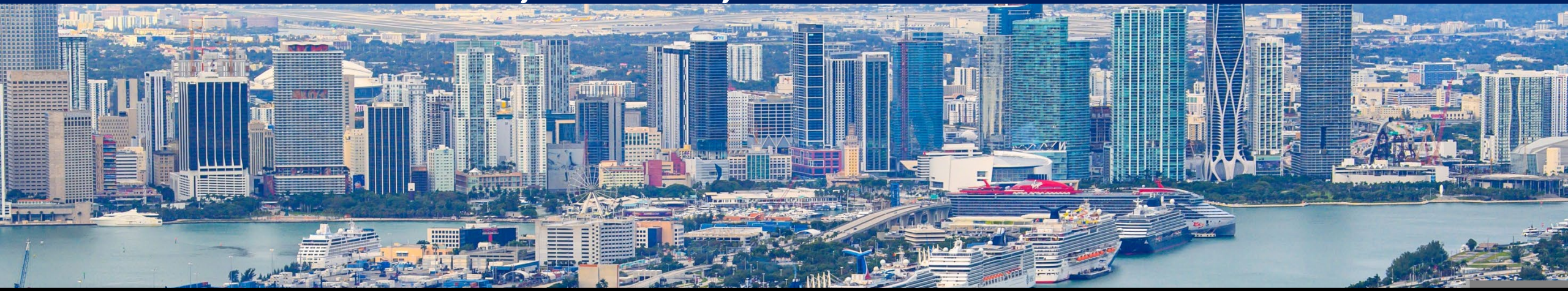
CRUISE STATS FY24

8,233,056 CRUISE PASSENGERS



ICONIC CRUISE TERMINALS Since 2018

CT A - Royal Caribbean "The Crown of Miami"
$250 million
Opened - November 2018



CT B - Norwegian Cruise Line "Pearl of Miami"
$239 million
Opened - August 2021





CT AA - MSC Cruises
$400 million
Groundbreaking - March 2022
Completion Date – First Quarter 2025

CT V - Virgin Voyages "Palm Grove"
$168 million
Opened - February 2022



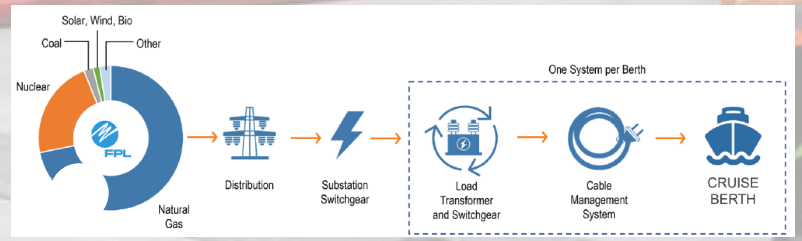
CT F - Carnival Cruise Line
$144 million
Opened - December 2022



SHORE POWER PROGRAM

- Available at 5 cruise berths, Miami-Dade County's **Shore Power Program** is a partnership between PortMiami, its cruise partners and Florida Power & Light Company.

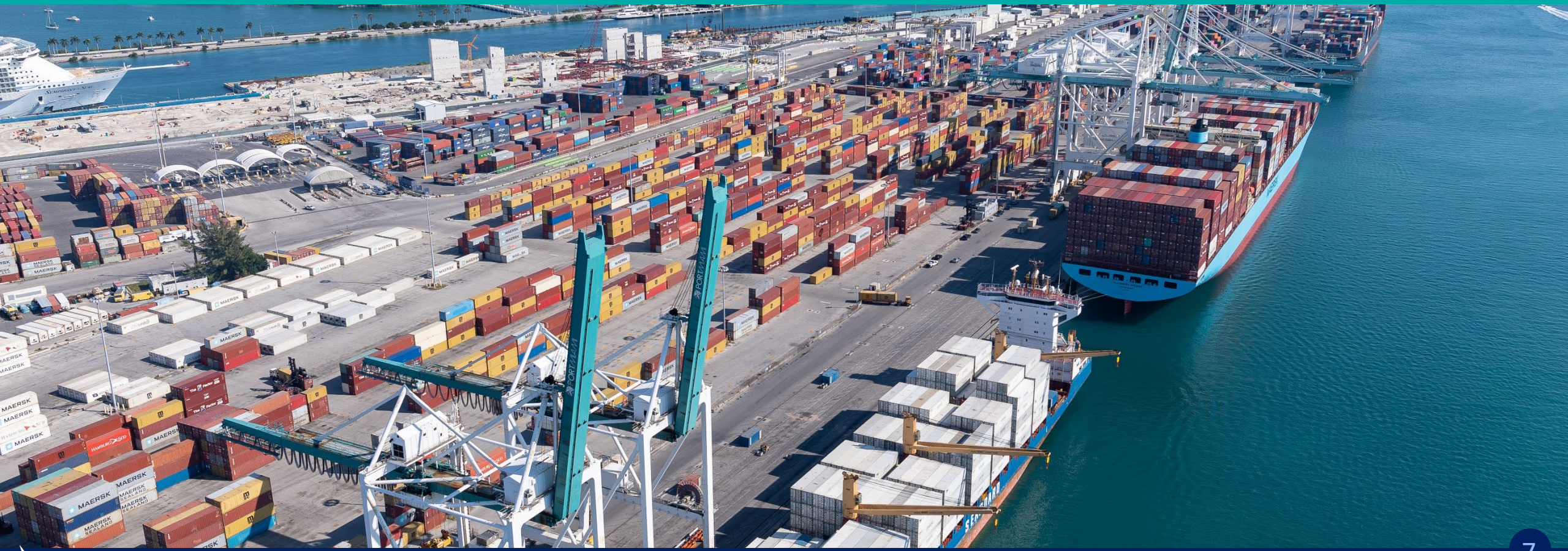
- The Shore Power Program cost $125 million. PortMiami received **$21.7 million in grants:** $19.7 million from Florida Department of Transportation and $2 million from U.S. Environmental Protection Agency.



PORTMIAMI netzero

CARGO STATS FY24

1,089,443 TEUs



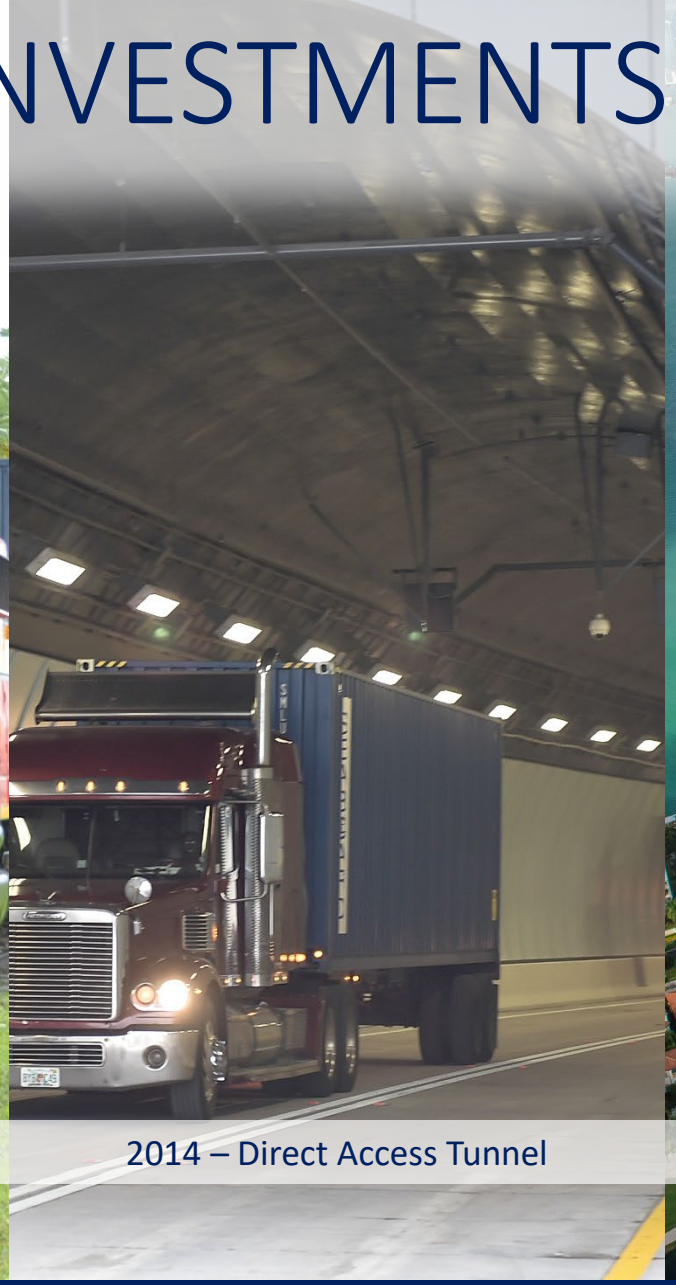
THANKS TO OUR PAST INVESTMENTS



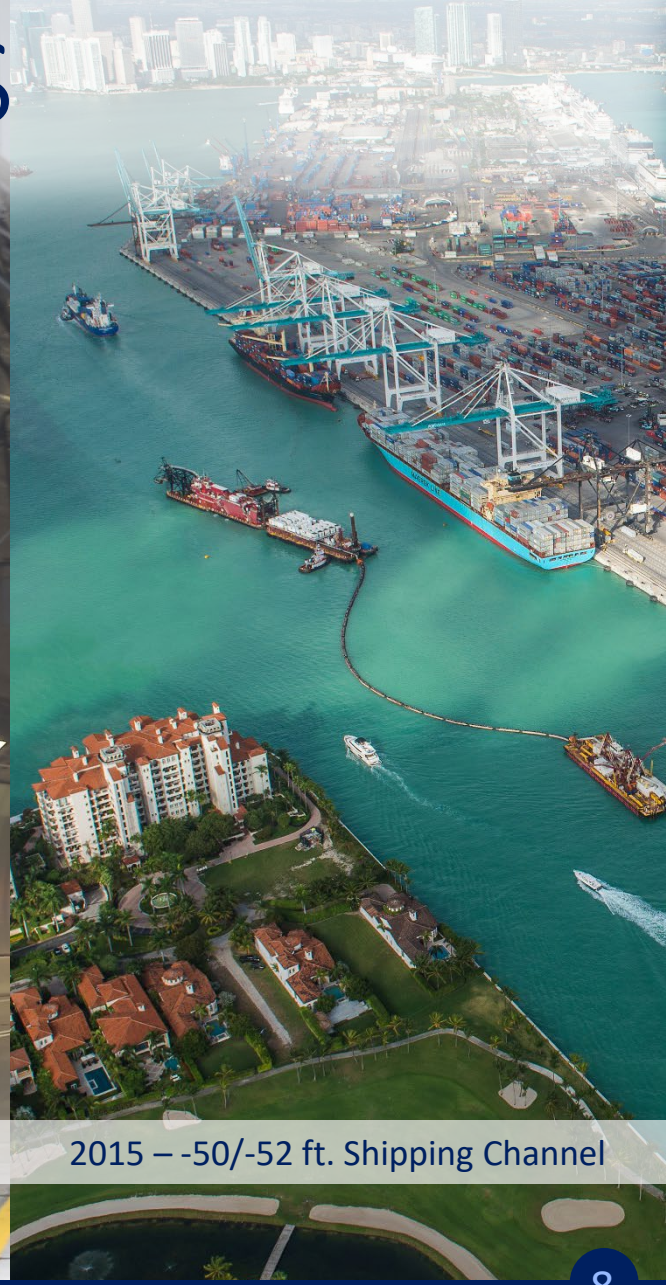
2013 – Super Post-Panamax Cranes



2013 – On-Dock Intermodal Rail



2014 – Direct Access Tunnel



2015 – -50/-52 ft. Shipping Channel

CAPITAL IMPROVEMENT PROGRAM



$2.8 Billion through 2031

1) Cruise Terminal G – Royal Caribbean Group, Completion 2027
2) Cruise Terminal AA – MSC Cruises, Completion First Quarter 2025
3) Berth 10 – Completion 2027
4) Electric Rubber Tired Gantry (e-RTG), Infrastructure Improvements, Phase II, Completion late 2025
5) 4-8 New Electric Gantry Cranes, Procurement 2025
6) North Bulkhead, 6-Year Project Commencing 2025
7) Royal Caribbean Group, Campus Expansion, Completion 2026
8) Inland Port

Shore Power — Cruise Terminal AA, Cruise Terminal A, Cruise Terminal B, Cruise Terminal F, Cruise Terminal V

WORKFORCE DEVELOPMENT PROGRAM

Jobs… Jobs… Jobs…
Supporting the
Maritime Industry



Presentation 3

PORT TAMPA BAY

REROUTE YOUR THINKING

Discussion of the Role of Florida's Seaports

House Subcommittee on Economic Infrastructure

February 20, 2025











PORT TAMPA BAY ECONOMIC IMPACT

$34.6 BILLION

ANNUAL ECONOMIC IMPACT

$10.2 BILLION

TOTAL PERSONAL INCOME & CONSUMPTION

THE PORT GENERATES **$1.2 BILLION** IN ANNUAL LOCAL & STATE TAX REVENUE

192,201

PORT TAMPA BAY MARITIME RELATED JOBS

PORT TAMPA BAY™

REROUTE YOUR THINKING®

$74,350

AVERAGE PORT TAMPA BAY MARITIME SALARY

COMPARISON OF TOTAL IMPACTS

ECONOMIC IMPACT, 2015 STUDY

Annual Economic Value	$17,200,000,000
Total Personal Income & Consumption	$5,100,000,000
Total Jobs	85,034
Total Local & State Taxes Paid	$612,200,000
Average Salary of Direct Jobs	$55,000

ECONOMIC IMPACT, 2024 STUDY

Annual Economic Value	$34,600,000,000
Total Personal Income & Consumption	$10,200,000,000
Total Jobs	192,201
Total Local & State Taxes Paid	$1,200,000,000
Average Salary of Direct Jobs	$74,350

CONTAINERS



CRUISE



ENERGY PRODUCTS



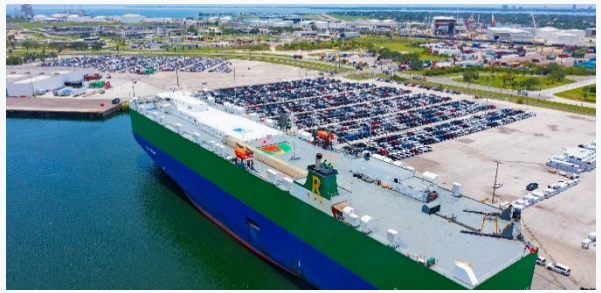
BUILDING MATERIALS



REFRIGERATED



AUTOMOBILES



FERTILIZER



SHIP BUILDING & REPAIR



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FLORIDA IS THE FASTEST GROWING STATE IN THE U.S. AND THE I-4 CORRIDOR IS THE FASTEST GROWING REGION OF FLORIDA

- **Florida Population:** 23+ million; 1.43 million Veterans
- **Forecasted to reach 28M by 2030 and 32M by 2040**
- **According to the US Census Florida ranks #1 in the country for total net migration with 444,484 people moving here 2021 - 2022**
- **Surpassed NY as the 3rd Largest State**
- **15th Largest Economy in the World**
- **Over 1,200 people a day moving to Florida**
- **Tourism: 140 million annual visitors**

TAMPA BAY/ORLANDO I-4 CORRIDOR

- **Largest concentration of Distribution Centers in Florida**
- **Over 550 million Square Feet of DC Space**

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ENERGY BULK

- Central Florida's Hub for Gasoline, Jet Fuel, Ethanol, Lube Oil
- Partnership between Port Tampa Bay Petroleum companies at REK
- Central Florida Pipeline connecting Port Tampa Bay to Orlando



PURAGLOBE

AG AIR GENERAL

MURPHY OIL CORPORATION

ASIG A BBA Aviation company

TRANSMONTAIGNE

PLAINS ALL AMERICAN

MARTIN ENERGY SERVICES



AMALIE MOTOR OIL

BUCKEYE PARTNERS, L.P.

KINDER MORGAN INC.

TECO AN EMERA COMPANY

TRANSFLO®

MOTIVA ENTERPRISES LLC



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FERTILIZER & AGRICULTURE BULK



- One of the World's Leading Fertilizer Export Ports



- Diverse mix of dry and liquid bulk cargoes
- Rail Service Resuming at TMT



- Positive outlook for phosphate and related input products (molten & prilled sulfur)



- Ardent Mills – now receiving ocean deliveries
- Forecast for juice shipments remains strong

Mosaic · citrosuco · Ardent Mills · Cargill · YARA Knowledge grows · CUTRALE · SATCO

GULF SULPHUR · Tampa Juice Service, Inc. · LouisDreyfus

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CONSTRUCTION & BUILDING MATERIALS BULK & BREAKBULK



- Florida's Largest Steel Port
- Processing & Distribution
- Manufacturing & Fabrication for Export



- Lumber & Forest Products
- Rail Service Resuming at TMT



- Cement
- Aggregates – Granite & Limestone



- Gypsum
- Favorable outlook across all commodities

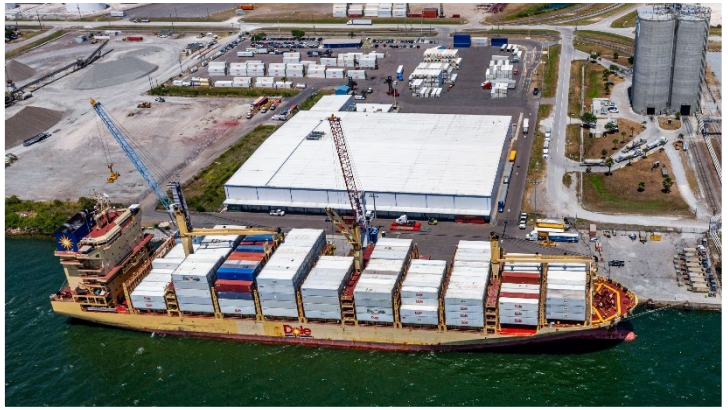
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REFRIGERATED ON-DOCK COLD STORAGE

- On site CBP Ag inspection & fumigation services
- 148 reefer plugs
- Food grade glycol refrigerant throughout
- Cross dock container yard connectivity w/truck capacity
- Adjacent berth with dedicated mobile harbor crane
- Uninterrupted cold chain solution
- Non-union operation
- 2 Gottwald Mobile harbor cranes

Services: Costa Rica, Honduras, Guatemala, & Mexico





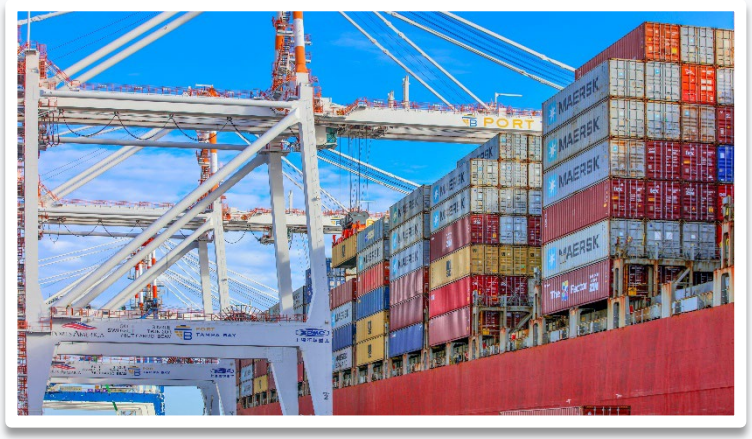




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CONTAINERS







- Huge, expanding Central Florida Market
- BCO supply chain sales strategy – Executive Shippers' Council

- Working with our carriers to support new services
- Expanding Terminal Capacity

PORTS AMERICA

Priorities:

- Attracting new container services
- Developing exports
- Attracting new DCs and manufacturers

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CONTAINER TERMINAL EXPANSION

Terminal Operating Efficiencies: High Productivity, Fast turnaround times, truck drivers do 3-4 round trip deliveries/day – NO CONGESTION, NO WAITING

- On-dock intermodal capability – 17,000 feet of adjacent rail track
- Terminal Expansion Now Underway
  - Total of five post-panamax cranes
  - New 6 lane gate system
  - Increasing paved storage from 67 acres to 97 acres (to be completed 2024)
  - Berth extension 214 from 3,200 to 4,500 feet (to be completed 2026)
  - On-dock rail-served trans-load facility planned for 2026
  - Future deep draft project underway (target 47') for future Neo Panamax vessels

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RORO & AUTOMOTIVE

- New lease agreement with Glovis providing shipment, handling, storage and processing of automobiles

- Short sea imports from Mexico due to plant expansion, as well as export opportunities





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CRUISE

- Eight homeported vessels in FY24:
- Two from Carnival
- Three from Royal Caribbean
- One each from Norwegian Cruise Line & Celebrity Cruises
- One from Margaritaville at Sea
- Discussions ongoing with other prospects









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EXECUTIVE SHIPPERS' COUNCIL LOCAL TAMPA MARKET



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PORT TAMPA BAY™

REROUTE YOUR THINKING®

THANK YOU!

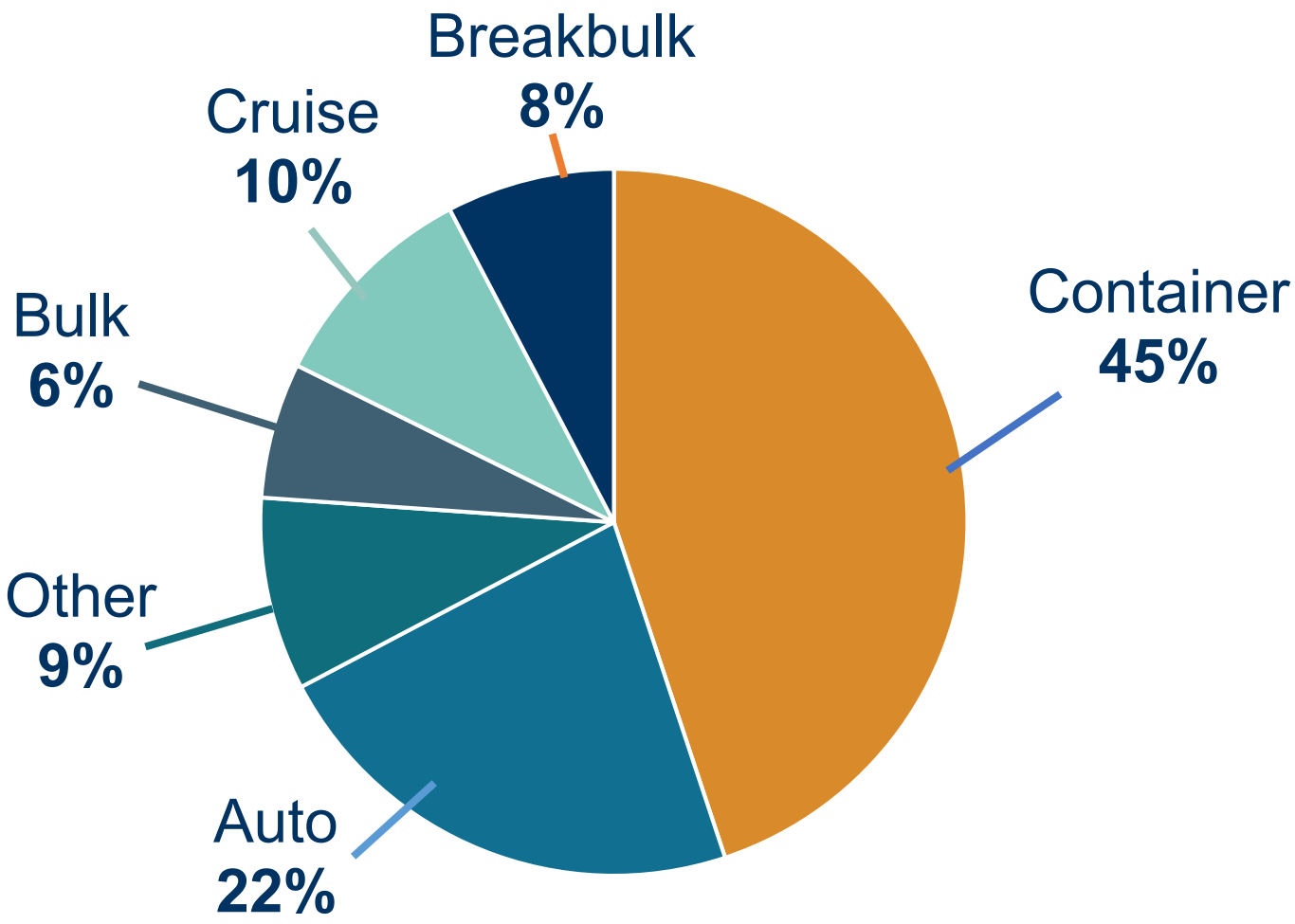
Presentation 4

JAXPORT

JACKSONVILLE PORT AUTHORITY



CARGO BUSINESS



REVENUE FY23

FLORIDA'S LARGEST CONTAINER PORT

1.3M CONTAINERS (TEUS)

25% INCREASE SINCE 2017

NO. 10 LARGEST U.S. CONTAINER PORT

NO. 1 U.S. PORT FOR TRADE WITH PUERTO RICO

TOP U.S. VEHICLE HANDLING PORT

STRATEGIC MILITARY SEAPORT

FY 2025 Goal:	**1,451,553 TEUs**
FY 2024 Projection:	**1,363,713 TEUs**

(94% of 2025 goal)



CREATING JOBS AND OPPORTUNITY

30K

Northeast Florida Jobs

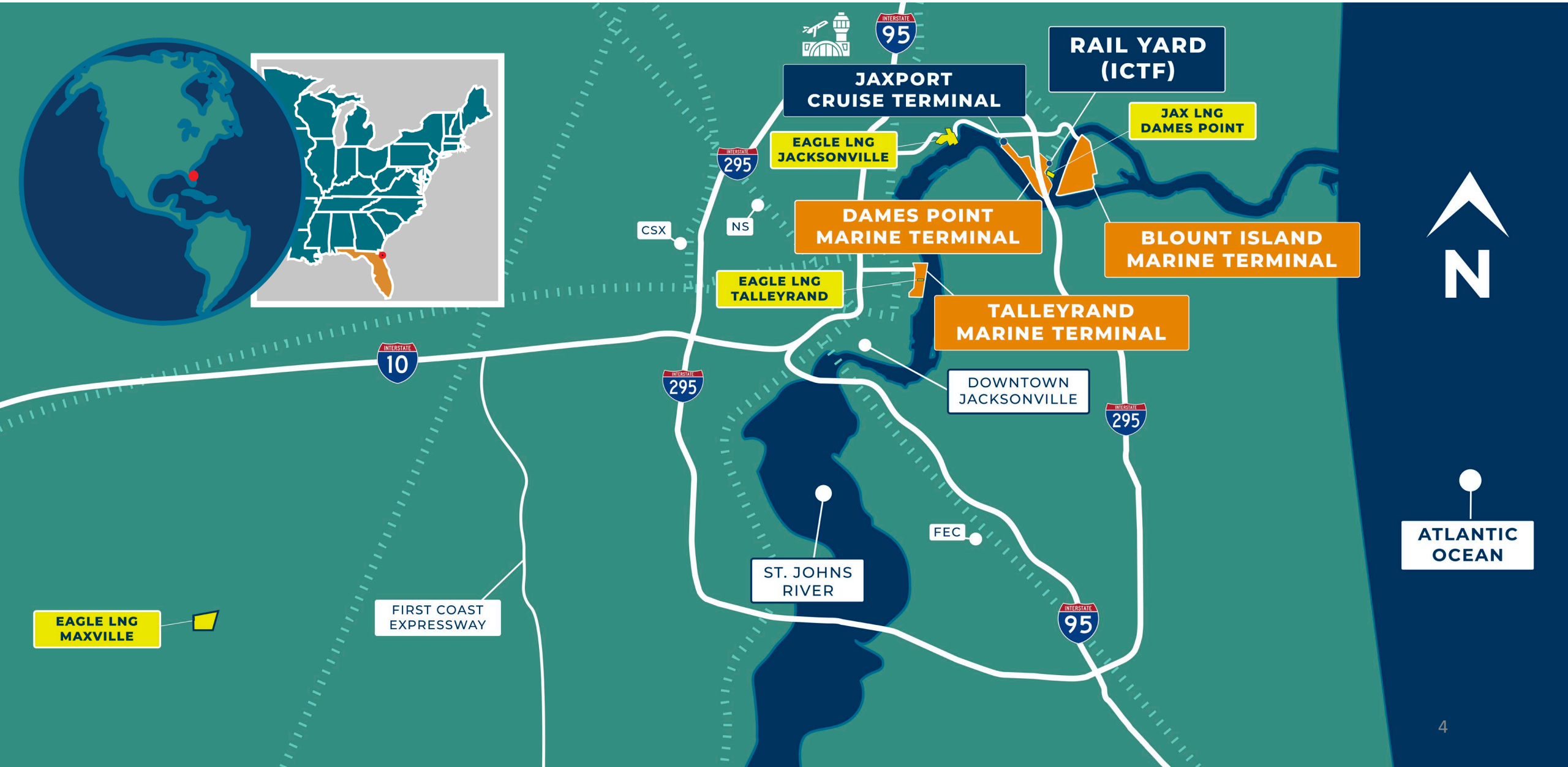
228K

State of Florida Jobs

$44B

Total Economic Impact

JAXPORT BIRDSEYE VIEW



GLOBAL CONNECTIONS



CARGO BUSINESS



TOP CARGOES

1. FURNITURE
2. GROCERY PRODUCTS
3. CHEMICALS
4. PLUMBING SUPPLIES
5. FOOD
6. PAPER
7. INDUSTRIAL SUPPLIES
8. AUTO SUPPLIES
9. PLASTICS
10. MISCELLANEOUS

Source: PIERS by S&P Global, TEUs, JAXPORT Terminals, FY24

CRANES



JAXPORT MAINTAINS A FLEET OF 22 CRANES BY SKILLED WORKFORCE OF MECHANICS, ELECTRICIANS, TECHNICIANS, AND FABRICATORS.

$53 MILLION IN STATE APPROPRIATIONS TO PURCHASE THREE NEW LIEBHERR CRANES

GROWING CONTAINER CAPACITY



Harbor Deepening $420M
Berth Upgrades $100M
SSA Terminal Improvements
$118M In Private Capital

SSA Jacksonville
Container Terminal

AUTO BRANDS



HIGH AND HEAVY



SOUTHEAST TOYOTA

PUBLIC-PRIVATE PARTNERSHIP



Architectural rendering of SET New Auto Processing Facility at BIMT

ENHANCING AUTO CAPABILITIES

BERTH UPGRADES

- Issued Award for Construction of Berth 20 Expansion
- Completed Construction to Modify Berth 22 (adding Breasting and Mooring Dolphins)



BERTH 20



BERTH 22

U.S. MILITARY SHIPMENTS

Only port in Florida handling military cargoes

JAXPORT = One of 17 U.S. ports of strategic significance due to military and humanitarian aid capabilities.

Frequent shipments of military equipment to support U.S. troops and operations overseas









BREAKBULK & PAPER PRODUCTS LEADER



1 MILLION SQ FT. OF TERMINAL WAREHOUSING

- PLYWOOD, PAPER BOARD, CELLULOSE AND FLUFF PULP, BAMBOO, COATED PAPER

OVER 800,000 TONS PER YEAR

NEW, LONG-TERM CONTRACT WITH ENSTRUCTURE

- BUILDING ~200,000 SQ FT OF BREAKBULK WAREHOUSING

SUPPLYING AGGREGATE



41 ACRES DEDICATED TO AGGREGATE/DRY BULK
~1.9 MILLION TONS OF BULK MATERIALS (FY24)

$2.6 MILLION GRANT FROM FDOT THROUGH THE CONSTRUCTION AGGREGATES GRANT PROGRAM (FY2024)
DEVELOPMENT OF NEW AGGREGATE FACILITY AND INCREASED RAIL CAPACITY

GLOBAL LEADER IN MARINE LNG



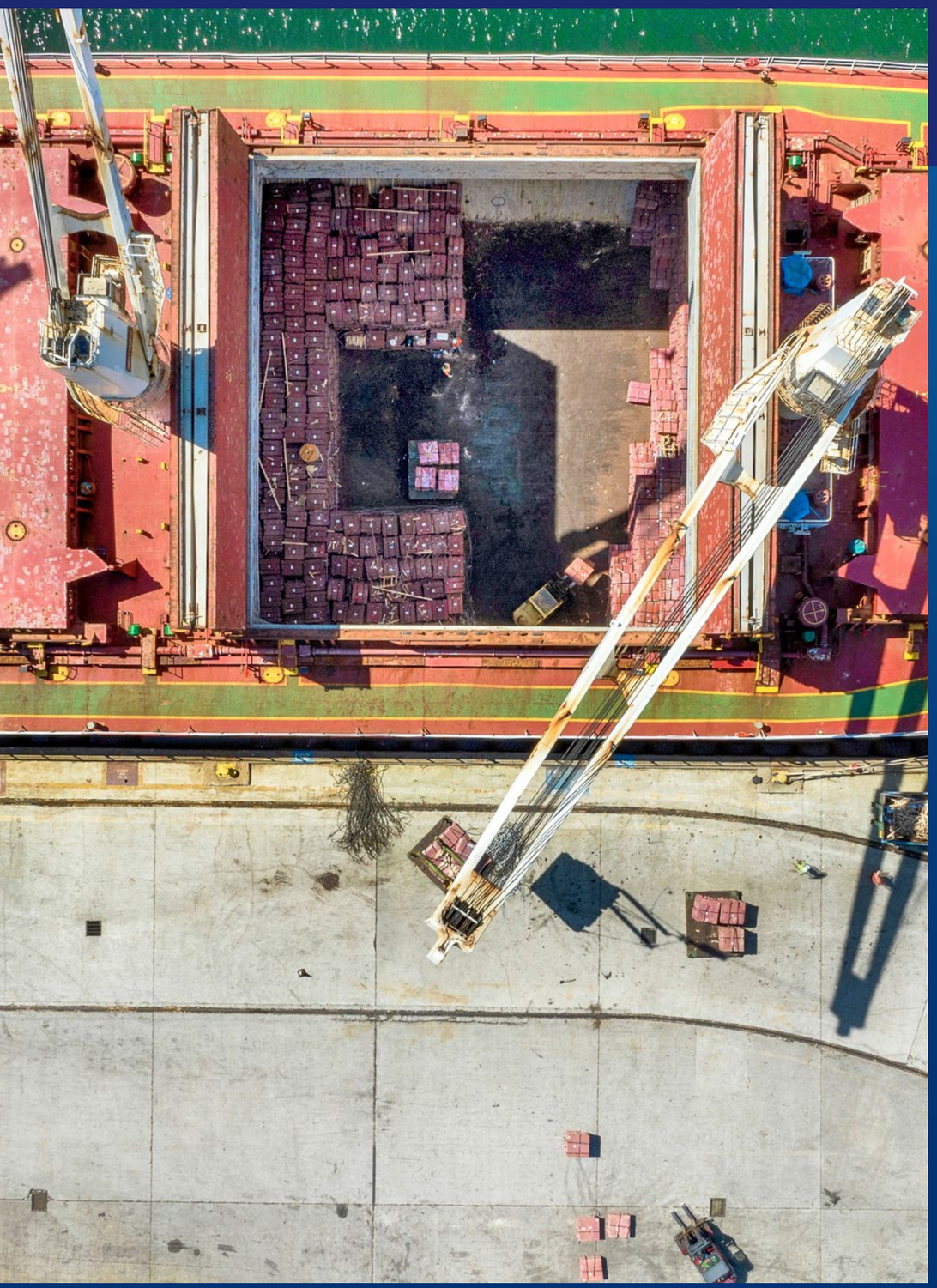


PORT
PANAMA CITY
FLORIDA | USA



PORT PANAMA CITY

OUR PEOPLE **MOVE THE WORLD**



PORT PANAMA CITY'S ECONOMIC IMPACT = $1.6 BILLION

11,000 Jobs

- Direct
- Indirect
- Induced

State & Local Taxes: $58.2 Million

Personal Income & Consumption: $634.5 Million

*2024 MARTIN & ASSOCIATES ECONOMIC IMPACT STUDY

PORT PANAMA CITY
FLORIDA | USA







OUR TERMINALS

WEST TERMINAL

6 Deep-Water Berths

80,000 SQUARE FOOT Multi-Bulk Terminal

1 Full-Service Container Terminal

70,000 SQUARE FOOT On-Port Container Freight Station

EAST TERMINAL

260,000 SQUARE FOOT On-Dock Warehouse

920 FOOT Bulkhead

27 ACRES For Future Port Development

INTERMODAL DISTRIBUTION CENTER

250 ACRES With a Hub for Global Logistics and Fulfillment Carriers

1 Full-Service Bulk Rail Transfer Facility

79 ACRES Shovel-Ready Sites Zoned for Industrial Development

Port Panama City is an operating Port offering two deep - water marine terminals and an Intermodal Distribution Center. The Port also supports two on - port heavy manufacturing tenants.

PORT PANAMA CITY
FLORIDA | USA

Two, OnPort Manufacturing Tenants





PORT PANAMA CITY
FLORIDA | USA

East Terminal Warehouse Phase Two
Start Date: Fiscal Year 2024/2025

Description: The East Terminal Warehouse Phase Two consists of the design and construction of a 200,000 square foot high stack, open span warehouse on an elevated, developed, and paved site that previously served as open storage. The new warehouse will incorporate resilient design elements and provide the needed capacity for timber, paper, KLB, and pulp, providing opportunities for breakbulk cargo growth. Funded with federal PIDP grant dollars, FDOT District 3 funds, and local Port funds, the project looks to create approximately 337 jobs throughout the region and over 200,000 tons of annual cargo capacity.

Warehouse Phase Two	**200,000 SF**
Truck Bays	Eight Auto-leveling
Rail Docks	Covered loading dock and storage tracks
Total Project Cost	**$28,718,075**
Federal PIDP	$11,250,000
Local Port	$5,468,075
State GMR	$12,000,000



East Terminal Bulkhead Extension
Start Date: Fiscal Year 2024/2025

Description: This project will extend the current 920 LF bulkhead by approximately 600 LF and two 15-foot mooring dolphins located at the opposite ends of the bulkhead. When completed, this project will allow the Port to have 1,520 LF of continuous berthing capabilities. This extension will support additional terminal expansion, including a second on-Port warehouse and 27 acres of cargo handling development.

ET Bulkhead Extension	**600 LF**
Total Project Cost	**$21,750,000**
State FSTED Grant	$16,250,000
Local Port Total	$5,500,000



EAST TERMINAL PHASE TWO EXPANSION

- The Phase Two Warehouse project will involve the construction of a new 200,000 - square - foot facility at Port Panama City. This expansion will enhance the port's cargo capacity by an additional 200,000 tons annually and is projected to generate 337 direct, indirect, and induced employment opportunities for the surrounding region.

- The East Terminal Bulkhead Extension will enhance the Port's berthing capacity, enabling it to accommodate two ships concurrently. This development supports the newly established warehouse facilities and the additional 27 - acres designated for future expansion at the East Terminal.

- The Port’s ability to effectively handle long - term cargo growth and modern capacity is dependent upon the East Terminal Expansion.

PORT PANAMA CITY
FLORIDA | USA

EAST TERMINAL TURNING BASIN & ACCESS CHANNEL

East Terminal Turning Basin and Access Channel Improvements
Start Date Fiscal Year 2023/2024

Description: The Phase II East Terminal development project includes a USACE Study for the expansion of the turning basin in conjunction with the planned 600 LF berth extension. The expanded turning basin will provide deep-draft access for two 700 LF vessels mooring simultaneously.

Berth and Channel Deepening	USACE Study
Total Project Cost	**$9,000,000**
State FSTED Grant	$3,000,000
Local Port Total	$6,000,000



PORT PANAMA CITY
FLORIDA | USA

West Terminal Container Terminal Expansion Cargo Handling Improvements
Start Date Fiscal Year 2023/2024

Description: Expanding terminal capacity to handle containerized cargoes is a lynchpin project for the current planning period. The Port Authority expanded container handling capabilities by adding new mobile harbor cranes, reachstackers, refrigerated container racks, expanded container yard handling areas, and a modern on-port container freight station in the previous Master Planning period.

A phased approach to further expansion will ensure the Port is capable of handling the projected, long-term growth in the regional container trades.

The initial phase during the current five-year planning period includes removal of the molasses tank and realignment of the south end rail switching tracks to convert the area to handle containers. This will add approximately 384 TEUs of stacking capacity, and connect the northbound container storage yards to the South berth 2 dock operations. The Port will expand inspection and fumigation capabilities to support perishable cargo including refrigerated and frozen commodities.

The second phase of the container terminal expansion includes reducing the footprint of West 2 Warehouse and adding additional refrigerated reefer racks. This phase will add 544 TEUs of stacking capacity, including 96 TEUs of refrigerated reefer stacking capacity.



The Port has allocated an additional $4.8 million over the next five years for projects at the West Terminal. These projects include cap and apron refurbishment and cathodic protection to extend the life of structural seawalls, support rail improvements, and annual security and technology improvements.

Total Project Cost	**$8,376,000**
State Grant FSTED	$3,888,000
Local Port Total	$4,488,000
Phase II - Five to Ten-Year Plan	**$5,000,000**

WEST TERMINAL CONTAINER TERMINAL EXPANSION

- The West Terminal Container Terminal Expansion is a lynchpin project for the Port.
- The initial phase will optimize and realign the current container terminal to add approximately 384 TEUs of stacking capacity and expand inspection and fumigation capabilities to support perishable cargo.
- The second phase will reduce the footprint of West 2 Warehouse to provide 544 TEUs of stacking capacity with 96 TEUs of refrigerated stacking capacity.

PORT PANAMA CITY
FLORIDA | USA



FIVE AND TEN YEAR PLAN

GROWTH

- Add container handling capacity and on-port infrastructure to support growth in the high-frequency, nearshore shipping between Mexico and Panama City, Florida.

- Continue terminal development and landside access improvements to the East Terminal to support long-term capacity growth for movement of critical commodities including forest products, copper, aggregates, steel, and containerized cargoes.

- Initiate a harbor and navigational study to include improvements to the navigation channels, turning basin, and rehabilitation to bulkheads at the West Terminal.

INVESTMENT

- 1 to 5 Year Total: $87,793,408
- 5 to 10 Year Total: $83,000,000

PORT PANAMA CITY
FLORIDA | USA



Powering Energy Trade Through Port Panama City

1.25 Million Tons of Cargo Handled Support the Energy Sector

FY ‘24: 63% of 2M Tons of Cargo Were Energy & Power Generation Related

- 331,000 tons of import copper used for electric wires
- 854,000 tons of wood pellets exported to the United Kingdom for power generation
- 117,000 tons of Steel Plate and Umbilicals manufactured to be utilized for oil and gas industries

PORT PANAMA CITY
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PORT
PANAMA CITY
FLORIDA | USA



PORT PANAMA CITY

OUR PEOPLE **MOVE THE WORLD**