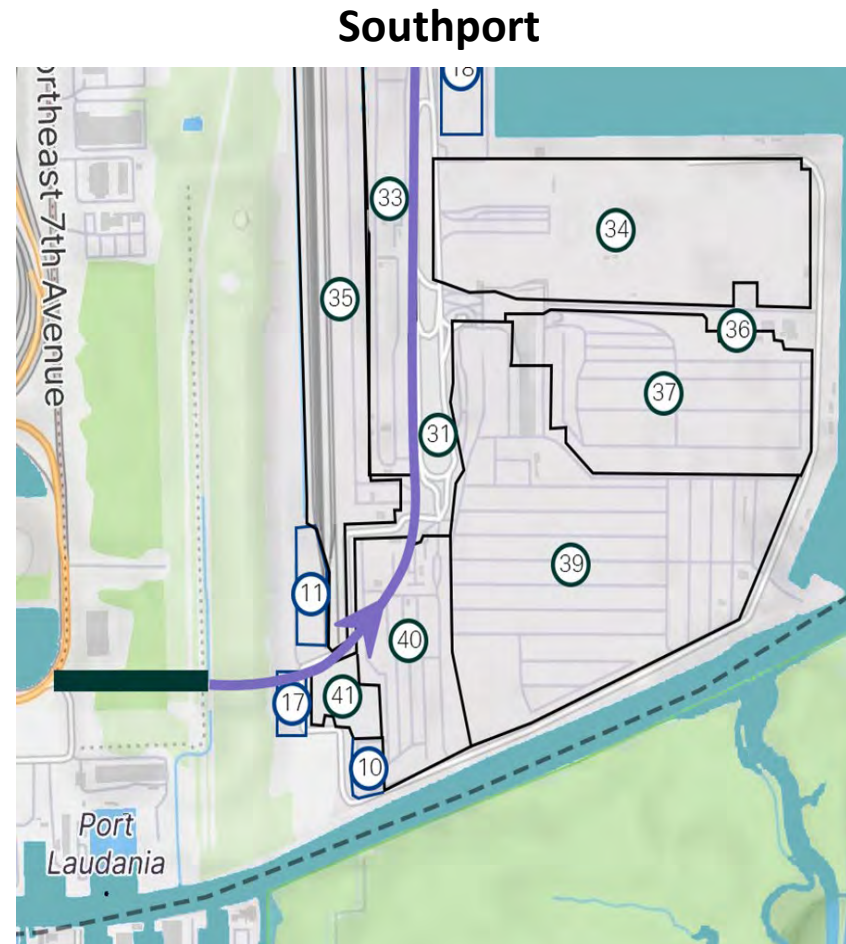
Project Ideas from the Port Community – ICW Berths

- Additional STS Cranes for Berths 31-33
- Extension of Berths 31-32
 - Provide 2 big ship berths (2500-2600') - eliminates Berth 33



Project Ideas from the Port Community – Gates

- New Perimeter Gates for Petroleum Area (purple)
 - South of Spangler – entry at 28th, exit to Eller
 - North of Spangler – entry/exit
- Redevelopment of Southport Gate/Traffic (red)
 - New SW Gate (Griffin Rd extension)
 - Realign McIntosh to the west to optimize footprint
 - Eliminate McIntosh gate
 - Create 1-way traffic flow
 - Requires consolidation & densification of terminals





Thank You!

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