April 6, 2018

Dear Friends:

During the past seven-and-a-half years, we have aggressively fought to make Florida the best destination for businesses to succeed. Today, nearly 1.5 million private sector jobs have been added since December 2010, and Florida's economic growth strategy has become a model for the nation, thanks to our focus on creating business-friendly policies, reducing burdensome regulations and cutting taxes. This 2018 Seaport Mission Plan highlights how investments in our seaports are growing Florida’s booming economy and supporting seven straight years of record tourism.

Florida remains a leader in transportation innovations and inventive funding solutions to enhance capacity of transportation infrastructure, and Florida's seaports continue to surge with success and growth. Since 2011, we have increased investments in transportation by more than 48 percent to $85 billion, including more than $1.4 billion in our seaports. I also worked with the Legislature last year to establish the $85-million Florida Job Growth Grant Fund to invest in approved local initiatives designed to support broad-based economic growth through improved infrastructure and to address specific workforce training needs in targeted growth industries.

As evidence of how our seaports have helped ensure Florida’s preeminence as an economic gateway to Latin America and the Caribbean, our state accounted for 23.1 percent of all U.S. waterborne exports and 19.3 percent of all U.S. waterborne imports to and from this growing region in 2017. In the same year, Florida’s ports experienced more than 111 million tons of cargo worth $83.2 billion, and 16 million cruise passengers passed through Florida ports. Since 2012, our ports investments have resulted in an economic value of more than $117 billion – a $15 billion increase.

Our fight to grow Florida’s success in the global market and continue breaking tourism records will secure Florida’s future and ensure our state remains the best place for new opportunities so that our children and grandchildren have the tools they need to succeed in our state.

Sincerely,

Rick Scott
Governor
OUR MISSION

Seaports work to enhance economic vitality and quality of life in Florida by fostering the growth of domestic and international waterborne commerce.

Charged with facilitating the implementation of seaport capital improvement projects, the Florida Seaport Transportation and Economic Development Council (FSTED) consists of the port directors of the 15 publicly owned seaports and a representative from both the Department of Transportation and the Department of Economic Opportunity. The Florida Ports Council administers the FSTED program and staffs the Council.

OUR MANDATE

Florida’s deepwater seaports, as mandated by Chapter 163, Florida Statutes, prepare master plans to guide their development and expansion. Regularly updated plans, consistent with the comprehensive plans of the seaports’ respective local governments, establish goals and objectives, address forecasted needs, and identify five-year capital seaport improvement programs to implement.

OUR GOALS

• Develop world-class cargo and cruise facilities to enhance Florida’s global competitiveness.
• Build system-wide, seamless intermodal facilities to move port goods and passengers efficiently and cost-effectively.
• Capitalize on increased north-south trade and the Panama Canal expansion to capture more direct all-water service and feeder calls.
• Strengthen and diversify strategic seaport funding to ensure vital and timely improvements.
• Advocate continued statewide economic development that includes investment in major economic engines - Florida seaports.
• Support security measures that balance compliance with an efficient flow of seaport commerce.
### CARGO TONNAGE AND PASSENGERS

- Florida’s waterborne international and domestic cargo in Fiscal Year 2016/2017 increased 3.2 percent, from 107.4 to 110.8 million tons.
- Container cargo tonnage grew 7.1 percent to 24 million tons, and 20-foot equivalent units (TEUs) grew by 5 percent to 3.7 million.
- Dry bulk grew by 7.5 percent.
- Domestic tonnage, at 57.8 million tons, overtook international trade in 2017, and now exceeds it by 4.7 million tons.
- Import tonnage is twice that of export tonnage, with a 67:33 split. The long-term trend shows rising waterborne imports and falling exports, although in 2017 exports rose 8.3 percent and imports fell nominally.
- In FY 2016/2017, a total of 16.1 million passengers cruised from Florida’s ports – a new record – up 4.3 percent from FY 2015/2016.

### FLORIDA INTERNATIONAL TRADE VALUE

- 2017 total value of trade (including air and other gateways) increased 2.9 percent to $151.4 billion; waterborne trade by itself increased 4.9 percent – to $83.2 billion from $79.3 billion.
- At $54.4 billion, containerized cargo increased significantly (up from $50.1 billion), and represented a growing share (at 65.4 percent) of the waterborne cargo value.

| $54.4 billion | Value of containerized cargo increased significantly |
| 3.7 million | TEUs Handled (5 percent increase) |
| 16.1 million | Cruise passengers served (4.3 percent increase) |
| $83.2 billion | 2017 total value of waterborne trade (4.9 percent increase) |

- Waterborne trade comprises the majority of the state’s total trade, by value – now 55 percent.
- Waterborne imports moving through Florida seaports increased in value by 7.4 percent in 2017, and exports rose by 1.2 percent.
- In 2017, the state’s deficit narrowed somewhat, with an import-export ratio for all modes including air of 54:46 – the third year in a row of deficit, after years of surplus.
• The state’s widening waterborne import-export ratio was 62:38 percent.
• 11 commodities contributed more than $1 billion in import values, and five export commodities contributed more than $1 billion. *Vehicles, except Railway or Tramway, and Parts* is the top waterborne import and *Nuclear Reactors, Boilers, Machinery, and Parts Thereof* is the top export commodity.

**DIVERSITY OF TRADING REGIONS**

• Florida seaports trade with almost every nation.
• Florida seaports handled 6.1 percent of U.S. global waterborne export trade, and a large percentage of U.S. waterborne export trade with South and Central America and the Caribbean – 23.1 percent.
• Florida seaports handled 4.4 percent of U.S. global waterborne import trade, and 19.3 percent of waterborne imports from South and Central America and the Caribbean.
• Three major trade partners, China, Mexico and Argentina, set new records for waterborne trade through Florida gateways in 2017.
• The top three trading regions are South and Central America and the Caribbean, Asia, and Europe; together they account for 92.9 percent of all trade through the state’s seaports.
• China and Japan are the top waterborne trading partners, followed by Dominican Republic, Brazil and Mexico.
• China remained the leading waterborne import trade partner; Brazil is the top export partner.
• Florida seaports recorded a large but narrowing trade surplus with trading partners to the south in 2017, exporting $7.1 billion more than they imported from the region.
• Florida’s waterborne trade deficit with Asia continued to widen in 2017 and now measures $15.3 billion.
BUILDING GLOBAL PRESENCE

Seaports are critical conduits for Florida and U.S. domestic cargo movements and global trade. They help build imports and exports, create new trade and logistics jobs, and expand the value-added services supporting global businesses.

Florida’s 15 established and emerging seaports are leaders in the effort to continuously enhance the state’s economy. They are important players in achieving Florida’s global vision:

- Supporting and leading export promotion efforts.
- Upgrading facilities to best-in-class.
- Partnering for investments to expand the number of direct global connections and optimizing supply chains.
- Improving the strategic presence of Florida at a national level to help shape federal action on trade and ports.
- Marketing the assets of Florida’s system of seaports and overall freight network.

Florida Ports
1. Port Canaveral
2. Port Everglades
3. Port of Fernandina
4. Port of Fort Pierce
5. JAXPORT
6. Port of Key West
7. Port Manatee
8. PortMiami
9. Port of Palm Beach
10. Port Panama City
11. Port of Pensacola
12. Port of Port St. Joe
13. Port St. Pete
14. Port Tampa Bay
15. Port Citrus
Florida seaports offer definitive advantages to the state’s consumers and producers by developing state-of-the-art infrastructure, and services and connectivity to move freight and passengers with ever-increasing speed and efficiency. The bottom line is Florida’s seaports are cultivating commerce for the benefit of all Floridians.

SCALE AND SCOPE

Florida’s natural harbors have welcomed vessels, freight and visitors for centuries. It wasn’t that long ago that cypress dugout canoes were the favored form of transportation – indeed, one washed up in the Indian River Lagoon near Port Canaveral following Hurricane Irma last year. And while small craft still abound along Florida’s coast, the state’s seaports are just as likely to be served today by monolithic luxury liners or super post-Panamax container ships.

Size is significant. With 20 million residents and counting, and almost 117 million visitors in 2017, the state needs things it doesn’t produce. And with a robust economy led by a labor force that measures 10 million strong, the state produces things to be sent to markets around the world. Larger ships and greater capacity all along Florida supply chains provide the scale economies that allow goods to get to destination efficiently, and affordably.

Passenger ships are supersizing too. The larger the ship, the more room for cruise lines to pack in amenities to entertain passengers, like zip lines and rock walls, balconies and Broadway shows. Scale has become important for the cruise industry, and is imperative for Florida ports to maintain their reign as global leaders of the cruise realm.

Port capacity and capabilities are critical factors in luring behemoth ships and their coveted routes and services. Thanks to incredible levels of investment in recent years, and $3.3 billion more in capital projects lined up for the next five years, seaports now have a rich and growing asset base of navigational channels, docks and terminals, and inland connectivity.

Florida seaports are doing great things with those massive assets. The economic impact spawned by port activities supports hundreds of thousands of well-paying jobs for Floridians, and is a mainstay of the Florida economy.

LEVERAGE ASSETS

Well-equipped and aptly managed seaports leverage their assets to maintain and attract business of varying types. Each port tailors its appeal for particular commodities or trade partners. While one might offer a better business case for a certain size of cruise ship, another might prove advantageous for Asian inbound containers, or domestic petroleum, or Mexican cement.

For every Italian sports car purchased in Florida, and for every machinery component exported to Brazil, there is a choice of supply chains. That chain may or may not work its way into or out of the state through a Florida seaport. But when it does, it provides additional economic benefits for Floridians. Florida’s ports won’t be the optimal hub for every purchase or sale in the state, but they will be for many. They compete industriously to be included in these supply chains.
LEVERAGING SUPPLY CHAIN

Florida ports recognize that to help embed themselves in import or export routings and capture cargo, it is important to build relationships with supply chain members. Captive markets are rare nowadays. While it used to be commonplace, for example, for a citrus exporter to truck a few miles to the nearest port for export, that is no longer a given. About 3.5 million TEUs of containerized goods alone originate in or are destined for Florida using out-of-state seaports. That is according to a 2015 Florida Ports Council report entitled Analysis of Global Opportunities and Challenges for Florida’s Seaports.

Florida seaports tackle opportunities for which they are most competitive. The Global Opportunities report revealed opportunities and challenges specifically related to expanding international trade through state seaports, and confirmed the cost advantage of adding Florida ports to freight supply chains for specific goods, especially container volumes that are destined for Florida but come via non-Florida ports.

While the ports already operate with a level of proficiency that helps the state maintain prominence on several waterborne trades, new opportunities to grow market share are being unearthed, on new trades and established ones, such as on South American and Caribbean trades, where Florida ports have long prevailed.
TOP FIVE STRATEGIES

Florida seaports and their trade partners have developed five important priorities to help grow their trade volumes:

• Addressing burdens such as out-of-date processes and unnecessary regulations that hamstring supply chain efficiency
• Developing additional tools that allow Florida to compete with nearby states to attract new manufacturers and businesses
• Continuing to invest in port infrastructure and channel upgrades that provide Florida with the ability to be the first inbound and last outbound port-of-call for import and export shipments
• Creating aggressive marketing campaigns to attract to Florida those beneficial cargo owners and carriers that are importing and exporting cargo through non-Florida ports
• Identifying incentives that would entice import distribution centers and export-oriented manufacturing companies to locate in Florida

Together, these strategic priorities, when fully executed, will unleash tremendous potential for Florida ports and the state’s prosperity.

RESPONSIVE STEWARDSHIP

No port business development effort will succeed in this decade without responsible and responsive two-way communication with seaport communities. As seaports continue to expand and invest in infrastructure to meet needs of the state’s population and economic growth, they are carefully balancing development with deft stewardship of public safety, security and the environment. Their shared responsibility to sustainable port operations benefits our state now and will continue to serve Florida’s future generations.

The Florida Ports Council’s Environmental Stewardship Initiative, highlights and advocates for ecologically responsible projects at seaports. Promoting environmental stewardship and utilizing best management practices and policies to maximize protection of the environment is becoming integral to all seaport decisions. The goal is for the state’s ports to continuously evaluate and improve activities and practices in order to meet or exceed rules and regulations. Communicating and promoting a culture of sustainability and environmental awareness to employees, customers and communities is serving Florida ports well.

ESCALATING ADVANCEMENTS

The rate of change in the trade and transportation industry is brisk. In addition to building, maintaining and administering port facilities, administrators have to fine-tune their product and service offerings to keep up with opportunities and stakeholder needs, and challenges.

Ports and their partners are adapting technologies to maximize their cargo and passenger throughput, and velocity. While costly at first, in the long run these technologies should raise a port’s bottom line and help ensure sustainability. As functions automate, ports have access to more data for more effective decision making, and employee and other resources are freed up to be redeployed to more strategic tasks. Technology is ultimately critical to the success of increasingly complex supply chains.

DISTRIBUTION AND LOGISTICS INVESTMENT STUDY

In 2017, the Florida Ports Council commissioned a study led by global transportation consultant CPCS, to guide the development of seaport strategy that tackles cargo opportunity stemming from distribution centers (DCs) and warehouses. The fact is that greater DC capacity in the state brings more opportunity for cargo through state seaports, and more economic benefits statewide.
The report entitled *Attracting Distribution Center and Related Logistics Investment to Florida to Anchor Traffic through Florida Ports* looked at the broad group of intermodal logistics facilities known for their activities in warehousing, fulfillment, transport, logistics, goods distribution, consolidation, and related value-added services.

This study identified Florida’s strengths as a destination for DC and warehouse investments: market access, low taxes, available construction sites and building inventory, and good maritime connections. The study also recommended prospecting for shippers with a retail footprint but without a logistics facility in the state, gauging logistics network expansion plans, and developing pitches specific to the most interested/attainable shippers by crystallizing the “Florida Value Proposition”. Specific findings from the study can be leveraged to inform discussions with shippers and develop and deliver appropriate messaging.

Also, because Florida’s state-level incentives are not really targeted at the transportation and logistics sector, especially relative to those offered by competing states, it is suggested that creating state-level incentives in Florida would help attract new DCs.

**ADDRESSING GROWTH CONSTRAINTS**

Both the Distribution and Logistics Investment study and the FDOT plan identified constraints to growth: a peninsular geography, somewhat limited rail options, fewer global carriers than neighboring states’ ports, DC operating costs, highway access or bottlenecks, navigation issues and vessel traffic delays, gate operations, highway challenges related to cruise and cargo traffic interaction, security access, federal funding for deepening/dredging, the U.S. Army Corps of Engineers joint permitting process, truck regulations such as weight limits and gate appointments, and tidal restrictions on vessel movement.
Fortunately, Governor Rick Scott, the Florida Legislature, FDOT, Florida seaports and other stakeholders continue to identify solutions and prioritize funding to address many of these ongoing challenges. While these challenges may affect some cargo on some routes, they by no means hinder all. And win-win solutions are at hand. For example, the more DCs and warehouses that are attracted to Florida, the more critical mass there will be to drive container traffic, and the more appeal Florida will have to attract more container services. And a refined prospecting strategy for attracting DCs – one that focuses on shippers that are looking to serve Florida from a regional footprint (as maybe their third, fourth or fifth DC in the U.S., not the first) – will likely herald greater success. Many challenges are offset by the potential for significant truck transportation cost savings related to being closer to the Florida retail footprint. Excellent access to Florida’s large consumer base and lower truck transportation costs to serve these consumers will appeal to site selectors.

**ELEVATING SEAPORT INFRASTRUCTURE**

Many of the challenges Florida seaports face are related to vessel size and will be resolved with deeper channels and capacity-related inland connectivity improvements. These types of improvements are incredibly expensive.

It comes as no surprise that almost one quarter, about $800 million, of the Florida seaport $3.3-billion five-year capital projects budget is dredging and deepening related. In the coming year, Florida seaports plan to spend $821 million on capital infrastructure, and while the numbers typically fall in future planning years, this time the budget substantially increases in Year 2 – up to $1 billion in Fiscal Year 2018/2019.

The state’s five largest tonnage seaports account for 89.3 percent of the planned capital spending, which roughly mirrors their contribution last year. New cargo terminals, berths and equipment, together with berth rehabilitation and repair, account for 34.5 percent of the Capital Improvement Plan. New and refurbished facilities are key to the seaports’ business retention and future competitiveness. At 16.2 percent, cruise terminal and related developments also represent a sizable portion of the overall budget.

To prepare for new growth, improve efficiency and minimize costs to port users over the long term, these investments are a necessity.

**HIGH PRODUCTIVITY**

To accommodate 300,000 tons of freight and 44,000 passengers per day, Florida seaports are open for business around the clock.

Their operational and project development performance is measurable and comparable, although differences in geography, scope, assets, opportunity and community inform decisions about value creation and stewardship of resources in different ways. Florida seaports consistently focus on benchmarking and feedback, which is also of great value in business development efforts. With metrics that speak to their business, and buttressed by a state model of cooperation for prioritizing transportation investments, Florida ports are working hard to be prepared for port productivity assessments that will help prioritize funding for vital transportation infrastructure in the future.

**FINDING FUNDS**

Florida’s seaport infrastructure is financed in a variety of ways, from working capital to public funds, and from construction bonds to government grants. Every capital project accesses a unique combination of funding options.
Despite a variety of funding sources, finding a required match can be difficult and there has been a seaport funding shortage on the federal level for decades. This lack of investment has negatively affected the nation’s transportation systems.

However, to the credit of Governor Rick Scott, the Legislature and FDOT, the state of Florida has taken a leadership position in funding seaport development and critical supply chain infrastructure. With long-term growth in trade volumes and cargo vessel size, it is important that Florida port facilities, navigation channels, inland transportation and logistics infrastructure be prepared.

**FLORIDA’S GLOBAL CRUISE INDUSTRY**

Setting a new record, Florida seaports handled 16.1 million passengers in 2017. Florida is the heart of the global cruise industry – home to the top three cruise ports in the world. Florida ports handle about a third of the global volume of 54.4 million revenue passengers.

More than one-third of global deployment will be in the Caribbean region in 2018. Florida’s eight cruise ports serve this region well, with exceptional airlift, accessibility and terminals. Most of the newest and largest vessels begin their voyages at Florida ports.

The industry generates tens of thousands of jobs and billions in spending annually in the state. Cruise operators and passengers alike expect an efficient seamless cruise experience, and that begins with getting to the ship. Maintaining and enhancing cruise terminal aesthetics, amenities and efficiencies give Florida gateways a competitive edge.
CARGO TONNAGE UP WITH STRONG CONTAINER HEADWAY

In Fiscal Year 2016/2017, Florida’s waterborne cargo tonnage grew by 3.2 percent, from 107.4 to 110.8 million tons.

Container cargo tonnage grew even faster, at 7.1 percent, to 24 million tons. Dry bulk grew by 7.5 percent, reflecting recovery in the building trades, and domestic tonnage, at 57.8 million tons, overtook international trade in 2017, and now exceeds it by 4.7 million tons. That growth has a lot to do with the state’s increasing gas and energy needs.

CARGO VALUES UP

Global trade continues to increase by value. U.S. and Florida trade are on the rise too. Florida waterborne trade values were up 4.9 percent to $83.2 billion in 2017. At $54.4 billion, containerized cargo increased significantly (up from $50.1 billion), and represented a growing share (at 65.4 percent) of the waterborne cargo value.

Waterborne trade comprises the majority of the state’s total trade, by value – now at 55 percent. Waterborne imports moved through Florida seaports increased in value by 7.4 percent in 2017, and exports rose by 1.2 percent. The state’s waterborne import-export ratio was 62:38 percent.

The state’s commodity slate includes 11 categories that contributed more than $1 billion in import values, and five export commodities that contributed more than $1 billion. Vehicles, except Railway or Tramway, and Parts is the top waterborne import and Nuclear Reactors, Boilers, Machinery, and Parts Thereof is the top export commodity.

In 2017, Florida seaports handled 6.1 percent of U.S. global waterborne export trade, and a large percentage of U.S. waterborne export trade with South and Central America and the Caribbean – 23.1 percent. The top three trading regions are South and Central America and the Caribbean, Asia, and Europe; together they account for 92.9 percent of all trade through the state’s seaports. Three major trade partners, China, Mexico and Argentina, set new records for waterborne trade through Florida gateways in 2017.

DRIVING FUTURE BUSINESS

Building more efficiency and economies of scale into Florida’s supply chains will help Florida seaports compete now and in the future.

Equipped with the right intelligence, infrastructure and initiative, Florida ports will continue to move more and more of the state’s consumption, raw materials and production. They are working diligently to attract new freight and develop markets along the eastern seaboard and into the Midwest. Continuing to eliminate obstacles to freight and passenger mobility is a priority.

Few states can match Florida for quality of life and economic prosperity. The state’s trade and transportation assets, and specifically its ports, enhance both. Seaport capacity to add value helps the state’s consumers and industry access new opportunities. The result is more business and faster access to a broader selection of products at a better price. Day in and day out, Florida ports help achieve that. It’s nonstop commerce, and it’s the way forward for Florida.
Port Canaveral is a world-class strategic gateway for Central Florida, now the nation’s tenth largest consumer market, with economic growth well above the national average.

The port is Florida’s third largest by operating revenues – expected to exceed $100 million in Fiscal Year 2018. It is a 21st century economic driver for the region, generating $2.2 billion in economic impact annually. Forward-looking strategic planning guides its improvement efforts and facilitates commerce and tourism.

It is a popular homeport and port of call for some of the largest, most sophisticated cruise ships afloat. Nearly five million revenue cruise passengers are expected this fiscal year, once again making it the second-busiest cruise port in the world. By 2019, the port is expected to be the first U.S. port serving LNG-powered cruise (and cargo) vessels.

Port Canaveral’s man-made deep-draft harbor offers direct access to the Atlantic Ocean, with a 45-minute transit from first buoy to dock. The port offers easy access to major road and rail systems. It is within three hours of every major Florida market, and eight hours of 81 million consumers in the Southeast. These critical advantages attracted nearly six million tons of diverse cargo in 2017.

A new Strategic Master Plan sets a vision for the future while supporting the foundations of the port’s success. This multi-year “look ahead” includes near-term priorities with investment in expanded capabilities and infrastructure that continue to advance port business lines and recreational activities.

Canaveral Port Authority has made strategic investments in harbor and landside infrastructure to augment the port’s mission as Central Florida’s premier maritime gateway. Several complex infrastructure projects will be initiated or completed in the next two to five years. More than $446 million is currently identified in the five-year capital improvement project budget to expand cruise and cargo operations. Crucial road network improvements will address increased demand by cruise and cargo partners. Revamped bulkheads will support the booming commercial space industry that depends on Port Canaveral for recovery and relaunch operations.

Port Canaveral views its partnerships with stakeholders as valued investments in the port’s future, essential to sustaining success in the maritime industry. Through these partnerships with customers, tenants and community members, Port Canaveral’s success will continue to contribute to the overall health and prosperity of greater Central Florida.
Goals & Objectives

- Sustain the port’s value as both a viable commercial entity and community resource, while keeping pace with an increasingly complex global marketplace.
- Expand port capabilities and infrastructure to meet the growth needs of cruise, tourism and commercial space industries.
- Support rapid growth of Central Florida’s region and its demand for imports and exports with Foreign Trade Zone 136.
- Improve crucial road networks to address increased growth in cruise and cargo business.
- Provide critical infrastructure to support the booming commercial space industry that depends on the port for recovery and relaunch operations.
- Support the recreational needs of the local community.

Current or Planned Investments

- **Cruise Terminal 3:** Replace the terminal, currently used for single-day port calls, with an expanded facility to serve vessels with up to 8,000 passengers. The new $150-million terminal, targeted for completion by 2019, will support nearly 4,000 permanent jobs.
- **LNG:** Develop operating scenario and related infrastructure to support earliest deliveries of LNG-powered cruise vessels.
- **Bulkhead Demand:** Manage the highest demand for bulkhead space in the history of the port with roadway expansions and improvements coupled with bulkhead renovations.

Accomplishments

- North Cargo Berths 5 and 6 renovated with 2,000 feet of quay deepened to -43 feet. Port Canaveral also plans to purchase a mobile harbor crane with 18-19 container reach, to begin operations by the end of 2018.
- West Turning Basin deepened to the authorized depth of -43 feet plus 2 feet of over-dredge, to complement the existing authorized port channel depth of -44 feet. With the turning basin deepening completed and the port’s channel clear from overhead obstructions (such as bridges, wires and other air-draft restrictions), Port Canaveral boasts one of the deepest working cargo berths with no air-draft limitation between Miami and Norfolk.
- Completed $54.5 million in capital investments in Fiscal Year 2017.
- Completed $33.9 million renovation of Cruise Terminal 10 to support an increased number of ship calls.
- Ro/ro terminal operator AutoPort Canaveral expanded OEM auto imports nearly four-fold to meet the high demand central and south Florida markets.
- Fuel terminal operator Seaport Canaveral completed a $2-million truck-lane expansion, nearly doubling the terminal’s automated loading capacity to 500 trucks per day. Truck volume is expected to exceed 120,000 this year.

Hinterland

The Central Florida region paralleling the I-4 corridor and the Central Florida I-95 corridor. **Cargo:** Central and North Florida counties of Brevard, Polk, Indian River, Orange, Osceola, Seminole and Volusia. **Cruise:** The U.S., Europe, the Bahamas and the Caribbean, Mexico, and Central and South America.

Trade Partners

**Imports (by tonnage):** Bahamas, Canada, Venezuela, Netherlands and France.  
**Exports (by tonnage):** Netherlands, Virgin Islands, Costa Rica, Bahamas and Panama.
Port Everglades is an economic powerhouse for the south Florida region and one of the most diverse seaports in the U.S.

Consistently ranked among the top three cruise ports in the world, Port Everglades is also one of the nation’s leading container ports and South Florida’s main seaport for receiving petroleum products including gasoline, jet fuel and alternative fuels.

The Port Everglades Department is a self-supporting Enterprise Fund of Broward County, with operating revenues of $161.7 million in Fiscal Year 2017. It does not rely on local tax dollars for operations. The port’s total economic activity is more than $30 billion, impacting 230,797 jobs including over 13,000 people who work for companies that provide direct services to Port Everglades.

Goals & Objectives

- Grow containerized cargo, capitalizing on location at the crossroads of north-south and east-west trade lanes, with direct highway access, a near-dock intermodal container transfer facility (ICTF), and an international airport less than two miles away.
- Capitalize on federal and state funding opportunities to deepen and widen channels and turning basin, and to purchase up to six super post-Panamax gantry cranes to handle larger cargo ships.
- Continue capital upgrades that ensure world-class facilities at eight multi-day cruise terminals serving 40 cruise ships.
- Augment the volume of perishable produce coming from Latin America by expanding cold treatment and fumigation services, and gaining approval to import a wider variety of produce from various markets by working in conjunction with appropriate government agencies.
- Invest in infrastructure renovations and construction to retain prominence as a top petroleum port in Florida, annually handling via water 116.7 million barrels of petroleum products plus alternative fuels.
- Ensure the long-term interests of both the maritime community and the fragile environment within and around the port by adhering to governmental regulations, employing best management practices, careful study, and advancing progressive remedial and protective measures.

Current or Planned Investments

- **Southport Turning Notch Extension:** (STNE) and Upland Mangrove Enhancement: Lengthen the STNE from 900 to 2,400 feet, providing for up to five additional berths and up to six cranes.
• **Harbor Deepening and Widening:** Work with the U.S. Army Corps of Engineers (USACE) to deepen and widen channels from 42 feet to 48 feet (with 2-foot over-dredge), to upsize the Outer Entrance Channel to a 55-foot depth and 800-foot channel width, to deepen the Inner Entrance Channel and Main Turning Basin from 42 to 48 feet, and to widen channels within the port to increase the margin of safety for ships transiting. The project is in preconstruction engineering and design, with an estimated cost of $389 million, including a $99 million investment by the port. No local taxes are to be used.

• **Redesign and modernization of Cruise Terminal 25:** Expand terminal footprint, add second floor check-in and waiting areas, and improve traffic circulation in time for the arrival of Celebrity Cruises’ futuristic *Celebrity Edge*, December 2018.

• **Port Everglades Logistics Center:** Relocate on-port Foreign Trade Zone facility to a new regional logistics distribution center with direct access to the interstate system and “the Florida East Coast Railway’s” ICTF.

• **Petroleum Slip 1:** Widen slip to 450 feet. The Berth 9 and 10 structural bulkhead and marine infrastructure within Slip 1 will be relocated 150 feet to the south. The port’s petroleum partners are developing improved offloading infrastructure. The project is currently in the design phase with construction of a new petroleum manifold system to begin in September 2018, in preparation for slip construction in 2020.

• **Super Post-Panamax Gantry Cranes:** Purchase three low-profile cranes for delivery in Fall 2019 with an option for an additional three, and to update seven existing cranes to improve lift capacity from 46.5 tons to 65 tons, along with construction of a FP&L sub-station to handle load.

### Accomplishments

- Set container record with 1,076,912 TEUs.
- Welcomed Royal Caribbean’s *Harmony of Seas* (newest and largest cruise ship in the world), Holland America’s ship in its new Pinnacle class, *Koningsdam*, and Pearl Seas Cruises’ *Pearl Mist* – the first cruise ship to sail to Cuba from Port Everglades since the 1950s.
- Received federal authorization that allowed USACE to move forward with the preconstruction engineering and design phase of deepening and widening port navigation channels.
- Completed a critical component of the STNE when Broward County transferred ownership of wetlands (approximately 60 acres at Port Everglades, including a 16.5-acre Wetland Enhancement project) to the State for permanent conservation. This allows 8.7 acres of an existing mangrove area to be removed and included in the STNE, making way for up to five new cargo ship berths.
- Approved an agreement with a Moss/Kiewit joint venture to move forward with the STNE and crane improvements project, the largest expansion in the port’s history – valued at $437.5 million.

### Hinterland

**Cargo:** Port Everglades is in the heart of one of the world’s largest consumer regions, with a constant flow of seasonal visitors and 110 million residents within a 500-mile radius. The Florida East Coast Railway’s 43-acre ICTF makes it possible for cargo shipped into Port Everglades to reach Atlanta and Charlotte in two days, Memphis and Nashville in three days, and 70 percent of the U.S. population in four days. **Cruise:** The Caribbean, Central America, South America, Panama Canal and Europe.

### Trade Partners

**Imports (by tonnage):** Honduras, Guatemala, Brazil, Italy, Spain.

**Exports (by tonnage):** Dominican Republic, Honduras, Guatemala, Netherlands Antilles, Bahamas.
The Port of Fernandina provides terminal service to numerous pulp and paper producers located throughout Florida and the Southeast, and provides steel export services to several steel companies with mills in the Southeast.

Fernandina supports a number of independent container lines serving Ecuador and Bermuda. The port’s principal cargoes include exports of steel products, machinery, forest products (including Kraft linerboard, logs and lumber), and building and construction material, as well as imports of wood pulp, hardboard, steel, building materials and grain. The containerized commodities moving through the port include wood pulp, automobile and truck parts, lumber, chemicals, beverages, food stuffs and chilled goods, machinery, consumer goods and building materials.

**Goals & Objectives**

- Promote economic development and create employment opportunities in Nassau County and Northeast Florida.
- Support local industries by providing efficient port facilities, and reduce inland costs.
- Maintain port infrastructure to the highest standards to meet the increasing customer demand.
- Provide superior service to niche carriers and port users at a competitive price.
- Develop and provide an off-port logistics and distribution facility to serve Northeast Florida.
- Work with state and local economic development agencies to attract manufacturing entities that import or export goods to Nassau County and Northeast Florida.

**Current or Planned Investments**

- **Logistics and Distribution Facility - Central and Westside of Nassau County:** The Port Authority is assisting in the recruitment and development of several manufacturing and logistics sites in both central and western Nassau County at the Wildlight Commerce Park, as well as, the Crawford Diamond Industrial Park, respectively, with their near combined 12 million square feet of entitled industrial space. These hubs would play a part in the handling of imported raw materials and exports of finished goods, along with contributing to significant job creation for the region. Wildlight Commerce Park is served by CSX and First Coast
Railroad (Genesee & Wyoming) and Crawford Diamond Industrial Park is served by dual competing Class I railroads, CSX and Norfolk Southern, and not one, but also two gas pipelines in the vicinity.

- Both sites are easily accessible by truck from I-95, I-10, U.S. Hwy 301/SR 200. These competitive advantages will help Northeast Florida capture a portion of the discretionary cargo currently moving through other out-of-state ports.

Accomplishments

- Developed a monthly liner service to the Caribbean including Jamaica, Dominican Republic and Haiti.
- Signed a new agreement for imported steel rebar and wire rod coils.
- Became part of the logistics chain of the Nassau County-based Kraft liner board mill, enhancing its efficiency.
- Attracted a major U.S. lumber exporter to utilize the Port of Fernandina for all of its Caribbean lumber exports.
- Installed a new scale and completed warehouse waterproofing and insulation.
- Working with local, state and Florida Department of Transportation officials, the expansion of A1A/SR200 leading to the port, from four to six lanes, is fully funded and currently in phase II of construction. As the highway is expanded, it will create manufacturing opportunities and efficiencies within the port corridor, enhancing the attractiveness of the Port of Fernandina.

Hinterland

The southeastern U.S. and gulf states. Major metropolitan areas include Tampa, Orlando, Jacksonville and Atlanta. As the most westerly port on the East Coast, the Midwest and the Great Lakes region can also be served efficiently. The Port of Fernandina enjoys excellent CSX rail connections with major paper and steel mills in the U.S. Southeast. Its geographical location also allows truckers to reach cities such as Memphis, Charleston, Richmond, Mobile and all of Florida in a day or less, at competitive prices.

Trade Partners

Ecuador, Bermuda, Spain, Dominican Republic, Jamaica, Haiti, Trinidad, St. Lucia and Finland. Exports: Steel products, Kraft liner board, lumber, machinery, foodstuff and chemicals. Imports: Scandinavian oats and steel rebar.
St. Lucie County is exploring strategic options for the Port of Fort Pierce, including development of vessel maintenance and refit operations.

St. Lucie County has recently purchased the former Indian River Terminal and is exploring strategic options for the Port of Fort Pierce, including repurposing the former cargo port into a facility for the maintenance and refit of large marine vessels. St. Lucie County now owns the former Indian River Cargo Terminal and a 20-acre tract known as “Harbour Pointe”.

Goals & Objectives

- Secure, under long-term agreement, a private partner to operate and develop the former Indian River Terminal. It is anticipated that a relationship will be in place before the end of 2018.
- Explore and develop the synergies between the Port of Fort Pierce and the Treasure Coast International Airport, including expansion of Foreign Trade Zone #218 to encompass the Port.
- Update the recently-consolidated Port Master Plan to reflect evolving ownership and opportunities in the port.

Current or Planned Investments

- **Former Indian River Terminal**: St. Lucie County purchased the Indian River Terminal in early 2018 and is evaluating strategies for its long-term operation and development.
- **Fisherman’s Wharf**: Design plans are underway for the reconstruction of Fisherman’s Wharf Roadway, which will include upgrading utilities and improvements to the storm water system. The Port of Fort Pierce is also moving forward on the planning effort for the reconstruction of the Fisherman’s Wharf Bulkhead, the Black Pearl Boat Ramp and permitting for the basin dredging, as well as an overall Conceptual Plan for the Fisherman’s Wharf Transition Zone.
- **Harbour Pointe**: St. Lucie County is evaluating possible development strategies of the 20-acre Harbour Pointe parcel, either as part of the development of the former Indian River Terminal or independently.
- **Second Street Reconstruction**: Reconstruction of North Second Street, the primary entrance road to the port, has been completed, supporting further port expansion plans. The project included installation of upgraded water, sewer, electrical, and natural gas mains to serve the entire port area.
Accomplishments

- Completed the recommendations issued in the Port of Fort Pierce Master Plan update.

Hinterland

St. Lucie, Indian River, Okeechobee, Highlands, Hendry, Glades and Martin counties.

Trade Partners

The Caribbean Basin, Bahamas, Far East and Europe.
The Jacksonville Port Authority (JAXPORT) is an independent agency responsible for the development of public seaport facilities in Jacksonville. It owns three cargo facilities, an intermodal rail terminal and a cruise terminal, and, according to a recent study, generates 132,000 jobs and more than $27 billion in annual economic impact for the northeast Florida region.

Goals & Objectives

- Complete harbor deepening project while further redeveloping JAXPORT’s terminals for intermodal, container, ro/ro, bulk and break-bulk business.
- Intensify international marketing efforts while preserving diversified trade lanes and cargo.
- Contribute to the economic well-being of the city, state and nation by developing new business, expanding export opportunities and attracting cargo bound for in-state markets to move through JAXPORT rather than through out-of-state ports.
- Collaborate with the Florida Department of Transportation to further improve the connector system linking Jacksonville to the interstate road network and rail system.

Current or Planned Investments

- **Harbor Deepening**: The federal project to deepen the Jacksonville shipping channel to 47 feet to accommodate more cargo aboard the largest ships began construction in February 2018. Along with significant state funding already in place, the $484-million project has received $21.5 million in federal funds along with a new start designation making it eligible for further federal dollars. Harbor deepening is projected to create 15,396 direct, indirect and induced jobs in Northeast Florida and add nearly two million TEUs to the port’s container volumes. Recent economic calculations find that every dollar invested in the deepening project will return $24.67 to the regional and state economy.

- **Autos**: In early 2018, JAXPORT began construction of a new automobile processing terminal, the first phase of a multi-year project which will increase the port’s vehicle-handling capacity by 25 percent. Once completed, the facility will add more than 100 acres of processing and storage space at JAXPORT’s Dames Point Marine Terminal and offer vessels direct waterside access for loading and unloading with major interstates less than one mile away (plus rail potential).
• **Other Infrastructure Upgrades:** A wide-ranging effort to enhance infrastructure at Blount Island and Talleyrand terminals continues. Upgrades to wharves, on-dock rail and terminal pavement areas are under way. These capital improvements – made possible by $100 million in federal and state funds – will enable JAXPORT to continue to build the port of the future.

**Accomplishments**

• Achieved record growth in containers, vehicles and overall tonnage. A record-setting 9.3 million tons of cargo moved through the port in 2017, up seven percent over 2016.

• Moved more than one million twenty-foot equivalent units in 2017, a seven percent increase over 2016, which was also a record year in container volumes for the port. The Asian sector now accounts for nearly 40 percent of JAXPORT’s total cargo container business, up from just 24 percent in 2013.

• Moved the most vehicles in its history in 2017 – a record-setting 693,000 total units - maintaining its position as one of the nation’s busiest vehicle handling ports.

• JAXPORT payments for work by certified Jacksonville Small and Emerging Businesses (JSEB) have topped $16.4 million over the past three years, accounting for an average of 23 percent of the port’s overall contract payments per year.

• Began the Jacksonville Harbor Deepening project, allocating the first phase of port funding to the U.S. Army Corps of Engineers for construction.

• Welcomed the 10,100-TEU *MOL Brave*, the largest container ship to ever visit a Florida port.

• Hans-Mill Corporation, one of the nation’s leading manufacturers of metal and plastic household products, opened a state-of-the-art manufacturing center near JAXPORT’s North Jacksonville marine terminals.

**Hinterland**

JAXPORT’s hinterland is primarily defined as the U.S. Southeast and Midwest. Jacksonville’s geographic location allows JAXPORT inbound cargo to reach 60 million consumers and 60 percent of the U.S. population within a one-day truck drive. The port is served by three dozen train departures daily. JAXPORT’s reach extends to all 48 contiguous states, according to the U.S. Department of Transportation’s study of destinations for imported goods.

**Trade Partners**

JAXPORT is the number one partner for commercial trade with Puerto Rico. The port offers worldwide cargo service from more than 40 ocean carriers, including direct service with Asia, Europe, Africa, South America, the Caribbean and other key markets.
MISSION
Providing visitors with a safe, quality experience in the southernmost city while ensuring a secure revenue source for the city and contributing to the economic growth of Key West businesses all while protecting the city’s heritage, the marine environment, the citizen’s quality of life and the fragile ecosystem for future generations.

Port of Key West
City of Key West

The Port of Key West includes cruise berths at Mallory Square, the Navy’s Outer Mole Pier, and the privately owned Pier B at the Margaritaville Key West Resort. This city also maintains a domestic ferry terminal in the Key West Bight.

These facilities constitute one of the busiest ports of call in the nation and one of the state’s strongest and most sustained ferry-port operations. The Port of Key West is a major economic engine for the city and local businesses, bringing in almost a million total passengers per year resulting in a local business impact of approximately $85 million. The port provides 1,260 direct and indirect jobs to the 25,000 citizens of Key West and contributes 15 percent of the city’s total tax revenue. Additionally, the port supports cruise and ferry activities throughout the state, hosting cruise ships from Miami, Port Everglades, Canaveral, Tampa and Jacksonville as well as ferries from Fort Myers and Marco Island.

Goals & Objectives

• Develop and maintain port-of-call facilities to accommodate the needs of the cruise ship industry and its passengers.
• Maximize cruise industry and ferry operation benefits and revenues for the city and local businesses.
• Manage the volume of cruise and ferry passengers to sustain the city’s quality of life and preserve the historic features of old Key West.
• Complete construction of a world-class park at the Truman Waterfront, which serves as the gateway between a major cruise berth and the heart of the city.

Current or Planned Investments

• Urban Park: The 33-acre former site of the Key West Naval Base is being redeveloped into an exceptional urban park that will offer residents and visitors alike the opportunity to experience the historical origin of Key West, its waterfront.
• Dolphin Upgrade: The city recently completed the upgrade to the monopile mooring dolphin at the Mallory Square Pier. Plans for additional improvements and expansion of the T-Pier are currently being developed.

Accomplishments

• Completed a retrofit of the T-Pier at Mallory Square with an additional berthing dolphin in order to reduce cruise ship forces on the main pier.
Port Manatee is a multi-purpose deep-water seaport on Tampa Bay handling a variety of bulk, break-bulk, containerized and heavy-lift project cargoes.

With its proximity to the Panama Canal, Port Manatee offers superior intermodal connectivity, competitive rates and a prime location with nearly 5,000 acres of surrounding green space ripe for development. Port Manatee features approximately 70 acres of lay-down area, one million square feet of public warehouse and office space, and 207,000 square feet of refrigerated space.

With room to grow, extensive development incentives and a growing consumer base at hand, Port Manatee offers significant benefits to current and potential customers, manufacturers, shippers and ocean carriers.

Goals & Objectives

- Develop and operate Port Manatee as a competitive and viable deep-water shipping port.
- Stimulate job creation and regional economic development.
- Serve community, state, national and international shipping needs generated by that development.
- Develop the Florida International Gateway.

Current or Planned Investments

- **North Gate Expansion:** The outbound lanes will be doubled at the main gate to securely accommodate increasing cargo volume.
- **Maintenance Dredging:** Inner harbor dredging.
- **Berth Rehabilitation:** Continued rehab of selected berths.
- **Expansion of the Intermodal Container Yard:** Paving of additional acreage contiguous to the existing 10-acre container yard.
- **Cold Storage Warehouse and/or Warehouse Improvements:** Paving of additional acreage contiguous to the existing 10-acre container yard.
- **Roadway Improvements:** Port-wide road improvements.
- **Purchase of Mobile Harbor Crane.**
- **Cruise Ferry Terminal.**

Accomplishments

- Port Manatee’s Berth 9 is now able to accommodate heavier loads with the completion in June 2017 of a reconstruction project. The fortified 625-foot-long berth can now handle uniform loads of up to 1,000 pounds per square foot.
• An additional 128 refrigerated plugs were installed in the intermodal container yard to accommodate the increase in containerized perishable cargo.

• In Fiscal Year 2017, the port experienced record numbers for container volumes while also reporting its top year for cargo tons moved.

• Operating revenues increased more than nine percent, largely due to an increase of more than a million dollars in waterborne-related revenue.

**Hinterland**

Florida counties within a 100-mile radius including Lee, Charlotte, DeSoto, Sarasota, Hardee, Polk, Hillsborough, Highlands, Pasco, Hernando, Pinellas and Manatee, as well as the U.S. Southeast, eastern U.S. and Midwest/Chicago area.

**Trade Partners**

Pacific Rim (including China), Canada, Latin America, Caribbean Basin, Europe and Australia.
MISSION

PortMiami’s mission is to operate and further develop the world’s leading cruise port and the largest container port in the state of Florida; to maximize its assets and strengthen its advantage for future growth; promote international trade and commerce as a vital link between North and South America and a growing center for global trade; support sustainability and operate in an environmentally responsible manner.

PortMiami is among America’s busiest cargo ports and is recognized around the globe as the Cruise Capital of the World and Cargo Gateway of the Americas.

It surpassed the five-million mark for cruise passengers during the 2017 cruise season and that figure is expected to increase again in 2018.

Infrastructure improvements for 2017 included the construction of a new cruise terminal A for Royal Caribbean, the award for the construction of a new cruise terminal B for NCL and the completion of the expansion to cruise terminal F to welcome the MSC Vista. In 2018 there will be additional cruise terminal expansions, roadway alignments for cruise and cargo traffic, and improvements to cargo yards for eRTGs. The port’s capital program totals more than $1 billion in projects recently completed or nearing completion.

The port can now welcome mega-size cargo ships for the growing trade with Asia using neo-Panamax ships. PortMiami and the Florida East Coast Railway reintroduced the on-dock rail Sunshine Gateway service, connecting the port to the Hialeah Rail Yard with links to the national rail system, which allows shippers to reach 70 percent of the U.S. population in less than four days. The deepening of the harbor and directly connecting the port to rail and highway systems enables PortMiami to increase its cargo and create thousands of new jobs throughout Florida.

PortMiami is home to the world’s leading cruise lines: Aida Cruises, Azamara Club Cruises, Carnival Cruise Lines, Celebrity Cruises, Crystal Cruises, Disney Cruise Line, Fathom, Fred Olsen Cruise Lines, Hapag Lloyd, MSC Cruises, Norwegian Cruise Line, Oceania Cruises, P & O Cruises, Princess Cruises, Regent Seven Seas Cruises, Resorts World Bimini, Royal Caribbean International, Seabourne, TUI and Virgin Cruises. These lines will bring 1,000 cruise vessel calls with 5.3 million passengers to the port. New for the 2017-18 cruise season, the port will welcome the newbuild ship the MSC Seaside.

PortMiami contributes more than $41 billion annually to the south Florida economy and helps provide direct and indirect employment for more than 324,000 jobs.

Goals & Objectives

- Capture new trade with Asian markets leveraging the -50/-52 foot channel, as well as continue to expand as an important north-south trade hub and to maximize trade opportunities with the growing Latin American markets.

- Expand intermodal infrastructure, in partnership with the state, to include rail and highway links, and encourage commercial real estate development such as warehousing.
• Market PortMiami’s Foreign Trade Zone 281 to make Miami-Dade County’s international trading community more profitable and competitive by providing quick and easy access to FTZ benefits.
• Continue to grow as the ‘Perishables Gateway of the Americas’ serving as shippers’ preferred entry point to markets nationwide.

**Current or Planned Investments**

PortMiami is planning for expansion, both in cruise and cargo business. Capital projects needed include: expansion to existing terminals, new cruise terminals and berths, additional intermodal and parking facilities, ferry terminals, additional cargo laydown area, consolidation of warehouse functions, roadway realignments, modernization of cargo terminals through investment in higher efficiency equipment, eRTGs, a new modern gate system, inland terminal area, bulkhead improvements, infrastructure improvements, and procurement of additional super post-Panamax gantry cranes.

**Accomplishments**

• In 2017 the port completed the construction of the expansion to cruise terminal F for the *MSC Seaside*.

**Hinterland**

**East-west Trade:** The south Florida counties of Miami-Dade, Broward, Monroe and Palm Beach throughout the state. **North-south Trade:** All of Florida, extending into the U.S. Southeast, Northeast and Midwest.

**Trade Partners**

**Partners:** China, Honduras, Dominican Republic, Costa Rica and Panama. **Commodities:** Machinery, Apparel, Textiles, Waste Products and Aluminum & Non-ferrous metals.
The Port of Palm Beach is a full service, diversified landlord port that provides services through its private sector partners and is responsible for facilitating economic development within Palm Beach County, the region and the state of Florida.

The port generates approximately 2,850 direct and indirect jobs in its community. Established in 1915, the port celebrated 102 years of economic development in 2017.

The port has three slips, 17 berths, and seven ro/ro ramps for 6,500 linear feet of berthing space to accommodate vessels up to 700 feet long and 100 feet wide. The port’s docks are 20-minute transit from the sea buoy. Operating draft is 33 feet MLW. The port has easy access to I-95, Florida’s Turnpike, and the Florida East Coast Railway, allowing for seamless, cost effective cargo movement.

Palm Beach offers on-dock rail. Florida East Coast Railway provides twice-daily service to the port’s rail interchange. The port owns and operates a locomotive and 6.5 miles of track. The industrial switching operation is capable of handling box, hopper and double-stack rail cars, with 24/7 operations. Rail operations can accommodate 20-axle rail cars, with 450-ton capacity.

The Port of Palm Beach is an important distribution center for commodities shipped all over the world, especially the Caribbean Basin. Operations include containerized, dry bulk, liquid bulk, break-bulk, ro/ro and heavy-lift/project cargoes. Additionally, the port has provided a foreign trade zone to the region since 1987, which encompasses both port and private sector sites. Federal agencies having oversight for international trade and passenger flow are housed in the port’s maritime office complex, located adjacent to a cruise terminal that accommodates day cruises, coastal, multi-day and port-of-call cruises.

**Goals & Objectives**

- Strengthen the port’s revenue stream by striving for diversification in import and export commodities while securing new revenue sources.
- Increase cruise operations, passenger counts and support travel and tourism to Palm Beach County with community partners.
- Increase cargo throughput by continuing to partner with existing tenants and users while also securing additional cargo from new customers.
- Maintain and expand port facilities to ensure the port has adequate capacity and operational efficiencies to accommodate further growth in cargo and passenger services by continuing to implement the port Master Plan.
• Continue to increase the port’s support of the local, regional, state and national economies while also enhancing the port’s role in the community through public relations, media outreach and social media.

Current or Planned Investments

• Berth 17: This project will replace the existing 60-year-old sheet pile. It includes improvements to the adjacent upland drainage system, utilities, existing and future tenant loading/unloading facilities and associated work required for the project. A mini slip will be cut into the existing dock, allowing for the stern-in mooring of a 350-foot vessel conducting ro/ro operations. It will expand current business and allow for new business at the site without interrupting the sugar operation located on the south side of Slip 3. This project is fully funded, will have an economic impact of $19 million per year, and will create 60 direct and indirect jobs.

• On-Port Rail Intermodal Expansion: The port switched almost 19,000 rail cars this past fiscal year. Phase 1 of this project will replace old light rail of various weights on wooden ties with 136-lb. rail on concrete ties, the same standard used by Florida East Coast Railway. Budgeted at $1.2 million, this phase of the project will be completed by Summer 2018.

• Waterside Cargo Terminal Redevelopment: This project will redevelop 3.5 acres of port property by demolishing an existing obsolete office building and adjacent parking lot. The land will be redeveloped as a refrigerated container laydown area with a 140 percent increase in reefer plugs over the current installation. Based just on the capacity percentage increase and historical business percentages, Florida-based companies should see their business increase $434 million. This project is fully funded and should be completed by July 2019.

• Master Plan Update: A new Master Plan Update has been introduced to guide ongoing business activity. The plan looks at both existing and potential opportunities. There was significant collaboration with the surrounding communities in the development of the Master Plan Update.

• Berth 1 Redevelopment: Berth 1 was completed in 1965 and contains the oldest sheet pile in the port. This project will replace the existing deteriorating sheet pile. The project is currently in the permitting and environmental monitoring stage. Construction is to begin in Fiscal Year 2018/2019 and is fully funded.

Accomplishments

• Fully funded $12-million refurbishment/expansion of Berth 17 and adjacent infrastructure.

• A new secondary metals exporter has been secured, providing a minimum guarantee of $500,000 in annual revenue to the port. This creates new jobs and generates a positive environmental impact in the region.

• In Fiscal Year 2016, the Port of Palm Beach posted its highest net revenue, highest TEU count and highest multi-day passenger count in its 100-year history.

Hinterland

Palm Beach, Martin, St. Lucie, Okeechobee, Highlands, Glades, Hendry, Brevard, Indian River, Monroe, Miami-Dade, Broward, Hillsborough and Orange counties.

Trade Partners

Anguilla, Antigua, Bahamas, Barbados, Cayman Islands, Dominica, Grenada, Guyana, Haiti, Marsh Harbour, Martinique, Netherlands Antilles, Nevis, Providenciales, Puerto Rico, Spain, St. Barts, St. Croix, St. John, St. Kitts, St. Lucia, St. Maarten, St. Thomas, St. Vincent and the Grenadines, Tortola, Trinidad & Tobago, Turkey, Turks & Caicos Islands and United Kingdom.
Port Panama City is a dynamic and growing port.

It handles more than 1.7 million tons of cargo per year including containerized cargo, copper cathodes, steel plate, steel coils, Kraft paper, wood pellets and aggregates. The port provides essential support service for five major manufacturing companies, including two located on port.

**Goals & Objectives**

- Double port cargo capacity with the development of the new East Terminal.
- Double container trade with Mexico and Central America.
- Expand the port’s warehouse distribution services at the Intermodal Distribution Center.
- Attract port-related manufacturing to the port’s Intermodal Distribution Center.

**Current or Planned Investments**

- **East Terminal:** Construction of a modern forest products terminal on a newly acquired 41-acre deep-water site.
- **Deepen East Channel:** The port is working with the Army Corps of Engineers to deepen the east channel and improve access to the new East Terminal.
- **Expand Bulk Storage:** New storage capacity will be added to the wood pellet terminal.

**Accomplishments**

- Started development of new East Terminal.
- Expanded container handling capacity.
- Completed 100,000-square-foot expansion to Distribution Warehouse.
- Completed construction of Bulk Transfer Facility.

**Hinterland**

Northwest Florida, Alabama, Georgia and Tennessee. Generally, Panama City provides a Gulf coast alternative to Savannah.

**Trade Partners**

Mexico, United Kingdom, Chile, Germany, Costa Rica and Panama.
As America’s First Settlement in 1559 and since its formal establishment in 1754, the Port of Pensacola has served as Northwest Florida’s trade and logistics gateway.

From its early shipments of regionally harvested long leaf pine, red snapper, and wooden ship parts, to the locally manufactured paper, steel, and wind energy power generation components being handled today, the Port of Pensacola has always existed, at least in part, to serve local and regional business interests in Northwest Florida and Alabama. With a smaller physical footprint than most of Florida’s other deep-water ports, Pensacola nevertheless provides a tactical solution for national, international and multi-national shippers and tenants who demand unmatched flexibility, capability, and customer service.

In light of the port’s diversification into non-tonnage based business lines such as the offshore vessel services industry, which generates little to no cargo throughput, and wind energy turbine and component business, which generates large volumes of relatively light-weight cargo, the Port of Pensacola continues to redefine the matrices by which it measures its success.

Notwithstanding these lines of business, the port also continues to excel at providing bulk and breakbulk cargo operations as it has for hundreds of years. The port’s single biggest advantage is a transit to/from the first sea buoy of only about 1 ½ hours.

Goals & Objectives

- Diversify the port’s business lines and land use in order to attract new business partners that will create jobs and grow local port-related employment opportunities.
- Use existing Port warehouse space and facilities to expand port business lines in order to maximize revenue generation, regional job creation, and economic impact.
- Expand port infrastructure and leverage recent improvements to facilities to meet the operational needs of the port’s business partners, drive customer loyalty, and attract new tenants.
- Evaluate non-traditional port activities, such as partnerships with local educational institutions, universities, and private technology companies to develop marine and subsurface research facilities on port.

Current or Planned Investments

- **Warehouse #1 Crane facility:** This warehouse modification project scheduled for completion summer of 2018 will include a raised-ceiling ‘high hat’ bay with...
30-foot plus hook height to support overhead bridge and low bay cranes. The facility will provide for private-sector job growth in a business sector that represents a non-traditional, diversified use of port facilities.

- **Port land utilization and development plan:** Work with industry, real estate professionals, current tenants and other appropriate experts to seek a growth and job creation port master plan for the future. The plan will balance existing port activities and tenants but potentially include new lines of business or areas for development that could be non-traditional.

- **Berth 6 Rehabilitation:** This multi-phase project is repairing areas of spalling on the Berth 6 substructure by removing loose concrete, rust and mill scale and incorporating new berthing and decking solutions. The rehabilitation will return an existing port berth to full utility, retaining jobs, and creating potential for additional jobs and revenue.

- **Pensacola Bay Ferry Landing:** In partnership with the National Park Service, passenger ferry service supporting Fort Pickens on the Gulf Island National Seashore, and Pensacola Beach, is scheduled to begin service in 2018. The ferries will be homeported at docks and ticketing facilities being constructed at the port to support an estimated 60,000 passengers annually once fully operational.

### Accomplishments

- In traditional cargo sectors, there are newly established monthly services to the eastern Mediterranean and Central and South America. Also, exports of wind turbine nacelles from GE’s Pensacola manufacturing facility continue along with special project cargo. On the import side, aggregate volume remained steady and is expected to increase.

- Coming online is an expanded existing warehouse facility with 50+ foot ceiling height to accommodate either traditional cargo use or for a light manufacturer or subsea support company. The new facility has fifty percent more square footage to just under 100,000 square feet.

- Floating dock and gangway for passenger operations has been completed for the new National Park Service ferry service accommodating mooring of two 150 passenger ferries. The associated ferry passenger terminal is under construction and expected to handle the first passengers in the spring of 2018.

### Hinterland

Southeastern and Midwestern U.S. roughly bounded by the Great Lakes to the north, the Mississippi River to the west, the Gulf of Mexico to the south and the Atlantic Ocean to the east including all or a portion of Florida, Alabama, Mississippi, Tennessee, Kentucky, Illinois, Indiana, Ohio, the Virginas, North Carolina, South Carolina and Georgia.

### Trade Partners

Central and South America, Mexico, Caribbean Basin, Mediterranean, Africa, Baltic Region and Asia.
MISSION
To enhance the economic vitality and quality of life in the Port St. Joe area and northwest Florida region by fostering the growth of domestic and foreign commerce.

Located in Gulf County, Florida, the Port of Port St. Joe offers a deep-water seaport with nearly 1,900 linear feet of frontage.

The port is well-suited for bulk and cargo shipments, offering access to rail, the U.S. Gulf Intracoastal Waterway, and state and U.S. highways.

Current cargo includes shipping Oyster shells to Mississippi and rock to Tampa.

One of the port’s greatest assets is the approximately 300 acres of combined ready-to-be-leased lands adjacent to the bulkheads, and the more than 5,000 acres of land in the port environs available for immediate development. Businesses wishing to establish facilities have plenty of room to build and expand. Additionally, much of the bulkhead area has water, sewer and electric in place. The emerging port anticipates ongoing development, building on established domestic shipments of oyster shells and rock.

Goals & Objectives

• Attract appropriate users – port tenants, shippers and manufacturers – to bring job creation and economic development opportunities. Initiate the process of resuming maintenance dredging of the ship channel.

• Enhance the Apalachicola Northern Railway (AN Railway) line that serves the port and connects with the CSXT Class I mainline.

Current or Planned Investments

With much of the basic infrastructure in place, the Port Authority and private partner, The St. Joe Company, have marketing efforts under way to ensure additional investment projects align with defined demand and support identified markets.

• Roadworks: Road and related improvements will continue on port property and the St. Joe Company mill site for future wood product shipments.

• Dredging: Dredging projects are planned for the ship turning basin and the shipping channel. A project to build the dredge material disposal sites is in planning but unfunded.

• Railworks: A planned $9-million project to repair the rail connection to the port will include funding from the Florida Department of Transportation, St. Joe Company, and Genesee & Wyoming Railroad.
• **New Dry Dock**: A $20-million project will include construction of a floating dry dock to be used by Eastern Ship Building for their Coast Guard contract.

**Accomplishments**

• A permit was issued by the U.S. Army Corps of Engineers to allow for spoil disposal as part of the planned dredging of the port’s navigational channel to the maximum authorized depth of 37 feet.

• The Port Authority has signed a lease with Port St. Joe International Terminal, LLC covering port property. The company plans to use the property to transport timber related products through the port. The St. Joe Company has also signed a license agreement with Port St. Joe International Terminal, LLC to allow use of the deep-water bulkhead, and improvements to provide access are under way.

**Hinterland**

North Florida, Alabama and Georgia.

**Trade Partners**

The recently implemented marketing initiatives are helping identify future Port of Port St. Joe’s trading partners.
Port St. Pete, located on Tampa Bay, is a multi-use facility that capitalizes on its unique assets within the city of St. Petersburg.

These include opportunities to attract research vessels, large yachts and other vessels, as well as to attract and enhance the benefits of marine science/research facilities on port property.

Goals & Objectives

- Continue to improve port facilities, including terminal, berths, landscaping, parking and public access, to attract revenue-generating users and to expand potential maritime operations.
- Diversify revenue and similar investment opportunities by creating an atmosphere that will attract research vessels, large yachts and other marine-related businesses.
- Continue to take advantage of the port’s proximity to the adjacent University of South Florida-St. Petersburg, College of Marine Science, the Albert Whitted Airport, U.S. Coast Guard Sector St. Petersburg, and a variety of other marine/maritime-oriented entities located nearby (and which comprise the St. Pete Ocean Team), through joint use and programming, to complement the city’s downtown redevelopment plans.
- Implement a cost-effective, phased development approach.
- Obtain funding assistance for capital improvements.

Current or Planned Investments

- Wharf Renovation: A recent, extensive wharf renovation project will allow the port to operate up to its design condition. This project includes the addition of utilities (power pedestals/electric) along the wharf in order to more fully serve visiting vessels. This new amenity is expected to attract business.
- Port Discovery: The port is working with the St. Pete Ocean Team to implement the Port Master Plan concept ‘Port Discovery’ – a marine science/research, educationally focused partnership initiative. ‘Port Discovery’ would utilize the Port Terminal Building and be open to the general public, and have a special focus on classroom visits from local schools.

Accomplishments

- Renovated entire wharf including sheet pile replacement, revetment and installation of utilities (power pedestals) for large visiting vessels.
- Improved port lighting.
- Completed construction of the SRI Research and Development Center.
- Implemented security upgrades, including camera coverage of the port.
Port Tampa Bay (PTB) is the largest of the Florida ports by tonnage and acreage, and a critical economic engine for all of Central Florida.

Located in the fastest growing region of the state, PTB is a full service port handling all types of cargo, cruise, and other maritime activities including shipbuilding and repair work. Building on a long and rich history as an important bulk port, PTB today handles a broad mix of bulk, break-bulk, container, ro/ro and heavy-lift/project cargo.

Unique to PTB is its vast and growing acreage. Private and public properties comprise 5,000 acres, of which more than 300 are currently available. These land assets are vital in attracting new business and stimulating manufacturing, creating economic value for the region.

The port continues to build its container business to serve central Florida and beyond, providing a more cost-effective alternative for carriers and shippers. PTB is also a vital gateway to Central Florida for energy products and construction/building materials, and, it is an important global distribution point for fertilizer.

**Goals & Objectives**

- Expand and diversify PTB’s business base through executing a supply-chain sales strategy.
- Fulfill Central Florida’s long term energy requirements.
- Optimize Tampa Bay’s vessel access to successfully pursue emerging trade opportunities generated by the Panama Canal expansion.
- Expand and diversify the region’s industrial economy and cargo base.
- Implement the Channelside Master Plan, optimizing cruise capability.
- Partner with the city and county to maximize future growth and development of the region.
- Develop and implement a landside transportation access strategy.

**Current or Planned Investments**

- **Hooker’s Point Developments:** Hooker’s Point is a 40-acre (expandable to 160-acre) multi-phased development that is home to the port’s container terminal, an energy gateway, and break-bulk and bulk berths. Current developments include another berth expansion, laydown space, transit sheds, reefer plugs, gate complex, equipment and upland developments. Future developments will
include refrigerated warehouse (Phase 2), additional berths, intermodal cargo yard expansion, channel/berth deepening and petroleum pipeline.

- **Petroleum Facilities Development**: PTB is the energy gateway for West Central Florida and its ten million residents. The port has invested tens of millions of dollars in the PTB Petroleum Complex (as well as the Tampa Gateway Terminal ethanol unit/train facility). This complex now sets records for deepest draft, most berths, and largest product range capability, and it connects to several of Tampa Bay's largest petroleum products distributors, including the Central Florida Pipeline.

- **Port Redwing Development/South Bay**: Port Redwing/South Bay, a 270-acre Greenfield site situated south of Tampa and near I-75 and the CSXT rail mainline, provides room for the port to grow its bulk trade and intermodal transportation activities. Recent undertakings include the construction of a new access road connecting to U.S.-41, rail track connecting to the CSXT mainline, utilities, development of the South Bay uplands to facilitate growth of current and new business, construction of a security complex and a new 1000-foot-long steel bulkhead berth (Berth 302).

- **Navigational Improvements**: PTB is the local sponsor for federal work to improve and maintain 40-plus miles of federal channels that provide access to seaports within Tampa Bay. It annually dredges 110,000 cubic yards to maintain and improve 62 deep-water ship berths. This year the Big Bend Channel and turning basin will be enlarged to help optimize landside infrastructure investments at Port Redwing.

### Accomplishments

- **Reefer**: A 135,000-square-foot on-dock refrigerated warehouse, opened November 2017 by Port Logistics Refrigerated Services, offers 102 reefer plugs, 6,348 racked pallet positions and a 100-ton mobile harbor crane.

- **Cruise**: Holland America and Norwegian Cruise Line introduced newer ships to the port for the 2016-2017 winter season. Carnival extended its commitment to the port through 2021, operating two year-round vessels. Royal Caribbean also expanded its Tampa presence with larger ships and year-round service.

- **Economic Benefits**: An economic impact study released in December 2016 reported the port generates an annual economic impact of $17.2 billion, supporting 85,000 direct, indirect, induced and related jobs.

- **Port Redwing Expansion**: In August 2016, Tampa Tank and Florida Structural Steel broke ground on an $18-million facility expansion plan at Port Redwing and South Bay. In September 2017, PTB and four partners reached an agreement for the deepening of Big Bend Channel and widening of the turning basin to accommodate large ships.

- **Post-Panamax Cranes**: Two post-Panamax cranes were introduced in the summer of 2016.

- **Expanded Facilities**: Acquired 150 acres at South Bay for cargo growth and industrial expansion.

- **Industrial Development**: The port reconstructed an access road, creating a new rail spur adjacent to the Puraglobe Florida (formerly NexLube, LLC) site for a 24-million-gallon used-oil recycling facility. It also installed six miles of piping for processing water.

- **Financial**: The port set a record for operating revenues in Fiscal Year 2017 with $55.5 million. It has consistently grown its operating revenues, closely managed its operating expenses, maintained solid operating margins, and generated significant net cash flows for reinvestment.

### Hinterland

**Bulk/Break-bulk**: Central Florida hub for energy, building, agricultural and fertilizer products. **Container**: Florida the U.S. Midwest and entire eastern seaboard.

### Trade Partners

Brazil, Mexico, Trinidad and Tobago, Canada, India, Honduras, Japan, Bahamas, Turkey and Columbia.
FLORIDA PORTS COUNCIL STAFF
Doug Wheeler, President and CEO
Toy Keller, Executive Vice President
Mike Rubin, Vice President of Governmental Affairs
Christy Gandy, Director of Administration
Jessie Werner, Vice President of Public Affairs
Casey Grigsby, Vice President of Programs and Planning

FLORIDA SEAPORTS

Port Canaveral
445 Challenger Road, Suite 301
Cape Canaveral, FL  32920
www.portcanaveral.com

Port Everglades
1850 Eller Drive
Fort Lauderdale, FL  33316
www.porteverglades.net

Port of Fernandina
501 N 3rd Street
Fernandina Beach, FL  32034
www.portoffernandina.org

Port of Fort Pierce
2300 Virginia Avenue
Fort Pierce, FL  34982
www.stlucieco.gov

JAXPORT
2831 Talleyrand Ave
Jacksonville, FL  32206
www.jaxport.com

Port of Key West
201 Williams Street
Key West, FL  33040
www.keywestcity.com

Port Manatee
300 Tampa Bay Way
Palmetto, FL  34221
www.portmanatee.com

PortMiami
1015 North America Way
Miami, FL  33132
www.miamidade.gov/portmiami/

Port of Palm Beach
1 East 11th Street, Suite 600
Riviera Beach, FL  33404
www.portofpalmbeach.com

Port Panama City
5321 West Highway 98
Panama City, FL  32401
www.portpanamacityusa.com

Port of Pensacola
700 South Barracks Street
Pensacola, FL  32501
www.portofpensacola.com

Port of Port St. Joe
406 Marina Drive
Port Saint Joe, FL  32456
www.portofportstjoe.com

Port St. Pete
250 8th Avenue
Saint Petersburg, FL  33701
www.stpete.org/port

Port Tampa Bay
1101 Channelside Drive
Tampa, FL  33602
www.porttb.com