



**SOUTH  
CAROLINA  
PORTS**

**JANUARY 2025**



# **STRATEGIC PRIORITIES & PERFORMANCE METRICS**

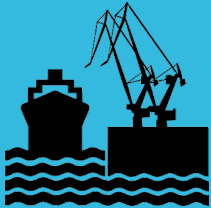
# STRATEGIC PRIORITIES OF SC PORTS



**Advance Operational Excellence**



**Grow and Anchor Our Cargo Base**



**Deliver Critical Infrastructure**



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



# STRONG FY2024 FINISH FOR SC PORTS

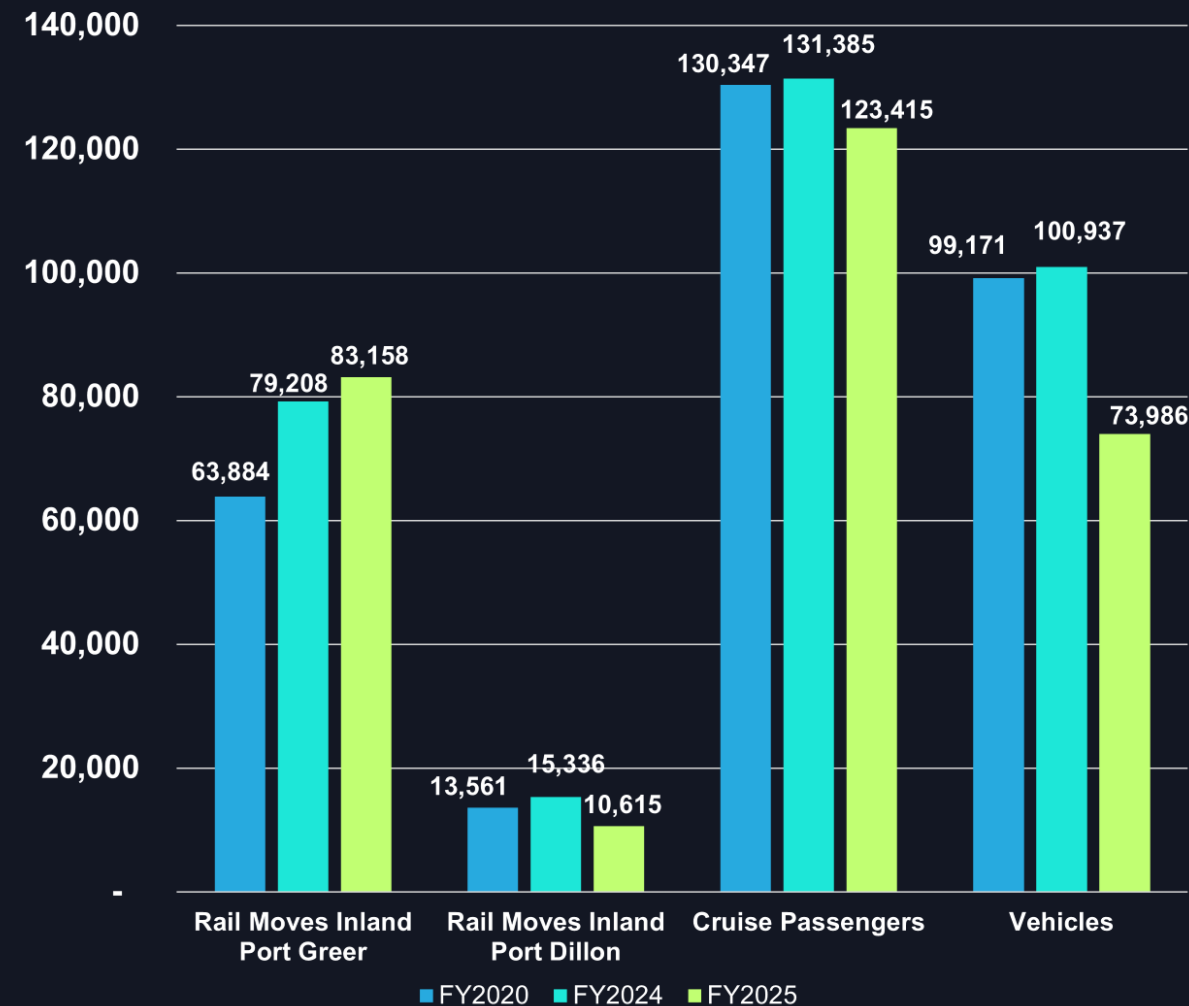
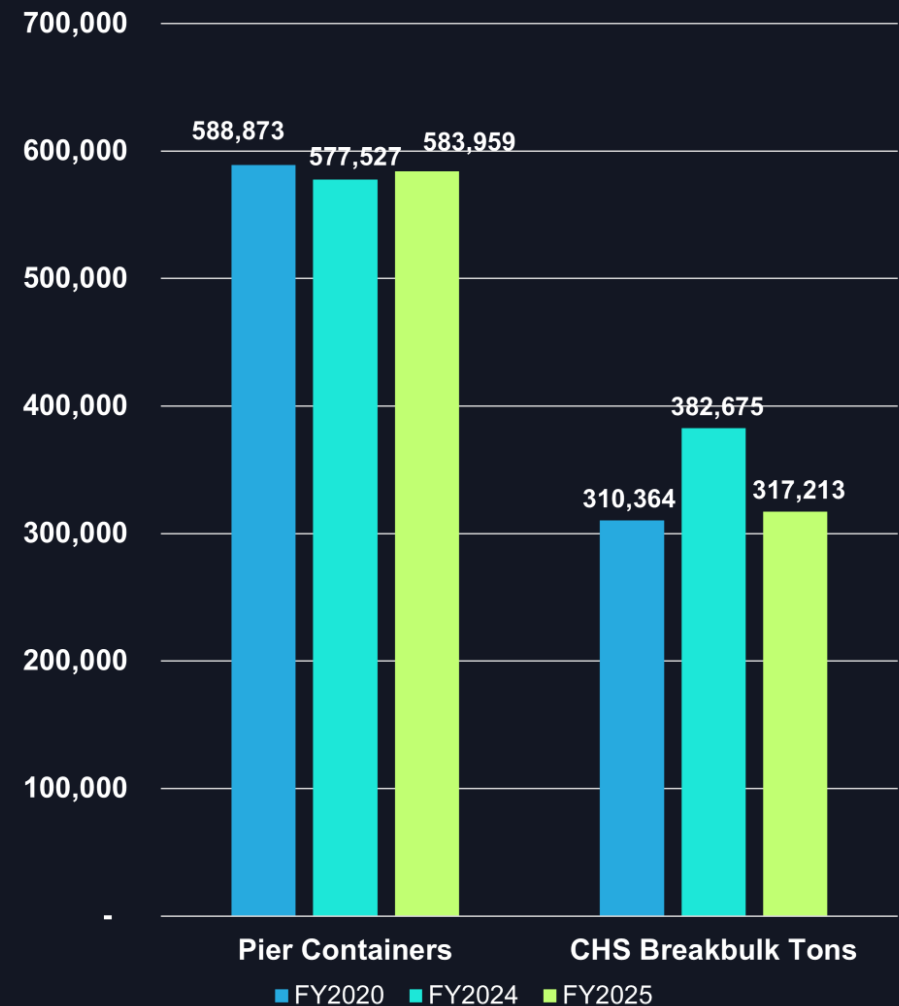


- Handled nearly 2.5 million TEUs and 1.4 million pier containers – *consistent with pre-pandemic results*
- Wando Welch Terminal notably achieved an *all-time record*, with more than 1.2 million containers moving across its wharf
- Both Inland Port Greer and Inland Port Dillon handled record cargo volumes, with a combined 230,409 containers – *up 24% from prior year*
- Handled 210,817 vehicles – *up 12% from prior year*



# SC PORTS FY2025 VOLUME RESULTS

## FY2020 / FY2024 / FY2025



\*FY2020 = July – November 2019 / FY2024 = July – November 2023 / FY2025 = July – November 2024

# SC PORTS FY2025 PLANNED VOLUMES

## FY2024 / FY2025

	FY2024 ACTUAL	FY2025 PLANNED		
PIER CONTAINERS	1,379,960	1,416,000	↑	3%
PIER TONS*	845,147	763,046	↓	-10%
CRUISE PASSENGERS**	295,624	158,990	↓	-46%
VEHICLES	210,817	190,543	↓	-10%
GREER RAIL MOVES	187,638	195,000	↑	4%
DILLON RAIL MOVES	42,769	42,148	=	0%

\*Includes vehicle tons.

\*\*December 31, 2024, marks the end of home port cruises.

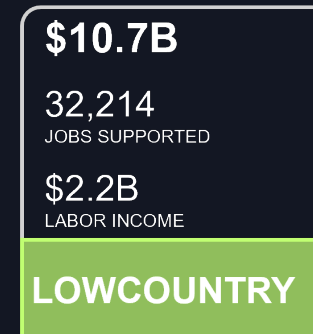
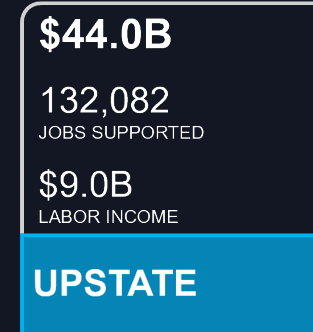
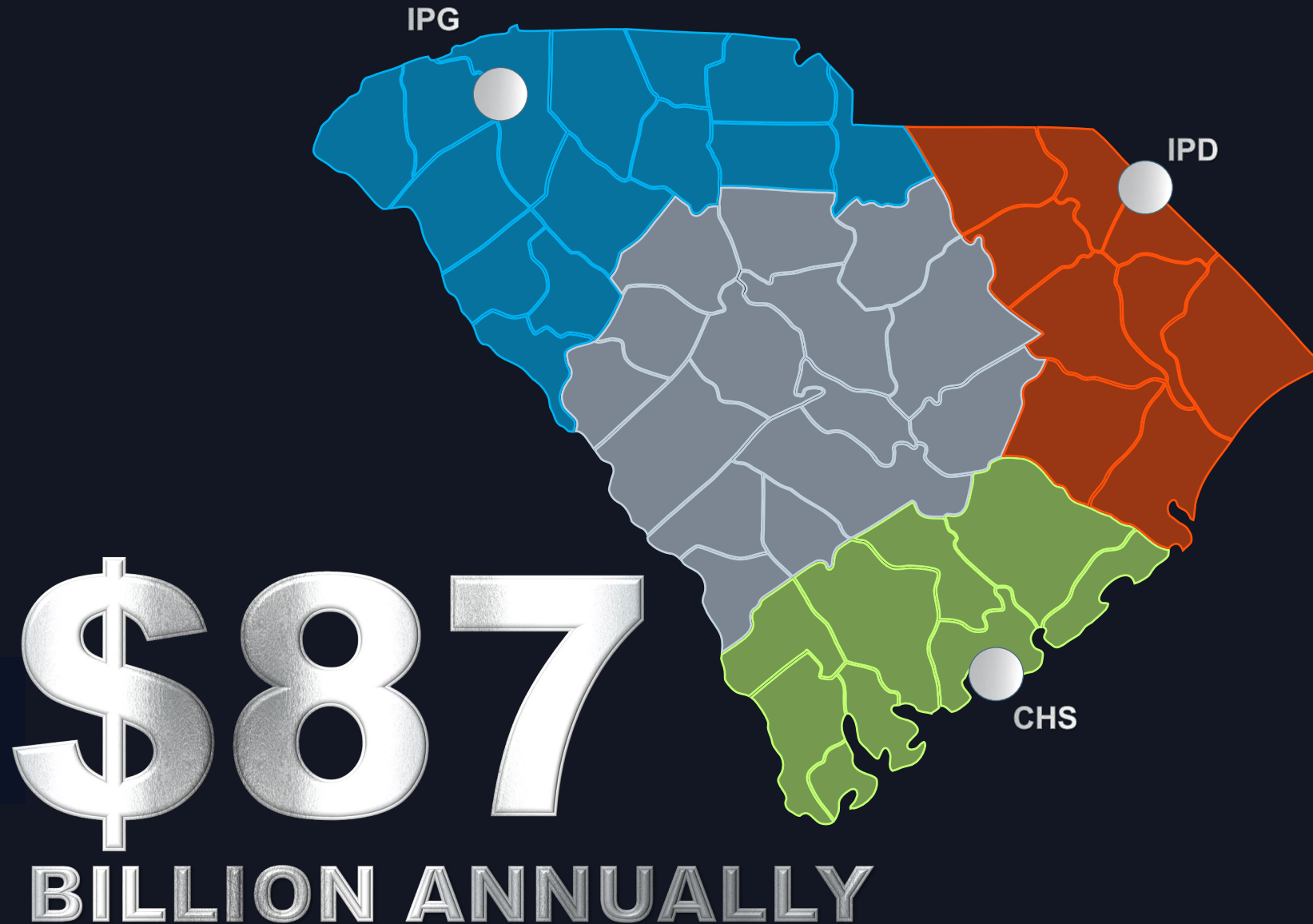


# INVESTING IN CAPACITY & GROWING SHARE

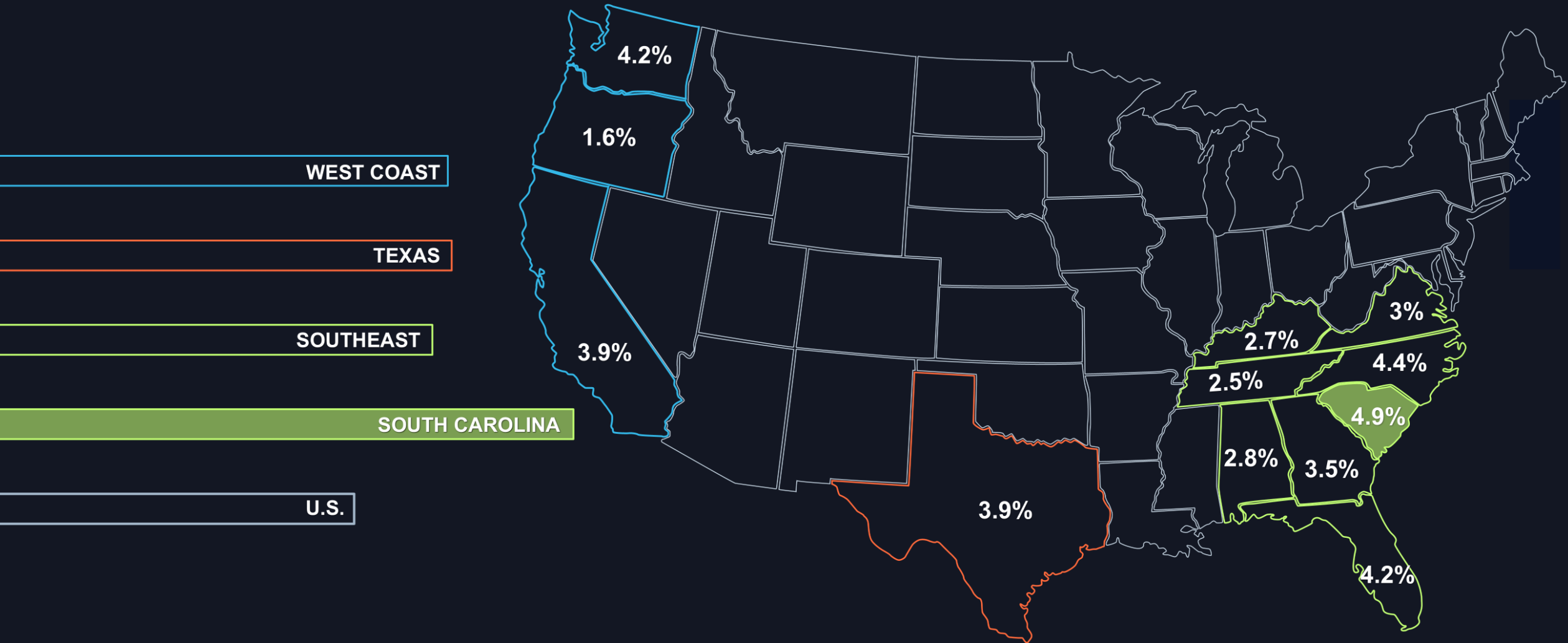
- More than \$3B of capital investment in 15 years
- Advanced manufacturing successes continue in South Carolina
- Retail successes continue providing international and domestic opportunities for growth
- Transload opportunities provide strong examples to grow intermodal market shares
- The Southeast will continue to grow at 2x the US port market



# ECONOMIC IMPACT OF SC PORTS



# GDP GROWTH



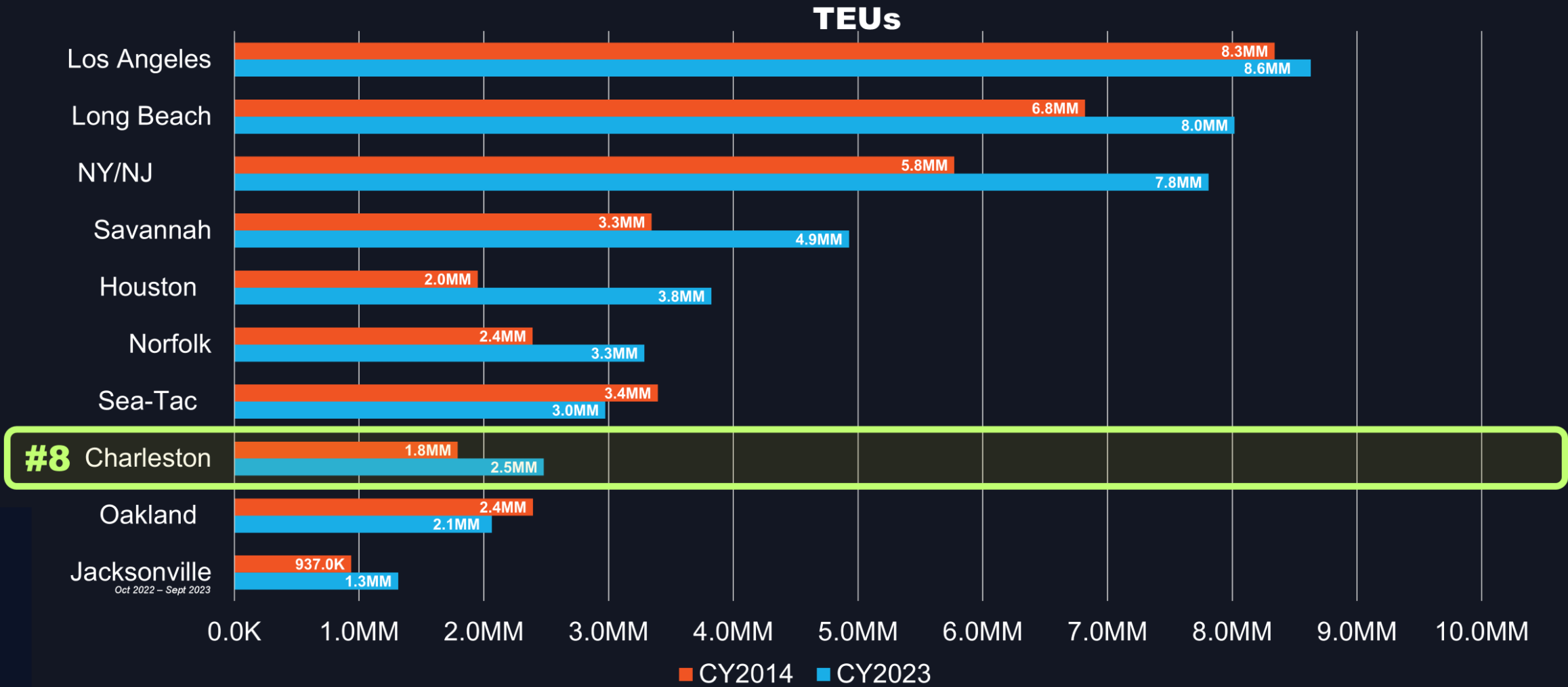
South Carolina's GDP growth of 4.9% currently ranks #1 in the nation.

**ADVANCE OPERATIONAL EXCELLENCE**



# 2023 TOP 10 US CONTAINER PORTS

## TEU 10-YEAR PERIOD COMPARISON / CY2014 – CY2023

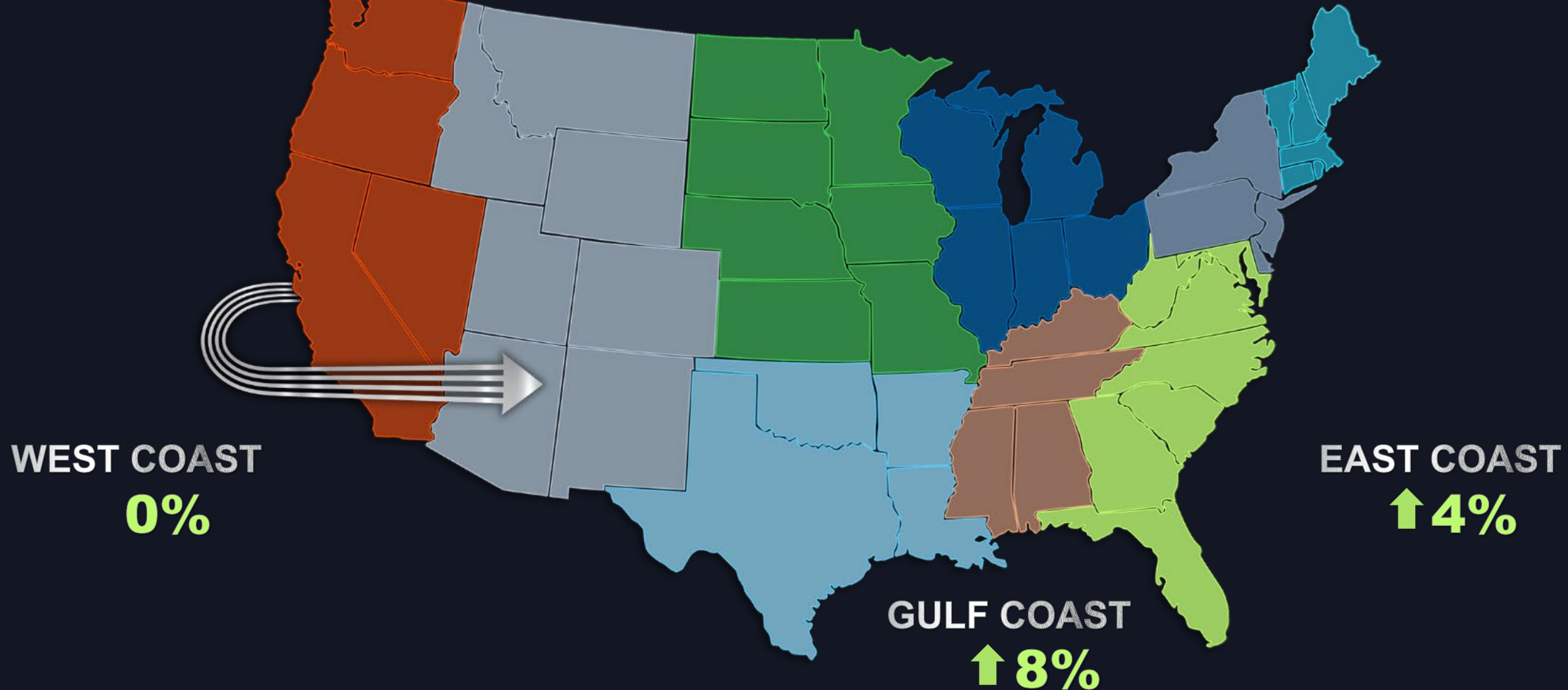


Source: AAPA & individual port websites  
2023 Jacksonville reports on FY starting Oct 1

# 2023 TOP 10 US CONTAINER PORTS

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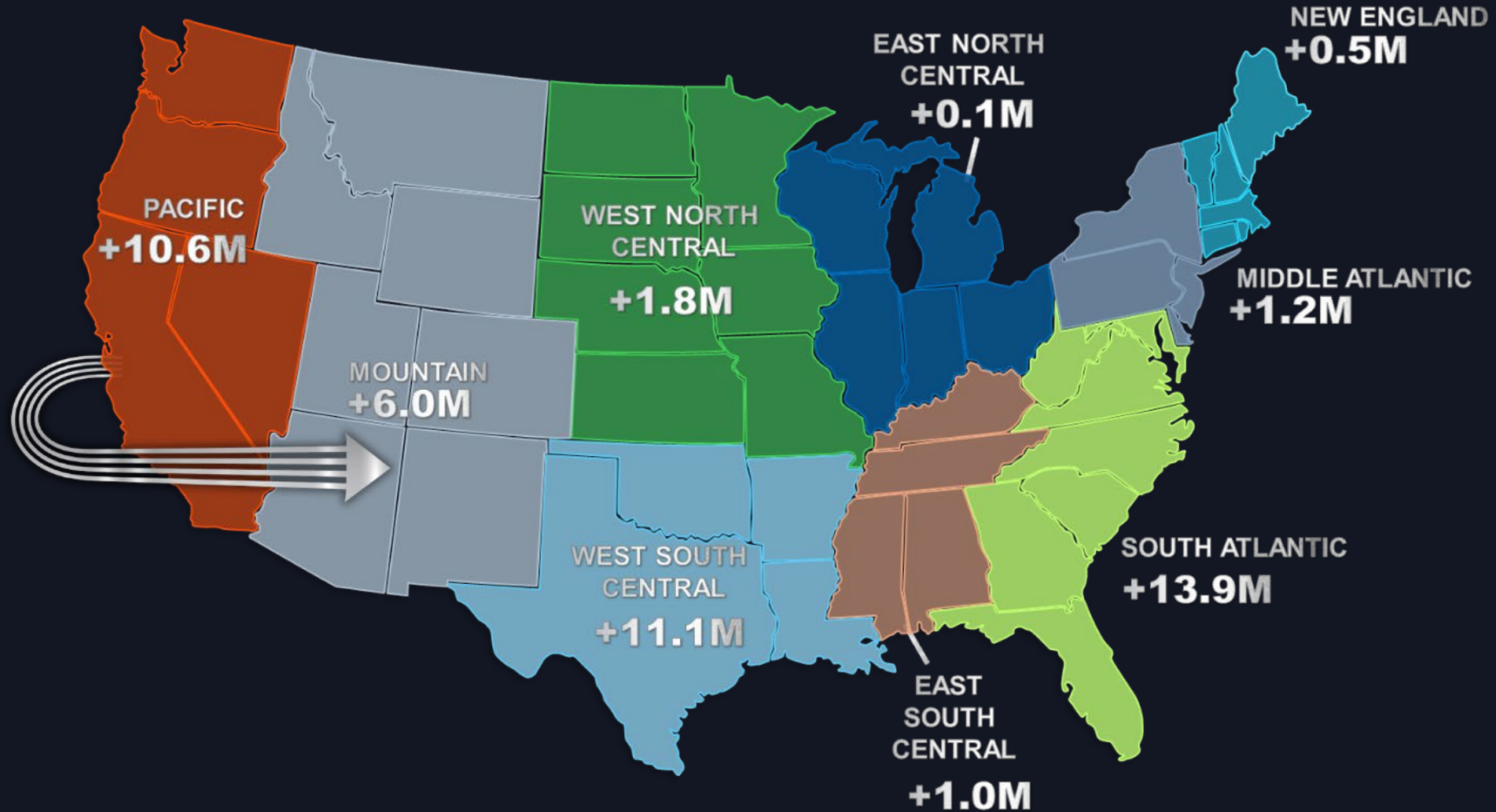
CONTINUED SHIFT OF VOLUMES FROM US WEST COAST TO U.S. EAST COAST



Source: AAPA & individual port websites  
\*2023 Jacksonville reports on FY starting Oct 1

# PROJECTED POPULATION GROWTH BY US REGION

## 2022 – 2040





# OPERATIONAL EXCELLENCE

## PRODUCTIVITY & CONTINUED CARGO FLUIDITY – NOV 2024



# CAPACITY WELL PLANNED FOR THE FUTURE

2033



5.3  
MILLION TEUS

2040



7.2  
MILLION TEUS

2050



10  
MILLION TEUS

**GROW & ANCHOR OUR CARGO BASE**



# DIVERSIFICATION REQUIRED WITH MANUFACTURING & RETAIL



## ADVANCED MANUFACTURING

11% of US GDP

Doubled our volume  
based on advanced  
manufacturing



## RETAIL GOODS CONSUMPTION

35% of US GDP

Growth must come  
from retail  
distribution

Ships go where  
there is cargo

# TOP RETAILERS CHOOSING CHARLESTON

## #1 U.S. IMPORTER



- 3 Million square-foot DC opened in 2022.
- Sam's Club DC.
- Transformational volume.

## #2 U.S. IMPORTER



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

## MAJOR IMPORTERS EXPANDING



GE APPLIANCES  
*a Haier company*





# SOUTH CAROLINA'S CY2023 EXPORT SALES TOP \$37 BILLION

Despite a 2% decrease in total US exports in 2023,  
**SOUTH CAROLINA'S EXPORT SALES  
INCREASED BY 18% FROM 2022.**

South Carolina exports have grown at an average yearly rate of 4.4% since 2013. During this same period, the US grew at a 3% rate. The state remains the nation's top exporter of tires and completed passenger vehicles.

## CY2023 TOP 3 CONTAINER EXPORT COMMODITIES

### # 1 CHEMICALS



A proven route with **21% growth** over CY2022. Solid relationships with key shippers. Fast becoming US East Coast resin pivot point.

**163,381 TEUs in CY2023.**

### # 2 FOREST PRODUCTS



A major regional industry. Variety of products including pulp, paper, logs and lumber. **Consistent** TEU numbers compared to CY2022.

**136,606 TEUs in CY2023.**

### # 3 FOODSTUFF & AG



A diversified sector including DDGs, grains, soybeans, poultry, etc. Solid relationships with key shippers. This business had **15% growth** over CY2022.

**97,541 TEUs in CY2023.**

**DELIVER CRITICAL INFRASTRUCTURE**



# NAVY BASE INTERMODAL FACILITY

## PROJECT TIMELINE

2008, Work Initiated

2015-16, Rail Mounted Crane  
Manufacturer Selected

2018, Work on Northern Lead Began  
**Completed 2020**

2020, Negotiations began to transfer  
Project + Secure State Funding

2021, State commits to funding \$550M  
for Projects + Authorizes first \$200M

2022, State Authorizes remaining  
\$350M, Groundbreaking Oct. 2022

2023, NBIF Begins Construction

2025, NBIF Opens



# NAVY BASE INTERMODAL FACILITY



## Site Project:

- NTP Feb 20, 2023
- More than 4 Miles of new track has been installed
- Crane rail beams have been installed
- Substation energized

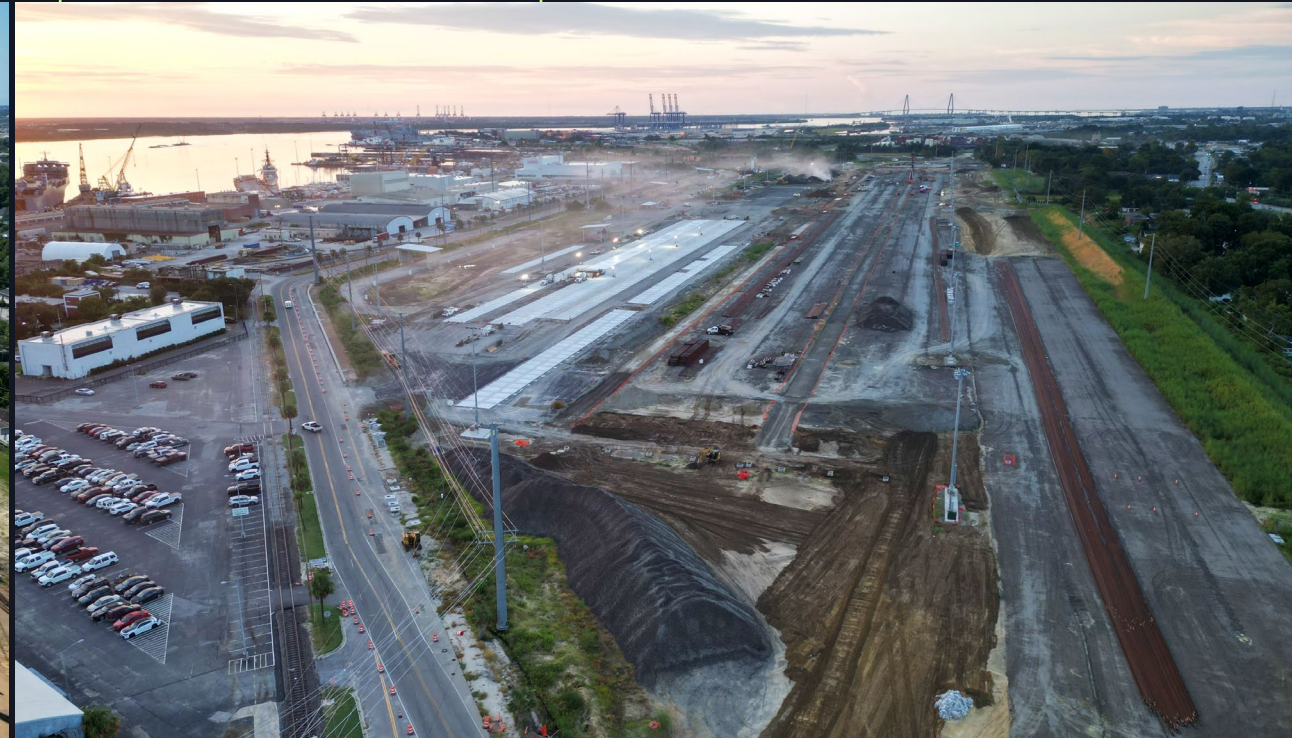


# NAVY BASE INTERMODAL FACILITY

6.14.24



9.18.24





# NAVY BASE INTERMODAL FACILITY

6.14.24



12.30.24





# INLAND PORT GREER & INLAND PORT DILLON

IDEAL ENTRY POINT TO SOUTHEAST

## INLAND PORT GREER

RECORD FY2024

187,638 RAIL LIFTS

Rail service provided by:



UPS & FedEx Ground

1-DAY GROUND

2-DAY GROUND

- Reach 40 million people within 1-day ground delivery
- 72% of US population within 2-day ground delivery
- Geographic benefits without congestion & high operating costs

## INLAND PORT DILLON

RECORD FY2024

42,770 RAIL LIFTS

Rail service provided by: **CSX**



# HUGH K. LEATHERMAN TERMINAL

- SC Ports celebrated the reopening of the Hugh K. Leatherman Terminal on September 25, 2024.
- The productivity of the Leatherman Terminal is equally as strong as our Wando Welch Terminal, providing excellent operations and world-class service to our customers.
- Leatherman Terminal is the newest ocean terminal to open in the United States in more than a decade. The opening unlocks an additional 700,000 TEUs in Charleston Harbor, with a planned capacity for 2.4 million TEUs at full build out.
- Contract for the construction of HLT berth 2 approved by the SCPA Board on November 19, 2024. Estimated completion date of berth 2 is September 2026.





# MAJOR CAPITAL INITIATIVES

## & EYE TO THE FUTURE



### TERMINAL CAPACITY

**Inland Port Greer Open**  
November 2013

**Inland Port Dillon Open**  
April 2018

**Hugh K. Leatherman Terminal**  
Phase 1, 2021

**Greer Expansion Completion**  
December 2024

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**Wando Terminal Refurbishment**  
February 2025

**NAVIS Terminal Operating System**  
2026

**Hugh K. Leatherman Terminal**  
Phases 2 & 3, 2028, 2030+

**North Charleston Modernization / WestRock**  
2030+

**Jasper Ocean Terminal**  
2030+



### TRANSPORTATION IMPROVEMENTS

**Harbor Deepening Completion**  
December 2022

**Official SMART POOL™ Chassis Program**  
March 2023

**Charleston Upper Harbor Deepening / Equalization**  
Requested Study Initiation January 2024

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**Navy Base Intermodal Facility**  
July 2025

**Barge Operation**  
2025

**526 / Long Point Road Interchange**  
2027

**Construct Higher & Wider Don Holt Bridge**  
2030s



### IMPORT / EXPORT INFRASTRUCTURE

**Walmart 8980**  
April 2022

**Target – Yusen Logistics**  
August 2022

**Performance Team – Maersk Cold Storage**  
November 2023

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**Ridgeville Industrial Campus**  
2025

# EXPANDING PORT CAPACITY

## BIG SHIP CAPABILITIES AT THE PORT OF CHARLESTON

We are investing in port infrastructure today to ensure we continue to provide **excellent port service to our industry partners.**



SC Ports is excited to share that we are moving forward with the purchase of a 280-acre industrial waterfront property that sits adjacent to the North Charleston Terminal.

**+ 280 ACRES**  
OF INCREASED FOOTPRINT

**5,000 FEET**  
OF LINEAR BERTH SPACE FOR VESSELS

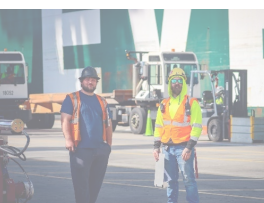
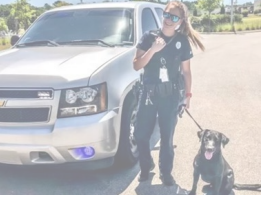
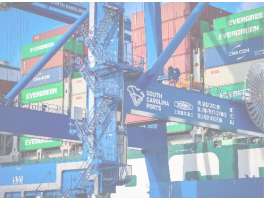
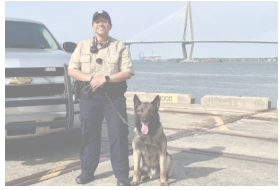
**5 MILLION TEUs**  
AT NORTH CHARLESTON TERMINAL

**OPTIMIZE MODERNIZATION**  
AT NORTH CHARLESTON TERMINAL

**RAISE DON HOLT BRIDGE**  
TO REMOVE HEIGHT RESTRICTIONS FOR VESSELS

**EQUALIZE HARBOR DEPTH**  
TO MATCH 52 FEET





# CARE FOR OUR PORT TEAM MEMBERS AND MARITIME COMMUNITY TEAMMATES





**SOUTH  
CAROLINA  
PORTS**

**THANK YOU**