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**SOUTH
CAROLINA
PORTS**

July 9, 2025



STRATEGIC PRIORITIES & PERFORMANCE METRICS

STRATEGIC PRIORITIES OF SC PORTS



Advance Operational Excellence



Grow & Anchor Our Cargo Base



Deliver Critical Infrastructure



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

STRONG FY2024 FINISH FOR SC PORTS

HANDLED NEARLY

2.5M

TEUs



HANDLED NEARLY

1.4M

PIER CONTAINERS

ALL-TIME RECORD WITH

>1.2M CONTAINERS

MOVING THROUGH WANDO WELCH TERMINAL

RECORD CARGO VOLUMES FOR
INLAND PORT GREER & INLAND PORT DILLON

230,409 COMBINED CONTAINERS



24% FROM YEAR PRIOR

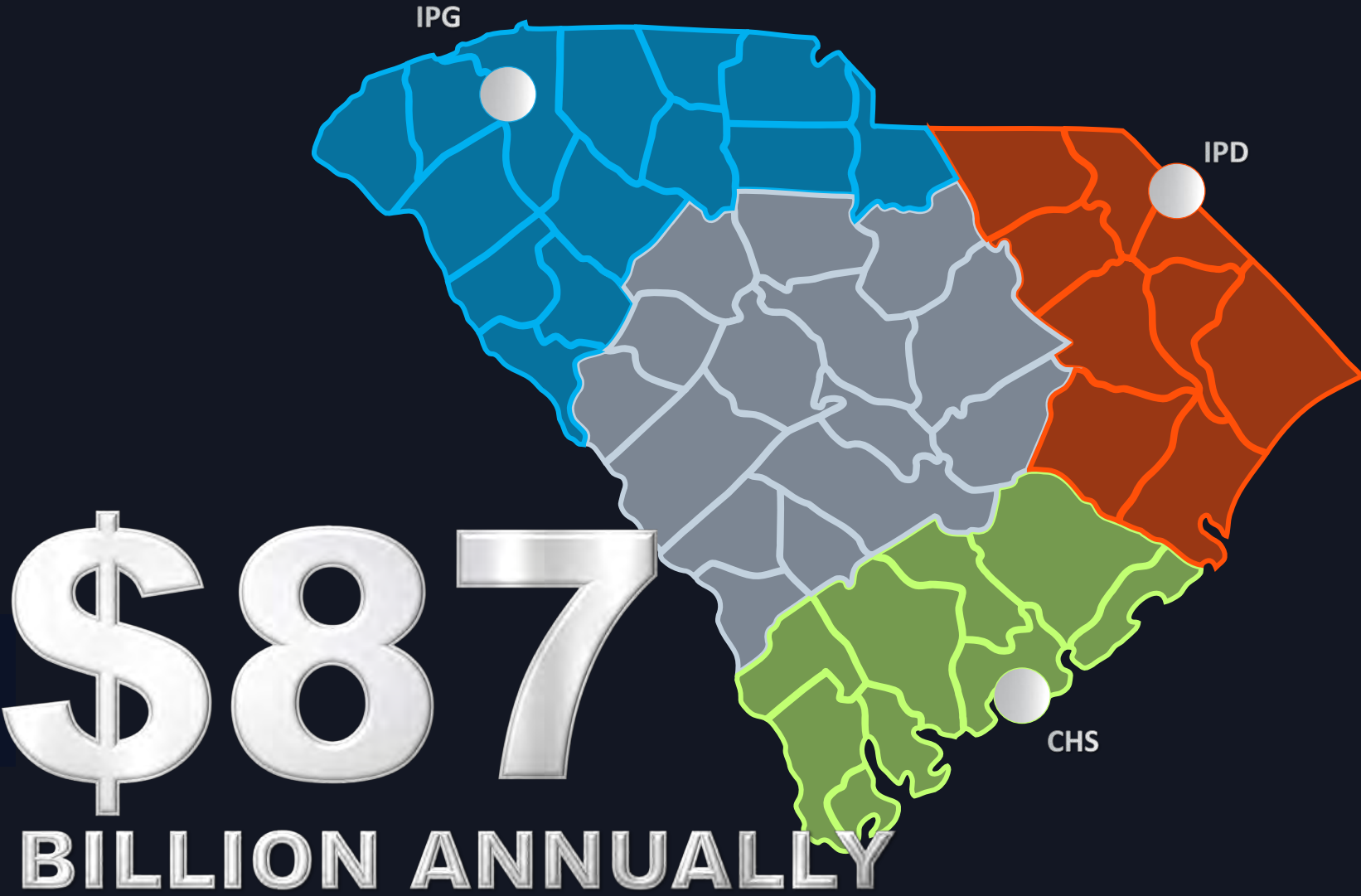
HANDLED

210,817 VEHICLES



12% FROM YEAR PRIOR

ECONOMIC IMPACT OF SC PORTS

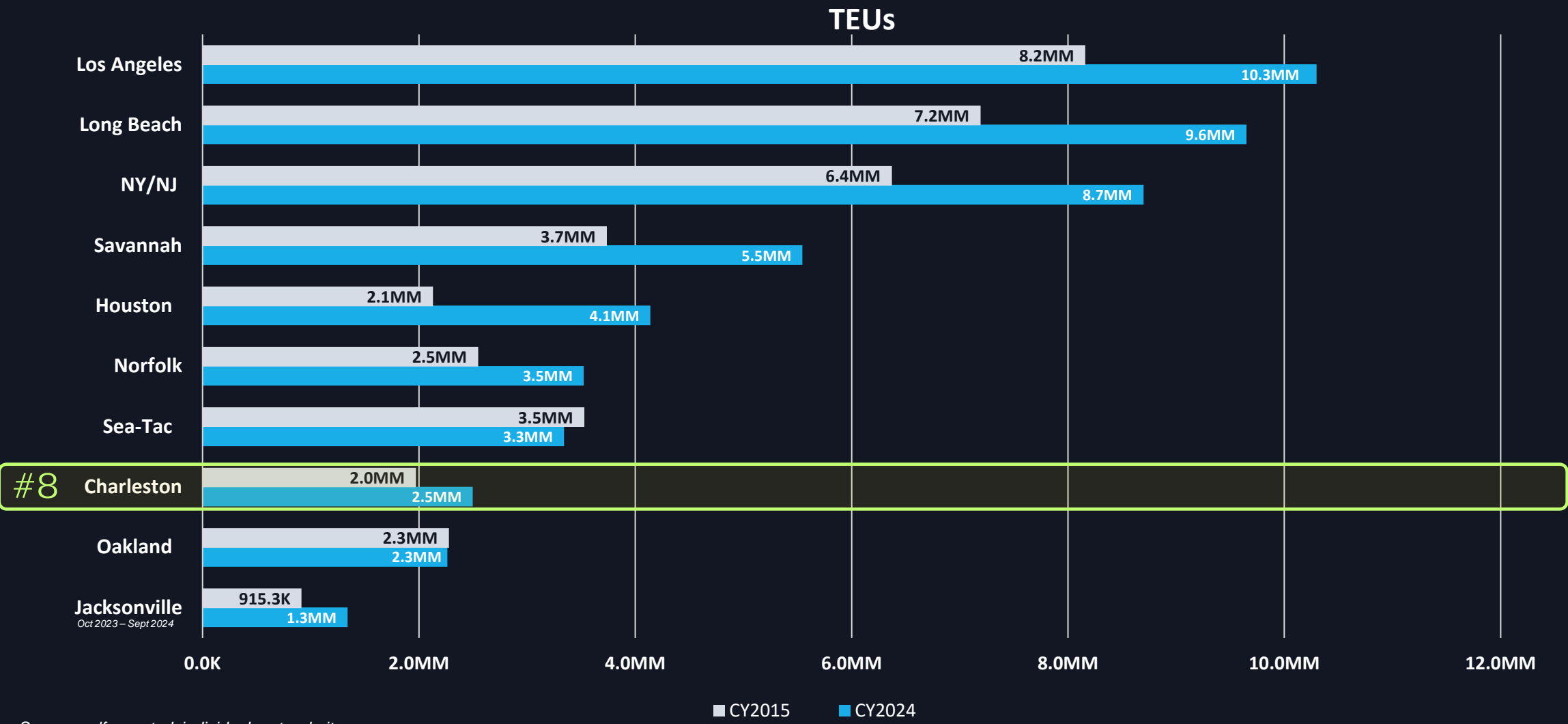


Source: Dr. Joseph Von Nessen, University of South Carolina, Darla Moore School of Business, 2023

ADVANCE OPERATIONAL EXCELLENCE

2024 TOP 10 US CONTAINER PORTS

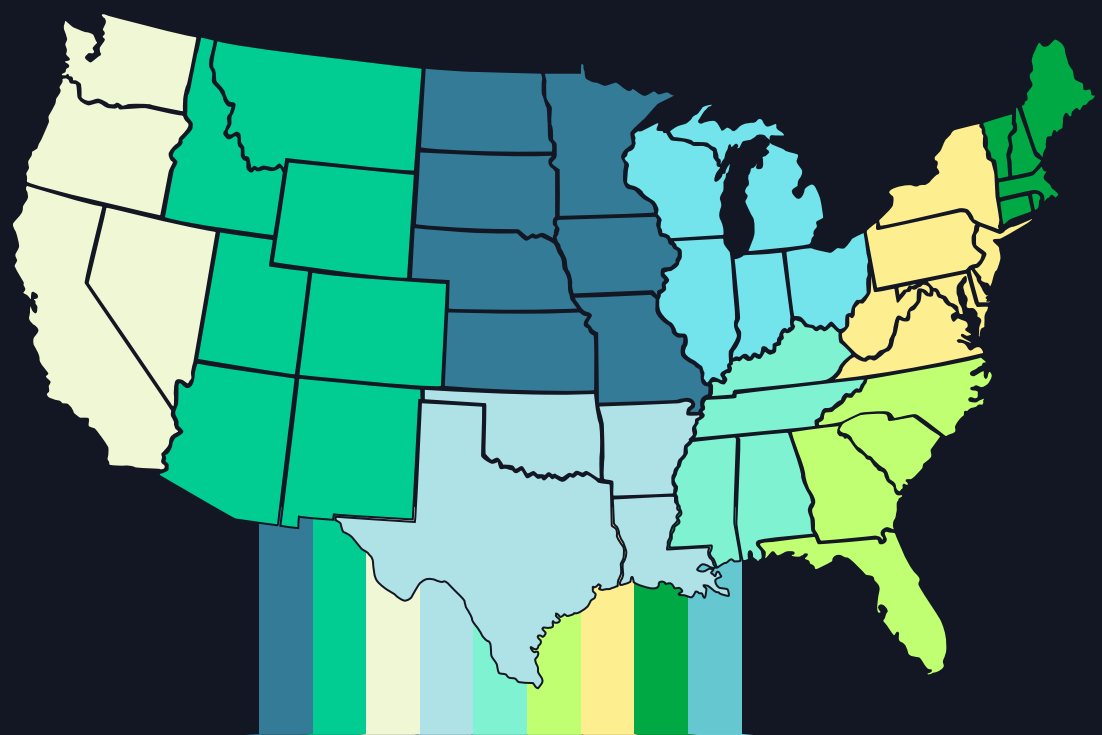
TEU 10-YEAR PERIOD COMPARISON / CY2015 – CY2024



Source: self-reported, individual port websites
2024 Jacksonville reports on FY starting Oct 1

PROJECTED POPULATION GROWTH BY US REGION

2024 - 2050



WEST NORTH CENTRAL	MOUNTAIN	PACIFIC	WEST SOUTH CENTRAL	EAST SOUTH CENTRAL	SOUTH ATLANTIC	MIDDLE ATLANTIC	NEW ENGLAND	EAST NORTH CENTRAL
+0.9M	+5.8M	+6.3M	+8.5M	+0.6M	+9.0M	+1.9M	+0.3M	-1.8M

Source: Dr. Joseph Von Nessen, University of South Carolina, Darla Moore School of Business, 2024/U.S. Census Bureau

OPERATIONAL EXCELLENCE

PRODUCTIVITY & CONTINUED CARGO
FLUIDITY – MAY 2025

CRANE PRODUCTIVITY

33 MOVES / HOUR



TOTAL TRUCK VISIT TIME

< 36 MINUTES



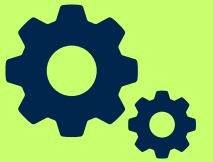
AVERAGE VESSELS AT ANCHOR

< 2 VESSELS



EQUIPMENT RELIABILITY

99.7 PERCENT



GROW & ANCHOR OUR CARGO BASE

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



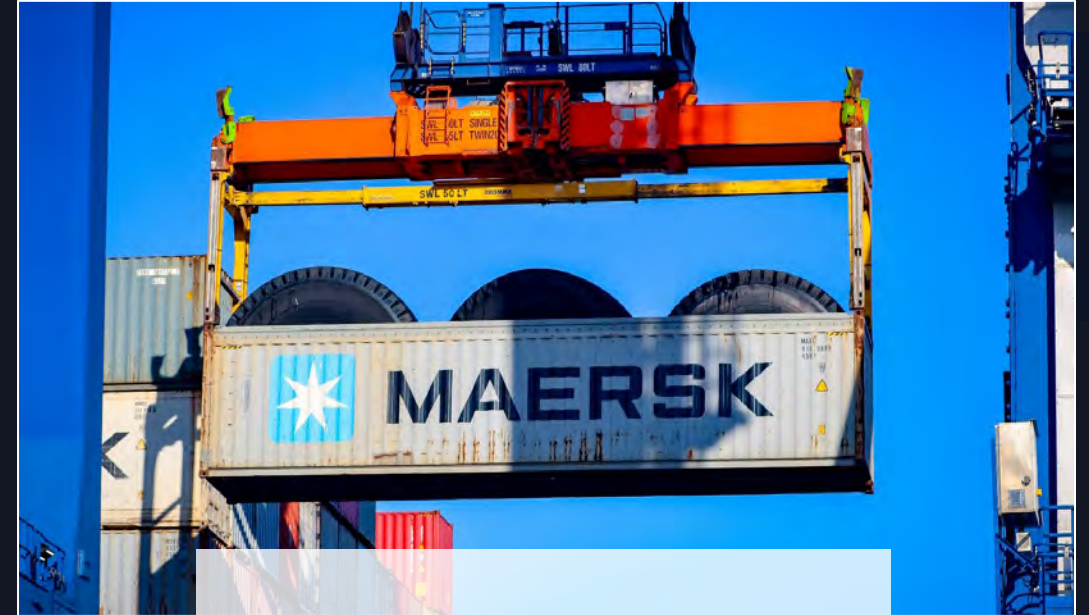
SOUTH CAROLINA'S CY2024 EXPORT SALES **TOTAL \$38 BILLION**

- the state's highest amount since 2019 -



South Carolina again leads the nation in export sales of completed passenger vehicles

\$ *By industry, automotive dominated the state's exported commodities*



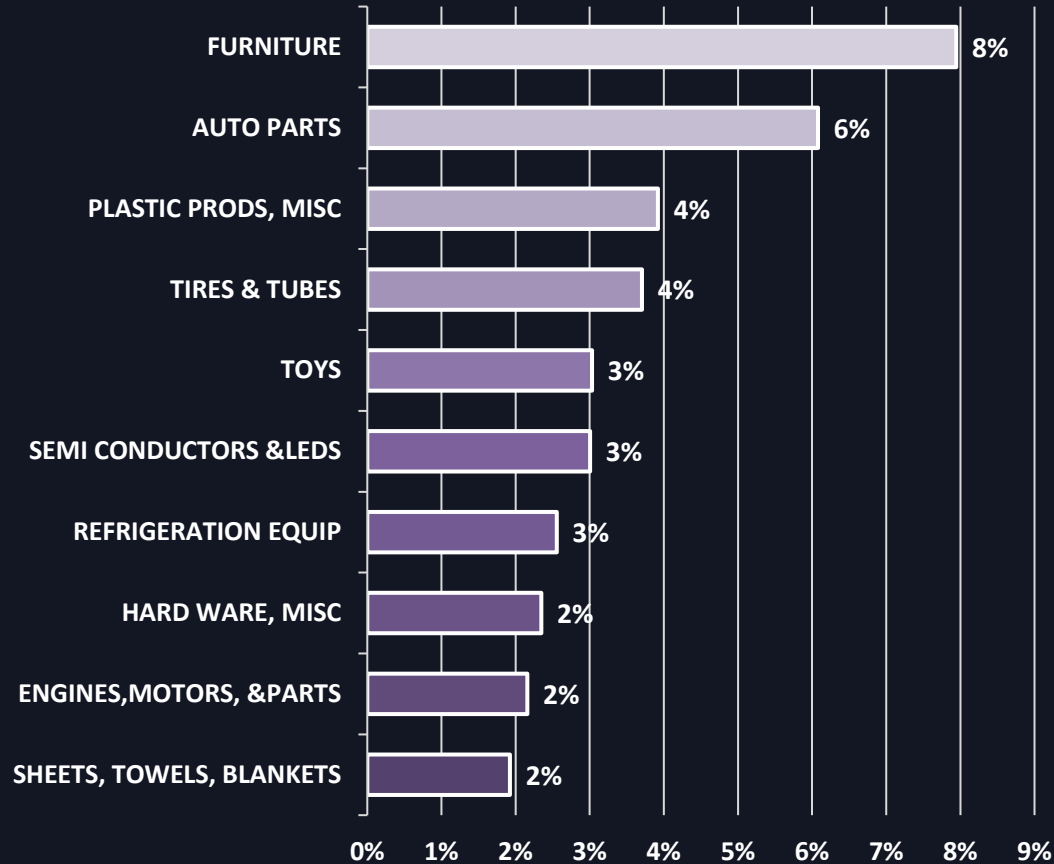
For the 10th consecutive year, South Carolina leads the nation in export of tires

\$ *Sales reached \$1.8 billion, roughly 36.5% of the total U.S. market share*

TOP COMMODITIES

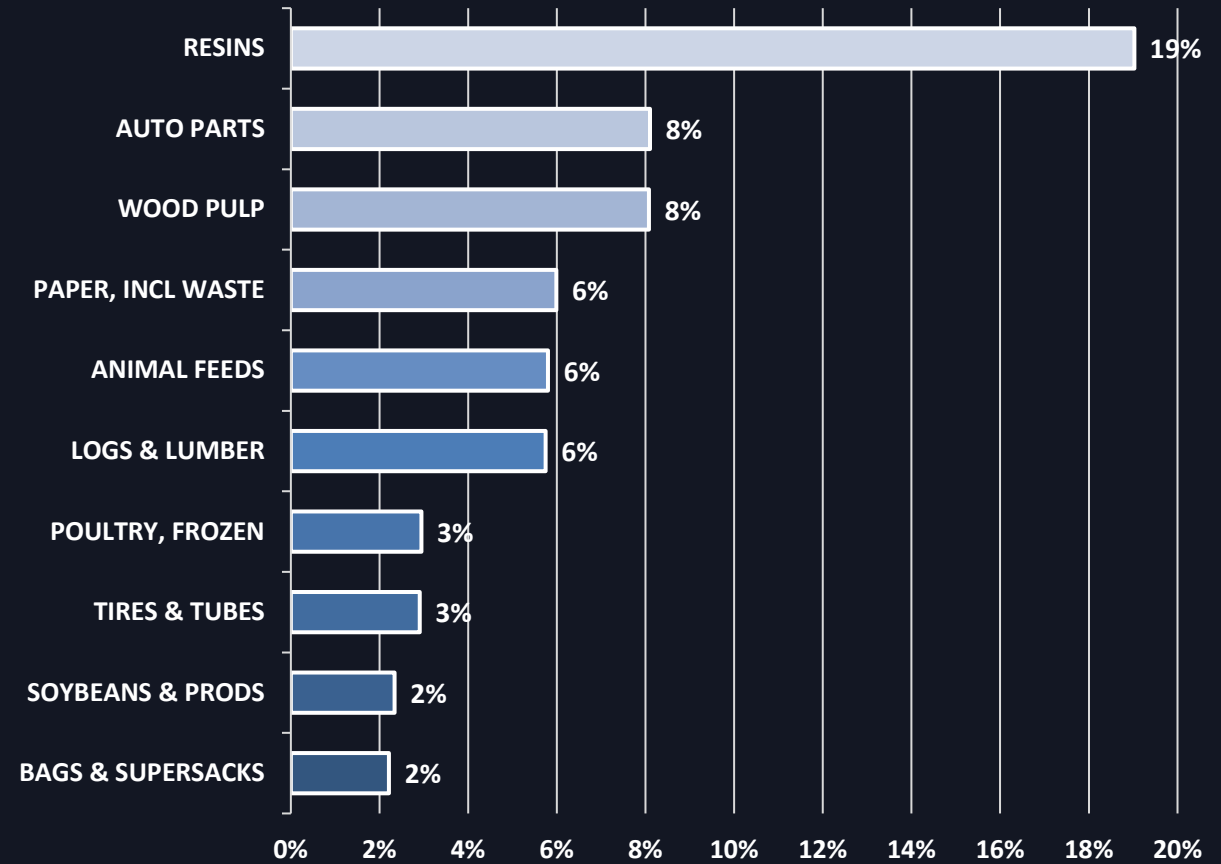
Loaded TEUs

TOP IMPORT COMMODITIES



All other import commodities total 63%.

TOP EXPORT COMMODITIES



All other export commodities total 37%.

DELIVER CRITICAL INFRASTRUCTURE

ENGINEERING AND FACILITIES MAINTENANCE

Responsible for the Planning, Design, Construction, and Maintenance of SCPA Owned Property and Facilities

- **Seven Terminals Currently in Operation + NBIF**
- **Approximately 1,800 Acres on Terminals**
- **170 Buildings**
- **Over 8,100 Acres**
- **Other Facilities off Terminal:**
 - **Dredge Material Containment Areas,**
 - **Ridgeville Industrial Campus,**
 - **Harvey Tract Landfill**

PORT FACILITIES AND RECENT IMPROVEMENTS



Charleston Harbor Terminals	Container	Roll On Roll Off	Break Bulk
Wando Welch	X		
North Charleston	X	X	X
Hugh Leatherman, Sr.	X	X	
Columbus Street		X	X
Union Pier		X	X
Veterans		X	X
Inland Ports/Intermodal			
Greer	X		
Dillon	X		
Navy Base	X		

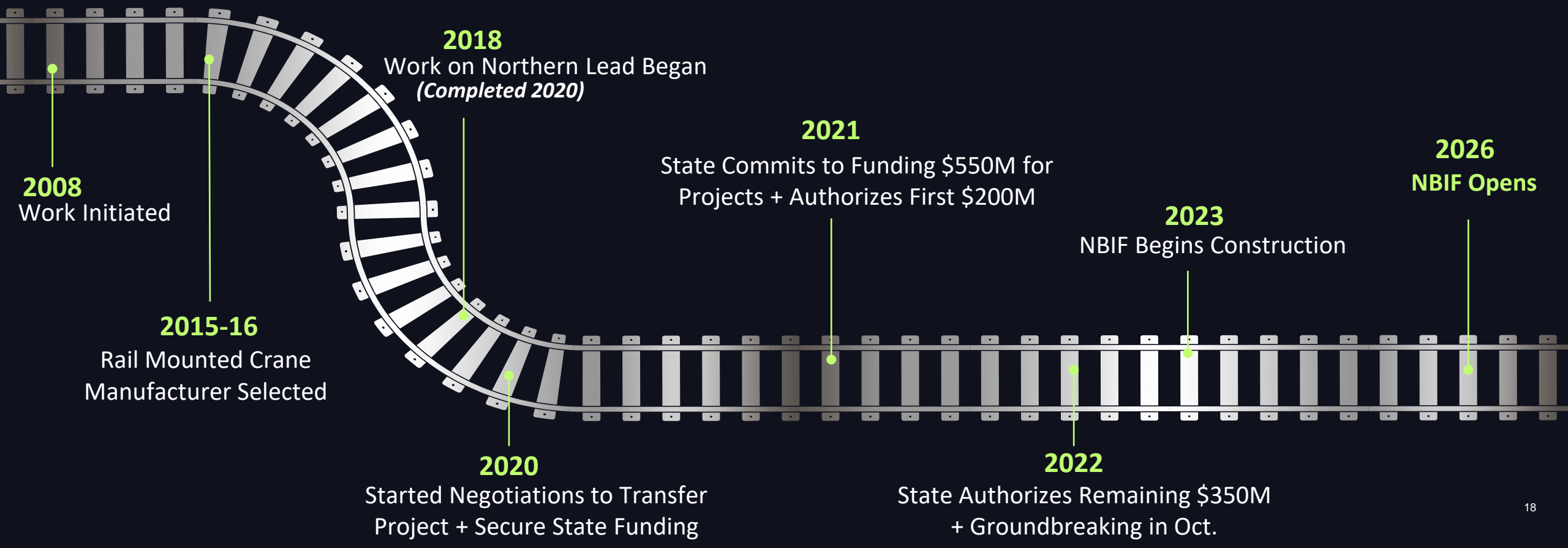
ENGINEERING AND FACILITIES MAINTENANCE

Personnel

- 4 Engineers
- 1 Permitting & Environmental Manager
- 1 GIS Manager
- 15 Facilities Maintenance



NAVY BASE INTERMODAL FACILITY



INLAND PORT GREER & INLAND PORT DILLON


ARE IDEAL ENTRY POINTS TO SOUTHEAST



INLAND PORT GREER

RECORD FY2024

187,638 RAIL LIFTS

Rail service provided by:  NORFOLK SOUTHERN



INLAND PORT DILLON

RECORD FY2024

42,770 RAIL LIFTS

Rail service provided by:  CSX



- 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

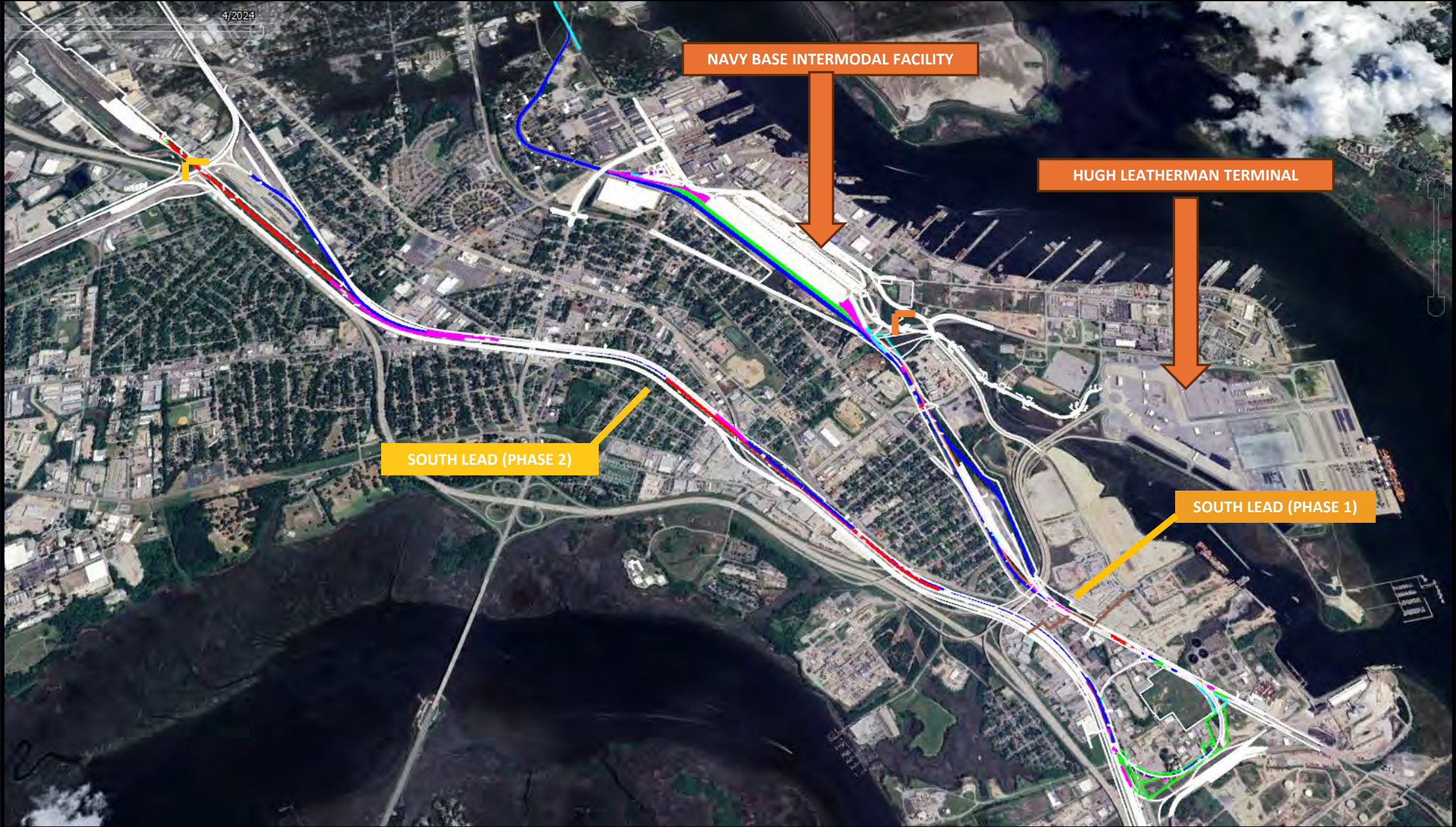
4/2024

NAVY BASE INTERMODAL FACILITY

HUGH LEATHERMAN TERMINAL

SOUTH LEAD (PHASE 2)

SOUTH LEAD (PHASE 1)





Photography by
Walter R. Lagarenne, Jr.
2025





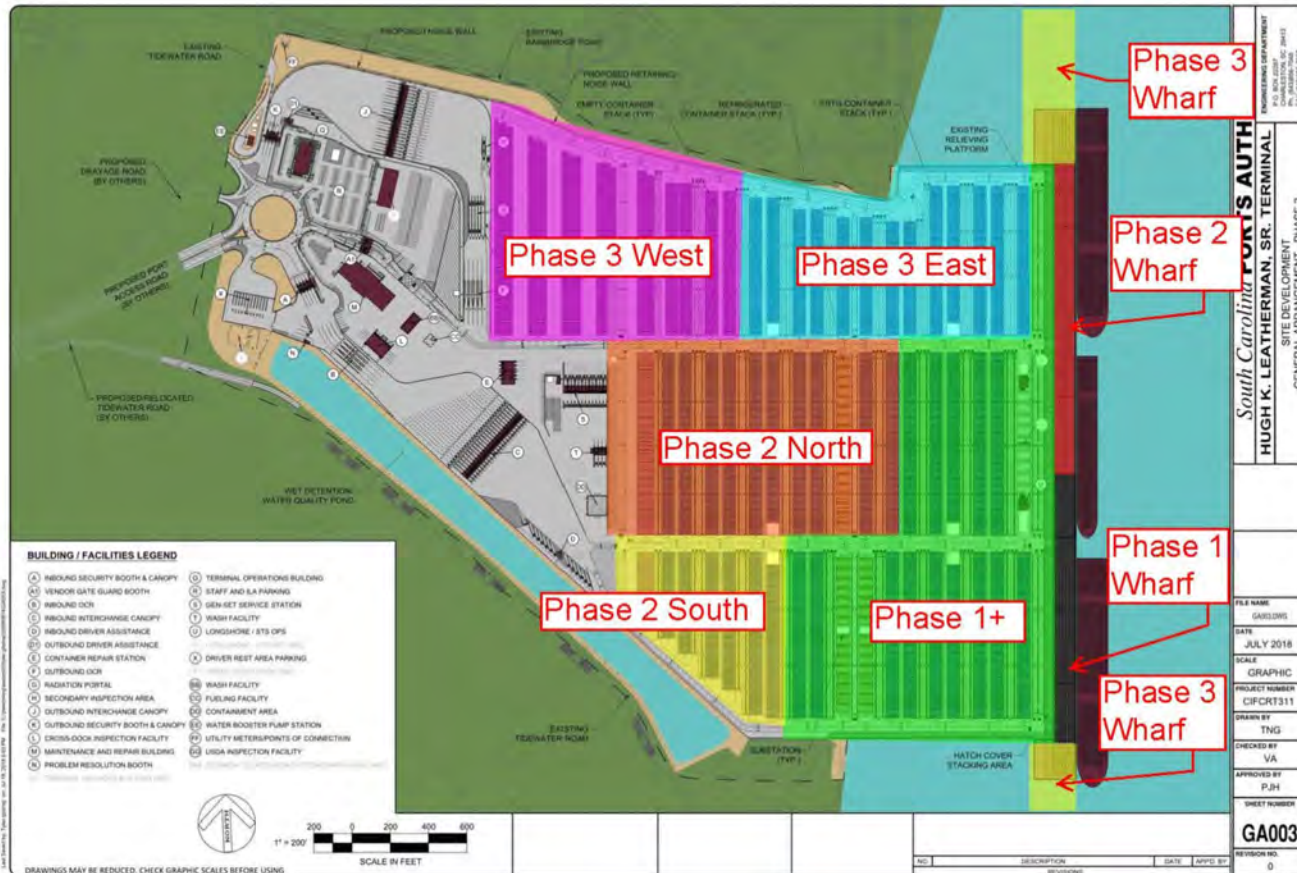


HUGH K. LEATHERMAN TERMINAL

- The Hugh K. Leatherman Terminal reopened 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 October 2026.



HUGH LEATHERMAN TERMINAL – FULL BUILDOUT



At Full Buildout

- Container Yard Acreage: 165.3
- Interchange Lanes: 24
- STS Cranes: 13-15
- RTGs: 65-75
- Capacity: 2.4 Million TEUs
- Approximately 25% Built Out Today



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

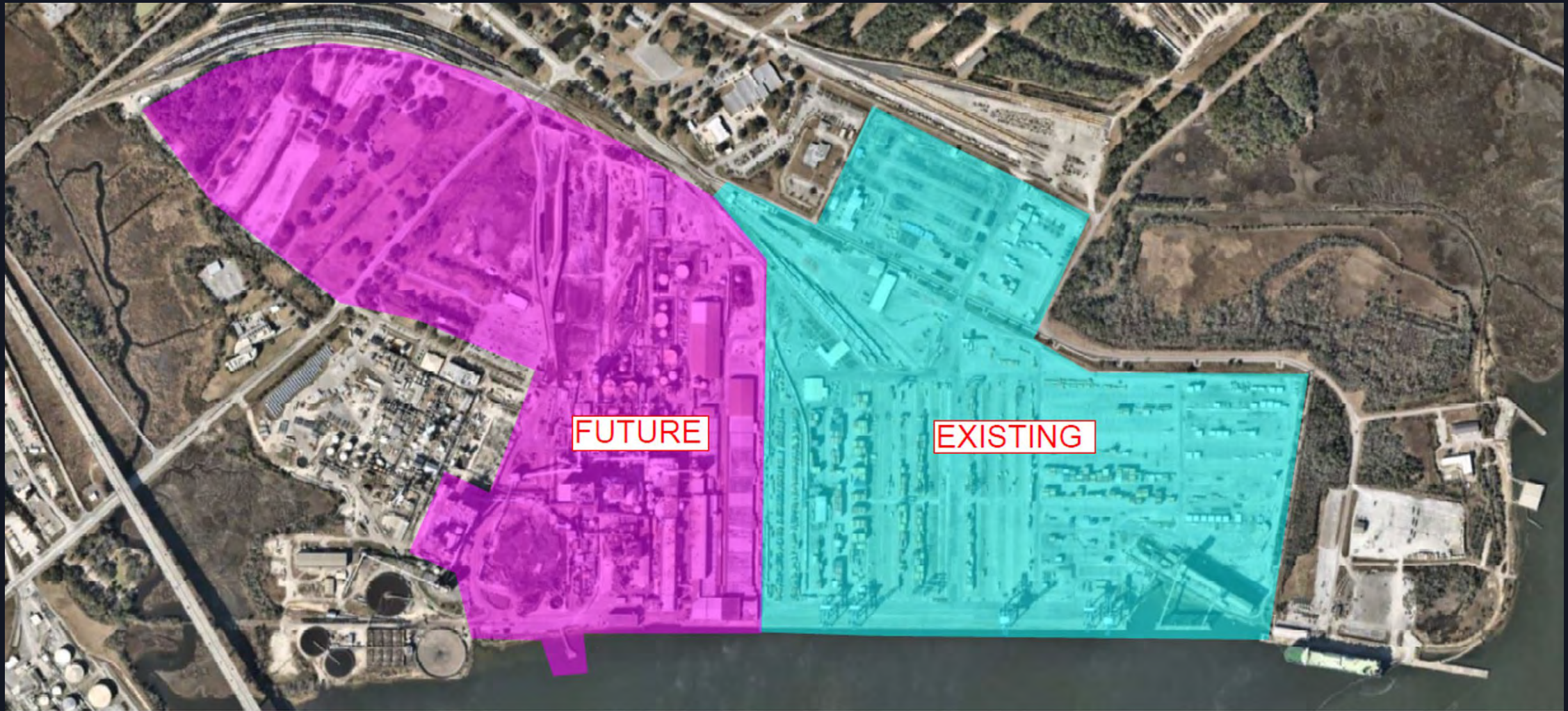
OPTIMIZE MODERNIZATION
AT NORTH CHARLESTON TERMINAL

RAISE DON HOLT BRIDGE
TO REMOVE HEIGHT RESTRICTIONS FOR VESSELS

EQUALIZE HARBOR DEPTH
TO MATCH 52 FEET

NORTH CHARLESTON TERMINAL

FUTURE CAPACITY: 5 Million TEUs



NORTH CHARLESTON TERMINAL IMPROVEMENTS

- ✓ Permitting – VCC with SC DES in place
- ✓ Demolition – Shortlist Complete
 - Demolish Structures to the Slab
- ✓ Planning
 - What will a terminal look like in 2040
 - Keep NCT in operation
- ✓ Permitting – TBD
- ✓ Construction – TBD
- ✓ Equipment – TBD
- ✓ Commissioning – TBD









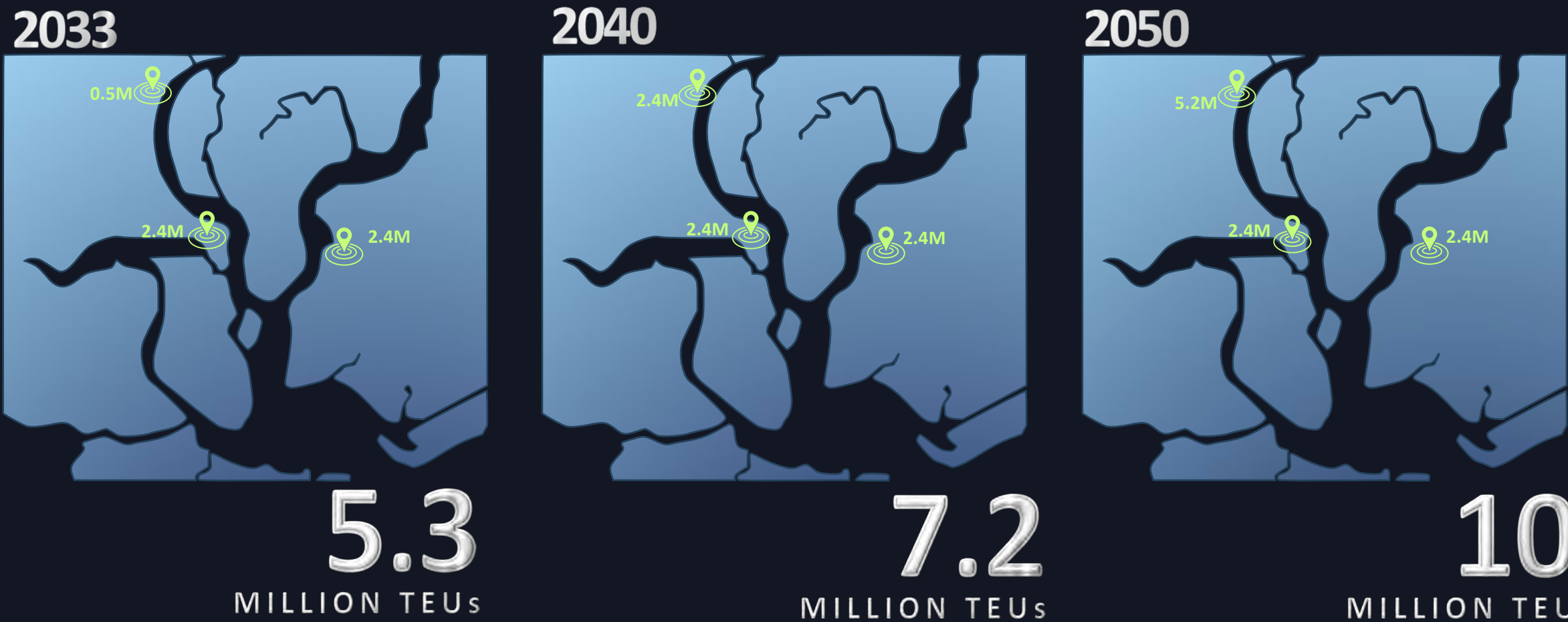
**SOUTH
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THE WORLD CONNECTS HERE



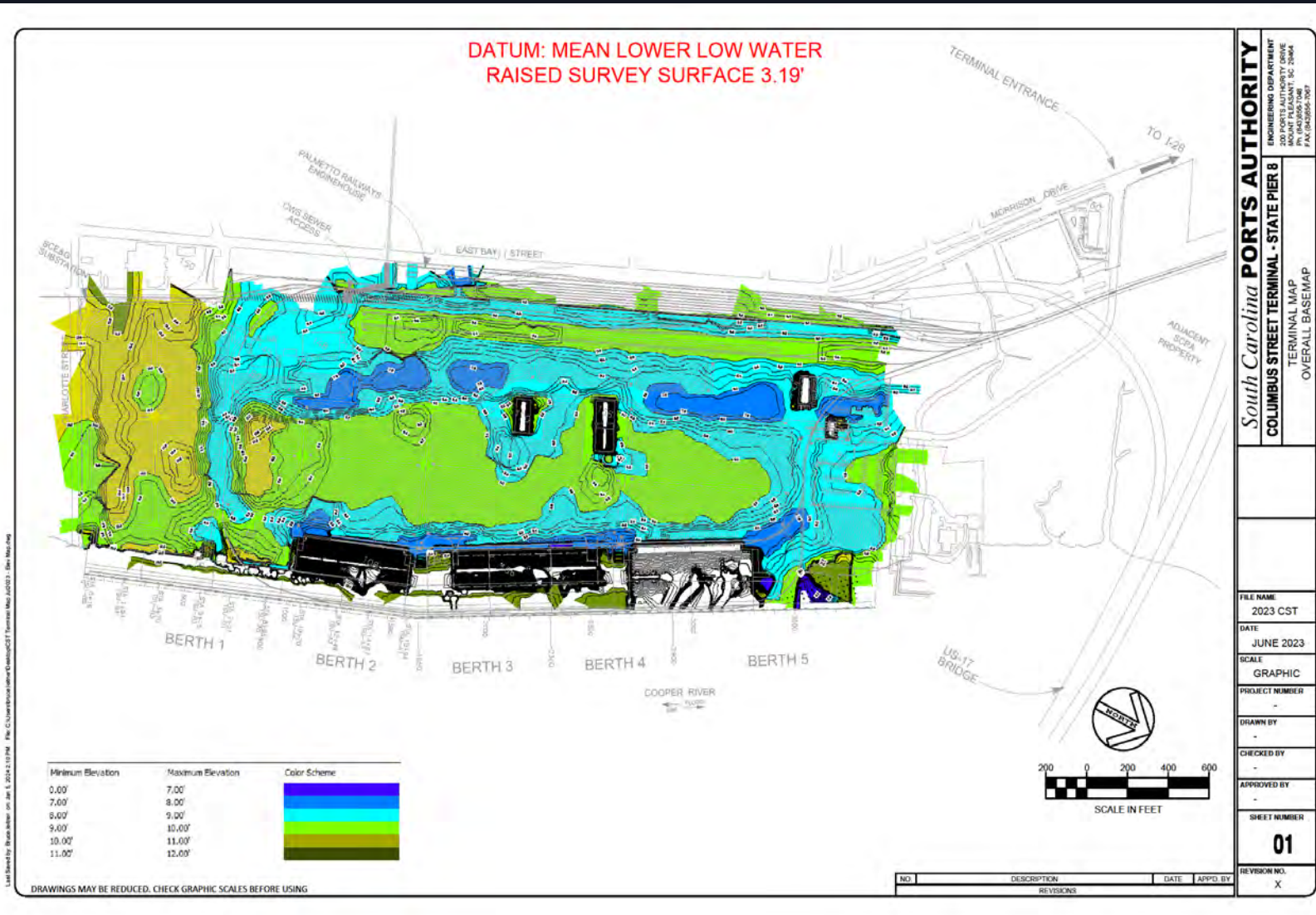
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CAPACITY WELL PLANNED FOR THE FUTURE

2025: >3 MILLION TEUs



COLUMBUS STREET TERMINAL - MODERNIZATION



- Existing Pavement EL from 4' – 8' NAVD88
- Increase Pavement EL to Min 8' NAVD88 over 60 Acres
- Replace All Underground Utilities
- Improve Terminal Drainage
- RFP for CST Wharf Inspections
 - Future Wharf Improvements
- Mooring and Berthing Analysis – Confirm Compatibility with Larger Ro/Ro Vessels

FACILITY INSPECTIONS

- *Aging Infrastructure*
- *SCPA is Typically the AHJ on our Terminals*
- *Systematic Process of Facility Inspections*



Ridgeville Industrial Park

Dredge Material Containment Areas

- Ditching**
- Drying**
- Dike Raising**

Facilities Maintenance

RIDGEVILLE EXPORT TRANSLOAD

- Acquired 1,000+ acres in 2018
- Walmart opened 3MM SF DC in Apr 2022
- More than 50,000 imports annually
- Infrastructure improvements underway
- 142 acres for export transload
- Top transload site in the Southeast



ENVIRONMENTAL IMPACT OF SOUTH CAROLINA PORTS

Reducing emissions, preserving shoreline, and investing in greener technology are all part of SC Ports' efforts to mitigate our environmental impact.

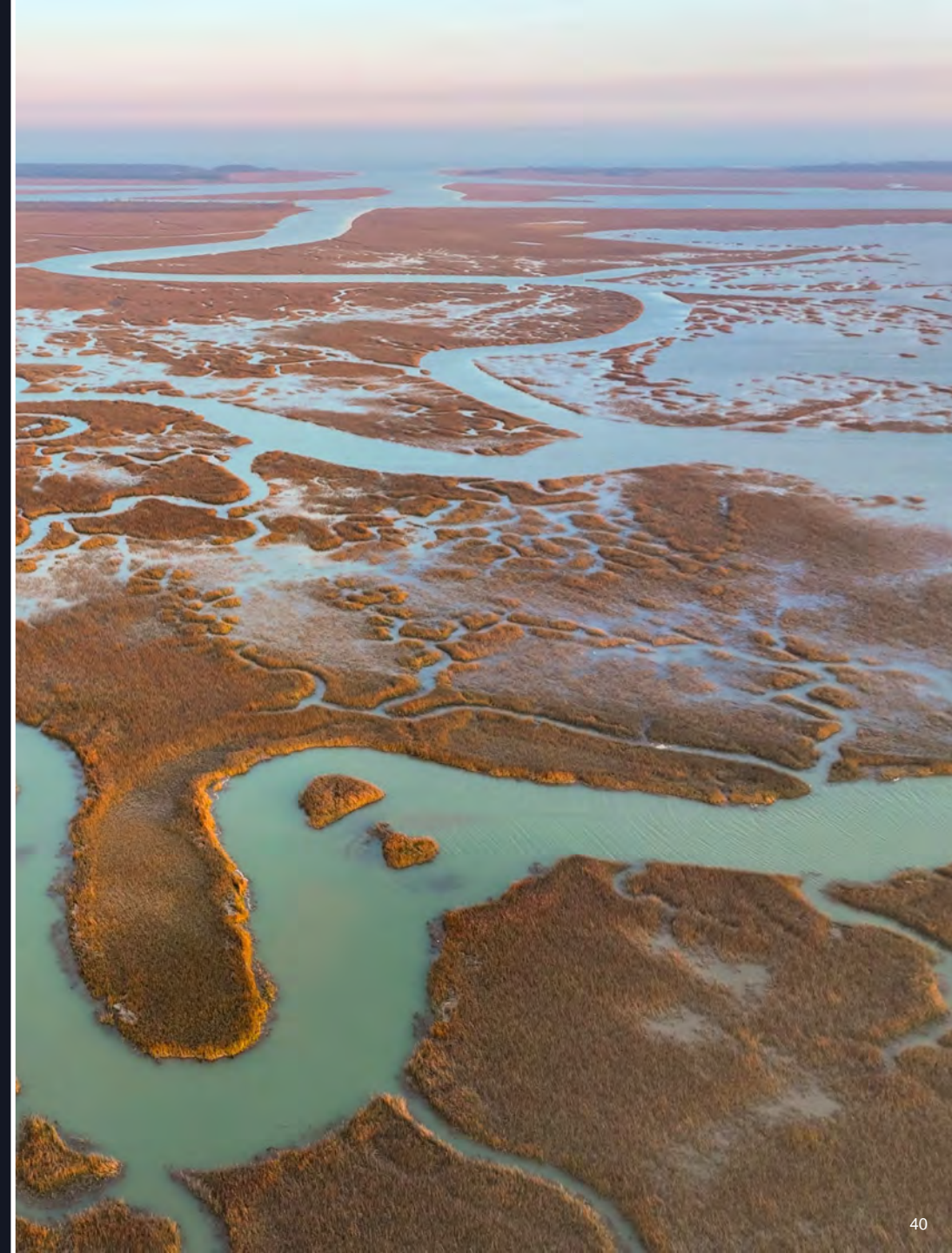
PRESERVATION of >3,000 acres of land in South Carolina since 2016

Continuous **AIR** Quality Monitoring & Emissions-Reducing Programs:

- Air Emissions Inventories
- Fleet Decarbonization Assessment
- Electric/Hybrid Equipment

RESTORATION of vital ecosystems within Charleston Harbor:

- Crab Bank Seabird Sanctuary
- Drum Island Restoration



**CARE FOR OUR PORT TEAM MEMBERS &
MARITIME COMMUNITY TEAMMATES**



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THANK YOU