



# SOUTH CAROLINA PORTS

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JUNE 2023





# SOUTH CAROLINA PORTS

- Deepest Port on US East & Gulf Coasts
- An Operating Port That is Fluid
- 33 Weekly Container Services Across All Trade Lanes
- Gateway to Booming Southeast

# STRATEGIC PRIORITIES



**Advance Operational Excellence**



**Grow and Anchor Our Cargo Base**



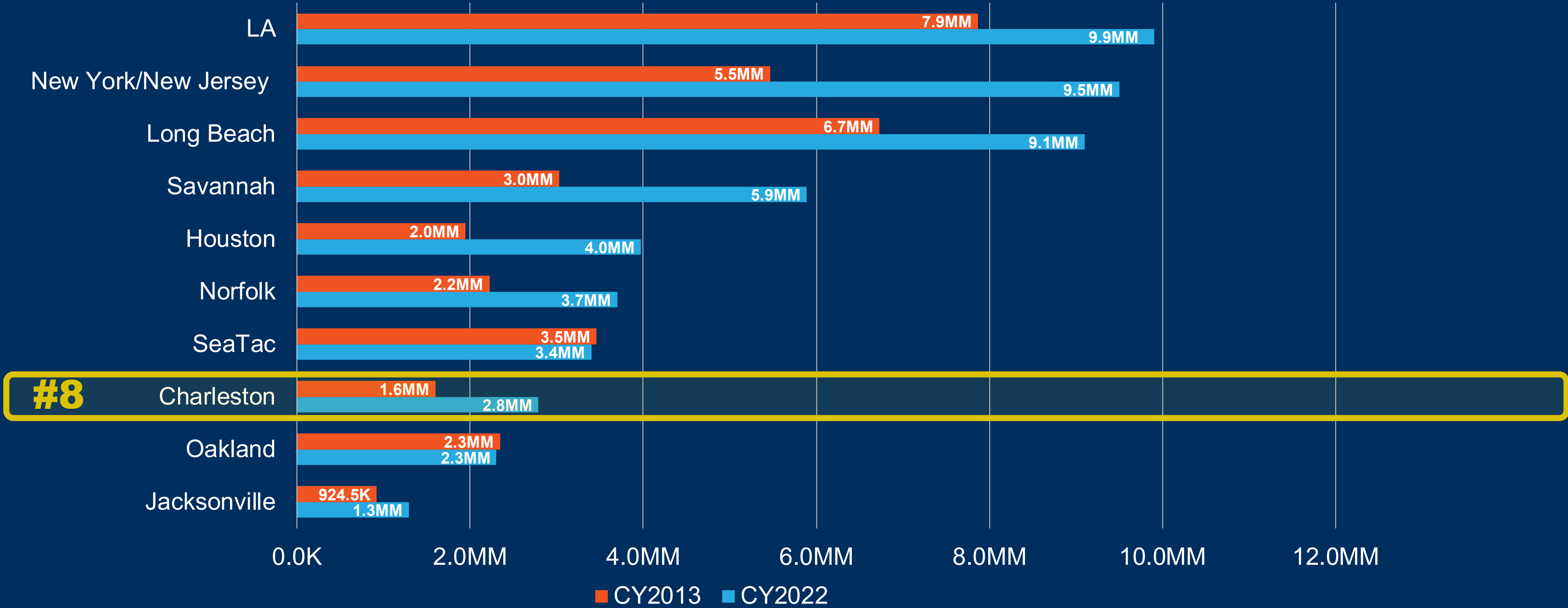
**Deliver Critical Infrastructure**



**Care For Our Port Team Members and Maritime Community Teammates**

# 2022 TOP 10 US PORTS

## TEU 10-YEAR PERIOD COMPARISON



Source: AAPA & individual port websites  
 2022 Jacksonville reports on FY starting Oct 1

# 2022 TOP 10 US PORTS



Over the past 5 years, TEUs grew +11% over the South Atlantic, +13% North Atlantic, and +33% Gulf while the West Coast shrank -4%.

## CAGR BY REGION FY2013-2022

<b>GULF COAST</b>	<b>8.2%</b>
Houston	8.2%
<b>EAST COAST</b>	<b>6.4%</b>
Savannah	7.7%
<b>Charleston</b>	<b>6.4%</b>
New York / New Jersey	6.3%
Norfolk	5.8%
Jacksonville*	3.8%
<b>WEST COAST</b>	<b>2.1%</b>
Long Beach	3.4%
Los Angeles	2.6%
SeaTac	-0.2%
Oakland	-0.2%

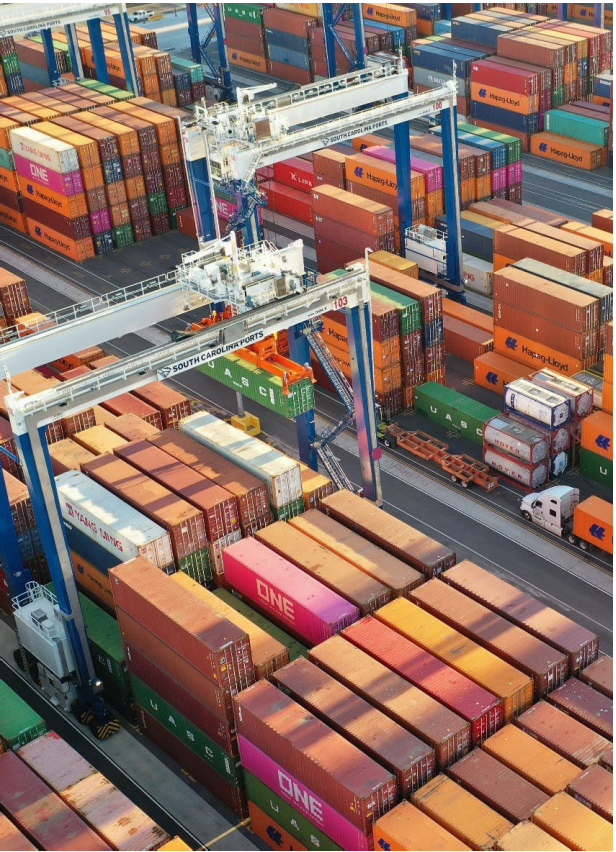
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\*2022 Jacksonville reports on FY starting Oct 1





# INVESTING IN CAPACITY & GROWING SHARE

- More than \$3B of capital investment in 15 years
- Advanced manufacturing successes in SC, such as EV & Solar
- Retail successes provide international & domestic growth opportunities
- Transload opportunities provide strong examples to grow intermodal market shares
- The Southeast will continue to grow at 2x the US port market







# \$3B CAPEX, DOUBLING CAPACITY



-  Wando Terminal Refurbishment
-  Leatherman Terminal Phase 1
-  Harbor Deepening – 52 ft
-  Inland Ports
-  SMART POOL™ Chassis Program
-  Leatherman Terminal Phases 2 / 3
-  NBIF / Wando Barge

# SC PORTS CAPACITY IS WELL PLANNED FOR THE FUTURE

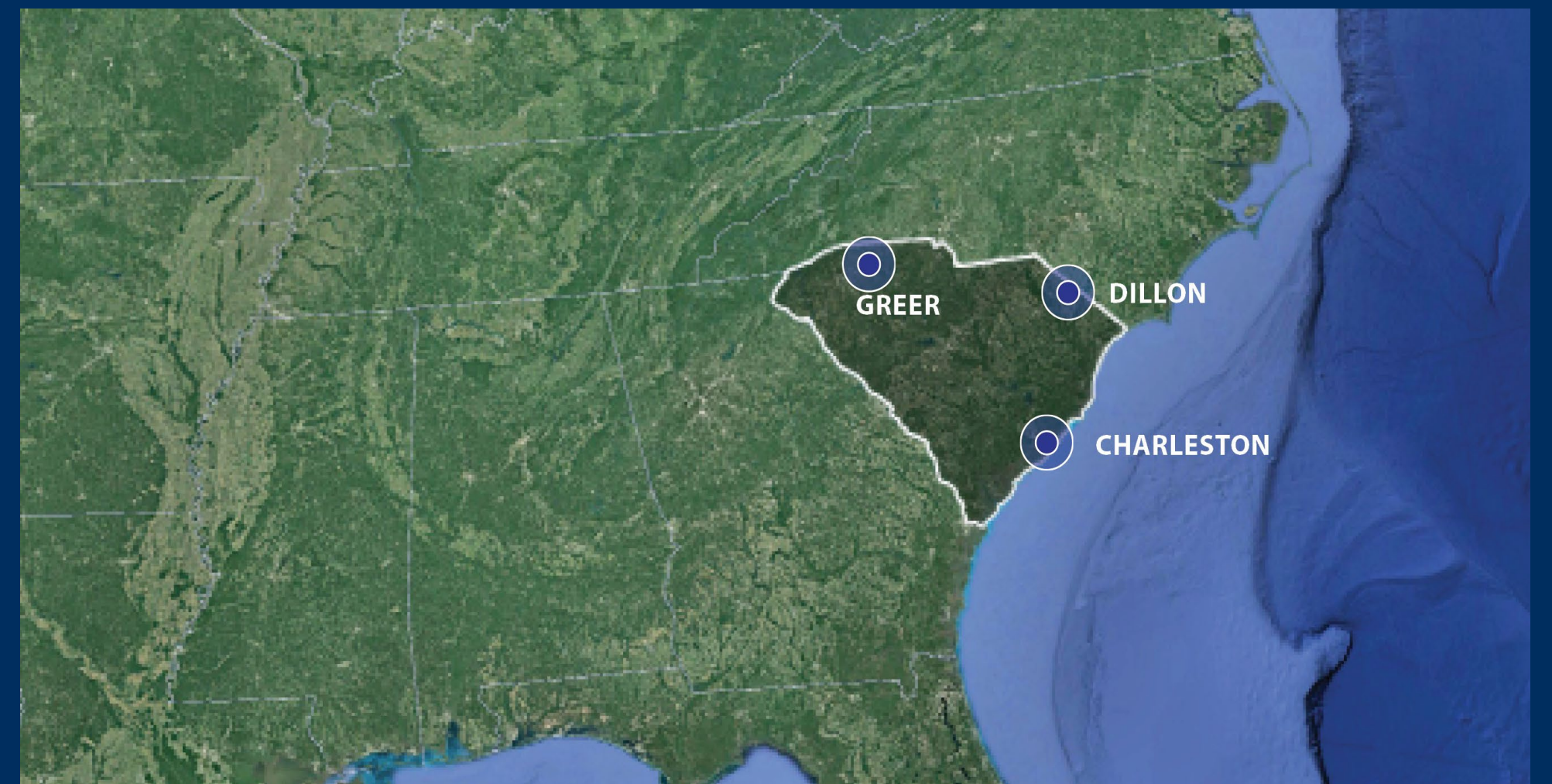
	2023 <i>In TEU millions</i>	2033 <i>In TEU millions</i>	2040 <i>In TEU millions</i>
<b>WANDOWELCH TERMINAL</b> 	2.4	2.4	2.4
<b>HUGH K. LEATHERMAN TERMINAL</b> 	0.7	<u>2.4</u>	2.4
<b>NORTH CHARLESTON TERMINAL</b> 	0.5	0.5	<u>2.4</u>
<b>TOTAL</b> 	<b>3.6</b> MILLION TEU	<b>5.3</b> MILLION TEU	<b>7.2</b> MILLION TEU



# SC INLAND PORTS DILLON & GREER



- Pushes port 212 miles inland
- Served via daily, overnight rail
- Added free-time, 24/7 gates, 12 min truck turns
- Lowers or eliminates variable costs, such as demurrage, chassis fees, & container per diem
- Significantly reduces truck miles
- Helps mitigate trucking risks
- Lowers carbon footprint by up to 75%



# GREER IS A PROVEN MODEL

## 1,000,000+ CONTAINERS IN <10 YEARS

- Powerful alternative to ATL & CLT
- Diversified the Greer cargo base
- BMW now only 19% of imports, 30% of total
- Attracted new import DCs, leading brands
- More coming, spec space in the pipeline
- Growing exports with major shippers



# TOP RETAILERS CHOOSING CHARLESTON



Image by Walmart February 2022



**#1 US IMPORTER**

- 3 Million SF DC opened in 2022
- Dedicated dotcom facility
- Sam's Club DC
- Transformational volume

## MAJOR HOME FURNISHING SUPPLIERS



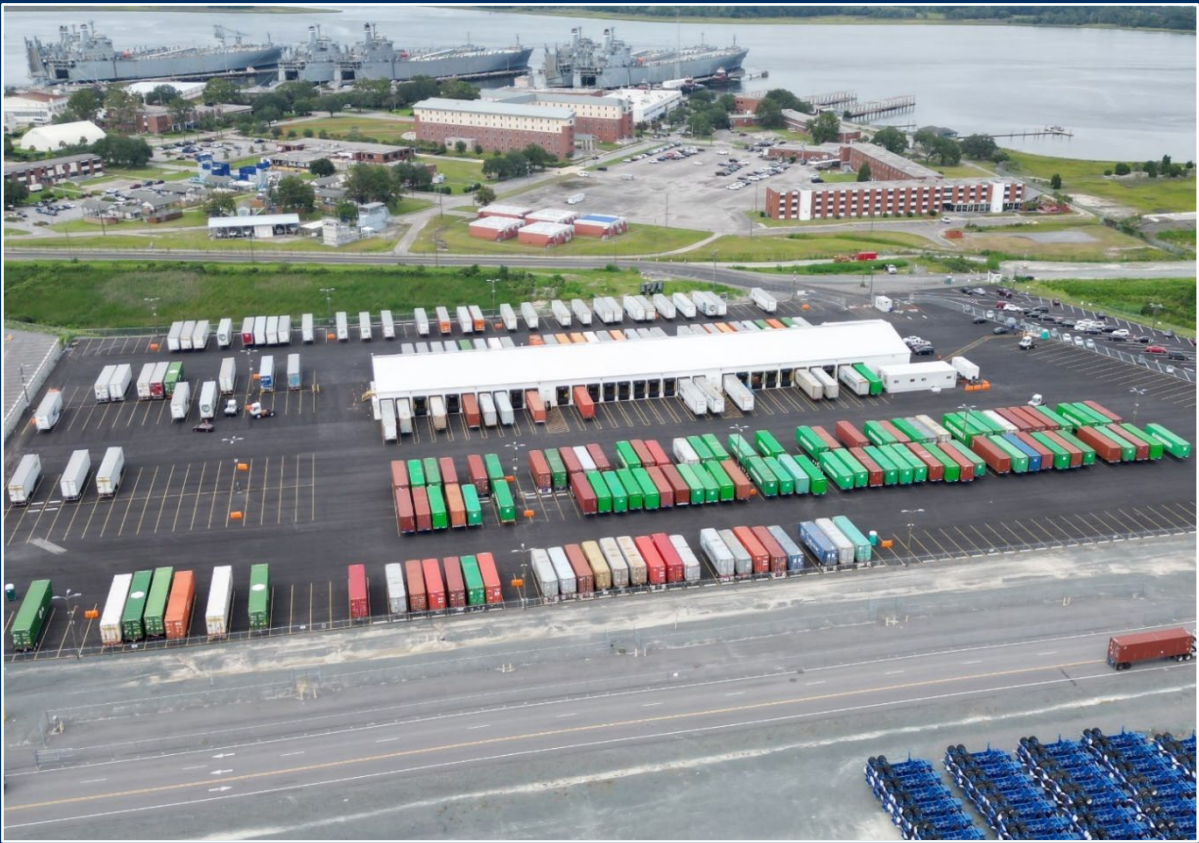
**GE APPLIANCES**  
a Haier company



**SAMSUNG**

**B E R N H A R D T**

**VISUAL COMFORT & Co.**



Dockzilla transload facility just outside HLT



**#2 US IMPORTER**

- Innovative facility opened in 2022
- Swift transload from container to 53ft dry van
- Delivered solution in just 6 months

# GLOBAL REACH

## OCEAN CARRIER SERVICES



- Direct carrier services to / from 77 global ports
- 12 direct weekly Asia services
- First-ins from Asia & North Europe
- Added capacity for SE Asia – closer to US East Coast

Origin Port	Services	Fastest IB	Fastest OB
Shanghai	9	27 Days	35 Days
Yantian	7	34 Days	37 Days
Ningbo	6	29 Days	37 days
Singapore	6	28 Days	34 Days
Busan	5	23 Days	38 Days
Cai Mep / HCM	5	31 Days	32 Days
Qingdao	4	32 Days	35 Days



# SC Port Tax Credit

- Up to \$100 per TEU for new business above base year
- Reduction of employee withholding or state income tax



# A SUPPLY CHAIN BUILT FOR FURNITURE

- Ocean coverage & strong network of service providers that specialize in furniture
- Close to your DCs & High Point's traditional furniture market
- Immediate import availability upon discharge
- Truck turn times less than 30 minutes
- Solutions for tracking, managing, & reporting on containers





**SOUTH  
CAROLINA  
PORTS**

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THE WORLD CONNECTS HERE

**THANK YOU**