



Port Everglades Master/Vision Plan Update

Market Forecasts
Draft Findings

Presented to the Port
Everglades Association

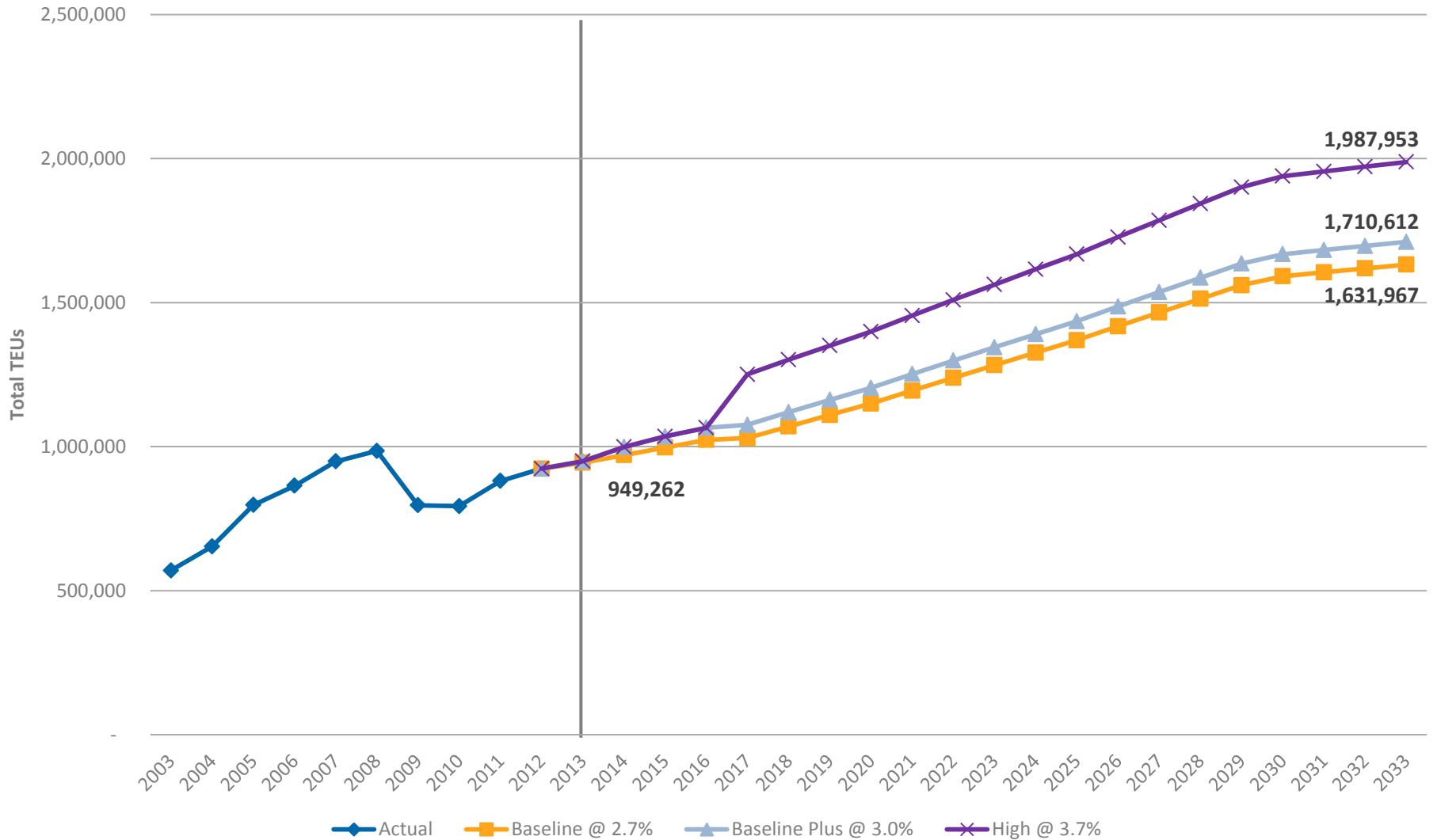
October 4, 2013

Container Forecast Assumptions

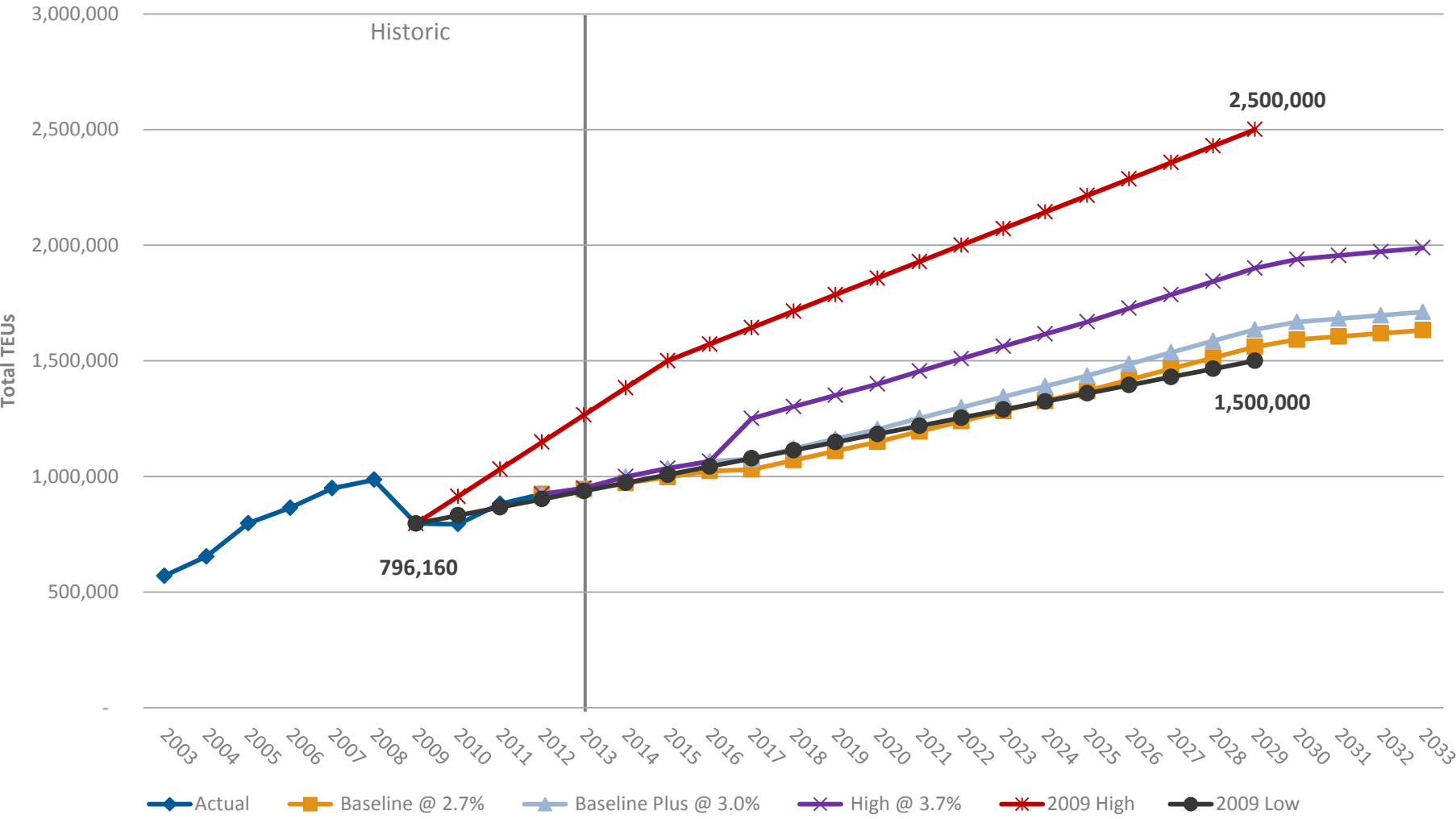
- Baseline Forecast
 - Derived from ACOE deepening study
- Baseline Plus Forecast
 - Accounts for new ICTF and adds Hapag-Lloyd GAX traffic
- High Forecast
 - Adds all-water Asia trade to Baseline Plus scenario and impact on ICTF utilization



Containers - Unconstrained Forecasts



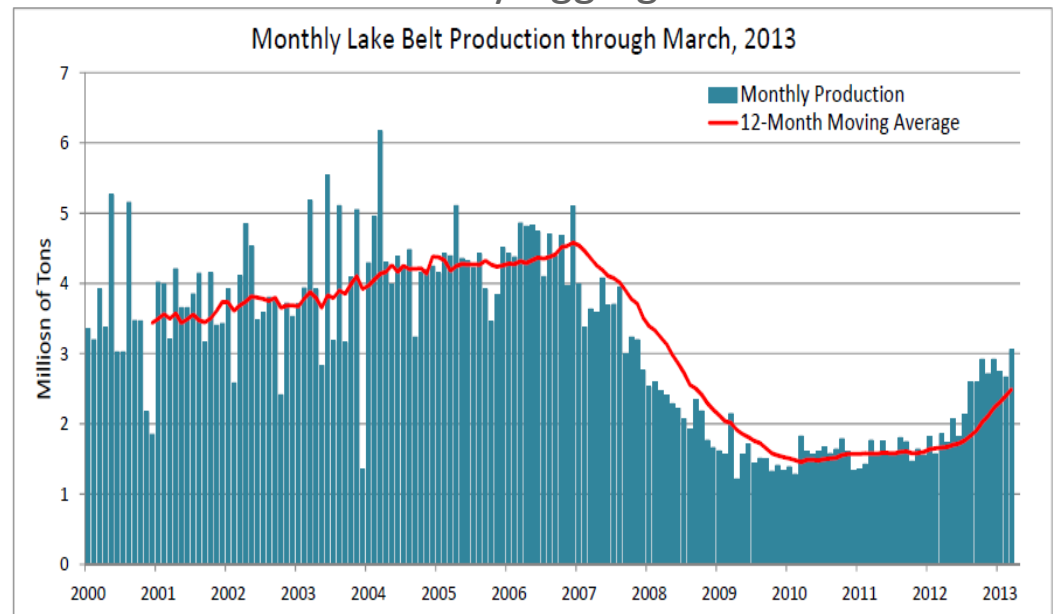
Containers - Comparison of 2009 and 2014 Forecasts



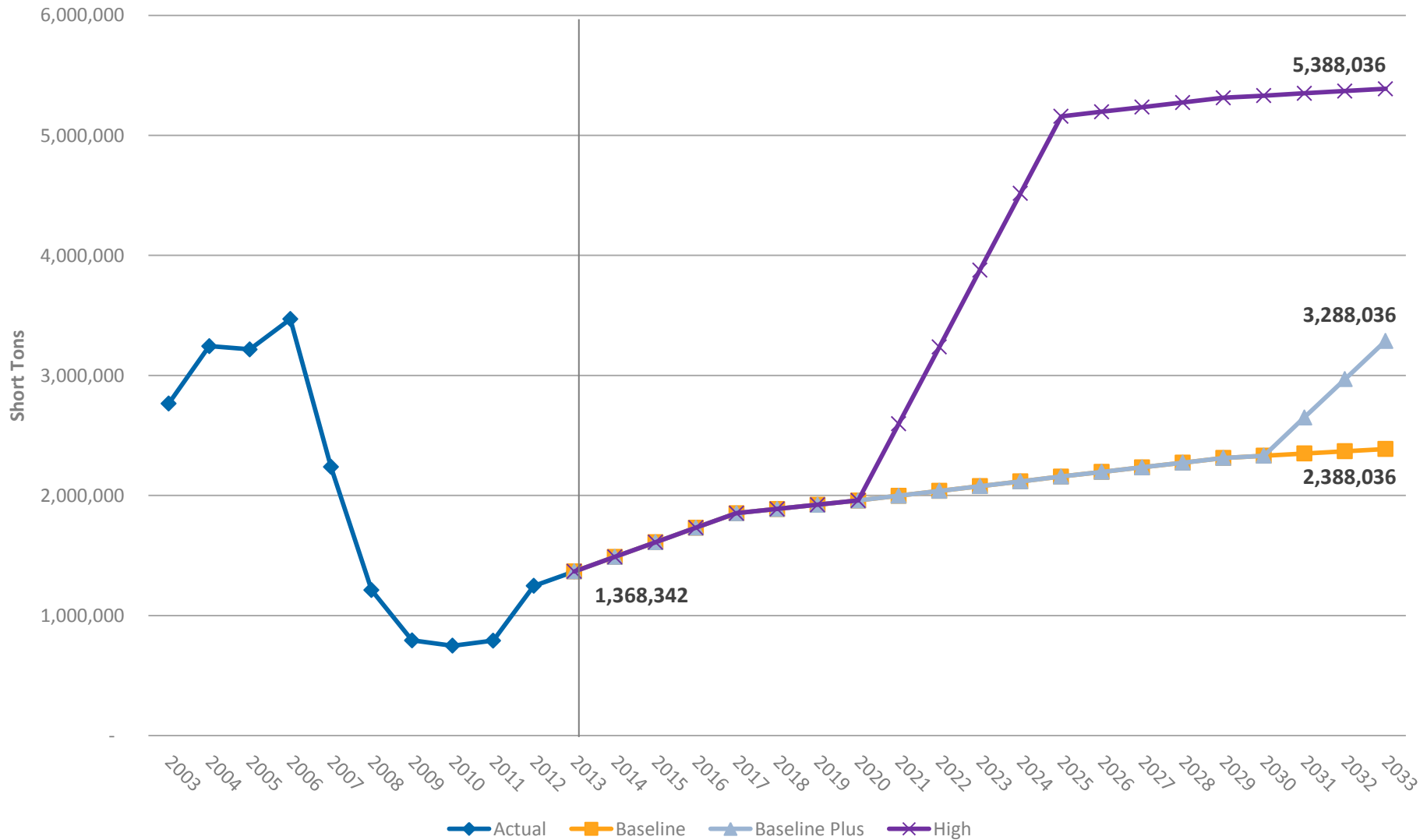
Dry Bulk, Break-Bulk, Yachts and Vehicles

- Baseline forecast
 - Slight rebound from 2012 through 2017, followed by slow growth (1.6% CAGR) through 2033
 - Demand for all commodity types tied to construction activity and GDP
- High forecast (provisional)
 - Possible new crushed rock import terminal
 - Demand depends on:
 - Timing and expiration of Lake Belt mining permits
 - Number of permit holders who could use Port Everglades imports to replace Lake Belt production
 - Suitable facilities, especially rail service, at Port

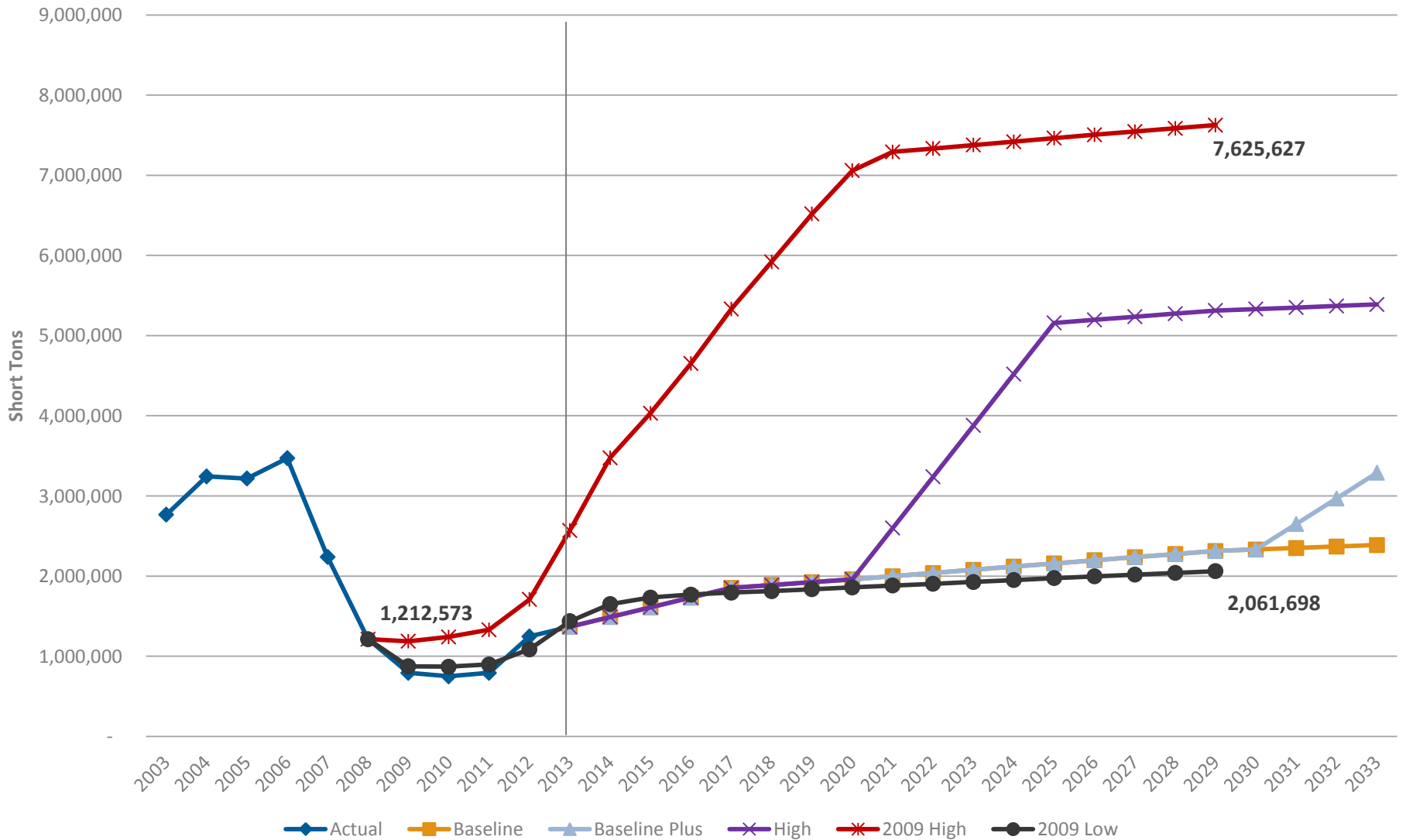
Miami-Dade County Aggregate Production



Dry Bulk, Break Bulk, Yachts and Vehicles 20-Year Forecast Estimates



Dry Bulk, Break Bulk, Yachts and Vehicles Comparison of 2009 and 2014 Forecast Estimates



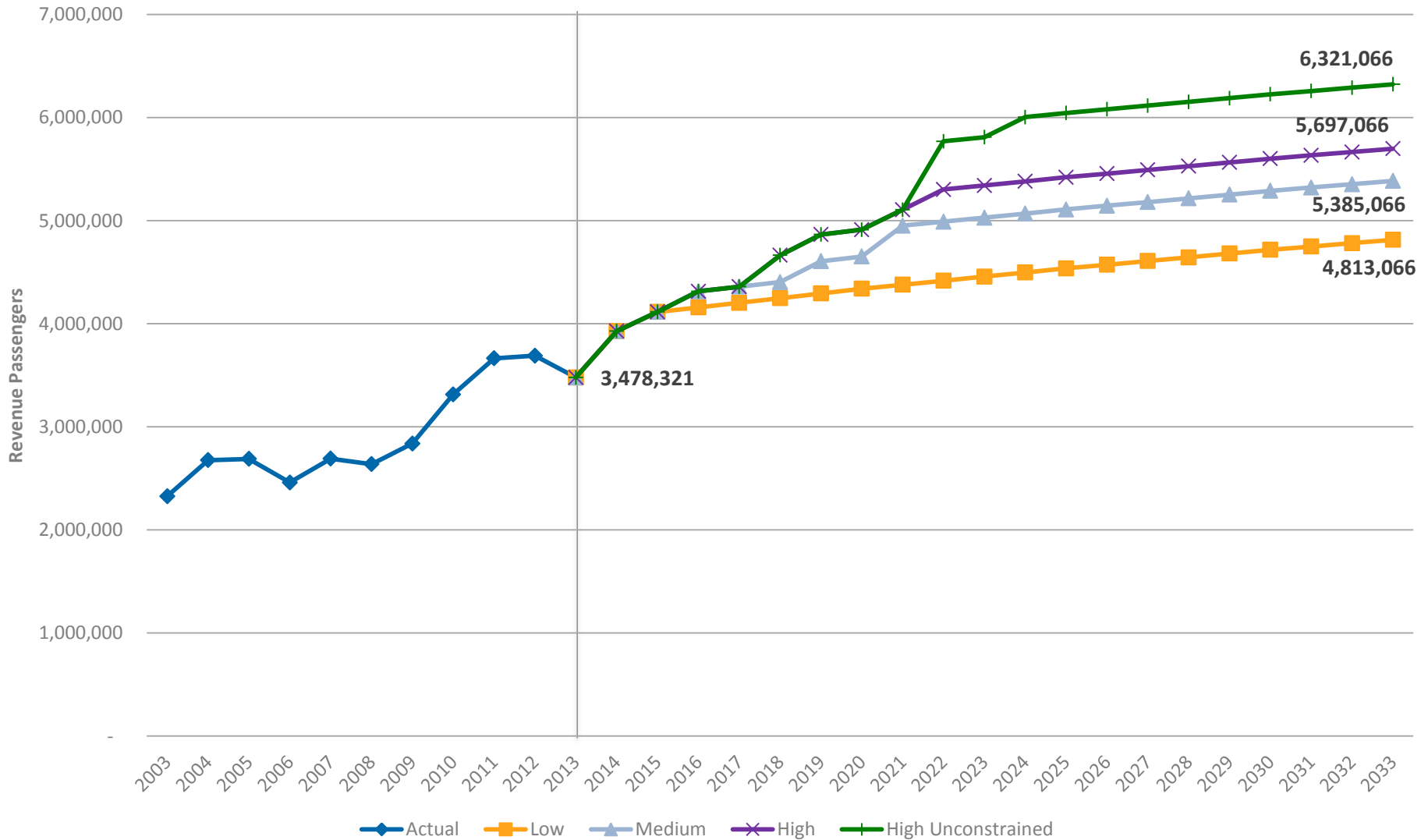
Cruise Forecast: What Key Factors Drove Our Growth Assumptions?

- Weekend Utilization
- Summer Sailings
- Non-weekend Sailings
- 9 Ship Maximum
- Port of Call
- Repositioning of Vessels and Vessel Size Increases
- Single Day Market



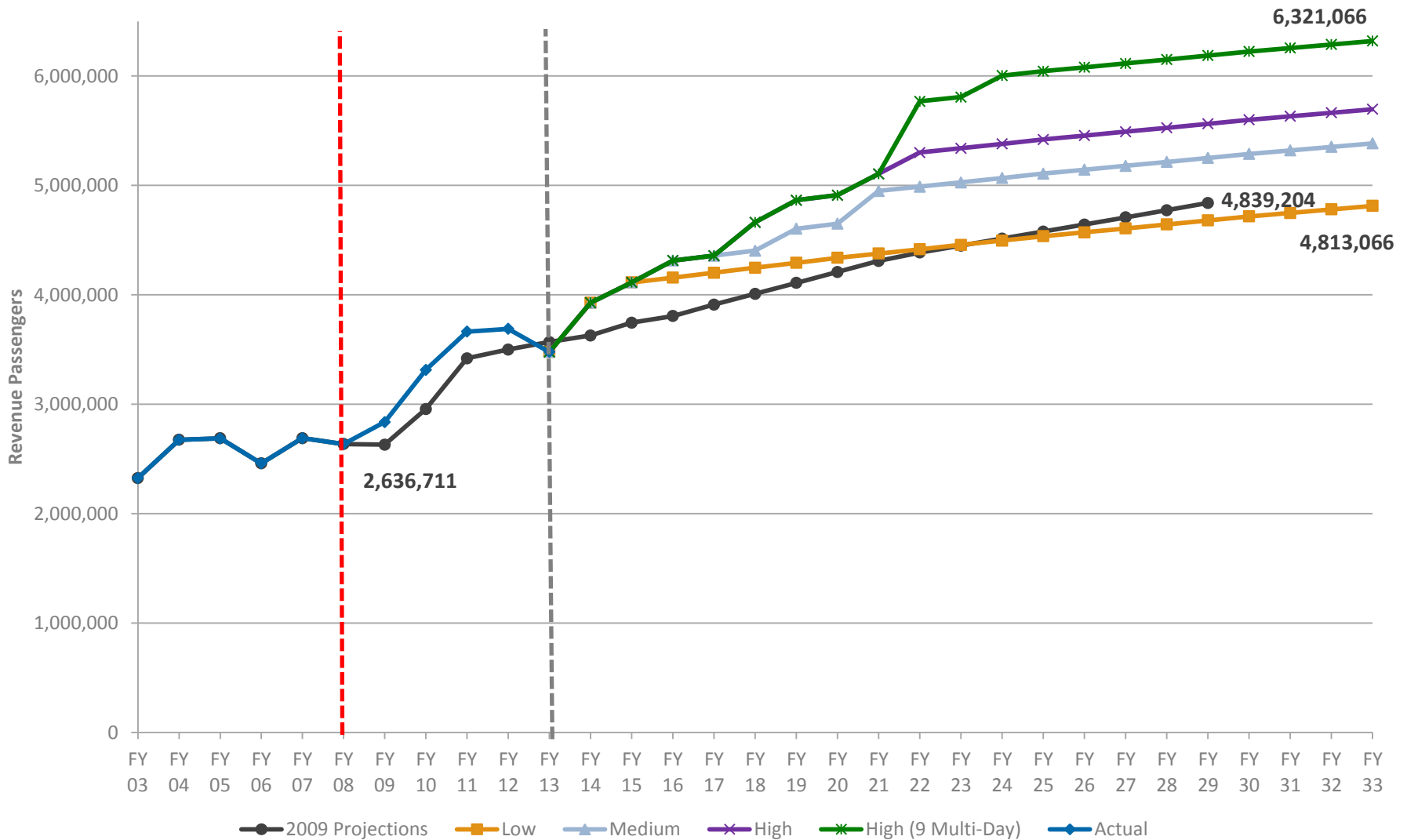
20 Year Forecast for Port Everglades

Multi-Day Cruise Passengers



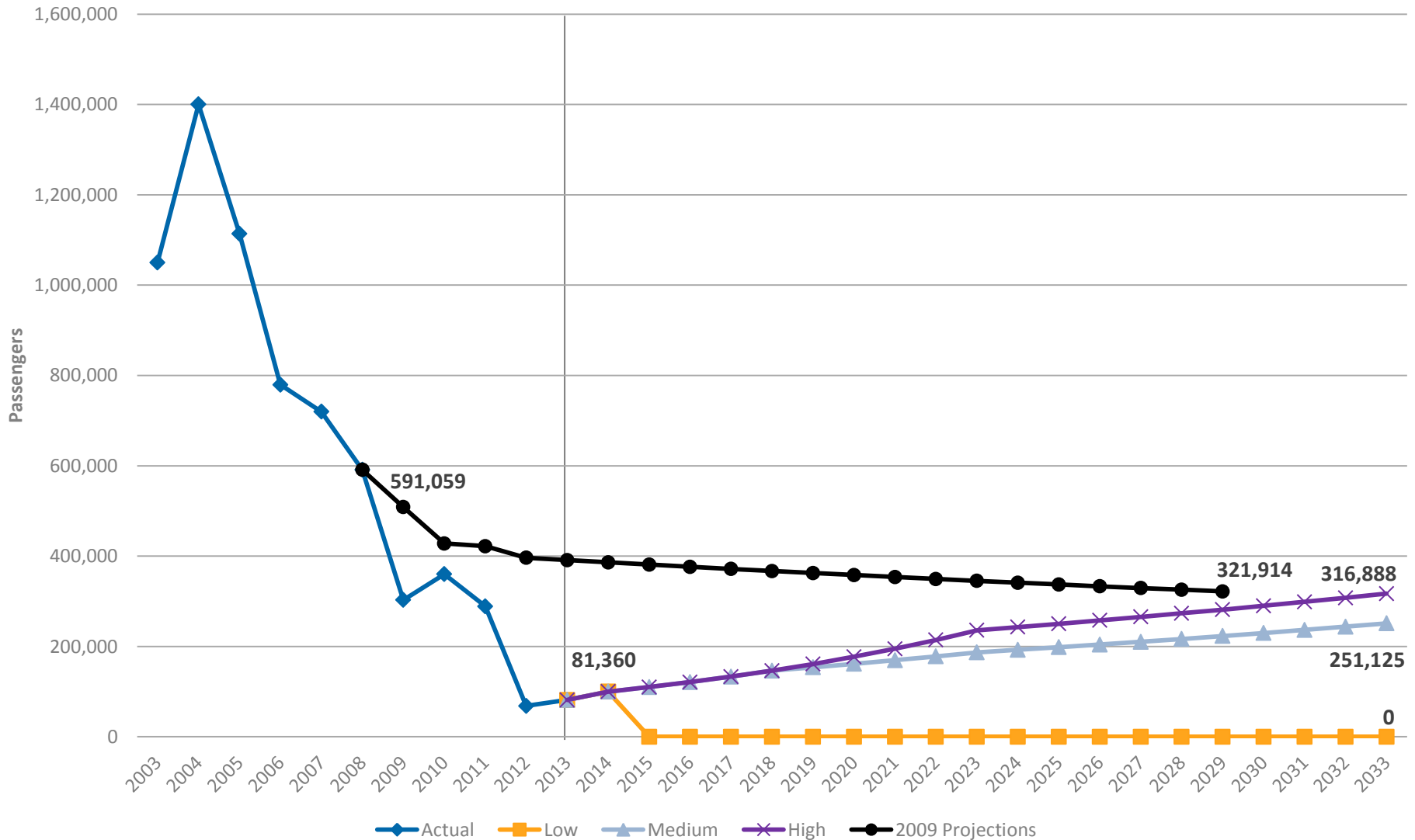
Multi-Day Cruise Passengers

Comparison of 2009 and 2014 Forecast Estimates



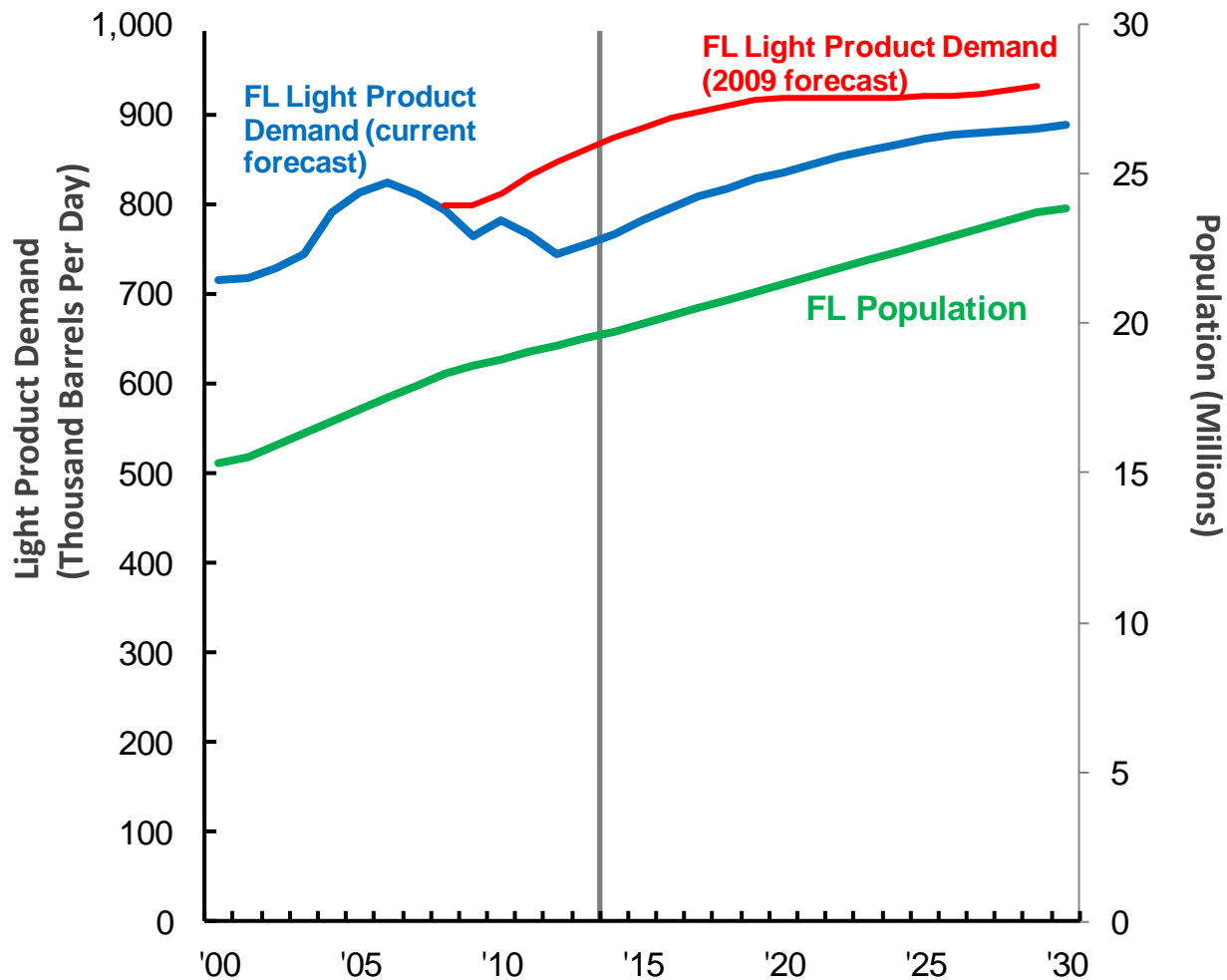
20 Year Forecast for Port Everglades

Single-Day Cruise Passengers



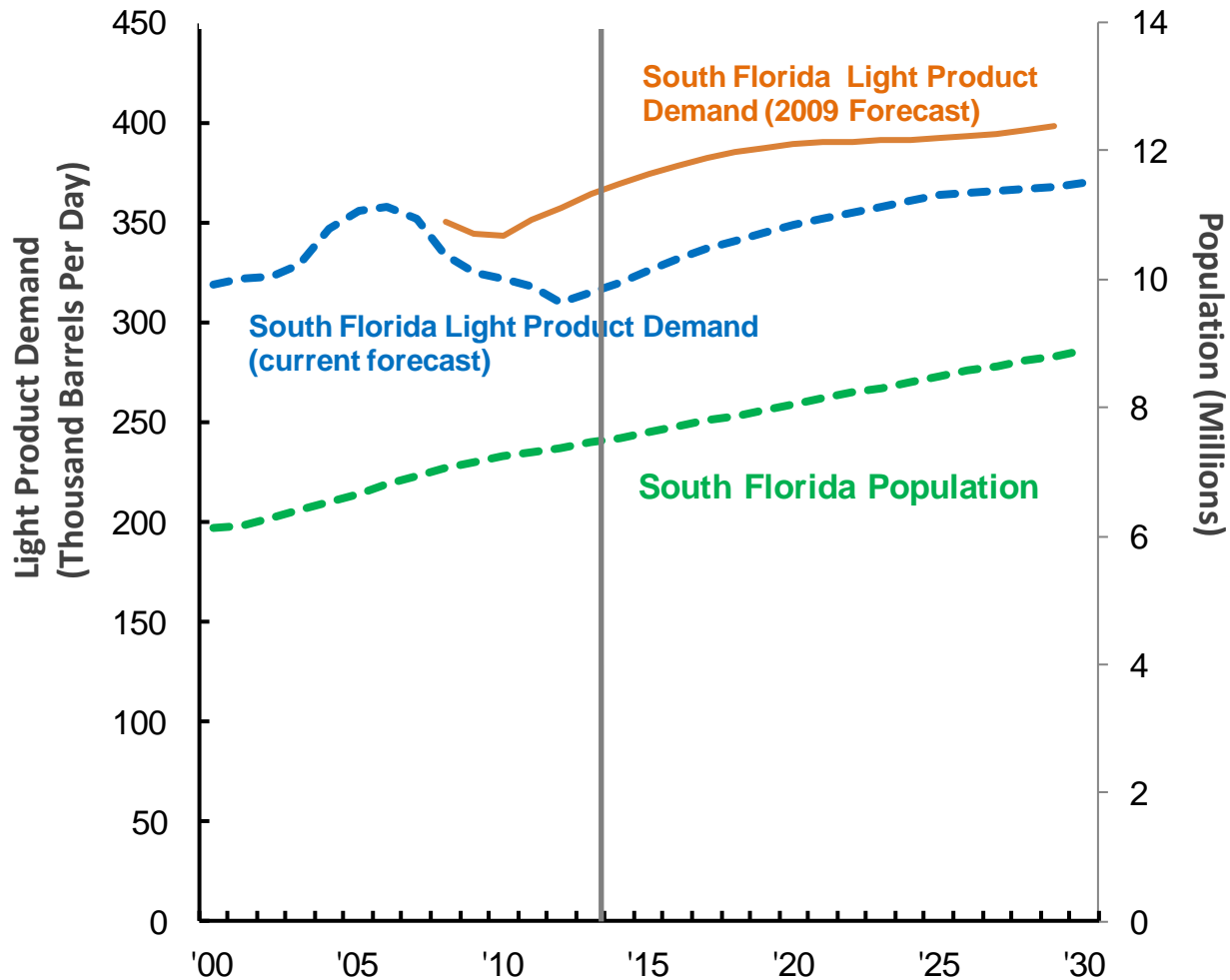
Petroleum Forecasts: Light Product Demand

Florida Light Product Demand and Population

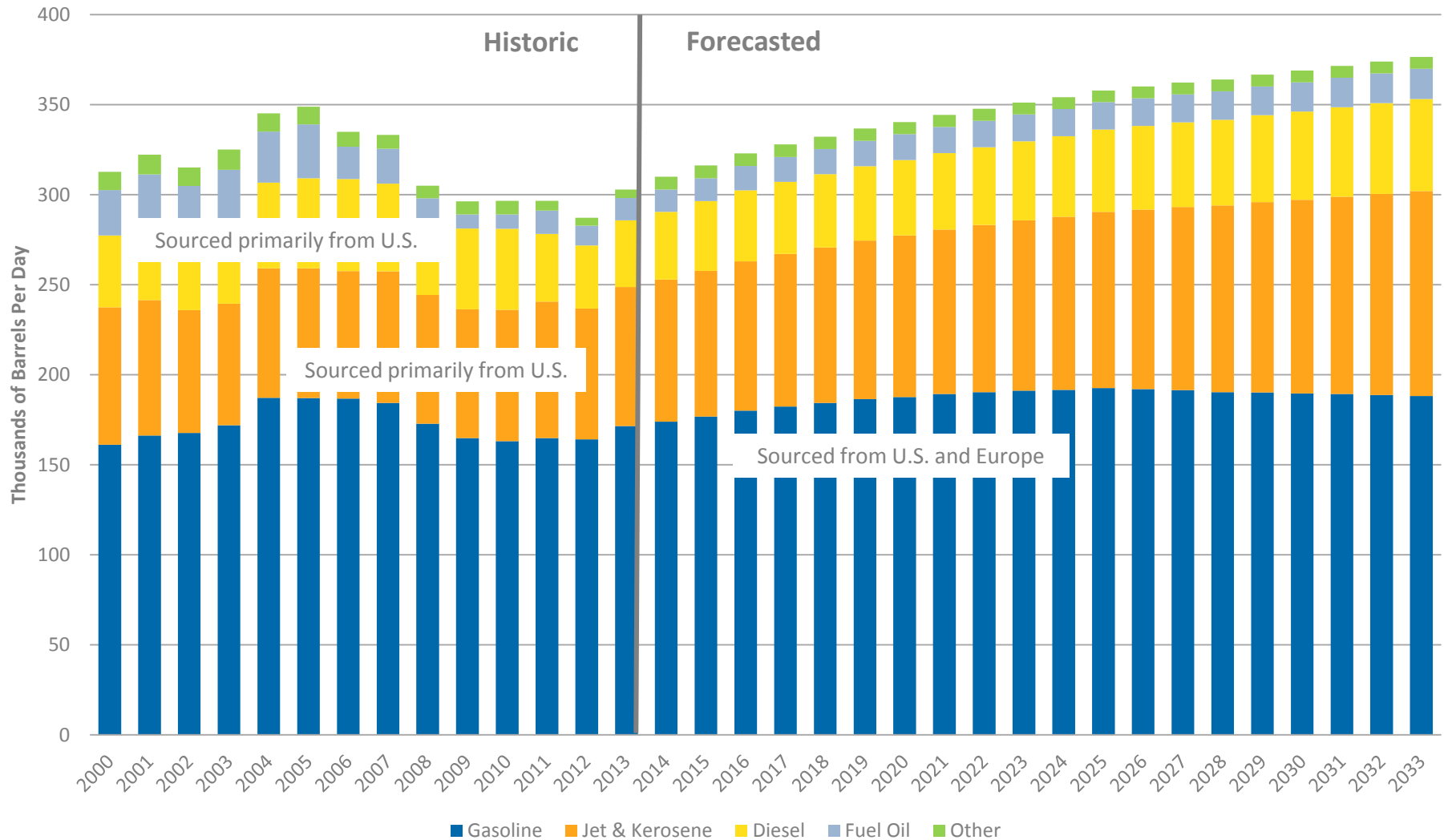


Petroleum Forecasts: Light Product Demand

South Florida Light Product Demand and Population

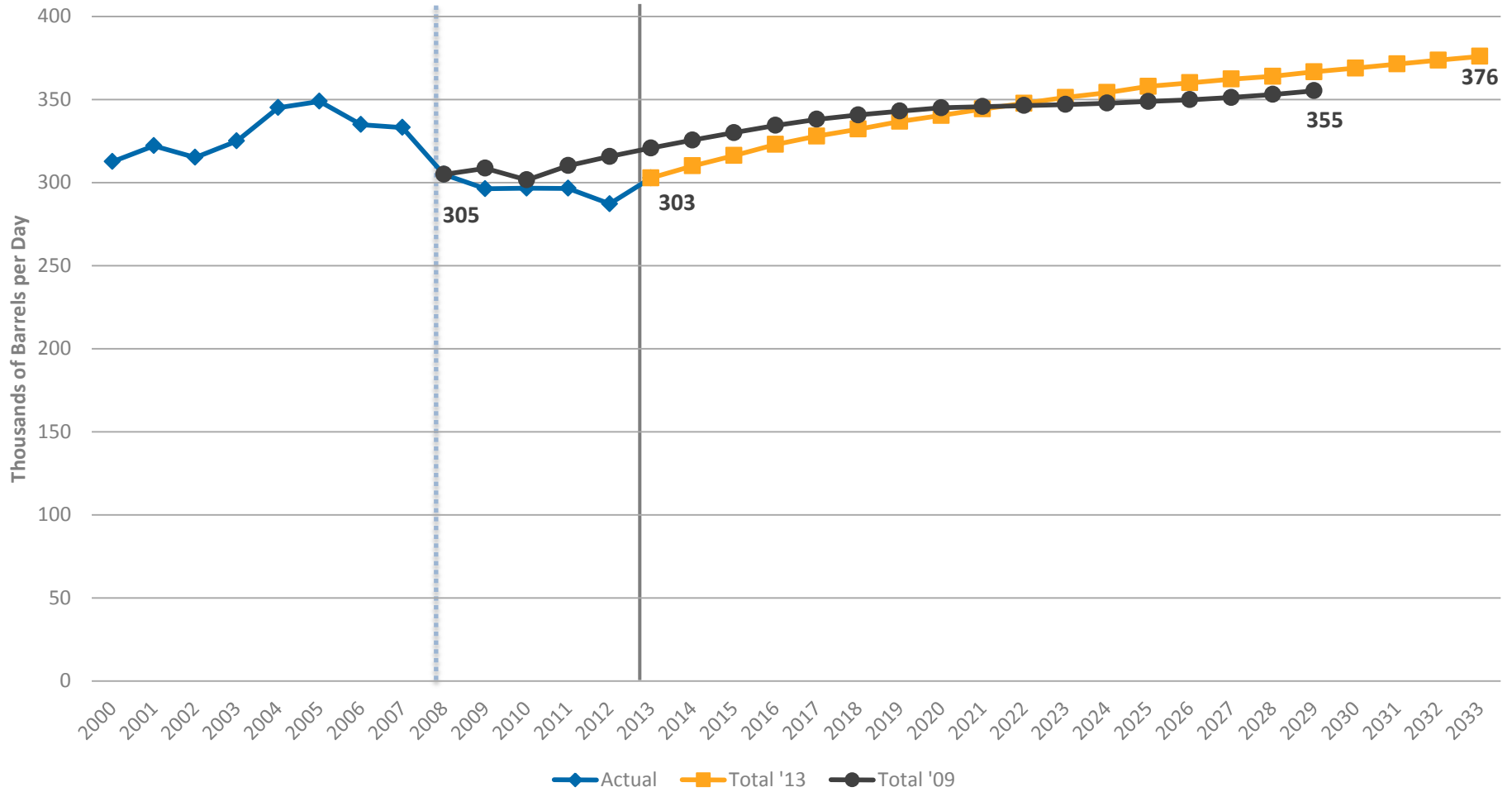


Port Everglades Petroleum Throughput and Forecast



Source: Port Everglades (2000-2012), USACE, DOE, IHS Estimates Note 2013 utilizes fiscal year 2013 data to April provided by Port Everglades

Petroleum Forecast: 2009 and 2014 Comparison



Upcoming Meetings

- **Tuesday, Oct. 8:** Public Meeting to present Market Forecasts, Broward County Main Library, 5-7pm
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- **Phase 2 Meetings** will be scheduled for November and December



Port Everglades Master/Vision Plan Update Contact Person and Email

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To Submit Comments by E-mail:

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