

**FLORIDA'S SEAPORTS
A GLOBAL THRESHOLD**

2016|2020

FLORIDA PORT PROFILES



**FIVE-YEAR FLORIDA
SEAPORT MISSION PLAN**

Florida Seaport Transportation and
Economic Development Council

www.flaports.org



Rick Scott
GOVERNOR



Cissy Proctor
EXECUTIVE DIRECTOR

April 2016

Dear Friend,

Florida's economic story has dramatically changed in just five short years. The state now boasts an eight-year low unemployment rate, more than 1 million new private-sector jobs, a stable housing market, and increasing consumer confidence. At the Department of Economic Opportunity, we are proud to be a part of Florida's remarkable resurgence and we are committed to making Florida the best place in the nation to live, learn, work, play, and do business. Through our partnerships with Florida's ports and the Florida Ports Council, we're meeting that goal every day.

To strengthen Florida's economy, Governor Scott promotes pro-growth, business-friendly policies that encourage private investment, remove burdensome regulations, and foster innovative development. To create the best environment for business, we've invested millions of dollars in Florida's infrastructure and logistics operations. Florida's nationally ranked ports are an important driver for business relocation and continue to be among our most powerful state assets.

Florida's 15 seaports serve as the gateway to the international business community. Our state's successful seaports have resulted in increased trade, business relocation, and new job opportunities for Floridians. Our seaports are also a vital piece of the state's internationally recognized tourism industry. Passenger traffic at Florida cruise terminals helped the state welcome more than 105 million visitors last year.

The *2016 Seaport Mission Plan* highlights cutting-edge investments in Florida ports, designed to improve our infrastructure, create new jobs, and attract new businesses. It also includes information about ongoing projects that will help our ports remain competitive in a rapidly expanding global marketplace.

The Department of Economic Opportunity is proud to work with our state's ports to continue growing Florida's economy. We look forward to sailing into the next five years of impressive growth with the help of our successful ports.

Sincerely,

Cissy Proctor

Executive Director

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2016



FLORIDA SEAPORTS AT THE CORE

OUR MISSION

Ports work to enhance economic vitality and quality of life in the state of 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.

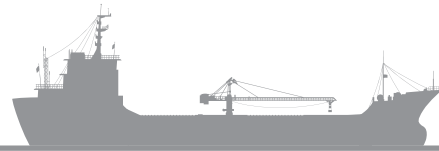
OUR MANDATE

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.

2015



FLORIDA SEAPORTS AT A GLANCE

\$49.8 billion

Value of containerized cargo moved (0.8 percent increase)

3.5 million

TEUs Handled (5.9 percent increase)

15.2 million

Cruise passengers served (2.0 percent decrease over 2014 record setting 10 percent growth)

\$3.7 billion

Programmed in improvements over the next five years to accommodate growing business and capture new opportunities.

FLORIDA INTERNATIONAL TRADE VALUE

- After a record 2014, 2015 total trade (including air and other gateways) fell 3.9 percent to \$149.9 billion, but waterborne trade only decreased by 0.7 percent – to \$86.2 billion from \$86.8 billion.
- At \$49.8 billion, containerized cargo increased slightly (up from \$49.5 billion), and represented 57.8 percent of the waterborne cargo value, 0.8 percent higher than in 2014.
- Florida ranked sixth nationally for trade exports and tenth for imports.
- Waterborne trade comprises a growing portion of the state's total trade, by value – now 57.5 percent.
- Waterborne imports moved through Florida seaports grew by 7.8 percent in 2015, and exports fell by 10.0 percent.
- In 2015, the state shifted from its traditional surplus into a deficit position with 51.1 percent imports and 48.9 percent exports.
- The state's waterborne import-export ratio was 57.2/42.8 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* are the top waterborne import AND export commodity.

FLORIDA CARGO TONNAGE

- Florida's waterborne international and domestic cargo in FY 2014/2015 increased 4.3 percent, from 98.7 to 103 million tons.
- Container cargo tonnage grew 6.6 percent and TEUs grew by 5.9 percent, dry bulk grew by 9.5 percent, and liquid bulk by 2.6 percent.
- Nine out of ten of the state's cargo ports increased tonnage.
- Domestic cargo tonnage is remarkably stable at 43.6 million tons, with virtually no change from FY 2013/2014 to FY 2014/2015 or from FY 2012/2013 to FY 2013/2014.

- The multi-year trend shows rising imports, falling exports, and falling domestic cargo, as a percentage of total waterborne cargo handled at Florida seaports.
- In FY 2014/2015, a total of 15.2 million passengers cruised from Florida's ports, down 2 percent from FY 2013/2014.
- Multi-day cruise passengers fell to 14.7 million passengers, a 1.2 percent decrease over last year's record-setting volumes.

DIVERSITY OF TRADING REGIONS

- Florida seaports trade with more than 200 countries globally.
- Florida seaports handled 6.1 percent of U.S. global waterborne export trade, and a growing percentage of U.S. waterborne export trade with South and Central America and the Caribbean – 25.2 percent.
- Florida seaports handled 4.7 percent of U.S. global waterborne import trade, and 19.1 percent of waterborne imports from South and Central America and the Caribbean.
- The top three trading regions are South and Central America and the Caribbean, Asia, and Europe; together they account for 93.3 percent of all trade through the state's seaports.
- Asia and the Middle East bumped South and Central America and the Caribbean out of the top position for imports in 2015.
- Florida seaports recorded a large but narrowing trade surplus with trading partners to the south in 2015, exporting \$9.5 billion more than they imported from the region.
- Florida's waterborne trade deficit with Asia widened by \$2.7 billion to \$12.3 billion in 2015.
- China remained the leading waterborne import trade partner, Brazil is the top export partner, and China leads for two-way trade.



South and Central America and the Caribbean • Asia • Europe

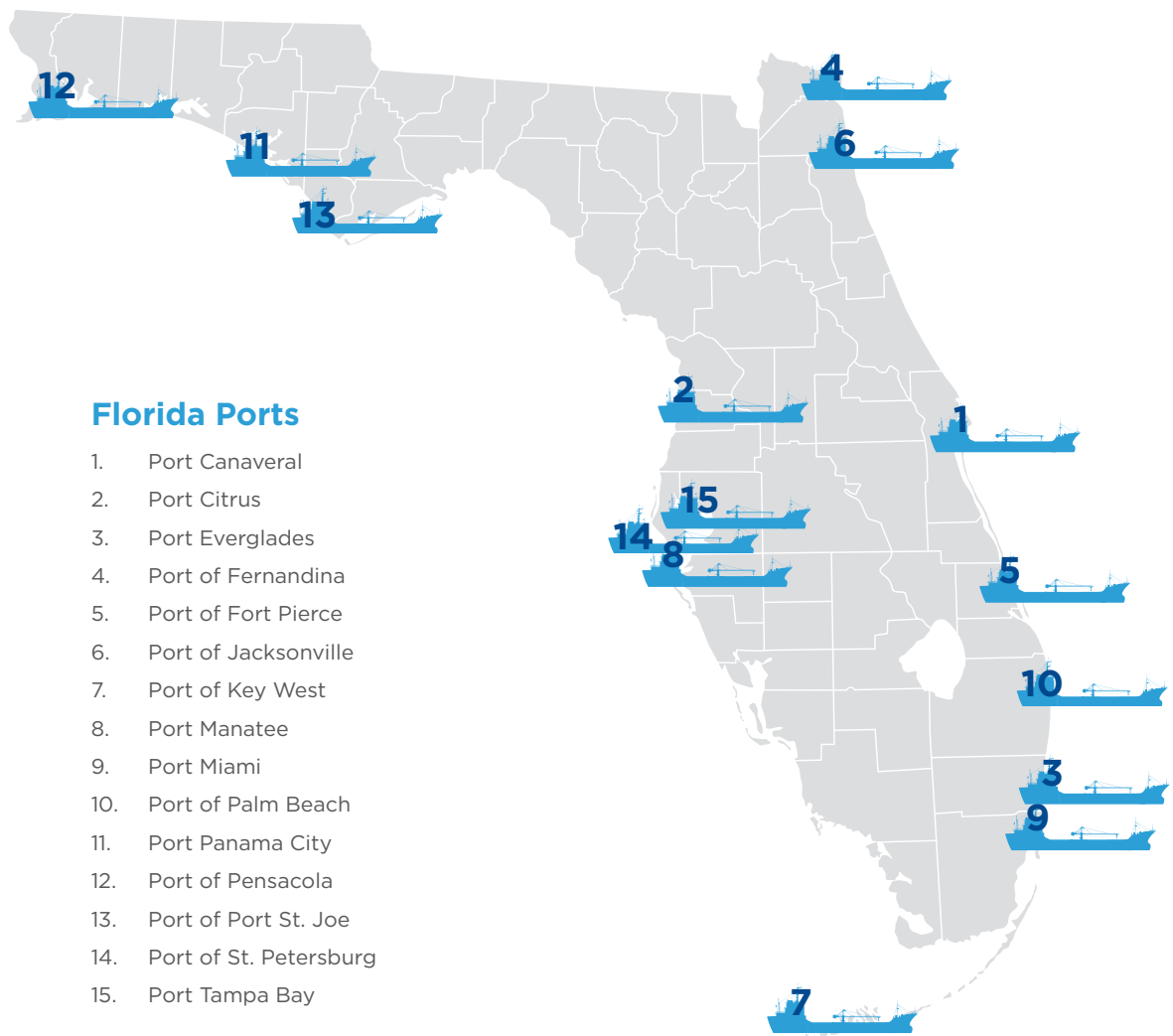
The top three trading regions; together they account for 93.3 percent of all trade through the state's seaports.

PORTS POSITIONED TO DRIVE GROWTH

Seaports are fundamental to positioning Florida as one of the nation's leading states for global trade, expanding imports and exports, creating new trade and logistics jobs, and expanding the value-added services that support global businesses.

All 15 seaports have a role to play in transforming the state's economy. They are repositioning themselves from handling trade to driving trade and aligning themselves around 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.



GLOBAL TRENDS PRESENT UNPRECEDENTED OPPORTUNITY

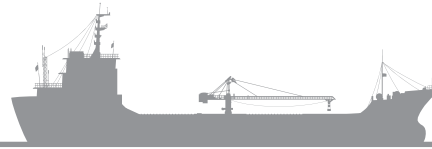
Many factors are converging to challenge seaports and offer rare opportunities.

- Growing global trade – trade growth is outpacing world economic growth.
- Prevailing demand economics – information is accelerating demand, soft infrastructure is determining routing, and fast freight and perishable markets are strengthening.
- Shifting production/sourcing – large productions shifts such as one to the Indian Subcontinent are altering trade routing, near-sourcing in Mexico is a new reality, short-sea opportunities are growing, and select commodities (such as natural gas, automotive, fast freight and perishables) offer great potential.
- Shifting consumption – for the future, Florida can tap largely untouched markets (such as Asian exports), and emerging markets (Latin American and the Caribbean markets are set to grow rapidly).
- China – the sheer market size is redefining global production, demand, and supply-chain structure.
- Commodity pricing – a global commodity supply glut and weak demand for raw materials are impacting trade flows.
- Population shifts – U.S. population growth is in the Southeast, and increasingly urbanized, providing Florida with a fast-growing consumer market.
- Ocean carriers seek economies of scale – vessel growth is continuing, and larger vessels make fewer port calls; the Panama Canal expansion will affect Florida supply chains.
- Greater global investment in transportation infrastructure – investment around the globe, especially in Latin and Caribbean hubs, is ramping up competition; with lagging federal commitment there is a compelling case for greater private investment in port facilities.
- Additional free trade agreements – fewer trade barriers accelerate trade.





PORT PROFILES



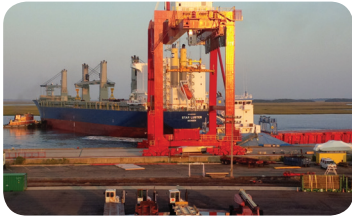
Port Canaveral



Port Citrus



Port Everglades



Port of Fernandina



Port of Fort Pierce



JAXPORT



Port of Key West



Port Manatee



PortMiami



Port of Palm Beach



Port Panama City



Port Pensacola



Port of Port St. Joe

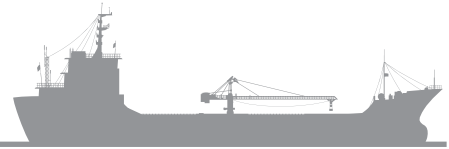


Port of St. Petersburg



Port Tampa Bay

PORT CANAVERAL



GOVERNING BODY: Canaveral Port Authority (Canaveral Port District)

MISSION

"Canaveral Port Authority serves the region, our customers, and constituencies by facilitating domestic and international maritime commerce, creating positive regional economic impact while maintaining transparency, effective planning and sound fiscal management practices."

www.portcanaveral.com



Introduction

Port Canaveral is a fast-growing seaport focused on increasing its cargo and cruise business as an important economic engine for Central Florida. It is home to four seasonal ships and eight year-round cruise ships from Carnival Cruise Lines, Disney Cruise Line, Norwegian Cruise Line and Royal Caribbean International.

Port Canaveral's seven cruise terminals welcomed 4.2 million passengers last year. The Port has invested \$354 million in cruise facilities, including its most recent 188,000-square-foot terminal supported by a 1,000-space parking facility. Port-of-call business remains strong, and a gaming ship sails twice daily from Port Canaveral on three-hour Atlantic cruises.

Port Canaveral is extending its cargo reach with development of intermodal facilities in the north and central areas of Brevard County while pursuing on-dock rail to a new state-of-the-art container terminal in the north cargo area. Population and distribution center growth in nearby central Florida bode well for cargo activity, and the Port's new deep-water container cargo berths will facilitate vessel access and throughput.

As part of overall expansion plans, and with a goal of accommodating larger vessels, a dredging project began in May 2014. The Port plans to deepen the harbor eventually to 48 feet.

Goals & Objectives

- Construct and expand port facilities and infrastructure for cruise and cargo in an orderly manner to meet the growth needs of Brevard County and the central Florida region, the cruise/tourism industry, the area's industrial base of imports and exports, the foreign trade zone (FTZ), local military bases, and the space industry, and, to meet the recreational demands of the community.
- Widen channel and deepen harbor.
- Provide new bulk, break-bulk, auto import processing, and containerized cargo facilities.
- Improve railroad connections.
- Achieve cooperative utilization of federal land now occupied by the Department of Defense with an Air Force Enhanced Use Lease or Joint Use Agreement in place.
- Support development of 270-acre inland distribution center at I-95 and SR 524 – Global Logistics Business Park.

Accomplishments

- Opened new Royal Caribbean Cruise Line terminal in 2014.
- GT USA container terminal opened and container line began service in early 2016.

- As part of redevelopment of the waterfront on the south side of the harbor, the Exploration Tower was completed, featuring a seventh floor observation deck and exhibits dedicated to local history. Plans continue for improving The Cove, the Port's tourism and entertainment area.
- Celebrated 29 years of not exercising local taxing authority and operating from revenues generated along with assistance from state and federal grants.
- On target to grow 15,000 jobs in 10 years.
- Honored with 24th consecutive CAFR Award for excellence in financial reporting.
- Completed a record-breaking \$184 million in capital projects in 2015.
- In December 2014, completed construction of a 188,000-square-foot cruise terminal, including berth, gangway and parking garage, along with new public boat ramps.

Investments

- **NORTHSIDE DEVELOPMENT PROJECTS:** The Port is completing new berths and cargo terminal, backup area with regional storm-water improvements, and the purchase and refurbishing of two post-Panamax ship-to-shore container cranes. These improvements allow Port Canaveral to service its newest cargo partner, GT USA, and current customers, and enhance port marketability and reach.
- **CHANNEL:** In May 2014, Port Canaveral began its project to widen Canaveral's 3.5-mile channel by 100 feet, expand the current width to 500 feet overall, and initiate the harbor entrance deepening element that is continuing into 2016. This project will facilitate expansion of cruise and cargo activity, allowing safe passage for the newer mega-cruise and cargo vessels. Future plans will take the channel to a depth of -48 feet.

TOP TRADE PARTNERS AND COMMODITIES

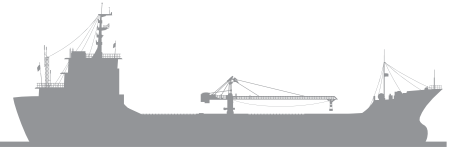
- Import Trade Partners: Bahamas, Canada, Venezuela, Netherlands, France.
- Import Commodities: Petroleum, aggregates, salt, slag, fertilizer.
- Export Trade Partners: Netherlands, Virgin Islands, Costa Rica, Bahamas, Panama.
- Export Commodities: Juice, slag, sand, autos/trucks, and general commodities.

Hinterland

Port Canaveral's hinterland includes the central Florida region paralleling the I-4 corridor. Cargo: Central and north Florida counties of Brevard, Polk, Indian River, Orange, Osceola, Seminole, Volusia, and the U.S. southeast. Two new logistics centers are under development as well as an inland port at Orlando International Airport in Orange County. Cruise: The U.S., Europe, the Bahamas and the Caribbean, Mexico, and Central and South America.



PORT CITRUS



GOVERNING BODY: Citrus County Port Authority

MISSION

“... to manage and operate a modern facility that increases our economic diversity and turns our unique physical assets and geographic location into sustainable jobs.”

www.citrusbocc.com/commissioners/special-districts/port-citrus.htm

Introduction

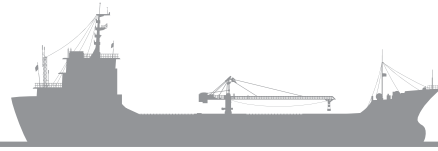
The effort behind Port Citrus is to establish a public port within Citrus County to grow the economic vitality and quality of life in the area. The timing for this endeavor is ideal. With the soon-to-be complete Panama Canal expansion and other major changes in trade patterns, global maritime commerce opportunities abound for Florida. Citrus County can benefit as well.

Goals & Objectives

- Port Citrus will take full advantage of a valuable asset: the Cross Florida Barge Canal. The region encompasses many underutilized public works projects, and development of the Port will turn those unique physical assets into sustainable economic opportunities and jobs. The existing direct connection to the Gulf of Mexico offers clear potential for port development.
- Initial feasibility studies completed in 2013 assessed markets and competitive position, preliminary and future infrastructure needs, development costs and potential funding sources. A determination of port development feasibility was made, with a market analysis refined to identify potential users, and a business model to yield the greatest feasibility. The consultant identified the optimal port facility location and recommended a sequenced development strategy.
- That strategy will maximize port development efficiency and growth potential and minimize development costs while growing a sustainable revenue stream.
- A Memorandum of Understanding is pending final execution between the Citrus County Port Authority and Port Tampa Bay, to develop a strategic partnership in creating a barge feeder service for bulk commodities, enhancing the port corridor supply chain and expanding international trade between the ports. The partnership would initially focus on rock aggregate movements.



PORT EVERGLADES



GOVERNING BODY: Broward County Board of County Commissioners

MISSION

As a premier gateway and powerhouse for international trade, travel and investment, Broward County's Port Everglades leverages its world-class South Florida facilities and innovative leadership to drive the region's economic vitality and provide unparalleled levels of service, safety, environmental stewardship and community engagement.

www.porteverglades.net



Introduction

As one of South Florida's leading economic powerhouses, Broward County's Port Everglades is the gateway for international trade and cruise vacations. Consistently ranked among the top three busiest 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, Florida government with operating revenues of approximately \$153 million in FY 2015 (October 1, 2014 through September 30, 2015). It does not rely on local tax dollars for operations. The total value of economic activity related to Port Everglades is almost \$30 billion. More than 226,000 Florida jobs are impacted by the Port, including 12,840 people who work for companies that provide direct services to Port Everglades.

Goals & Objectives

- Enhance growing volumes of containerized cargo and petroleum through berth improvements, deepening and widening the Port's navigation channels, constructing new cargo berths and purchasing new container gantry cranes.
- Capitalize on state and federal funding opportunities for infrastructure improvements that are critical to handle larger cargo ships and petroleum tankers that are already coming to Port Everglades from Europe and South America as well as accommodate vessels coming from Asia.
- Maximize the return on investments for the recently completed Florida East Coast Railway intermodal container transfer facility and seamless highway links to major north-south corridors such as I-95, I-75 and Florida's Turnpike that improve connectivity with transportation corridors and logistic centers.
- Work with shippers and regulatory agencies to upgrade port facilities to handle higher volumes of perishable products coming from Latin America.
- Continue supporting innovative environmental initiatives such as the Port's upland mangrove enhancement area, coral reef mitigation and manatee protection program.

Accomplishments

- The Port received a signed Chief of Engineer's Report from the U.S. Army Corps of Engineers in June 2015 that cleared the way to begin the pre-construction engineering and design phase of deepening and widening the Port's channels; authorization via federal legislation is expected in 2016.

- Planted more than 70,000 mangroves and over 16 acres of native Florida plants as a critical component of the Port's Southport Turning Notch Extension project to allow for the removal of 8.7 acres of existing mangroves so that the Port can add much-needed cargo berths.
- The FDOT-funded Eller Drive Overpass opened to connect the east end of I-595 directly to the Port's main entrance allowing vehicles entering Port Everglades to travel unimpeded over two new at-grade rail tracks that lead into the Florida East Coast Railway's 43-acre intermodal container transfer facility.
- The 140,000-square-foot Cruise Terminal 4 was remodeled for efficiency and guest convenience, marking the Port's sixth cruise makeover in five years. Terminal 4 received Leadership in Energy and Environmental Design certification – a first for Port Everglades.
- Port Everglades became the port for first and last U.S. calls for SeaLand and APL's North American Express Service (NAE/ACX) to Latin America, beginning in August 2015. Florida International Terminal, LLC is providing cargo handling and stevedoring services.

Investments

- **SLIP 2 EXTENSION:** Adjacent to Cruise Terminal 4, Slip 2 is undergoing an extension of 250 feet for a total of 1,150 feet of berth length to accommodate larger cruise ships. The Slip 2 extension is slated for completion by the end of 2017.
- **SOUTHPORT TURNING NOTCH EXTENSION AND UPLAND MANGROVE ENHANCEMENT:** The Southport Turning Notch Extension (STNE) project will lengthen the existing STNE from approximately 900 feet to 2,400 feet. This project will provide for up to five additional berths and new Super Post-Panamax gantry cranes for the east-end of the STNE and existing cargo berths in Southport.
- **HARBOR DEEPENING AND WIDENING:** In partnership with the U.S. Army Corps of Engineers, Port Everglades is advancing an 19-year effort to deepen and widen its navigational channels and turning basin to handle larger cargo ships. The Port already handles post-Panamax ships, but the ships must be lightly loaded, and older fleets are being replaced with much larger ships. The project is expected to be completed by 2022.

TOP TRADE PARTNERS AND COMMODITIES

- Honduras, Guatemala, Brazil, Dominican Republic, Bahamas, Italy and Colombia.
- Perishables, apparel, automobiles, grocery products, general cargo.

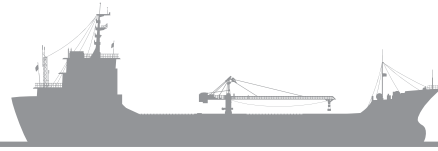
Hinterland

Cargo shipped into Port Everglades can 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.



PORT OF FERNANDINA



GOVERNING BODY: Ocean Highway and Port Authority, Nassau County

MISSION

The “Ocean Highway and Port Authority was created in 1941 and authorized to carry out public purposes to benefit to the citizens of the County of Nassau and the State of Florida.”

www.portoffernandina.org | www.kindermorgan.com

Introduction

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 including a Bermuda service in its 30th year of continuous service between Hamilton, Bermuda and the Port of Fernandina. The Port's principal cargoes include exports of Kraft liner board, lumber, steel products, machinery, building and construction material, as well as imports of grains, wood pulp, hardboard and building materials. 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.

Accomplishments

- Welcomed new shipping service from Europe with bulk oats for the Florida and Georgia horse racing community.
- Initiated a new monthly break-bulk liner service to the Caribbean including ports of calls at St. Lucia, Dominica, Trinidad, Jamaica, and the Dominican Republic. The service is expected become bi-monthly in 2016.
- Initiated a new monthly break-bulk liner service to the Mediterranean.
- Fernandina also added imports of bulk oats from Northern Europe, used as feed additive, servicing the horse racing community in Central Florida and Southern Georgia.
- Working with local, state and Florida Department of Transportation officials, A1A/ SR-200 leading to the Port is being expanded from four to six lanes, and is fully funded in the current five-year work program. Construction began in September 2014 and phase two is in progress now. As the highway is expanded, it will create manufacturing opportunities and efficiencies within the port corridor, enhancing the attractiveness of the Port of Fernandina.

Investments

- **LOGISTICS AND DISTRIBUTION FACILITY-WEST SIDE OF NASSAU COUNTY:** The Port Authority is working to develop a logistics center at the Crawford Diamond Industrial Park. There are more than 2,000 acres zoned industrial. The logistics center can play a part in the handling of imported raw materials and exports of finished goods. The site is served by two Class I railroads with not one but two gas pipelines nearby. In addition, the site is easily accessible by truck from I-10 and State Road 301. These competitive advantages will help northeast Florida capture a portion of the discretionary cargo currently moving through other out-of-state ports.

TOP TRADE PARTNERS AND COMMODITIES

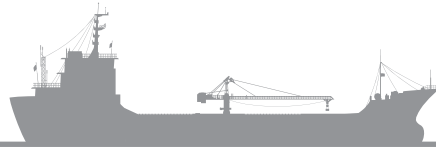
- Ecuador, Dominican Republic, St. Lucia, Trinidad, Bermuda, Spain, Italy, Finland.
- Major export commodities include steel products, lumber, Kraft liner board, machinery, foodstuff and consumer goods. The major import commodities are wood pulp and bulk oats.

Hinterland

The Port of Fernandina's hinterland is defined as the Southeastern U.S. including the Gulf States. Major metropolitan areas served 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.



PORT OF FORT PIERCE



GOVERNING BODY: St. Lucie County

MISSION

“Broaden and strengthen the economic base of the regional community by providing adequate infrastructure and development processes for mixed-use port development.”

www.stlucieco.gov

Introduction

St. Lucie County is exploring strategic options for the Port of Fort Pierce. The county owns 20 acres at the Port, adjacent to 67 acres owned privately, as well as 12 acres that house the privately-owned Indian River Terminal. The Port Master Plan was updated in December 2015. The four key recommendations follow.

- Seek funding for infrastructure that may include rail/road/bridge enhancements, storm water projects and other infrastructure.
- Coordinate alignment of city and county planning and code to facilitate port development through approval of an Interlocal Agreement of governance.
- Complete reconstruction of the Port Entrance Road and utility improvements to serve future port development activities.
- Through the Harbor Advisory Committee, continue a dialogue with seaport land owners, key community groups, and city and county governance, to build alliances and advance economic development.

The county is striving to refresh the Port’s vision and direction and set strategies for revitalization, as well as tackle heavy county unemployment.

Accomplishments

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

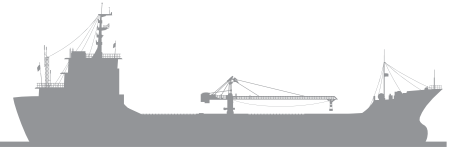
TOP TRADE PARTNERS AND COMMODITIES

- Historic partners have included the Caribbean Basin, Bahamas, Far East and Europe.

Hinterland

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





MISSION

“Creating jobs and opportunity by offering the most competitive environment for the movement of cargo and people.”

www.jaxport.com



Introduction

The Jacksonville Port Authority (JAXPORT) is an independent agency responsible for the development of public seaport facilities in Jacksonville. It owns three cargo facilities and a cruise terminal, and, according to a recent study, supports 132,000 jobs and nearly \$27 billion in annual economic impact for the northeast Florida region.

Goals & Objectives

- Complete harbor improvement and deepening projects while further redeveloping JAXPORT's terminals for intermodal, container, 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 and moving cargo bound for in-state markets through JAXPORT rather than through out-of-state ports.
- Collaborate with the Florida Department of Transportation to improve the connector system linking Jacksonville to the interstate road network and rail system.

Accomplishments

- JAXPORT's auto volumes rebounded to pre-recession levels last year. Port customers moved 656,599 vehicles between Oct. 1, 2014 and Sept. 30, 2015, the largest volume moved since JAXPORT set an auto volume record in 2007. JAXPORT also began service as Volkswagen's southeastern U.S. distribution hub and Porsche Cars North America, Inc.'s port of entry for new Porsche vehicles bound for dealers in the southeastern U.S.
- In September 2015, JAXPORT received approval from the federal government to import select cold-treated produce from certain South American markets for the first time.
- In July 2015, Maersk Line, the world's No. 1 container shipping company, began a new weekly service through JAXPORT, offering direct service from Jacksonville to Xingang, Qingdao and Shanghai in China and Busan in South Korea.
- In July 2015, Florida Governor Rick Scott along with other state, local and port leaders officially kicked-off JAXPORT's Mile Point harbor improvement project, to remove an existing navigational restriction in the St. Johns River.
- In April 2015, the MOL *Northern Juvenile*, capable of carrying 8,800 twenty-foot equivalent units (containers), set a record as the largest container cargo ship to ever call on Jacksonville.
- An updated economic impact study reported that cargo activity through JAXPORT supports nearly \$27 billion in annual economic output.

Investments

- **HARBOR DEEPENING:** JAXPORT is deepening the St. Johns River channel to 47 feet. This project, currently in the planning, engineering and design phase, will create 15,396 direct, indirect and induced jobs and add nearly two million TEUs in container volumes.
- **MILE POINT:** The state advanced \$43.5 million for design and construction of the Mile Point harbor improvement project to improve the flow of the St. Johns River at Mile Point, where currents pose navigational hindrances during certain tidal conditions. The U.S. Army Corps of Engineers is overseeing the project, underway and to be completed in 2016.
- **INTERMODAL CONTAINER TRANSFER FACILITY:** Construction is nearly complete on the new intermodal container transfer facility at Dames Point, which will facilitate the direct transfer of containers between vessels and trains.
- **100-GAUGE CRANES:** Construction of three new 100-gauge cranes for the Blount Island Marine Terminal continues in China; JAXPORT's Berth 35 is being upgraded to handle the cranes, which will be operational in 2016. JAXPORT's long-term strategic plan calls for the purchase of a total of 10 new 100-gauge cranes.
- **HEAVY LIFT BERTH:** JAXPORT recently unveiled a newly rebuilt heavy-lift cargo berth at its Blount Island Marine Terminal. The berth now ranks as one of the nation's highest weight-bearing capacity docks, offering up to an 1,800-pound-per-square-foot load capacity, and increased the heavy-lift berth rail capability to 78 kips per axle.
- **OTHER INFRASTRUCTURE UPGRADES:** A wide-ranging effort is underway to enhance infrastructure at Blount Island and Talleyrand terminals. Upgrades to wharves, on-dock rail and terminal pavement areas are under construction.

TOP TRADE PARTNERS AND COMMODITIES

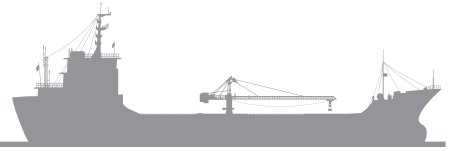
- Colombia, Brazil, China, Japan and Mexico.
- JAXPORT is the nation's No. 1 port for cargo movement to and from Puerto Rico.

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.



PORT OF KEY WEST



GOVERNING BODY: City of Key West

MISSION

“Providing visitors with a safe, quality experience in the southernmost city while contributing to the economic growth of Key West businesses.”

www.keywestcity.com

Introduction

The Port of Key West includes cruise berths at Mallory Square, the U.S. Navy’s Outer Mole Pier, and the privately owned Pier B at the Weston Resort. The city also maintains a domestic ferry terminal. 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 and contributes 15 percent of the city’s total tax revenue.

Additionally, the Port of Key West supports cruise and ferry activities throughout the state, hosting cruise ships from Florida cruise ports as well as ferries. These passengers are introduced to the unique charm of Key West without contributing vehicular traffic to the overburdened US-1 corridor.

Goals & Objectives

- Develop and maintain port-of-call facilities for the cruise ship industry and its passengers.
- Maximize the cruise industry and ferry operations benefits and revenues for the city and local businesses while sustaining the city’s quality of life and preserve the historic features of old Key West.
- Design, build, and maintain a world-class park at the Truman Waterfront at the 28-acre former Key West Naval Base offering residents and visitors the opportunity to experience historical Key West.

Accomplishments

- The city entered into a long term lease with the U.S. Navy for continued docking of cruise ships at the Outer Mole facility.

Investments

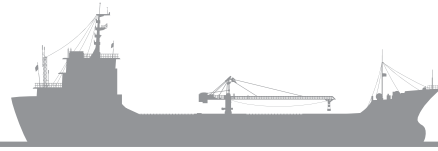
- The City has completed a study and determined that the T-Pier at Mallory Square must be retrofitted with an additional berthing dolphin in order to reduce cruise ship forces to the main pier. Construction is expected to begin in 2016.

Hinterland

U.S. cruise homeports, Florida west coast ferry ports, city of Key West and Monroe County.



PORT MANATEE



GOVERNING BODY: Manatee County Port Authority

MISSION

“To be a powerful catalyst of countywide economic growth and hub of trade-related activity, by developing diversified and competitive deep-water shipping facilities and conducting maritime-related activities in a profitable and environmentally responsible manner.”

www.portmanatee.com



Introduction

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 including 30,000 square feet of freezer 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.

Accomplishments

- The Port added Manatee Ship Repair and Fabrication LLC to its list of tenants, enhancing full-service port offerings at the entrance to Tampa Bay.
- Port Manatee has gained federal approval to receive direct imports of select cold-treated South American produce via an expanding pilot program.
- In FY2015, the Port handled 83 percent more container units than in the preceding 12-month period
- Port Manatee has been awarded a federal security grant to be used in efforts to support the Port's recovery and resiliency capabilities.
- Port Manatee Harbor deepening study gained full funding in President Obama's FY2016 budget.
- Port Manatee was awarded AAPA communications awards for the 2015 official directory and redesigned website.
- Due to its wide-ranging capabilities to handle a variety of cargo types, Port Manatee has been recognized by the Global Trade magazine as one of the Top 20 Niche Ports in the U.S.

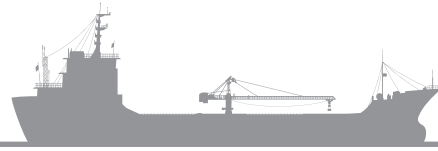
TOP TRADE PARTNERS AND COMMODITIES

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

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.





MISSION

“... to be a powerful catalyst of countywide economic growth and hub of trade-related activity, by developing diversified and competitive deep-water shipping facilities and conducting maritime-related activities in a profitable and environmentally responsible manner.”

www.portmiami.biz



Introduction

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 approached the five-million mark for cruise passengers during the 2015 cruise season and that figure is expected to increase further in 2016.

Infrastructure improvements beginning in 2016 include the site preparation of a new cruise terminal A for Royal Caribbean, expansions to cruise terminal F to welcome the *MSC Vista* and to cruise terminal E for the *Carnival Vista*. The Port’s capital program totals more than \$1 billion in projects recently completed or nearing completion.

As of September 2015, the Port can now welcome mega-size cargo ships – ahead of the opening of the expanded Panama Canal in 2016. 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 contributes more than \$27 billion annually to the south Florida economy and helps provide direct and indirect employment for more than 207,000 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.

Accomplishments

- The U.S. Army Corps of Engineers completed the PortMiami Deep Dredge in September 2015.
- The Port completed its \$50-million Rail Rehabilitation and Intermodal Rail Yard, which was part of the federally funded TIGER II.
- The Port Tunnel officially opened in August 2014, linking the Port directly with the U.S. Interstate

Highway System, providing quicker and easier access for both cruise passengers and containerized cargo traffic.

- New for 2015-16 is Norwegian Cruise Line's the *Norwegian Escape*. Carnival Corporation named PortMiami as their homeport for its new social impact travel brand – Fathom. Carnival also selected PortMiami as the homeport for Carnival Cruise Line's largest ship, the *Carnival Vista*. Aida Cruise Line is adding three cruise ships, *Aida Mar*, *Aida Vita* and the *Aida Diva*, and Costa Cruises will introduce a second seasonal vessel to Miami, the *Costa Mediterranea*. MSC Cruises is expanding its cruise operations at the Port offering year round sailings with the *MSC Divina*.
- Royal Caribbean's *Empress of the Seas* will sail out PortMiami in March 2016. PortMiami also executed a long-term contract with new market entrant Virgin Cruise Lines for the first of its vessels in 2020.
- PortMiami and the Florida East Coast Railway (FECR) 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.
- PortMiami is home to the world's leading cruise lines: Aida Cruises, Azamara Club Cruises, Carnival Cruise Lines, Celebrity Cruises, Costa Cruises, Crystal Cruises, Disney Cruise Line, Fathom, Fred Olsen Cruise Lines, MSC Cruises, Norwegian Cruise Line, Oceania Cruises, P & O Cruises, Princess Cruises Regent Seven Seas Cruises, Resorts World Bimini, and Royal Caribbean International, Virgin Cruises and The World.

Investments

PortMiami is planning for expansion, both in cruise and cargo business. Capital projects needed include new cruise berths, terminals, intermodal and parking facilities, ferry terminals, additional cargo laydown area, consolidation of warehouse functions, roadway realignment and modernization of cargo terminals through investment in higher efficiency equipment, RTGs, infrastructure improvements, and procurement of additional super post-Panamax gantry cranes.

TOP TRADE PARTNERS AND COMMODITIES

- PortMiami's top trade partners in 2015: China, Dominican Republic, Honduras, Guatemala, and El Salvador.
- PortMiami's top trade commodities in 2015: Sweaters, T-shirts, cotton yarn, motor vehicles and cigarettes.

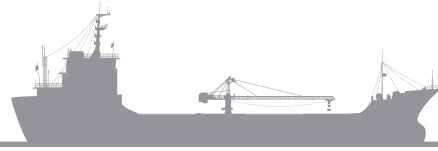
Hinterland

For east-west trade the hinterland extends from the south Florida counties of Miami-Dade, Broward, Monroe and Palm Beach throughout the state. For north-south trade it includes all of Florida and extends into the Southeast, Northeast and Midwest.

PORT MIAMI



PORT OF PALM BEACH



GOVERNING BODY: Board of Port Commissioners (Port of Palm Beach District)

MISSION

“Provide quality deep-water facilities to serve the diverse maritime shipping, rail, intermodal, and cruise markets; and facilitate economic development within Palm Beach County, the region, and the state of Florida.”

www.portofpalmbeach.com



Introduction

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. The 162-acre port is located 80 miles north of the city of Miami.

Seamless, cost effective cargo movement is facilitated with easy access to I-95 and Florida's Turnpike, as well as five miles of on-dock rail that connects directly to the Florida East Coast Railway. The Port operates its rail 24/7 alongside twice-daily service calls from Florida East Coast Railway.

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. Federal agencies having oversight for international trade and passenger flow are housed in the Port's maritime office complex, which also accommodates day cruises, 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 with existing tenants and users while also securing new cargo.
- 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's Master Plan.
- Continue support of the local, regional, state and national economies while enhancing the Port's role in the community through public relations, media outreach, online and social media.

Accomplishments

- Refunded series 1999A Bonds with privately placed series 2013 bonds; saving nearly \$2 million in interest costs.
- Recently completed a \$45-million refurbishment/expansion of Slip 3 and adjacent infrastructure.

- Moody's Investors Service, Inc. upgraded the Port of Palm Beach District senior rating to Baa3 from Ba1, and reported the outlook stable.
- Named Second Fastest Growing Export Port in the nation, through JOC data.
- Registered year-over-year increases in cargo, including containers.

Investments

- **SLIP 3 REDEVELOPMENT:** The redevelopment of Slip 3 and the surrounding area will improve the efficiency of cargo operations, while keeping the same facility width and length. The project improves the existing infrastructure with the addition of two ro/ro ramps, at different elevations, and the demolition of an adjacent warehouse.
- **BERTH 17 REDEVELOPMENT:** The reconstruction of Berth 17 will replace the existing 60-year-old sheet pile and includes improvements to the adjacent upland drainage system, utilities, existing and future tenant loading/unloading facilities and associated work. 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. This project will expand current business and allow for possible new business at the site.
- **INLET AND CHANNEL DREDGING:** The U.S. Army Corp of Engineers (USACE) conducted a market analysis to identify market trends and future needs of the Port. The previous channel improvement occurred in 1963. The feasibility study aimed to determine areas in the Lake Worth Inlet that, once improved, would allow the Port to handle slightly larger ships, while increasing navigational safety. The project has been approved by the USACE, was included in the 2014 WRRDA, and is currently waiting for Congressional funding.
- **PORT OF PALM BEACH MASTER PLAN UPDATE:** The Port will be updating its 2012 to 2017 master plan update that was adopted in 2012, which will include a revised port economic impact study, based upon changes in infrastructure and business development over the past five years.

TOP TRADE PARTNERS AND COMMODITIES

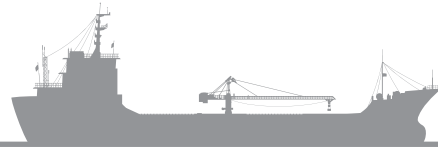
- Bahamas, Canada, Virgin Islands, Leeward and Windward Islands and Trinidad.

Hinterland

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



PORT PANAMA CITY



GOVERNING BODY: Panama City Port Authority

MISSION

“Expand regional economic opportunities by providing modern port facilities, promoting trade, and supporting industrial development.”

www.portpanamacityusa.com

Introduction

Port Panama City is a dynamic and growing port. It handles more than two 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 the Port.

Goals & Objectives

- Increase port cargo handling capacity to 2.5 million tons per year.
- Double container trade with Mexico and Central America.
- Expand the Port’s freight distribution services at the Intermodal Distribution Center.
- Attract port-related manufacturing to the Intermodal Distribution Center.

Accomplishments

- Completed refurbishment of West Berth One.
- Completed an intermodal bulk trans-load facility.
- Expanded container handling capacity.
- Attracted a new container line service to the Port.

Investments

- **COMPLETION OF CONTAINER YARD EXPANSION:** The Port will add additional container handling capacity by relocating a bulk storage facility, adding heavy paving, constructing racks to allow the stacking of refrigerated containers, and upgrading its interchange gate.
- **EXPANSION OF DISTRIBUTION WAREHOUSE:** The Port will add 100,000 square feet to its distribution warehouse in its Intermodal Distribution Center. This space will accommodate trans-loading and distribution operations for importers and exporters utilizing the Port.
- **NEW TERMINAL:** The Port will purchase and upgrade a 40-acre deep-water terminal facility to provide for future growth.

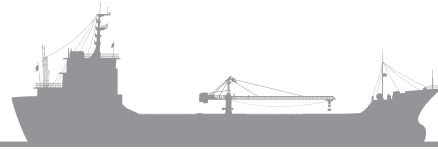
TOP TRADE PARTNERS AND COMMODITIES

- Chile, Mexico, United Kingdom, Panama and Germany.
- Commodities include copper and articles thereof, manufactured products, wood pellets, steel and paper.

Hinterland

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





MISSION

“... to manage and operate cost-effective facilities for marine commerce in order to foster regional and international trade and promote economic development and employment.”

www.portofpensacola.com



Introduction

Since its formal establishment in 1754, Port of Pensacola has served as northwest Florida’s gateway to the world. From its early shipments of regionally harvested lumber, locally made bricks and sailing ship masts, to the locally manufactured paper and electrical power plant components being shipped today, the Port has always existed, at least partially, to support local and regional business interests. The Port is committed to providing an efficient, cost-effective, and customer-focused gateway for national, international and multi-national shippers. Additionally, it is focused on being a vessel services hub with facilities and a tenant base engaged in direct support of offshore petroleum and subsurface construction.

In light of Port of Pensacola’s continued diversification into non-tonnage based business lines such as the offshore vessel services industry, which generates no cargo, and the wind turbine business, which generates large volumes of relatively light-weight cargo, Port of Pensacola continues to redefine the matrices by which it measures its success and economic impact. The Port now tracks wind components by both tonnage and number of units and tracks its offshore vessel services business in terms of vessel dockage days generated.

Goals & Objectives

- Diversify lines of business in order to maximize revenue generation, regional job creation, and economic impact, with the current focus being primarily on attracting business partners that provide services to the offshore oil and gas industry.
- Invest in port infrastructure improvements and modernization to meet the operational needs of the Port’s business partners and to increase end-user loyalty, satisfaction, and economic success.
- Expand marketing efforts in the traditional port business areas of breakbulk and special project cargo and general import and export activities, in order to drive growth for all port stakeholders.
- Generate revenues to fund all operating expenses (other than depreciation) and for port infrastructure enhancements, improvements, and modernization.

Accomplishments

- Exports of wind turbine nacelles from GE’s Pensacola manufacturing facility continue to increase as does the Port’s support of their overall logistics requirements for components.
- Port revenues increased on a fiscal year-to-year comparison and tenants also reported a general increase in economic activity.
- Port completed almost \$1,000,000 in real estate and other infrastructure and facility improvements that enhanced operational capabilities, and promoted future development opportunities and regional economic activity.

Investments

- **WAREHOUSE 9 IMPROVEMENTS AND EXPANSION ONGOING CONSTRUCTION PROJECT:** The 68,000-square-foot tenant funded warehouse expansion will include a 50-foot-high (plus) bay to ensure a high hook height for overhead cranes and other uses.
- **BERTH 6 REHABILITATION:** This project will repair areas of spalling for Berth #6 substructure. Phase one will include removal of the deteriorated deck, installation of new mooring dolphins, and gangways for vessel access pier side. Phase two will replace the entire berth deck and incorporate the phase one enhancements. The rehabilitation will return the berth to full utility, retaining up to 20 jobs, and creating potential for additional jobs and revenue.
- **PENSACOLA FERRY TERMINAL:** This project will develop passenger ferry ticketing, embarkation/ disembarkation and ferry boat landing facilities at the Port's Commendencia Slip area, which will tie in to ferry facilities being developed at Pensacola Beach and by the National Park Service at Fort Pickens / Gulf Islands National Seashore. Simultaneously, the National Park Service in collaboration with the Port and Escambia County is developing a solicitation package for private-sector operators interested in operating the ferry service, with ferry vessels provided in part from the Park Service. Ferry operations are scheduled to begin in spring of 2017.
- **INFRASTRUCTURE IMPROVEMENTS:** This is a project to improve internal port roadways and infrastructure to provide capacity for intra-terminal transport of project and heavy-lift cargoes, including under-grounding of utilities and other related improvements. This project is in support of the continued growth of the Port's non-traditional business lines in light manufacturing, assembly and other value-added operations.

TOP TRADE PARTNERS AND COMMODITIES

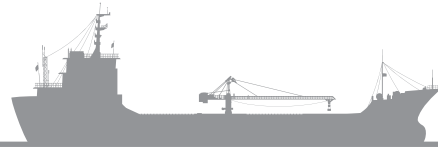
- Central and South America, Mexico, Caribbean Basin, Mediterranean, Africa, Baltic Region and Asia.
- Wind turbines, lumber, paper, aggregates, steel.

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 Virginias, North Carolina, South Carolina and Georgia.



PORT OF PORT ST. JOE



GOVERNING BODY: Port St. Joe Authority

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.”

www.portofportstjoe.com

Introduction

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

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 available for immediate development.

Goals & Objectives

- Attract appropriate users – port tenants, shippers and manufacturers – to create jobs 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.

Accomplishments

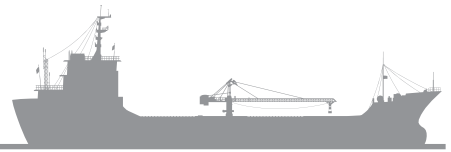
- The U.S. Army Corps of Engineers issued a permit for spoil disposal as part of the dredging of the Port's channel to 37 feet. FDOT approved a \$1-million grant to complete the final engineering of the off-site disposal area.
- Many improvements were made to the port property in 2015 including security fencing, access road improvements and upgraded landscaping.
- The Port signed a Letter of Interest (LOI) with Holland M. Ware Charitable Foundation regarding transporting materials via the Port and the AN Railway. St. Joe Company signed a LOI with Enova Energy Group, a clean-energy development company regarding wood pellets and signed a LOI with Green Circle Bio Energy, Inc., a producer of biomass-based renewable energy, regarding leasing a site along the AN Railway to develop a wood pellet facility.

Hinterland

North Florida, Alabama and Georgia.



PORT OF ST. PETERSBURG



GOVERNING BODY: City of St. Petersburg

MISSION

"To provide safe, clean, attractive commercial port facilities for use by the shipping industry and general public, and to provide research and development capability, thereby increasing economic development opportunities throughout the city of St. Petersburg, the greater Tampa Bay area, and West Central Florida by creating new high-paying maritime jobs in our community, while attracting tourism and other maritime industries to our region."

www.stpete.org/port



Introduction

The Port of St. Petersburg, located on Tampa Bay, is exploring opportunities to create a multi-use facility that capitalizes on its unique assets including attracting research vessels, large yachts, as well as enhancing marine science/research facilities.

Goals & Objectives

- Continue to provide and improve port facilities to attract revenue-generating users and to expand potential maritime operations.
- Diversify revenue and similar investment opportunities to attract research vessels, large yachts and other marine-related businesses.
- Continue to take advantage of the Port's proximity to marine/maritime entities comprising the St. Pete Ocean Team, to complement the city's downtown redevelopment plans.

Accomplishments

- Undertook renovation of entire wharf including sheet pile replacement, revetment and installation of utilities (power pedestals) along the wharf for large visiting vessels, as well as implemented security and camera upgrades.
- Completed construction of the SRI Research and Development Center.

Investments

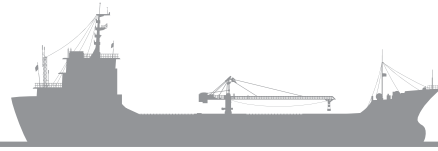
- Renovation of the wharf including adding utilities (power pedestals/electric) to more fully serve visiting vessels and to attract business.
- Working with the St. Pete Ocean Team to implement 'Port Discovery,' a marine science/research, educationally-focused initiative using the Port Terminal, and open to the general public.

Hinterland

Port users would come from other parts of Florida and from around the world as the Port focuses on marine science/research facilities, research vessels and other types of vessels including large yachts.



PORT TAMPA BAY



GOVERNING BODY: Tampa Port Authority

MISSION

“Port Tampa Bay will be recognized as a leader in the maritime industry. Port Tampa Bay will have a customer driven, strategic business focus in working with stakeholders to develop and manage maritime terminals and supporting infrastructure for the benefit of the regional economy. Port Tampa Bay will employ sound financial, business, and environmental management practices in fulfilling its mission.”

www.porttb.com



Introduction

Port Tampa Bay is largest of the Florida ports by tonnage and land, and is a critical economic engine for central Florida. Port Tampa Bay is a full service port handling all types of cargo and cruise passengers, as well as other maritime activities including important shipbuilding and repair facilities. Building on a long and rich history as a significant bulk port, Port Tampa Bay today handles a broad mix of bulk, break-bulk, container, ro/ro and heavy-lift/ project cargo. It is also a significant cruise port with nearly 1 million passengers per year.

Unique to Port Tampa Bay is its vast and growing acreage. Private and public properties comprise 5,000 acres across the entire port complex, of which the Port owns more than 2,600 acres and more than 300 are currently available for lease. These land assets are vital in attracting new business and stimulating manufacturing. The Port continues to build its container business, providing a more cost-effective alternative for carriers and shippers. Port Tampa Bay is also a vital energy products gateway to all of central Florida.

Goals & Objectives

The Port's Strategic and Master Plan provides a multi-faceted strategic direction focused on six key factors.

- Protecting and acquiring maritime land to build on the competitive advantage of already having room to grow.
- Overall growth of diversity in lines of business with emphasis on the expansion of container cargo operations.
- Enhancing navigational access for current and future vessels.
- Sustainable capital formation.
- Supporting west central Florida's long-term energy needs.
- Aligning with evolving demand of the regional freight transportation system.

Accomplishments

- **GENERAL CARGO AND CONTAINER ADVANCEMENTS:** Ongoing container terminal expansion is providing greater capacity and efficiency for cargo movements as well as opportunities for shippers.
- **ROAD AND RAIL DEVELOPMENTS:** A dedicated express truck ramp links the Port directly with the nation's interstates, greatly enhancing connectivity to customers in west central Florida and beyond. It was part of the FDOT's I-4/Selmon Expressway Connector project.

- **LAND ACQUISITION:** The Port acquired 150 acres at Port Redwing, conveying an important competitive advantage with new capacity for cargo growth and industrial expansion.
- **PETROLEUM FACILITIES DEVELOPMENT:** Port Tampa Bay's premiere energy facility was recently rebuilt, improving logistical reliability and efficiency, enhancing safety, protecting and preserving the environment and extending the facility's life by 30 years.

Investments

- **HOOKERS POINT DEVELOPMENTS:** The development of Hookers Point will comprise 160 acres, and includes the acquisition of gantry cranes, a berth extension to 2,800 feet and a container terminal yard expansion to 40 acres. The upcoming development phases will add berthing, laydown space, transit sheds, reefer plugs, a gate complex, equipment and expanded rail.
- **REFRIGERATED:** Port Tampa Bay is planning a multi-phased refrigerated warehouse complex and Food Campus targeting imports and exports of chilled and frozen agricultural commodities and protein products. Phase I will begin in 2017 with a new 120,000-square-foot trans-load warehouse facility.
- **PORT REDWING DEVELOPMENT:** Port Redwing, a 128-acre Greenfield site, situated near I-75 and the CSXT rail mainline, will provide capacity for additional bulk trade and intermodal activities. The current phase includes a new access road connecting to US-41, rail track connecting to the CSXT mainline, and security infrastructure and utilities. Design and permits for the improvements are nearly complete.
- **EASTPORT IMPROVEMENTS:** The Port is developing a new 20-acre cargo terminal with 43-foot deep water access. The full site plan includes the creation of eight berths and a 102-acre multi-purpose cargo facility. The current 20-acre phase will be completed mid-2016. The project will create many permanent jobs and temporary construction jobs.

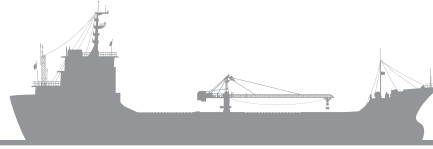
TOP TRADE PARTNERS AND COMMODITIES

- India, Mexico, Trinidad, Brazil, Canada, Russia, Australia, Japan, Colombia and Argentina.

Hinterland

Traditionally the Port's hinterland has been the heavily populated central Florida market and its bulk and break-bulk cargoes such as fertilizer, energy products, building materials and consumer products. With the development of container terminal facilities, the Tampa Gateway Rail on-dock terminal and the I-4 Crosstown Connector, the Port's range will expand significantly to encompass the CSX network across the U.S. Midwest and eastern seaboard.





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