



North Carolina Ports Developments

NCLTL Annual Conference
June 10, 2022

Topics

- NC Ports Infrastructure Update and Future Planning
- Market Update
- NC Ports Solution & Opportunities

Infrastructure



Capital Improvements

\$256 Million Infrastructure Improvements Plan	
Project	Status
Berth Expansion	Complete
212' Air Draft Clearance	Complete
3 Neo-Panamax Cranes	Operational
Turning Basin Expansion – Phase II	Complete
Container Yard Expansion Master Plan	Underway
Refrigerated Yard Expansion	Phase I Complete / Phase II Underway
Gate Complex + Terminal Operating System + Community Access Portal + Chassis Yard	Operational
Wilmington Harbor Navigation Improvement Project	Conditionally Authorized

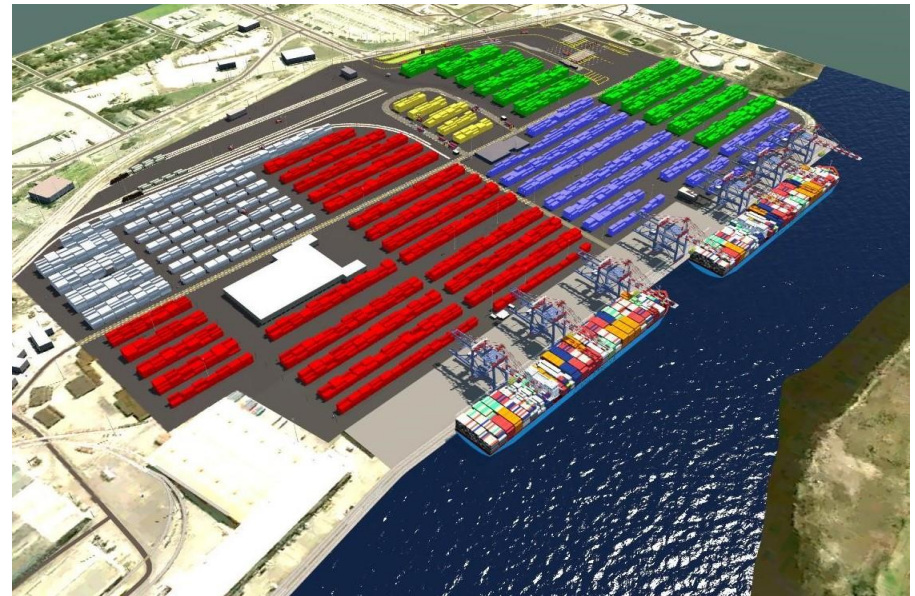


Big Ship Experienced



Container Yard Expansion Master Plan

- Building for 1.2M TEU capacity
- Current yard utilization at 50%
- Improvements and enhancements to cranes, gates, berths, TOS, GOS have been completed



New Container Gate Complex

Expanded for Speed with Scale - Operational February 2022



- New terminal and gate operating systems
- Doubled Lane Capacity in step with 1.2M TEU Capacity readiness
- RFID technology, weigh-in-motion scales, optical character recognition
- Proactive Planning + Execution with Customer Access Portal (CAP)

Refrigerated Capacity Expansion



Project Details

- 760 fixed plugs after Phase 1
- Phase 2 adds 720 additional fixed plugs
- Phase 3 infrastructure
- New RSA (reefer service area)
- Backup Power

Increased Refrigeration Capacity

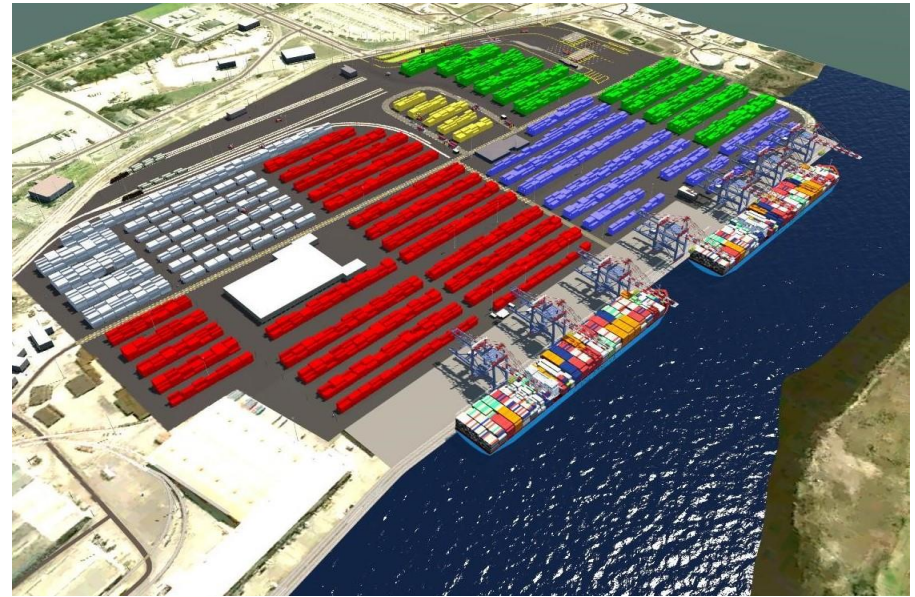




Infrastructure Projects

Current Infrastructure Projects

- Burnett Blvd. East property expansion
- F East (5-acre laydown area upgrade)
- TOS warehouse automation project



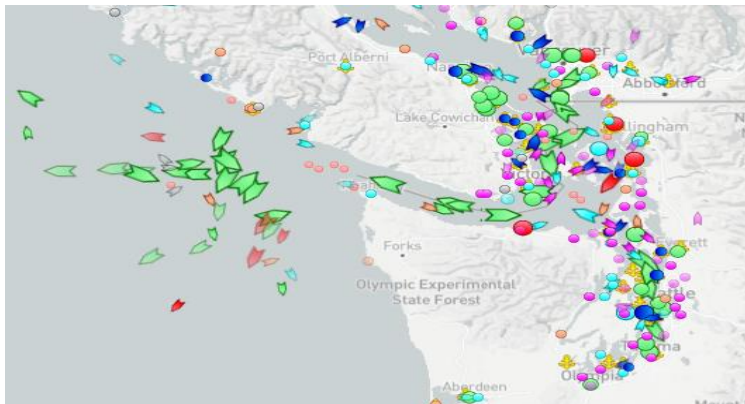
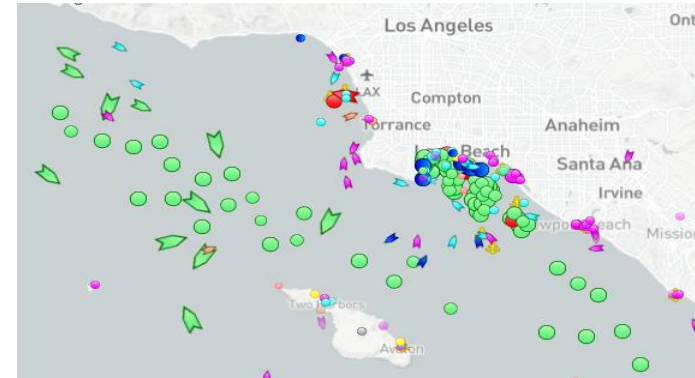
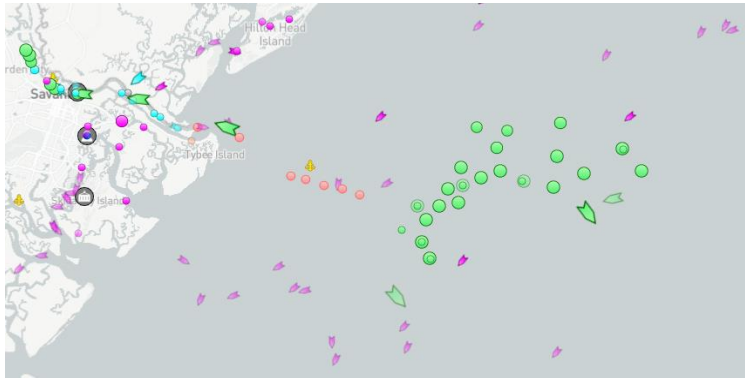


Market Conditions

Logistics In The New Normal

- COVID Rebound & Reset
- Ongoing Shift Dynamics
 1. Demand, Supply & Consumer Pattern Shifts
 2. Organizational & Strategy Shifts
 3. Geographic & Model Shifts
- NC Solution & Opportunities

Congestion Requires Change & New Solutions



Gateway Contracting & Diversification

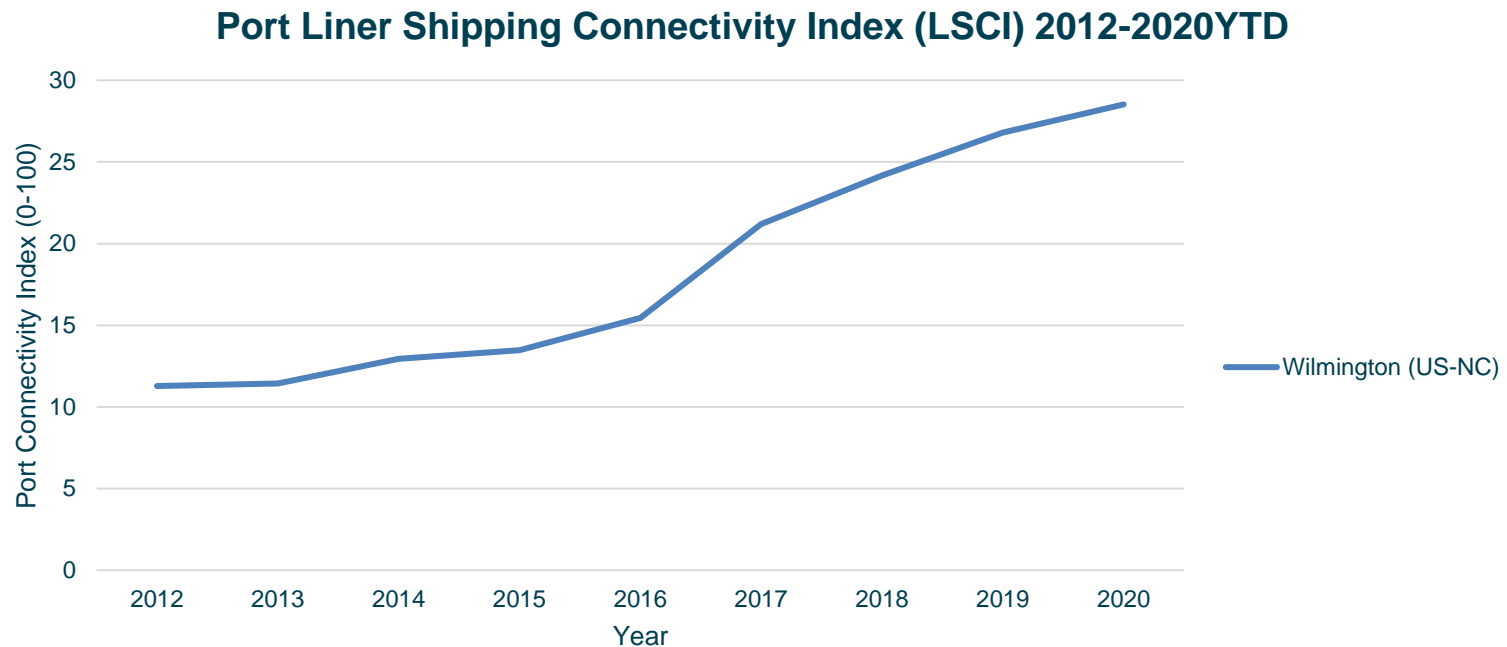
- Market Dynamics
- Risk Mitigation
- Saturated logistics infrastructure
- NC Ports – Available Capacity & Best Performance

NC Ports Advantage

A graphic consisting of several overlapping, wavy, light blue shapes that resemble stylized waves or a coastline, positioned behind the main text.

Greater Trade Connectivity

- Port of Wilmington is the #1 fastest growing LSCI connectivity index by any U.S. port 2012-2020



***Source: The Liner Shipping Connectivity Index (LSCI) - United Nations Conference on Trade + Development*

Defining Performance Excellence

Container Port Performance Index (CPPI)

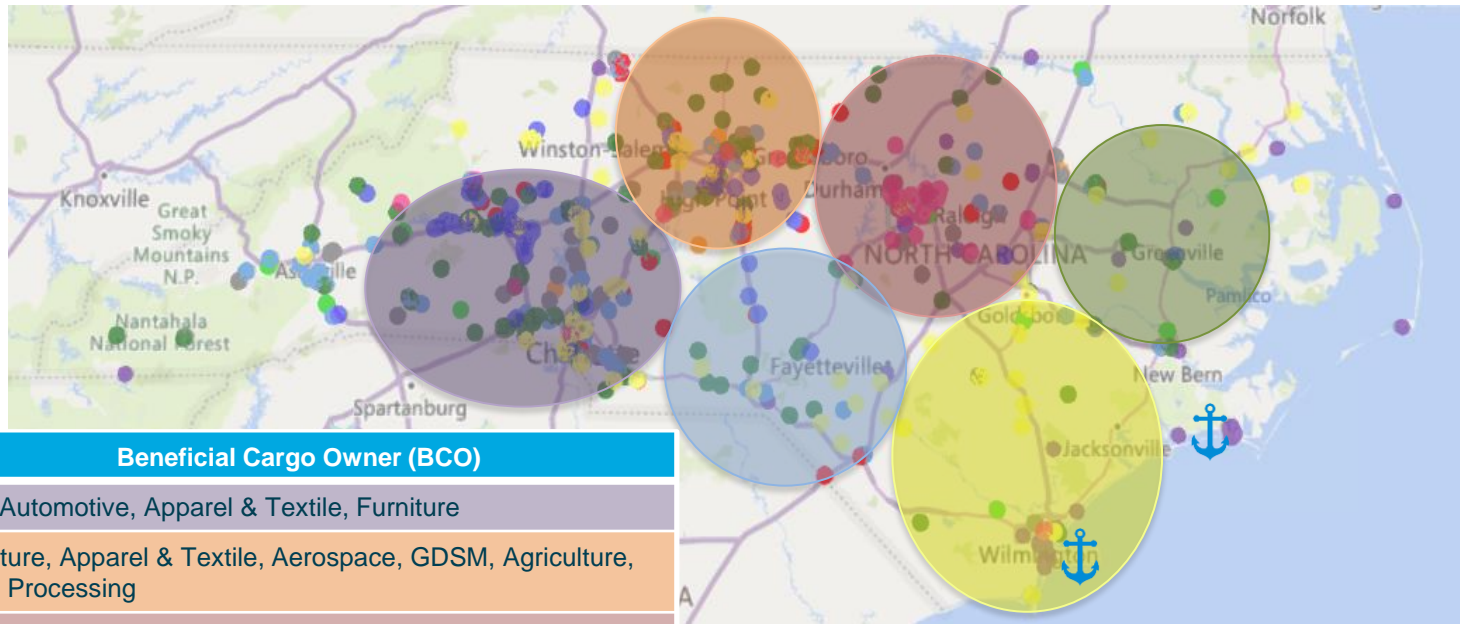
- #1 North America for ports under 500,000 TEUs annually
 - #4 North America
 - #49 Globally out of 370 ports
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- #1 in North America for Overall Productivity – Journal of Commerce (JOC)
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Metrics Driven

- Vessel productivity – 39 net moves per hour
- Gate productivity – Single turn: 19 minutes / Dual turn: 32 minutes

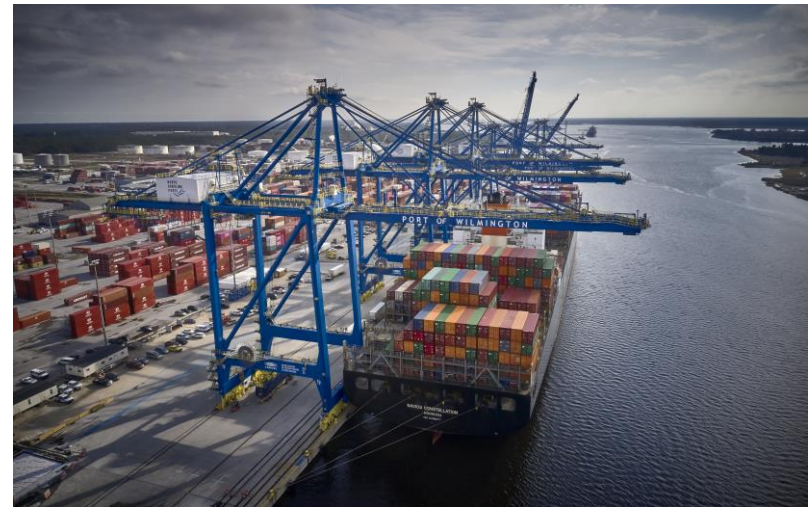
NC Ports Economic Development Alignment



Region	Beneficial Cargo Owner (BCO)
Greater Charlotte	DIY, Automotive, Apparel & Textile, Furniture
Piedmont Triad	Furniture, Apparel & Textile, Aerospace, GDSM, Agriculture, Food Processing
Research Triangle	GDSM, Pharma, Life Sciences, Agriculture, Chemicals, Automotive
Greater Fayetteville	Chemical, DIY, Rubber, GDSM, Apparel & Textile, Agriculture, Defense
Southeastern	Agriculture, Apparel & Textile, Defense, Food Processing
Northeastern	DIY, Pharma, Life Sciences, Agriculture, Aerospace, GDSM

Navigating The New Normal

- **Diversification – Multi-Gateway Strategies**
 - Network balance, resiliency, risk mitigation
- **Efficiency & Performance**
 - Metrics driven
 - Best on the East Coast (JOC)
- **Visibility, Simplicity & Priority**
 - 1 port, 1 terminal for containers
- **Value Delivery – Holistic & Measurable**
 - Best customer experience
- **Smart Growth**
 - NC – best gateway & market combination



Looking Toward the Future

- Continued growth of cargo volumes
- Increasing cold storage capacity
- Expand the global coverage of vessel services
- Engage and support state-wide economic development projects
- Develop the talent pipeline
- Build the NC Ports brand



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