

PATHWAY TO PROSPERITY

2019 | 2023 FIVE-YEAR FLORIDA SEAPORT MISSION PLAN

FLORIDA
 PORTS
COUNCIL

Florida Seaport Transportation
and Economic Development Council

flaports.org





Florida Department of Transportation

RON DESANTIS
GOVERNOR

605 Suwannee Street
Tallahassee, FL 32399-0450

KEVIN J. THIBAUT, P.E.
SECRETARY

May 2, 2019

The Florida Seaport Transportation and Economic Development (FSTED) Council's *2019-2023 Five-Year Seaport Mission Plan* outlines trends and projections in cargo and cruise activities at Florida's seaports, and includes specific recommendations for the development of \$3.5 billion dollars' worth of transportation facilities.

These recommendations target state and local resources, which will enhance trade, promote cargo flow, increase cruise passenger movements, and provide long-term economic benefits to the state. The Florida Department of Transportation is committed to collaborating with Florida's seaports to implement these recommendations, and deliver transportation solutions for residents and visitors, which provide for the safe and efficient mobility of people and goods.

The Department appreciates the opportunity to partner with Florida's seaports, and we look forward to continuing our shared work to send a message to the rest of the world, that Florida is a good place to live, invest and conduct business.

Sincerely,

A handwritten signature in blue ink, appearing to read "Kevin J. Thibault", with a long horizontal flourish extending to the right.

Kevin J. Thibault, P.E.
Secretary

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**Florida Seaport
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Development Council**

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FLORIDA SEAPORTS' GUIDING PRINCIPALS

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.

FLORIDA SEAPORTS: AT A GLANCE

CARGO AND PASSENGER COUNTS

(Fiscal Year 2017/2018)

- Florida's waterborne tonnage remained steady, topping 110 million tons
- International cargo increased 6.7%, to 56.6 million tons
- Import tonnage led the growth
- Import tonnage is twice that of export tonnage, with a 62:38 split
- The state of Florida maintains a container tonnage surplus; the import share of tonnage is lower for containerized tonnage than export, at 46:54
- The long-term trend shows rising waterborne imports and falling exports
- The number of TEUs handled increased 10.3%
- By handling type:
 - Container tonnage grew by 4.3%
 - Liquid bulk grew by 1.2%
 - Break-bulk grew by 0.5%
- A record-setting 16.8 million passengers cruised from Florida's ports

"Governor DeSantis' bold vision for Florida's economy relies on the strength of our partnerships with agencies and organizations. Florida's seaports represent the best of our state, and we will continue to support their work, which enhances Florida's global presence as a leader in trade and commerce and provides nearly 900,000 skilled jobs."

— KEN LAWSON, Executive Director,
Department of Economic Opportunity

2018 TOP STATISTICS

\$57.4 Billion

Container cargo
values (5% increase)

110 Million

Tons of cargo

38.7 Million

Import tonnage
(9.4% increase)

4.1 Million

TEUs handled
(10.3% increase)

16.8 Million

Cruise passengers
(4.2% increase)

\$87.3 Billion

Value of waterborne
trade (4.9% increase)

ALABAMA

GEORGIA

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 INTERNATIONAL TRADE VALUE (Calendar Year 2018)

- Total value of imports and exports by all international gateways (including air and sea) increased 3.6% to \$156.9 billion
- The value of waterborne trade alone increased 4.9% – to \$87.3 billion
- Value of containerized cargo increased at a higher rate a 5.5% increase to \$57.4 billion versus a 4% increase for non-containerized cargo
- Container cargo represents a growing share (at 65.7%) of the waterborne cargo value
- Waterborne trade comprises the majority of the state's total trade, by value – now 55.3%
- Waterborne imports moving through Florida seaports increased in value by 5.6% in 2018, and exports rose by 4%
- The state's widening waterborne import-export ratio was 62:38
- 12 commodities each contributed more than \$1 billion in import values, and five export commodities each contributed more than \$1 billion
 - *Vehicles, except Railway or Tramway, and Parts* is the top waterborne import by value
 - *Nuclear Reactors, Boilers, Machinery, and Parts Thereof* is the top export commodity by value

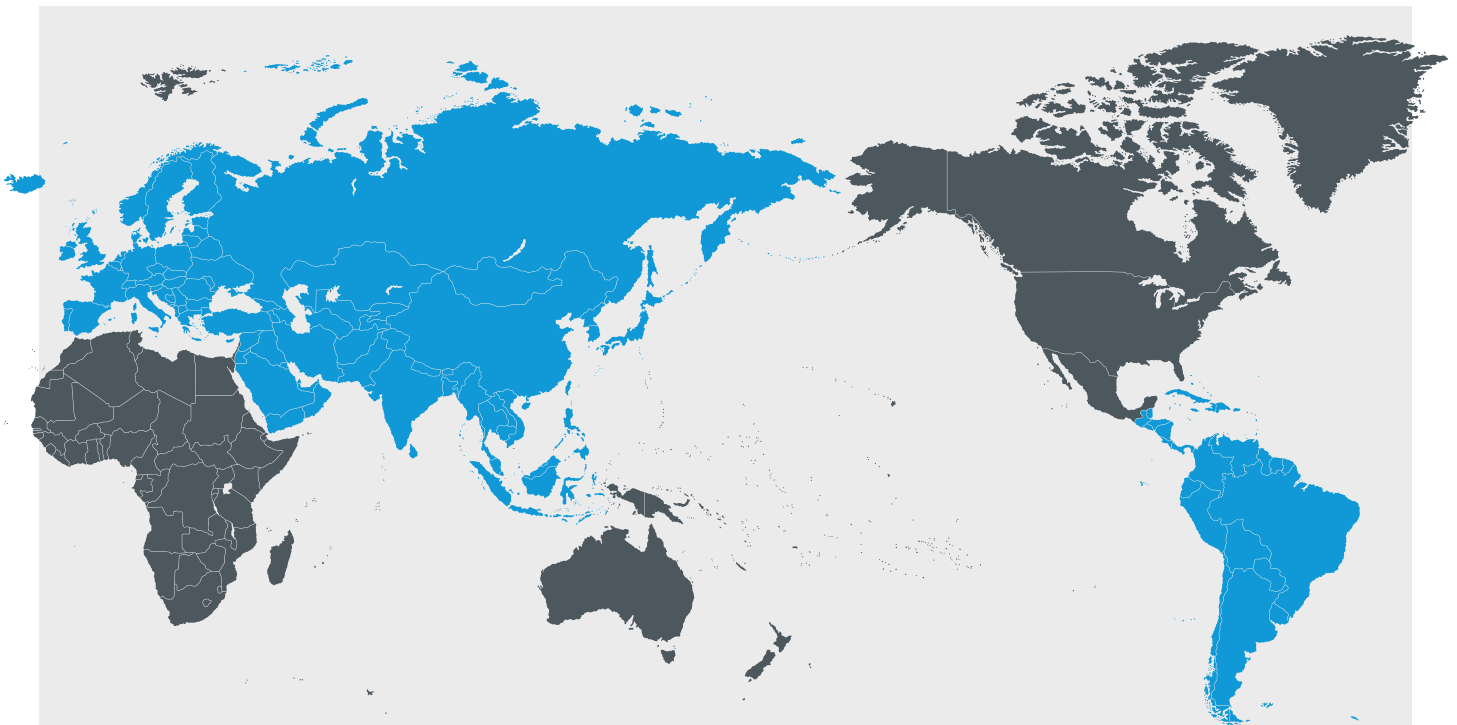
DOLLAR VALUE CARGO STATISTICS – BY DIVERSE TRADE REGION (Calendar Year 2018)

AIR AND SEA COMBINED:

- Brazil is the state's top trade partner, with \$20.7 billion in trade (up 3.1% over 2017)
- Trade with Brazil is almost twice the dollar value of the next ranked country, China
- Florida's top ten trade partners include: Brazil, China, Chile, Japan, Colombia, Mexico, Dominican Republic, Germany, Honduras and Costa Rica

SEA ONLY:

- Florida seaports trade with almost every nation
- Looking only at port cargo, the top two trade partners are China and Japan, with \$7.6 billion and \$6.9 billion respectively in waterborne cargo
- Brazil remains the top export country by water
- China is the top import country by water
- At \$33.1 billion, Florida seaports handled 5.7% of U.S. global waterborne export trade
- Florida ports moved a large percentage of U.S. waterborne export trade with South and Central America and the Caribbean: 21.7%
- At \$54.2 billion, Florida seaports handled 4.6% of U.S. global waterborne import trade
- Florida ports moved 19% of the nation's waterborne imports from South and Central America and the Caribbean
- Top three trading regions: South and Central America and the Caribbean, Asia, and Europe; account for 92.6% of all Florida trade
- Florida seaports recorded a large trade surplus with trading partners to the south in 2018, exporting \$7.2 billion more than they imported from the region
- Florida's waterborne trade deficit with Asia continued to widen in 2018 and now measures \$16.4 billion



TOP THREE TRADING REGIONS: South and Central America and the Caribbean, Asia, and Europe; account for **92.6%** of all Florida trade

FINANCING PORTS

KEY TAKEAWAYS

- **Trade and transportation are rapidly evolving**
- **Florida seaports need continual investment**
- **15 seaports are investing \$3.5 billion in infrastructure over the next five years**
- **State and federal funds are indispensable to these projects**
- **Port projects produce at least \$7 in tax revenue for every \$1 of state investment**
- **New and improved terminals and berths accounts for the greatest expenditures**
- **Channel deepening accounts for almost 17 percent of spending**
- **Many new projects address changing needs related to big ships**

ALIGNING INVESTMENT WITH OPPORTUNITY

Port funding comes from sources such as working capital, government grants and low-interest loans, private loans, and, increasingly, public-private partnerships.

In Florida, a massive state commitment has been made over the past decade to prioritize freight and passenger mobility projects, and global competitiveness has generated a series of state government investments in ports, totaling more than \$1.4 billion dollars. Much of that has been matched by ports.

This investment has paid off....Waterborne cargo activity at seaports contributes to the local and regional economy by generating business revenue to local and national firms providing vessel and cargo handling services at the seaport terminals. These firms, in turn, provide employment and income to individuals, and pay taxes to federal, state and local governments.

Port strategic planning tries to synchronize future seaport improvements with trends and optimize benefits for Florida's economy. To prepare for Florida's population growth, rising global trade volumes, the evolution of the state's businesses, and shifts in cargo suppliers and markets, Florida's seaports have identified \$3.5 billion in capital improvements over the next five years, from FY 2018/2019 through FY 2022/2023.

EXHIBIT #1

COLLECTIVE FLORIDA SEAPORT FIVE-YEAR CAPITAL IMPROVEMENT PLAN (BY YEAR) FY 2018/2019 TO FY 2022/2023

PORT	FY 2018/2019	FY 2019/2020	FY 2020/2021	FY 2021/2022	FY 2022/2023	Total Five-Year CIP
Canaveral	\$226,835,000	\$67,238,000	\$36,940,000	\$36,863,000	\$38,139,000	\$406,015,000
Citrus	\$0	\$0	\$0	\$0	\$0	\$0
Everglades	\$331,249,000	\$202,334,000	\$95,495,500	\$105,767,500	\$82,842,000	\$817,688,000
Fernandina	\$6,050,000	\$4,700,000	\$6,900,000	\$12,400,000	\$5,400,000	\$35,450,000
Fort Pierce	\$0	\$815,000	\$0	\$0	\$0	\$815,000
Jacksonville	\$123,466,000	\$96,084,000	\$185,238,000	\$142,171,000	\$108,644,000	\$655,603,000
Key West	\$51,000	\$1,975,000	\$1,700,000	\$0	\$0	\$3,726,000
Manatee	\$18,154,000	\$65,700,000	\$4,950,000	\$20,500,000	\$18,000,000	\$127,304,000
Miami	\$242,736,000	\$166,709,000	\$169,438,000	\$129,157,000	\$81,700,000	\$789,740,000
Palm Beach	\$8,600,000	\$9,200,000	\$7,800,000	\$9,900,000	\$13,000,000	\$48,500,000
Panama City	\$21,200,000	\$20,750,000	\$24,600,000	\$20,000,000	\$4,000,000	\$90,550,000
Pensacola	\$2,225,000	\$500,000	\$6,287,000	\$250,000	\$0	\$9,262,000
Port St. Joe	\$1,000,000	\$49,000,000	\$0	\$0	\$0	\$50,000,000
St. Petersburg	\$3,255,000	\$1,490,000	\$0	\$0	\$0	\$4,745,000
Tampa	\$94,900,000	\$123,125,000	\$120,825,000	\$77,200,000	\$55,500,000	\$471,550,000
TOTAL	\$1,079,721,000	\$809,620,000	\$660,173,500	\$554,208,500	\$407,225,000	\$3,510,948,000

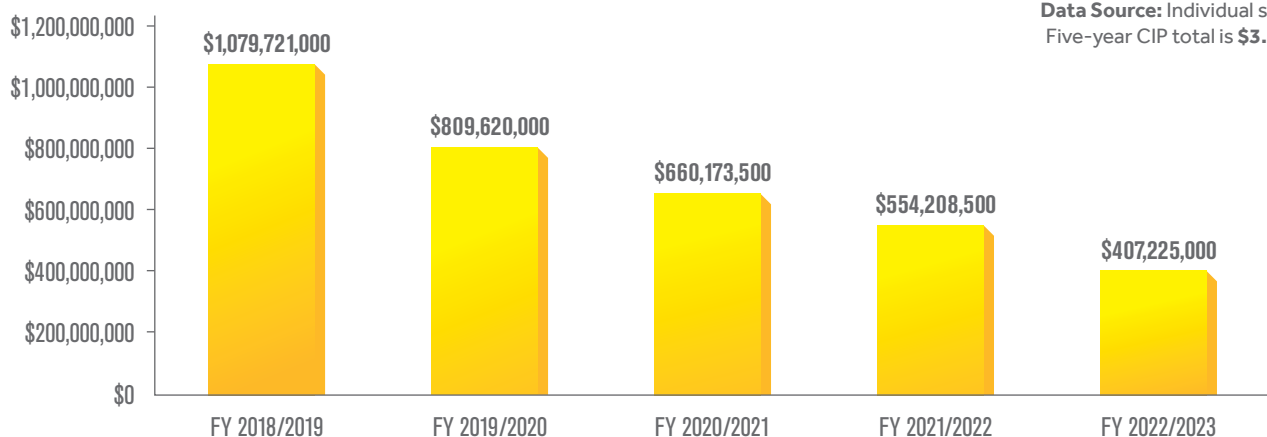
Data Source: Individual seaport CIPs (as of November 16, 2018)

Notes: Funds for some projects are yet to be appropriated. Figures used may reflect, low, mid or high range forecasts. Ports may choose to move projects from year to year, and/or to add or eliminate projects.

The capital investment plan is 6.1 percent higher than the planned investments from FY 2017/2018 through FY 2022/2023. The size of the budget indicates major plans for expansion and business growth throughout the state of Florida.

EXHIBIT #2

COLLECTIVE FLORIDA SEAPORT FIVE-YEAR CAPITAL IMPROVEMENT PLAN (BY YEAR) FY 2018/2019 TO FY 2022/2023



Data Source: Individual seaports
Five-year CIP total is **\$3.5 billion**

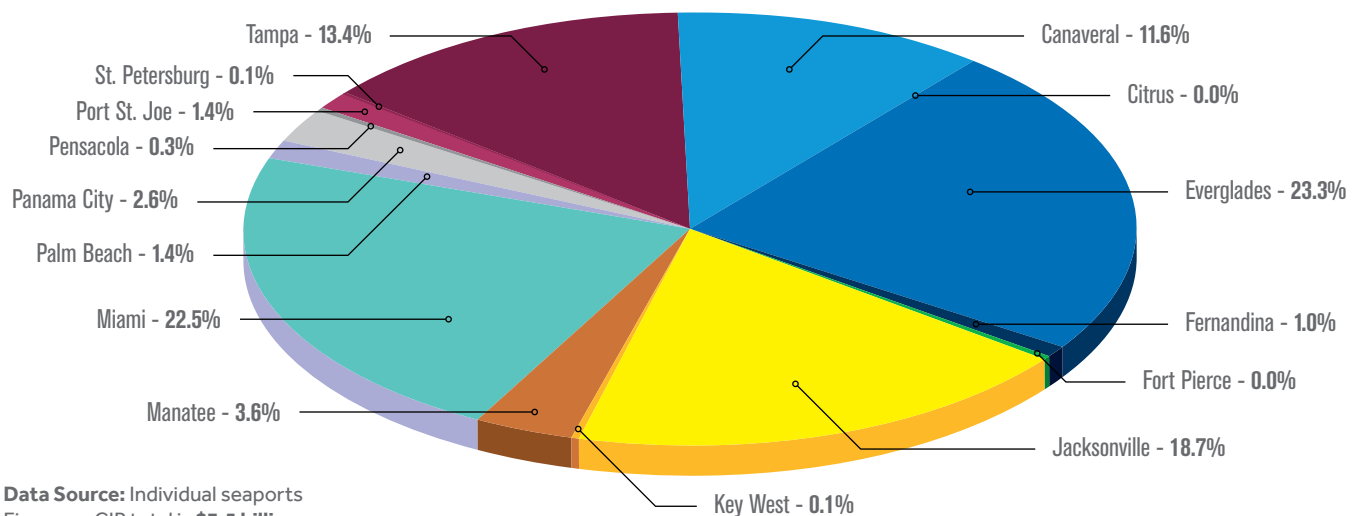
INVESTMENTS BY PORT

The capital projects outlined in the five-year capital plan will add capacity, attract cargo, expedite movement, automate processes and decrease costs with an emphasis on using as few resources as possible. Fernandina, Manatee and Palm Beach doubled their five-year budgets since last year, due to expanded and increased terminal operations, expansion of cold warehouse storage terminals, berth rehabs, purchasing of mobile cranes, and intermodal connectivity improvements.

Everglades, Miami, Jacksonville, Tampa and Canaveral have the largest capital programs, and have planned investments over the next five years for additional cruise terminals, deepening channels to accommodate Neo- and Post-Panamax cargo ships, berth rehabilitations, and intermodal improvements for rail and trucks.

EXHIBIT #3

COLLECTIVE FLORIDA SEAPORT FIVE-YEAR CAPITAL IMPROVEMENT PLAN (BY PORT) FY 2018/2019 TO FY 2022/2023

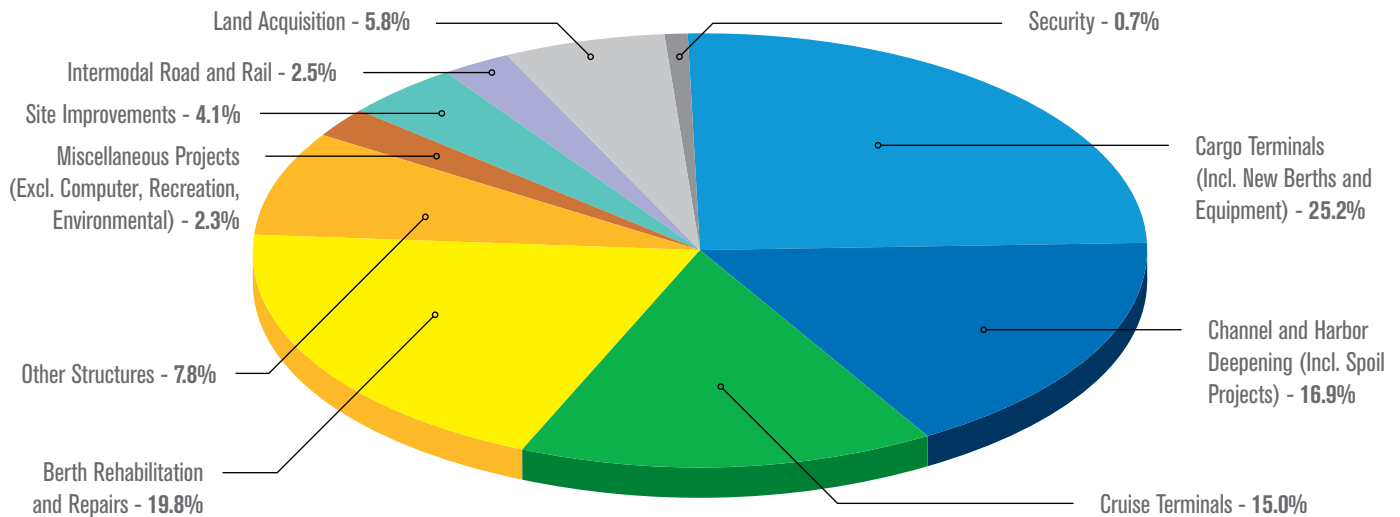


"Florida's seaports play a vital role in Florida's global competitiveness. In fact, they support over 900,000 jobs in Florida and contribute to more than \$117 billion in economic activity. In order to ensure Florida remains a leader in trade and development we must continue investing in our ports system."

**– MARK WILSON, President & CEO,
Florida Chamber of Commerce**

EXHIBIT #4

COLLECTIVE FLORIDA SEAPORT FIVE-YEAR CAPITAL IMPROVEMENT PLAN (BY PROJECT TYPE) FY 2018/2019 TO FY 2022/2023



Data Source: Individual seaports
Five-year CIP total is **\$3.5 billion**

Exhibit 4 Note: Project categories used in this document are sorted by major investment type, but sometimes a project will cross over into two or more categories.

HOW PORTS ARE FUNDED

Seaport infrastructure may be financed by grants or loans from federal, state or local governments. Capital project financing packages may include working capital, state grants, federal grants, ad valorem taxes or other public funds, construction bonds, bank loans, commercial mortgages, and private capital. Every capital project accesses a unique combination of funding options, and usually requires a match.

In order to successfully finance on-port and near-port projects, Florida seaports work with their local, state, federal, private and association partners to secure funding options and incentives.

Florida Seaport Transportation and Economic Development (FSTED): A council comprised of 15 Florida seaports representatives, Florida Department of Economic Opportunity (FDEO) and Florida Department of Transportation (FDOT). The FSTED grant allocates a minimum of \$25 million a year for seaport improvements, requiring a 50-50 match. Additional sub-program allocates \$1 million for seaport security projects.

Strategic Port Investment Initiative (SPII): An FDOT-managed fund which allocates a minimum of \$35 million to seaports each year. State funding is matched by the local port, requiring a 50-50 match.

Strategic Intermodal System (SIS): A pool of funding administered by FDOT to focus the state's limited transportation resources on the facilities most significant for interregional, interstate, and international travel.

Intermodal Logistics Center (ILC): An FDOT-managed grant allocating \$5 million annually to a facility or group of facilities, serving as a point of transfer of freight in a specific area whose services are designed to support or be supported by conveyance or shipping through one or more Florida seaports, maximum of \$2.5 million per entity.

Florida's State Infrastructure Bank (SIB): A loan and credit enhancement program administered by FDOT and consisting of two separate accounts – the federally-funded account which is capitalized by federal money matched with state money and the state-funded account which is capitalized by state money and bond proceeds.

Volkswagen Settlement (VW): A state managed fund resulting from a lawsuit settlement between VW and the U.S. EPA to partially resolve allegations of violations of the Clean Air Act. Florida's share is more than \$166 million, or 5.68 percent of the overall Mitigation Trust Fund.

Triumph Grant: Following the 2010 Oil Spill, the State of Florida sued British Petroleum ("B.P.") for the economic damages it sustained. B.P. and the state entered into a settlement agreement whereby the State will receive a total of \$2 Billion dollars until 2033. These funds are available to generate increased economic activity in the disproportionately affected counties, which are all in the Florida Panhandle.

Port Infrastructure Development Grant: A Federal appropriations omnibus bill that included \$293-million port infrastructure development grant program. The amount is to remain available until expended.

Fixing America's Surface Transportation (FAST) Act: A federally managed grant that provides \$6.3 billion for the new National Highway Freight Program, which pioneers dedicated formula funding to states for freight projects such as port-inland connectivity. It funds \$4.5 billion for the Nationally Significant Freight and Highway Projects program, which includes \$500 million for multi-modal freight projects and a \$450-million 'carve-out' for smaller projects of up to \$100 million. Only a percentage of FAST Act freight funding (\$1.13 billion of \$11 billion) is multimodal, a crucial need for many Florida ports.

Infrastructure for Rebuilding America (INFRA): A federally managed grant program, borne out of the FAST Act of 2015, which will make approximately \$900 million available this year to projects that help rebuild America's 'crumbling infrastructure.' In addition to providing direct federal funding, the INFRA program aims to increase the total investment by state, local, and private partners. The program funds projects mainly outside the port gates, including set asides for rural versus urban projects.

Better Utilizing Investments to Leverage Development (BUILD): A federal multimodal grant funded at \$1.5 billion in 2018.

U.S. Army Corps of Engineers (USACE) 2019 Work Plan: A plan that provides federal funding for construction dredging, deepening, operation and maintenance dredging for PortMiami, Port Everglades, JAXPORT, and Port Panama City. These funds need to be matched at the local or state level.

Railroad Rehabilitation & Improvement Financing (RRIF): A financing tool available for port rail projects, which some ports find burdensome to use, and some would prefer if it had a capital grants component, so continued advocacy is important.

Consolidated Rail Infrastructure and Safety Improvement Grants Program (CRISI): A program through the Federal Railroad Administration which can provide important multimodal funding for port rail access projects.

Port Security Grant Program (PSGP): Federal grant with \$100 million available for funded patrol vessels, video surveillance, access control systems, sonar equipment, cybersecurity assessments, TWIC readers, and infrastructure.

Diesel Emissions Reduction (DERA): A federal grant to improve air quality at the nation's ports. There is \$87 million currently available address as emissions and idle control devices, aerodynamic equipment, engine and vehicle replacements, and alternative fuel options.

OPPORTUNITY ZONES TO IGNITE TRADE TONNAGE

Florida has 427 Opportunity Zones created to offer tax incentives for investments in one fourth of the state's low-income census tracts.

Every county in the state has at least one Opportunity Zone; and benefits of the zone may include improved access to capital for small businesses, deferring capital gains taxes for up to seven years, and providing a decrease in the total taxes owed on an original capital gain.

Every Florida seaport is committed to regional economic development; development of a seaport-specific Opportunity Zone strategy will deliver an important new tool to port business development planners.

If a company invests \$1 million and invests in an Opportunity Zone, in five years, the investor only owes taxes on \$900,000 of the original gain. After seven years, the investor only owes taxes on \$850,000 of the original gain. After ten years, if the investment is the worth \$5 million, the investor owes no taxes on the additional \$4 million gain over the lifetime of the investment.



FOREIGN TRADE ZONES

A Foreign Trade Zone (FTZ) is a secured site located within the U.S., but technically considered outside of Customs' jurisdiction, allowing businesses to defer, reduce, or even eliminate costly U.S. Customs' duties on imported products. Some importers can realize great benefits, including substantial savings, by operating in a FTZ. Businesses with just the right combination of import values, manufacturing waste, duty rates, number of "entries", and proportion of exports/re-exports, will benefit. Third-party logistics providers (3PLs), distribution centers, and manufacturers all stand to benefit.

Of the Florida cargo ports, 11 are within an FTZ, with another port in the approval process at publication of this document. Florida ports can serve as the host or 'grantee' of regional foreign trade zones. Grantee staff with a knowledge of operational realities and an established relationship with Customs can make a port an excellent grantee.

CARGO & TRADE

KEY TAKEAWAYS IN CARGO

- **Total value of imports and exports by all Florida's international gateways (including air and sea) increased 3.6% to \$156.9 billion**
- **Value of waterborne trade alone increased 4.9% – to \$87.3 billion**
- **Value of waterborne containerized cargo increased 5.5% to \$57.4 billion**
- **Container cargo represents 65.7% of the waterborne cargo value**
- **Waterborne imports through Florida seaports increased in value by 5.6% in 2018, and exports rose by 4%**
- **Twenty-foot Equivalent Unit (TEU) counts rose 10.3%**

KEY TAKEAWAYS IN TRADE

- **Top two trade partners are China and Japan**
- **At \$33.1 billion, Florida seaports handled 5.7% of U.S. global waterborne export trade**
- **South and Central America and the Caribbean accounted for 21.7% of U.S. waterborne export trade, and 19% of waterborne imports**
- **At \$54.2 billion, Florida seaports handled 4.6% of U.S. global waterborne import trade**
- **The top three trading regions are South and Central America and the Caribbean, Asia, and Europe; together they account for 92.6 percent of all trade through the state's seaports.**

TRADE TRENDS

Florida's seaports handled \$87.3 billion worth of cargo in 2018. The state traded with almost every country in the world, but proximity to South and Central America and the Caribbean, and an appetite for consumer goods from Asia, has dominated Florida trade for years. The relative strength of trading partners and the makeup of the commodity mix reveal a great deal about Florida seaport strengths, and trade trend analysis is critical to help them optimize growth and benefits for Floridians.

TRADE & ECONOMIC OUTLOOK FOR 2019

The U.S. Census Bureau reported the nation's merchandise trade deficit was almost \$900 billion in 2018, the largest in history. The U.S. imported \$2.6 trillion in goods and exported \$1.7 trillion, the highest on record. The 2018 deficit for goods and services reached \$621 billion, a 12.5 percent increase from 2017. The U.S. continues to run a surplus in services, which offsets the deficit in goods. In 2018, the import to export ratio for the nation's merchandise trade was 60.4 to 39.6.

China's trade surplus with the U.S. rose to \$323.3 billion last year, the highest on record. That compared with about \$275.8 billion in 2017. China's exports to the U.S. rose 11.3 percent last year, while imports from the U.S. only increased 0.7 percent.

Slower Growth: The World Bank forecasts growth slowing to 2.9 percent in 2019. In fact, its 2019 *Global Economic Prospects* report was titled *Darkening Skies*. The report said international trade and investment are moderating, while trade tensions remain elevated, and financing conditions are tightening.

Growth in emerging markets and developing economies has lost momentum, according to the Bank, and is projected to stall at 4.2 percent this year, with a "weaker-than-expected rebound in commodity exports accompanied by deceleration in commodity imports." There is concern about multiple risks that could cause already fractious trade tensions to escalate.

Higher Uncertainty: The International Monetary Fund (IMF) World Economic Outlook Update released in January 2019 echoed the World Bank outlook. It said global expansion is weakening with growth of 3.5 percent in 2019 (down from 3.7 percent in 2018).

Major factors affecting the slower growth include: the negative effects of tariff increases enacted in the U.S. and China, natural disasters in Japan, the impact of Germany's introduction of new automobile fuel emission standards, and a fall in Italy's domestic demand related to concerns about sovereign and financial risk. A further escalation of trade tensions is a concern, according to the IMF, as the potential for a withdrawal of the United Kingdom from the European Union and a greater-than-expected slowdown in China.

"Florida seaports are gateways to one of the nation's most critical global trade hubs – and their economic reach extends far beyond Florida, supporting markets in the rapidly-growing Southeastern United States. In Washington, D.C., Florida seaports provide a unified and highly-regarded voice in policy development pertaining to infrastructure, trade, and economic development."

– ELAINE NESSLE, Executive Director,
Coalition for America's Gateways
and Trade Corridors



EXHIBIT #5

FLORIDA'S INTERNATIONAL TRADE IN 2018

Florida's total international trade over its air, sea, and land gateways was valued at \$157.9 billion in 2018, a \$5.4 billion (3.6 percent) increase over the 2017 figure, as reported by the U.S. Census Bureau.¹

Broken down, Florida's **waterborne** trade value increased in 2018 to \$87.3 billion from \$83.2 billion in 2017.

FLORIDA INTERNATIONAL TRADE (BY VALUE) 2017 AND 2018 (U.S. \$ BILLIONS)

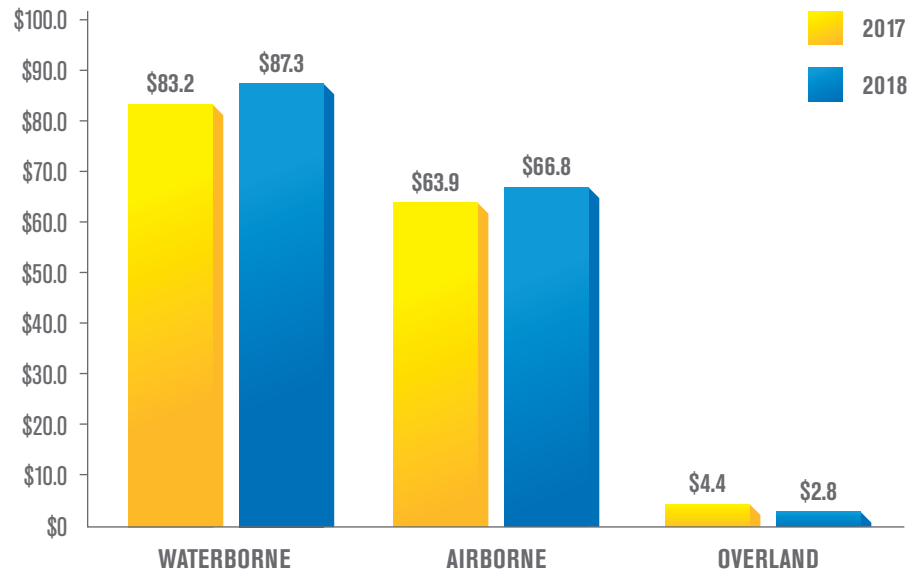
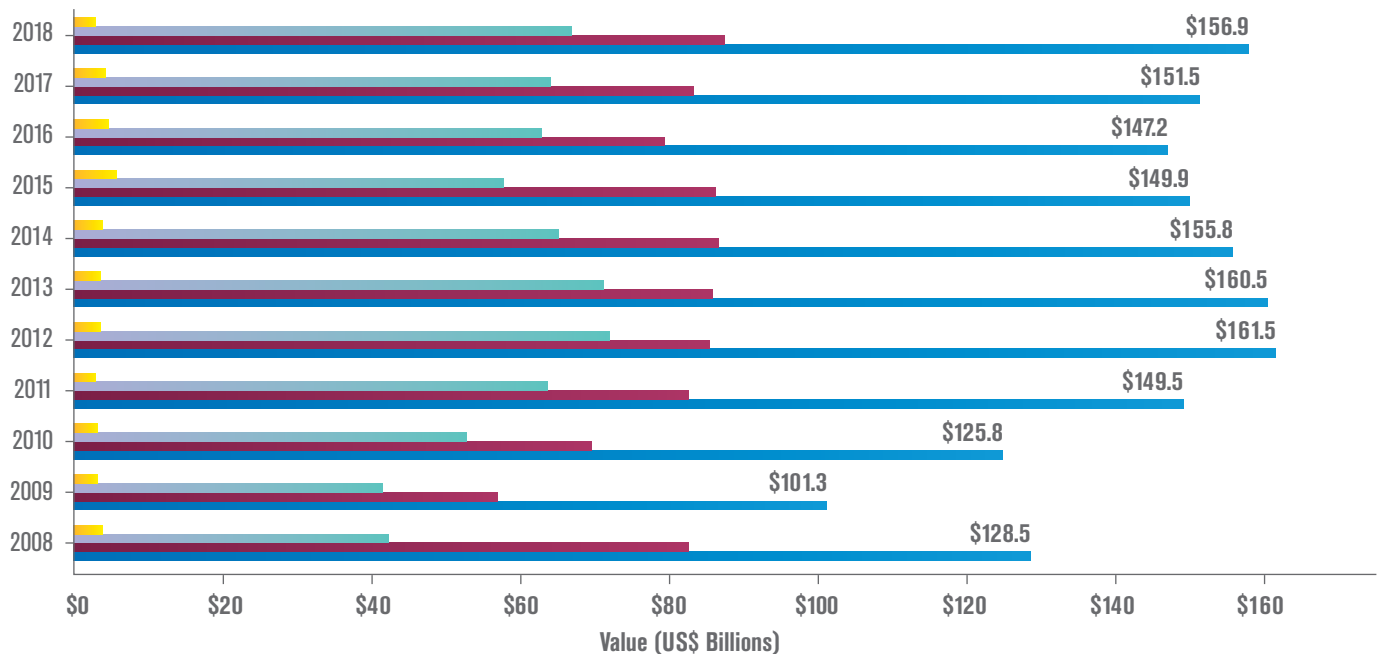


EXHIBIT #6

FLORIDA INTERNATIONAL TRADE (BY VALUE) FY 2018/2019 TO FY 2022/2023



Data Source:
U.S. Census Bureau

OVERLAND AIRBORNE WATERBORNE TOTAL

¹ International trade figures do not include Florida origin or destined goods that move over airports and seaports in other states. Domestic trade, such as that moving between Florida and Puerto Rico, is also excluded.

FLORIDA AIRBORNE AND WATERBORNE TRADE: PARTNERS AND COMMODITIES

In 2018, Brazil retained its position as Florida's top waterborne and airborne trade partner with \$20.7 billion in trade, almost twice that of the next ranked country, China.

Imports of many commodities moved by vessel grew substantially in 2018, in large part on the strength of a recovering U.S. dollar. Only one of the top 10 commodity categories *Vehicles, except Railway or Tramway, and Parts* fell in value.

Over a 10-year period, airborne cargo, which is more volatile than waterborne, has increased 57.9 percent while international waterborne cargo grew 5.8 percent. Comparing today's numbers to the post-recession lows in 2009; however, waterborne cargo has grown 53.2 percent versus 61.7 percent growth by airborne. Over the same time frame, the composition of the waterborne cargo has changed dramatically in favor of containerized goods.

EXHIBIT #7

FLORIDA INTERNATIONAL TRADE (BY VALUE) ANNUAL PERCENTAGE CHANGES 2008 TO 2018

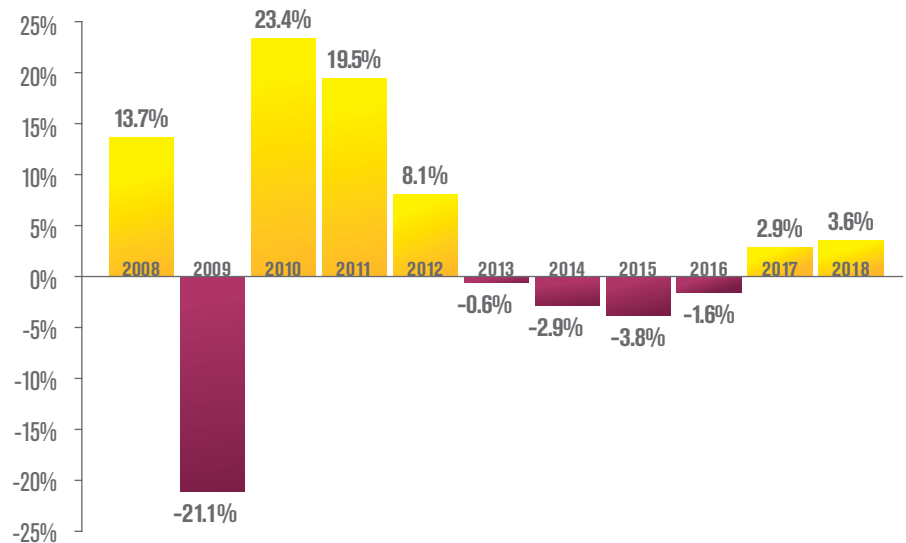


EXHIBIT #8

FLORIDA WATERBORNE, AIRBORNE, AND OVERLAND INTERNATIONAL TRADE (BY VALUE) 2008 TO 2018 (US\$ BILLIONS)

YEAR	WATERBORNE	AIRBORNE	OVERLAND
2008	\$82.5	\$42.3	\$3.7
2009	\$57.0	\$41.3	\$3.0
2010	\$69.7	\$52.8	\$3.3
2011	\$82.7	\$63.8	\$3.0
2012	\$85.6	\$72.1	\$3.8
2013	\$85.9	\$71.1	\$3.5
2014	\$86.8	\$65.3	\$3.7
2015	\$86.2	\$57.9	\$5.8
2016	\$79.3	\$63.1	\$4.8
2017	\$83.2	\$63.9	\$4.4
2018	\$87.3	\$66.8	\$2.8

Data Source: U.S. Census Bureau - total 2018 international trade value basis is \$156.9 billion

EXHIBIT #9

FLORIDA AIRBORNE AND WATERBORNE TRADE: IMPORT-EXPORT BALANCE

Trade through Florida's sea and air gateways is better balanced than that of the nation as a whole.

Of the more than \$156.9 billion in international trade moving through Florida gateways in 2018, \$83.4 billion (or 53.1 percent) were imports and \$73.5 billion (or 46.9 percent) were exports. Over the last decade, both imports and exports through Florida gateways have grown in value but as a percentage of total trade, exports have fallen. The rate of growth of imports is outpacing the growth of exports. In 2007, there was a shift to a trade surplus; the state's trade over its air and sea gateways returned to a deficit position in 2015.

By comparison, total U.S. imports by air, sea and overland increased 8.2 percent and exports increased 7.6 percent in 2018.

FLORIDA IMPORT AND EXPORT PERCENTAGES (BY VALUE) 2008 TO 2018

YEAR	IMPORTS	EXPORTS
2008	43.2%	56.8%
2009	41.0%	59.0%
2010	41.4%	58.6%
2011	41.8%	58.2%
2012	44.0%	56.0%
2013	46.8%	53.2%
2014	47.6%	52.4%
2015	51.1%	48.9%
2016	53.8%	46.1%
2017	53.6%	46.4%
2018	53.1%	46.9%

Data Source: U.S. Census Bureau - total 2018 international trade value basis is \$156.9 billion

EXHIBIT #10

U.S. IMPORTS AND EXPORTS (BY VALUE) 2008 TO 2018 (US\$ 000,000)

	TOTAL TRADE		IMPORTS			EXPORTS		
YEAR	TOTAL U.S. MERCHANDISE TRADE VALUE	CHANGE OVER PRIOR YEAR	IMPORTS VALUE	CHANGE OVER PRIOR YEAR	SHARE OF TOTAL U.S. TRADE	EXPORTS VALUE	CHANGE OVER PRIOR YEAR	SHARE OF TOTAL U.S. TRADE
2008	\$3,391,083	9.3%	\$2,103,641	7.7%	62.0%	\$1,287,442	12.1%	38.0%
2009	\$2,615,668	-22.9%	\$1,559,625	25.9%	59.6%	\$1,056,043	-17.4%	40.4%
2010	\$3,191,423	22.0%	\$1,913,160	22.7%	59.9%	\$1,278,263	21.0%	40.1%
2011	\$3,687,481	15.5%	\$2,206,929	15.4%	59.8%	\$1,480,552	15.8%	40.2%
2012	\$3,821,848	3.6%	\$2,275,392	3.1%	59.5%	\$1,546,455	4.5%	40.5%
2013	\$3,845,707	0.6%	\$2,266,855	-0.4%	58.9%	\$1,578,851	2.1%	41.1%
2014	\$3,968,630	3.2%	\$2,345,187	3.5%	59.1%	\$1,623,443	2.8%	40.9%
2015	\$3,746,261	-5.6%	\$2,241,664	-4.4%	59.8%	\$1,504,597	-7.3%	40.2%
2016	\$3,642,904	-2.8%	\$2,189,183	-2.3%	60.1%	\$1,453,721	-3.4%	39.9%
2017	\$3,889,638	6.8%	\$2,342,905	7.0%	60.2%	\$1,546,733	6.4%	39.8%
2018	\$4,206,789	8.2%	\$2,542,733	8.5%	60.4%	\$1,664,056	7.6%	39.6%

Data Source: U.S. Census Bureau

FLORIDA WATERBORNE CONTAINER TRADE

Florida's waterborne containerized cargo volumes and values have grown from 2.7 million TEUs at the peak of the recession to 4.1 million this year. Container vessels carried 65.7 percent of all waterborne cargo by value, showing a long-term upward trend. In 2018, containerized cargo vessels carried \$57.4 billion in trade to and from Florida, a 5.5 percent increase over the prior year. About \$33.6 billion, or 58.6 percent, were imports and \$23.7 billion, or 41.4 percent were exports.

FLORIDA'S TOP TRADING REGIONS: BY WATER

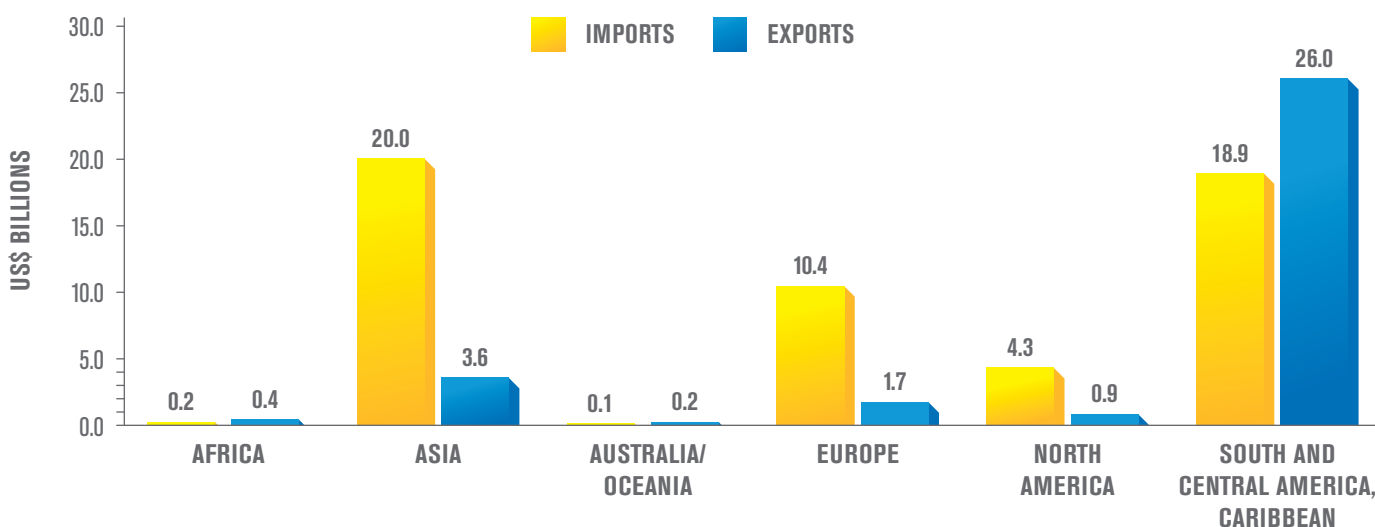
Florida's regional trade with trade partners to the South – South and Central America as well as the Caribbean – accounted for \$45 billion or 51.5 percent of the state's total waterborne trade.

South America, Central America and the Caribbean trade comprise 78.7 percent of waterborne exports by value. Over the last decade, Florida's value of trade with the region has also grown remarkably. Imports from South America, Central America and the Caribbean rose 5.8 percent to \$18.9 billion; exports rose 4.3 percent to 26.1 billion tons.

Asia, with \$23.7 billion in cargo, or about 27.2 percent of Florida's waterborne trade, continues to be one of Florida's most important trading regions. Imports were up 5.1 percent over the prior year, but exports to Asia were down 2.8 percent attributed to the new tariffs put into place in 2018. The trade continues to be largely inbound and is fed by the rise of e-commerce.

EXHIBIT #11

FLORIDA WATERBORNE TRADE BY REGION (BY VALUE) 2018 (US\$ BILLIONS)



Data Source: U.S. Census Bureau - total international trade value basis is \$156.9 billion; total waterborne trade value is \$87.3 billion

EXHIBIT #12
**FLORIDA INTERNATIONAL WATERBORNE TRADE BY GLOBAL REGION
2016 TO 2018 (US\$ 000,000)**

	2016		2017		2018		
REGION	VALUE OF TRADE	PERCENT OF TOTAL	VALUE OF TRADE	PERCENT OF TOTAL	VALUE OF TRADE	PERCENT OF TOTAL	PERCENT CHANGE 2017-2018
South and Central America, Caribbean	\$40,740	51.4%	\$42,898	51.6%	\$45,007	51.5%	4.9%
Asia and the Middle East	\$22,431	28.3%	\$22,860	27.5%	\$23,733	27.2%	3.8%
Europe	\$11,609	14.6%	\$11,537	13.9%	\$12,159	13.9%	5.4%
North America	\$3,668	4.6%	\$4,815	5.8%	\$5,341	6.1%	10.9%
African Continent	\$479	0.6%	\$632	0.8%	\$615	0.7%	-2.7%
Australia and Oceania	\$362	0.5%	\$436	0.5%	\$493	0.6%	13.1%
TOTAL	\$79,289	100.0%	\$83,178	100.0%	\$87,348	100.0%	5.0%

Data Source: U.S. Census Bureau

Waterborne trade from North America and Australia and Oceania all showed double-digit growth in 2018. Strong Canada and Mexico trade figures are linked to the U.S. tax policy-inspired investment boom which is expected to continue in the wake of the Tax Cuts and Jobs Act of late 2017.

EXHIBIT #13
**FLORIDA WATERBORNE IMPORTS AND EXPORTS BY GLOBAL REGION (US\$ 000,000)
2018 (WITH 2017 COMPARISON)**

	IMPORTS			EXPORTS		
	2017			2018		
REGION	2017	2018	PERCENT CHANGE 2018 OVER 2017	2017	2018	PERCENT CHANGE 2018 OVER 2017
South and Central America, Caribbean	\$17,884	\$18,920	5.8%	\$25,014	\$26,086	4.3%
Asia and the Middle East	\$19,104	\$20,084	5.1%	\$3,756	\$3,649	-2.8%
Europe	\$9,923	\$10,411	4.9%	\$1,614	\$1,748	8.3%
North America	\$3,980	\$4,386	10.2%	\$835	\$954	14.3%
African Continent	\$197	\$201	2.0%	\$436	\$414	-5.0%
Australia and Oceania	\$221	\$196	-11.3%	\$215	\$297	38.1%
TOTAL	\$51,309	\$54,198	5.6%	\$31,870	\$33,148	4.0%

Data Source: U.S. Census Bureau - total 2018 international trade value basis is \$156.9 billion; total waterborne trade value is \$87.3 billion

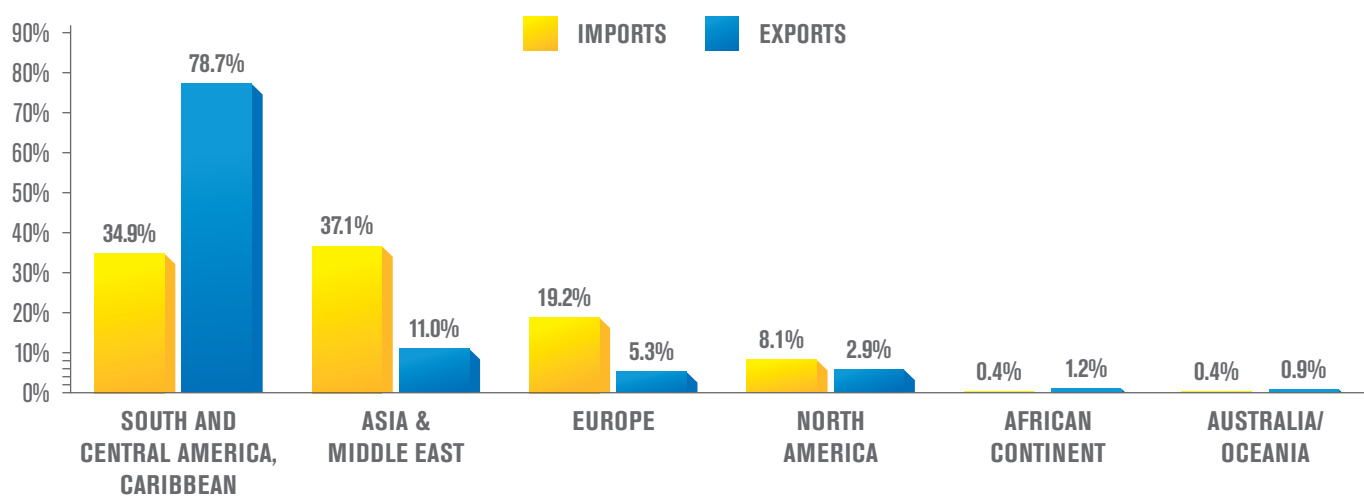
Up until 2015, Florida experienced eight straight years with a surplus of total trade through all gateways. The 2014 surplus was \$7.6 billion. In 2015, Florida trade, including waterborne, airborne and other, moved into a deficit position, which continued in 2016 and 2017. From 2008 to 2012, waterborne trade showed a surplus, peaking in 2011 with \$2.9 billion more in exports than imports. That shifted in 2013 when a small deficit of \$1.1 billion was recorded. That gap has widened – in 2015 to \$12.5 billion in waterborne cargo, in 2016 to \$16.3 billion, in 2017 to \$19.4 billion, and in 2018 to \$21.1 billion.

A number of trends are responsible for this shift of waterborne trade to a deficit position: the growing consumption base in Florida; the return of consumer confidence which increased imports of vehicles and construction materials; low-priced oil; and even the electronic ease of accessing global products to import.

Overall, the value of waterborne import trade through the state's seaports increased for the eighth time in the last nine years, up \$2.9 billion or 5.6 percent over 2017, to \$54.2 billion, and the value of waterborne exports rose 4 percent to \$33.1 billion.

EXHIBIT #14

FLORIDA WATERBORNE TRADE WITH GLOBAL REGIONS (BY VALUE) 2018 PERCENTAGES OF FLORIDA'S IMPORT AND EXPORT MARKETS



Data Source: U.S. Census Bureau - total 2018 international trade value basis is \$156.9 billion; total waterborne trade value is \$87.3 billion

The characteristics of Florida's international trade are better understood by looking at the comparative market shares of individual countries within the respective global regions.

The top ten countries whose commerce contributed to the state's combined waterborne and airborne international trade in 2018 were: Brazil, China, Chile, Japan, Colombia, Mexico, Dominican Republic, Germany, Honduras and Costa Rica.

Consistent with Florida's dominant role in trade with Central and South America and the Caribbean, seven of the countries on the list of the state's top 10 trading partners are from those regions. Brazil retained its top spot with \$20.7 billion in trade. That figure is up 3.1 percent over 2017 and is almost twice the dollar value of the next ranked country, China. Costa Rica and Argentina have been jostling for tenth position, with Costa Rica edging out Argentina in 2018.

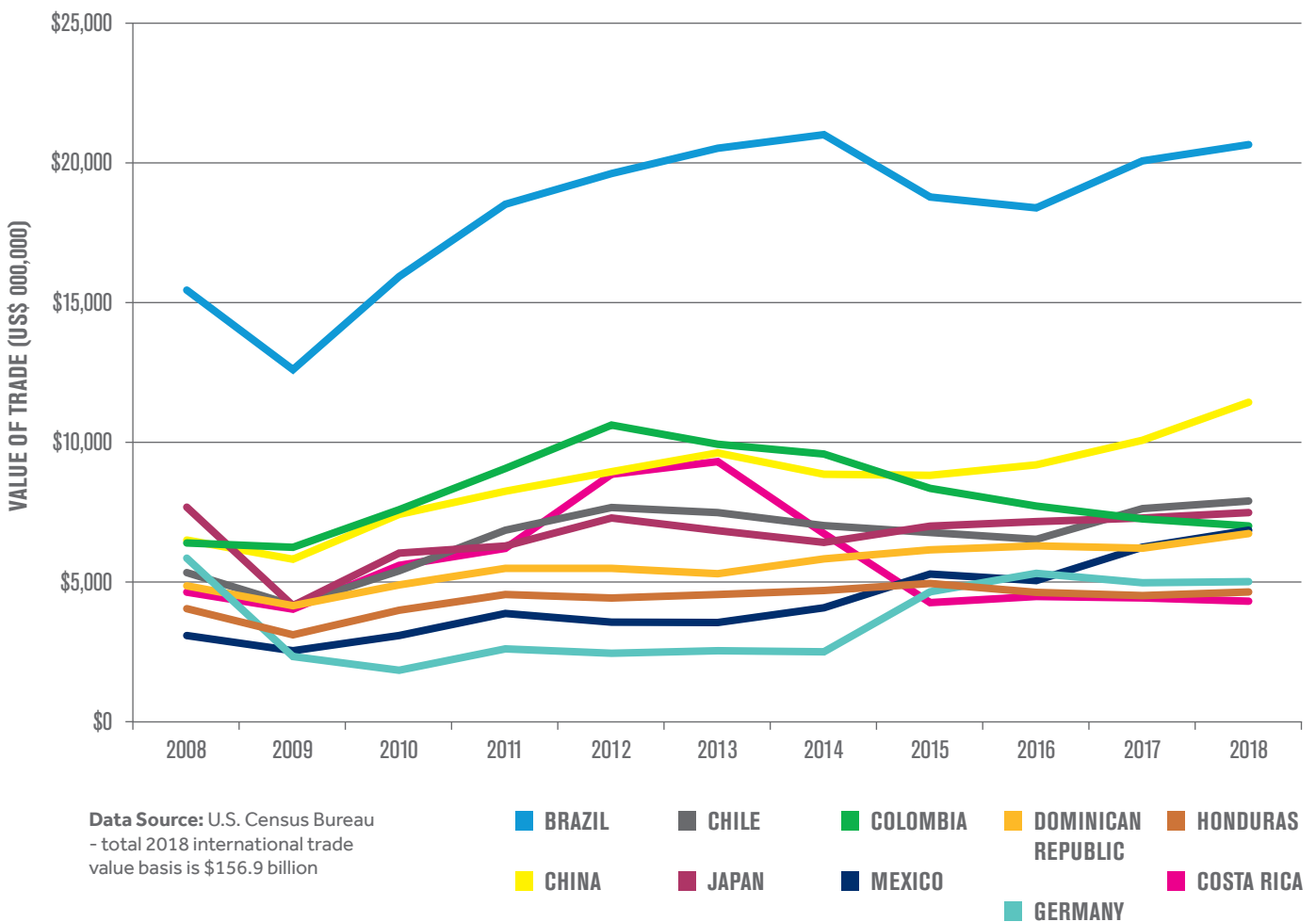
FLORIDA'S TOP TRADING REGIONS: BY WATER AND AIR COMBINED

Eight of Florida's top 10 trade partners experienced an increase in trade in 2018: China led with 13.5 percent growth, followed by Mexico with 9.8 percent growth, and Dominican Republic with 8.2 percent. The two countries that lost cargo value were Colombia and Costa Rica, with losses of 3.8 percent and 2.7 percent.

China enjoyed the largest dollar value growth, increasing by \$1.4 billion to \$11.4 billion. Brazil and Mexico grew by \$600 million and Dominican Republic by \$500 million. Mexico's trade increase in part reflects U.S. tax policy change that has spurred investment and near-sourcing.

EXHIBIT #15

FLORIDA INTERNATIONAL TRADE (BY VALUE) WITH TOP TEN TRADING PARTNERS 2008 TO 2018



Four major trade partners, China, Chile, Mexico and the Dominican Republic, set new records for trade through Florida gateways in 2018, with 13.5, 3.9, 9.8 and 8.3 percent growth over 2017 figures.



EXHIBIT #16

FLORIDA TOP TEN TRADING PARTNERS FOR WATERBORNE CARGO (BY VALUE) 2016 TO 2018

	2016		2017		2018		
COUNTRY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2018 OVER 2017
TOTAL ALL COUNTRIES	\$79,288,854,622		\$83,178,595,192		\$87,346,177,283		5.0%
China	\$6,635,066,531	1	\$7,024,071,631	1	\$7,563,524,186	1	7.7%
Japan	\$6,410,297,638	2	\$6,868,221,347	2	\$6,914,159,749	2	0.7%
Dominican Republic	\$5,238,455,824	3	\$5,163,824,207	3	\$5,707,154,314	3	10.5%
Brazil	\$4,012,253,093	5	\$4,388,607,350	4	\$5,233,083,683	4	19.2%
Mexico	\$3,221,105,353	6	\$4,165,370,381	5	\$4,655,623,181	5	11.8%
Honduras	\$4,124,692,396	4	\$4,035,120,863	6	\$4,249,014,882	6	5.3%
Chile	\$2,959,186,370	7	\$3,794,131,327	7	\$3,904,932,111	7	2.9%
Colombia	\$2,228,665,162	10	\$2,396,582,755	10	\$2,480,776,090	8	3.5%
Costa Rica	\$2,616,704,350	9	\$2,509,560,139	9	\$2,441,423,965	9	-2.7%
Guatemala	\$2,139,650,440	11	\$2,262,566,036	11	\$2,316,285,499	10	2.4%
TOP TEN TOTAL					\$45,465,977,660		

Data Source:
U.S. Census Bureau

TOP 10 (2018) SHARE OF TOTAL \$87.3 BILLION: 52.1%

FLORIDA'S TOP TRADING PARTNERS: BY WATER

Proximity of market and commodity type affect the decision to move by air or water. Trade from China and Japan continues to favor waterborne routings, due to commodity ranges and distance to market. The Dominican Republic's strong apparel markets operate on tight margins, and are close enough to Florida that waterborne delivery competes well with air. Fast new ocean carrier services into South Florida from Columbia are currently opening up high-value perishable markets too.

Following several years of low oil prices and deteriorated trade relations, Venezuela no longer serves as a top ten trade partner of the state of Florida, for total international trade or for waterborne trade.

The state's waterborne trade picture comes into even better focus when trade by country is broken down into imports versus exports.

EXHIBIT #17

FLORIDA TOP TEN WATERBORNE IMPORT TRADING PARTNERS 2016 TO 2018

	2016		2017		2018		
COUNTRY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2018 OVER 2017
TOTAL ALL COUNTRIES	\$47,793,985,026		\$51,309,067,432		\$54,198,051,876		5.6%
China	\$6,141,798,998	2	\$6,441,885,051	2	\$7,133,750,876	1	10.7%
Japan	\$6,167,890,898	1	\$6,624,047,167	1	\$6,629,076,002	2	0.1%
Mexico	\$2,475,459,736	5	\$3,422,021,969	3	\$3,791,381,004	3	10.8%
Dominican Republic	\$2,661,076,914	3	\$2,656,952,146	4	\$2,977,571,897	4	12.1%
Honduras	\$2,456,892,181	6	\$2,391,894,727	7	\$2,594,241,862	5	8.5%
Chile	\$1,721,376,443	7	\$2,457,536,542	5	\$2,429,851,020	6	-1.1%
Germany	\$2,573,594,363	4	\$2,406,630,924	6	\$2,130,072,256	7	-11.5%
Italy	\$1,678,913,369	8	\$1,711,704,280	8	\$1,942,296,829	8	13.5%
Brazil	\$1,289,134,399	10	\$1,425,438,985	11	\$1,710,594,348	9	20.0%
Nicaragua	\$932,101,976	16	\$1,442,958,228	10	\$1,535,494,391	10	6.4%
TOP TEN TOTAL					\$32,874,330,485		

Data Source:
U.S. Census Bureau

TOP 10 (2018) SHARE OF TOTAL \$54.2 BILLION: 60.7%

"When appealing to international markets, Enterprise Florida is able to leverage the state's convenient geography and its ports, which serve as the perfect conduit for shippers that are trading with Asia, Europe and the Americas."

– JAMAL SOWELL, President & CEO,
Enterprise Florida

EXHIBIT #18

FLORIDA TOP TEN WATERBORNE EXPORT TRADING PARTNERS 2016 TO 2018

	2016		2017		2018		
COUNTRY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2018 OVER 2017
TOTAL ALL COUNTRIES	\$31,494,869,596		\$31,869,527,760		\$33,148,125,407		4.0%
Brazil	\$2,720,531,730	1	\$2,962,359,300	1	\$3,522,489,335	1	18.9%
Dominican Republic	\$2,577,378,910	2	\$2,506,872,061	2	\$2,729,582,417	2	8.9%
Honduras	\$1,667,800,215	3	\$1,643,226,136	3	\$1,654,773,020	3	0.7%
Colombia	\$1,427,787,978	4	\$1,549,554,579	4	\$1,610,238,674	4	3.9%
Chile	\$1,237,809,927	7	\$1,336,594,785	6	\$1,475,081,091	5	10.4%
Costa Rica	\$1,409,840,190	5	\$1,393,416,246	5	\$1,410,685,577	6	1.2%
Panama	\$1,378,854,963	6	\$1,303,330,945	7	\$1,291,268,770	7	-0.9%
Bahamas	\$1,118,143,111	8	\$1,243,926,513	9	\$1,252,371,757	8	0.7%
Peru	\$1,075,794,403	10	\$1,055,760,181	11	\$1,221,582,832	9	15.7%
Argentina	\$1,094,538,374	9	\$1,276,020,951	8	\$1,100,050,400	10	-13.8%
TOP TEN TOTAL					\$18,489,706,705		

Data Source:
U.S. Census Bureau

TOP 10 (2018) SHARE OF TOTAL \$33.1 BILLION: 55.8%

Venezuela, United Arab Emirates (UAE) and Saudi Arabia, which ranked in the top ten only three years ago, have all dropped off the top 10 charts to be replaced by the Bahamas, Argentina, and Guatemala.

Florida's top 10 waterborne export partners provided more than half, at 55.8 percent, of the state's \$33.2 billion total waterborne exports.



FLORIDA'S TOP TRADE COMMODITIES: BY WATER

Ten commodity types accounted for \$51.4 billion, or 58.8 percent, of Florida's waterborne international trade for 2018.

Vehicles, Except Railway or Tramway, and Parts was the top category moving through Florida seaports for the eighth year in a row with a value of almost \$17.9 billion. \$1 in every \$4 of waterborne imports in 2018 were categorized as *Vehicles, Except Railway or Tramway, and Parts*, more than double any other category.

Other top-performers were *Mineral Fuel, Oil, Bituminous Substances, Mineral Wax*, which experienced a 27.1 percent growth, following a loss in 2016 reflecting the Venezuelan oil decline.

EXHIBIT #19

FLORIDA TOP TEN WATERBORNE COMMODITIES (IMPORT AND EXPORT) 2016 TO 2018

	2016		2017		2018		
COMMODITY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2018 OVER 2017
TOTAL ALL COMMODITIES	\$79,288,854,622		\$83,178,595,192		\$87,346,177,283		5.0%
Vehicles, Except Railway or Tramway, and Parts	\$16,959,392,765	1	\$17,984,935,111	1	\$17,904,161,654	1	-0.4%
Nuclear Reactors, Boilers, Machinery, and Parts Thereof	\$7,902,745,078	2	\$7,899,766,814	2	\$8,577,107,768	2	8.6%
Electric Machinery, Including Sound and TV Equipment	\$5,209,479,546	3	\$5,693,534,481	3	\$6,081,011,438	3	6.8%
Apparel Articles and Accessories, Knit or Crochet	\$4,587,503,477	4	\$4,873,625,815	4	\$5,215,943,043	4	7.0%
Mineral Fuel, Oil, Bituminous Substances, Mineral Wax	\$2,602,193,888	5	\$2,485,010,124	5	\$3,159,414,109	5	27.1%
Furniture, Bedding, Lamps Not Elsewhere Specified, Prefab Buildings	\$1,880,091,749	8	\$2,001,056,454	8	\$2,211,100,528	6	10.5%
Copper and Articles Thereof	\$1,396,026,594	18	\$2,131,429,731	6	\$2,206,679,878	7	3.5%
Plastics and Articles Thereof	\$1,866,884,766	9	\$1,939,339,585	10	\$2,078,733,339	8	7.2%
Optical, Photo, Medical or Surgical Instruments	\$2,235,884,673	6	\$2,061,342,435	7	\$2,007,134,986	9	-2.6%
Beverages, Spirits and Vinegar	\$1,890,202,672	7	\$1,849,896,677	11	\$1,952,496,578	10	N/A
TOP TEN TOTAL					\$51,393,783,321		

Data Source:
U.S. Census Bureau

TOP 10 (2018) SHARE OF TOTAL \$87.3 BILLION: 58.8%

EXHIBIT #20

FLORIDA TOP TEN WATERBORNE IMPORT COMMODITIES 2016 TO 2018

	2016		2017		2018		
COMMODITY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2018 OVER 2017
TOTAL ALL IMPORT COMMODITIES	\$47,793,985,026		\$51,309,067,432		\$54,198,051,876		5.6%
Vehicles, Except Railway or Tramway, and Parts	\$11,900,439,363	1	\$13,175,511,693	1	\$12,738,160,490	1	-3.3%
Apparel Articles and Accessories, Knit or Crochet	\$4,411,718,247	2	\$4,691,688,266	2	\$5,026,434,698	2	7.1%
Electric Machinery, Including Sound and TV Equipment	\$2,517,996,693	3	\$2,845,157,414	3	\$3,247,733,742	3	14.1%
Mineral Fuel, Oil, Bituminous Substances, Mineral Wax	\$2,411,876,819	4	\$2,290,300,251	4	\$2,937,959,165	4	28.3%
Nuclear Reactors, Boilers, Machinery and Parts Thereof	\$2,129,516,017	5	\$2,063,843,149	5	\$2,442,001,545	5	18.3%
Copper and Articles Thereof	\$1,220,285,610	11	\$1,933,399,325	6	\$1,989,241,966	6	2.9%
Furniture, Bedding, Lamps, Prefabricated Buildings	\$1,425,479,076	9	\$1,540,445,091	8	\$1,723,721,808	7	11.9%
Beverages, Spirits and Vinegar	\$1,540,788,842	7	\$1,537,809,114	9	\$1,611,132,505	8	4.8%
Apparel Articles and Accessories, not Knit	\$1,589,764,191	6	\$1,527,017,219	10	\$1,607,325,063	9	5.3%
Fish, Crustaceans and Aquatic Invertebrates	\$1,360,904,836	10	\$1,565,361,052	7	\$1,565,887,578	10	0.0%
TOP TEN TOTAL					\$34,889,598,560		
Data Source: U.S. Census Bureau	TOP 10 (2018) SHARE OF TOTAL \$54.2 BILLION: 64.4%						

Also noteworthy is the large jump in recovery in fuel imports (28.3 percent), and the nuclear reactor and parts categories (18.3 percent).



EXHIBIT #21

FLORIDA TOP TEN WATERBORNE EXPORT COMMODITIES 2016 TO 2018

	2016		2017		2018		
COMMODITY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2018 OVER 2017
TOTAL ALL EXPORT COMMODITIES	\$31,494,869,596		\$31,869,527,760		\$33,148,125,407		4.0%
Nuclear Reactors, Boilers, Machinery and Parts Thereof	\$5,773,229,061	1	\$5,835,923,665	1	\$6,135,106,223	1	5.1%
Vehicles, Except Railway or Tramway, and Parts	\$5,058,953,402	2	\$4,809,423,418	2	\$5,166,001,164	2	7.4%
Electric Machinery, Including Sound and TV Equipment	\$2,691,482,853	3	\$2,848,377,067	3	\$2,833,277,696	3	-0.5%
Fertilizers	\$1,542,738,620	4	\$1,523,497,595	4	\$1,437,247,272	4	-5.7%
Plastics and Articles Thereof	\$1,126,751,076	5	\$1,110,555,624	5	\$1,169,615,392	5	5.3%
Essential Oils, Perfumery, and Cosmetic Preparations	\$893,570,427	6	\$990,756,623	6	\$995,182,639	6	0.4%
Cotton,including Yarn and Woven Fabric Thereof	\$778,963,991	8	\$839,056,770	7	\$881,871,755	7	5.1%
Optical, Photo, Medical or Surgical Instruments	\$792,342,557	7	\$768,332,015	8	\$823,914,889	8	7.2%
Meat and Edible Meat Offal	\$648,913,591	9	\$709,551,580	9	\$697,901,977	9	-1.6%
Ships, Boats and Floating Structures	\$485,172,158	12	\$548,648,669	11	\$648,855,753	10	18.3%
TOP TEN TOTAL					\$20,788,974,760		
Data Source: U.S. Census Bureau							
TOP 10 (2018) SHARE OF TOTAL \$33.1 BILLION: 62.7%							

Exhibit 21 ranks the top 10 waterborne commodities exported via Florida seaports in 2017. These ten commodities accounted for \$20.8 billion of the seaports' \$33.1 billion in international exports.

Exhibit 21 shows:

- *Nuclear Reactors, Boilers, Machinery and Parts Thereof* retained its position as Florida's top waterborne export in 2018, with a \$1 billion lead, by value, over the number two export commodity – *Vehicles, Except Railway or Tramway, and Parts*.
- Seven of the top 10 commodities gained in dollar value in 2018, and *Ships, Boats and Floating Structures* enjoyed double-digit growth.

Worth noting in the analysis of Florida's import and export commodities is that the top three waterborne export commodities – *Nuclear Reactors, Boilers, Machinery and Parts Thereof*; *Vehicles, except Railway or Tramway, and Parts*; and *Electric Machinery including Sound and TV Equipment* – were also among the top five imports. Together, these three commodity types, whether imported or exported, represent \$32.6 million in trade, more than a third (37.3 percent) of Florida's waterborne international trade.

THE VALUE OF TRADE

The growth in value of Florida port imports and exports to \$87.3 billion and the evolving mix of trade partners reflects Florida's global reach.

The state traded with almost every country in the world, but proximity to South and Central America and the Caribbean, and an appetite for consumer goods from Asia, has dominated Florida trade for years. That isn't expected to change soon, despite emerging but somewhat unpredictable trade barriers.

The trade partner and commodity trends reveal a great deal about Florida seaport strengths, and trade trend analysis is critical to help them optimize growth and benefits for Floridians.

Eleven of Florida's 15 established and emerging seaports handled cargo last year, and eight handled passenger movements by cruise ship, ferry and/or day-cruise vessel. No two ports are alike in their facilities or ability to accommodate ships, cargo or passengers, however, taken together, Florida's ports handle virtually anything that moves.

VALUE OF TRADE HIGHLIGHT:

The value of international waterborne cargo over Florida seaports, which comprises more than half of the state's total trade by dollar, was **up 4.9 percent to \$87.3 billion**; that comes after a similar increase in 2017 over 2016.

U.S. DOLLAR IMPACT:

The weak U.S. dollar of 2017 recovered in 2018, and import volumes were **up 5.6 percent and their tonnage volumes rose a whopping 9.4 percent.**

TONNAGE HIGHLIGHTS:

Cargo figures for fiscal year 2018 show seaport cargo tonnage remained stable overall. Highlights include **a 9.4 percent increase in export tonnage, and a 4.3 percent increase in container tonnage.**



PORT IMPORTS AND EXPORTS BY DOLLAR VALUE

In 2018, Florida seaports moved \$87.3 billion worth of goods to and from countries all over the world, a 5 percent increase over the prior year.

The 5 percent increase, shown in Exhibit 22, reflects the global movement to higher volumes of trade, especially on trades with Latin America and inbound from Asia. The U.S. Census Bureau reported that in 2018, all U.S. goods imports were up 8.5 percent to \$2.5 trillion and exports were up 7.6 percent to \$1.7 trillion – two new records for U.S. trade.

In 2018, there was growth in Florida seaport cargo moving in the form of liquid bulk, containers, and break-bulk (this category is a catch-all including non-containerized general cargo such as vehicles and other roll on/roll off shipments, palletized freight and neo-bulk). There was a solid 10.2 percent increase in TEUs, which, accompanied by a 4.3 percent increase in container tonnage, indicates a shift to nominally lighter containers and/or more empties.

EXHIBIT #22

FLORIDA CONTAINERIZED WATERBORNE TRADE BY SEAPORT (BY VALUE) 2017 TO 2018

	2017		2018		
PORT	CONTAINERIZED CARGO VALUE	TOTAL WATERBORNE CARGO VALUE	CONTAINERIZED CARGO VALUE	TOTAL WATERBORNE CARGO VALUE	CHANGE IN TOTAL WATERBORNE CARGO VALUE 2018 OVER 2017
Canaveral	\$79,734,977	\$1,083,451,940	\$37,643,136	\$1,577,160,683	45.6%
Everglades	\$18,914,756,487	\$23,160,439,092	\$20,093,788,745	\$24,403,731,018	5.4%
Fernandina	\$95,821,743	\$149,112,677	\$109,060,100	\$158,573,138	6.3%
Fort Pierce	\$789,389	\$8,814,918	\$1,066,833	\$4,784,211	-45.7%
Jacksonville	\$10,203,604,298	\$25,262,163,311	\$9,723,379,688	\$25,677,929,340	1.6%
Manatee	\$281,746,312	\$837,486,031	\$287,650,670	\$973,196,487	16.2%
Miami	\$21,373,050,307	\$23,887,352,725	\$23,376,855,500	\$25,664,657,271	7.4%
Palm Beach	\$1,746,710,503	\$2,267,591,744	\$1,860,347,174	\$2,345,233,241	3.4%
Panama City	\$792,890,850	\$2,964,631,797	\$755,361,300	\$2,839,931,348	-4.2%
Pensacola	\$10,037	\$14,368,626	\$23,742,640	\$37,575,873	161.5%
Tampa	\$888,496,587	\$3,531,464,974	\$1,111,901,322	\$3,654,326,814	3.5%
Miscellaneous*	\$930,433	\$11,343,485	\$1,392,056	\$9,077,859	-20.0%
TOTAL	\$54,378,541,923	\$83,178,221,320	\$57,382,189,164	\$87,346,177,283	5.0%

Data Source: U.S. Census Bureau - the total 2018 international trade value basis is \$156.9 billion. This figure does not include Puerto Rican or other domestic cargo.

* No cargo handled at the following ports: Citrus, Key West, St. Joe or St. Petersburg; cargo values in the miscellaneous category reflect operations other than those at specific port docks, as calculated by the federal government

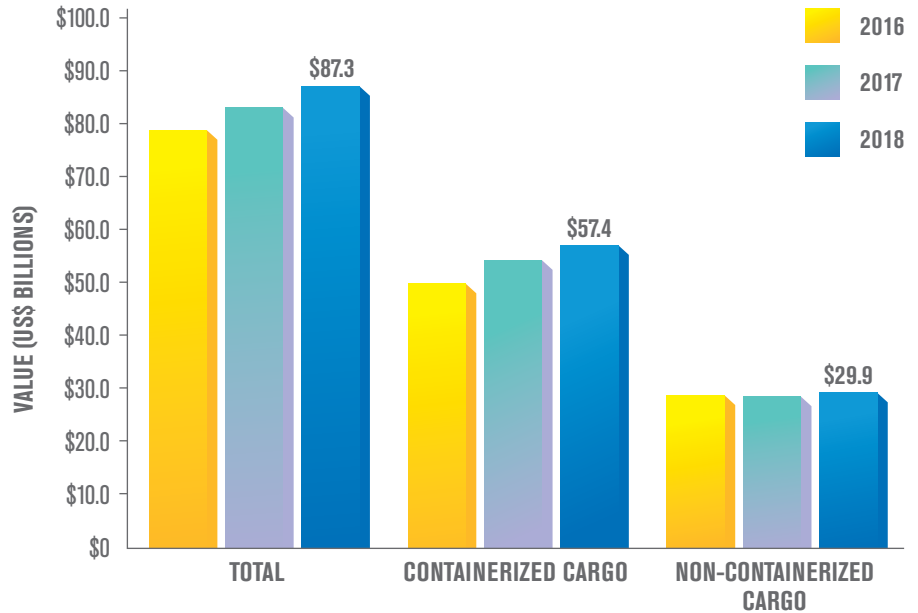
Although the majority of the state's waterborne cargo is not containerized, the container cargo sector has a far higher value and the rate of growth continues to outpace other cargo types.

EXHIBIT #23

Domestic cargo values are not reflected in Exhibits 22 through 25, which were compiled using U.S. Census Bureau import and export data. Domestic cargo is defined in this report as cargo transported in the waterborne trade between two or more states or between the U.S. and Puerto Rico.

Florida is the primary waterborne trading state with Puerto Rico and U.S. territories in the Caribbean. This domestic trade will increase as Florida seaports and partners continue to invest in seaport infrastructure and vessels.

THREE-YEAR COMPARISON OF FLORIDA CONTAINERIZED AND NON-CONTAINERIZED CARGO (BY VALUE) 2016 TO 2018



Data Source: U.S. Census Bureau - the total 2018 international trade value basis is \$156.9 billion

EXHIBIT #24

FLORIDA WATERBORNE IMPORTS AND EXPORTS BY SEAPORT (BY VALUE) 2017 TO 2018

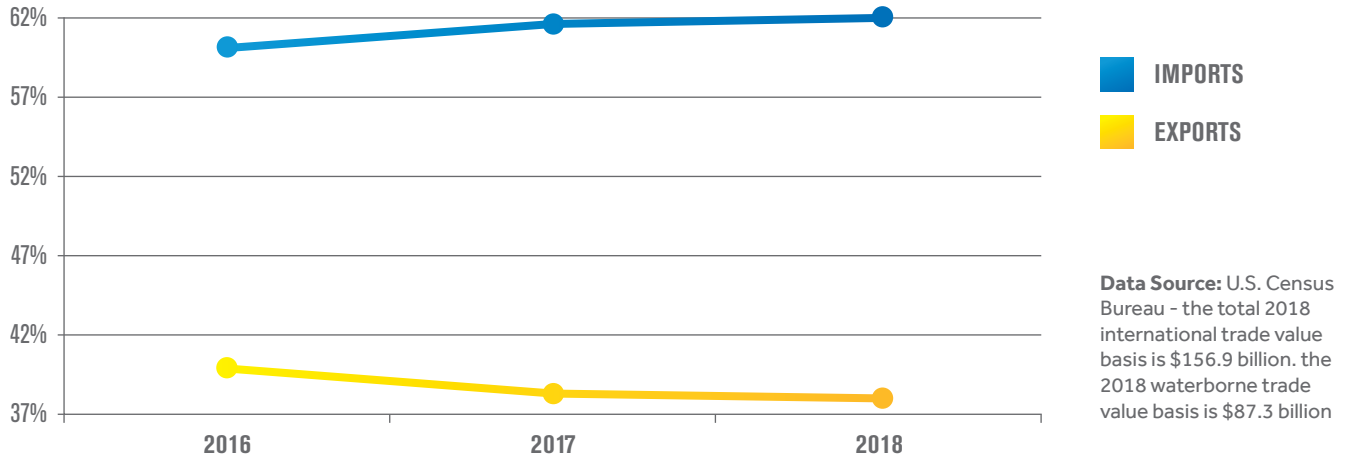
PORT	2017			2018		
	IMPORTS	EXPORTS	TOTAL	IMPORTS	EXPORTS	TOTAL
Canaveral	\$1,014,752,294	\$68,699,646	\$1,083,451,940	\$1,542,287,322	\$34,873,361	\$1,577,160,683
Everglades	\$11,080,530,426	\$12,079,908,666	\$23,160,439,092	\$11,769,212,802	\$12,634,518,216	\$24,403,731,018
Fernandina	\$10,340,317	\$138,772,360	\$149,112,677	\$4,356,749	\$154,216,389	\$158,573,138
Fort Pierce	\$4,717,366	\$4,097,552	\$8,814,918	\$625,360	\$4,158,851	\$4,784,211
Jacksonville	\$19,342,315,153	\$5,919,848,158	\$25,262,163,311	\$19,198,826,259	\$6,479,103,081	\$25,677,929,340
Manatee	\$749,538,074	\$87,947,957	\$837,486,031	\$870,458,850	\$102,737,637	\$973,196,487
Miami	\$14,454,613,396	\$9,432,739,329	\$23,887,352,725	\$15,852,168,363	\$9,812,488,908	\$25,664,657,271
Palm Beach	\$512,834,877	\$1,754,756,867	\$2,267,591,744	\$473,998,768	\$1,871,234,473	\$2,345,233,241
Panama City	\$2,315,627,064	\$649,004,733	\$2,964,631,797	\$2,367,942,756	\$471,988,592	\$2,839,931,348
Pensacola	\$1,949,292	\$12,419,334	\$14,368,626	\$7,751,498	\$29,824,375	\$37,575,873
Tampa	\$1,820,932,122	\$1,710,532,852	\$3,531,464,974	\$2,109,861,594	\$1,544,465,220	\$3,654,326,814
Miscellaneous*	\$793,241	\$10,550,244	\$11,343,485	\$561,555	\$8,516,304	\$9,077,859
TOTAL	\$51,308,943,622	\$31,869,277,698	\$83,178,221,320	\$54,198,051,876	\$33,148,125,407	\$87,346,177,283

Data Source: U.S. Census Bureau - the total 2018 international trade value basis is \$156.9 billion. This figure does not include Puerto Rican or other domestic cargo.

* No cargo handled at the following ports: Citrus, Key West, St. Joe or St. Petersburg; cargo values in the miscellaneous category reflect operations other than those at specific port docks, as calculated by the federal government

EXHIBIT #25

PERCENTAGE OF FLORIDA WATERBORNE IMPORT AND EXPORT CARGO (BY VALUE) 2016 TO 2018



THE COMPLEXITY OF CARGO

Ports are paid based on cargo's tonnage and the complexity of its handling requirements, not on cargo value. A change in the value of cargo does not have the same scale of impact on ports as a change in the tonnage. Large tonnage changes can lead to congestion or can empty out a port facility. Since not all ports and trades are well-balanced, ports and supply chain partners must often plan infrastructure, operations and services around the larger, inbound leg of the goods movements. A terminal that is overflowing on a Monday may appear empty on a Tuesday.

FLORIDA SEAPORT TONNAGE

Florida's waterborne trade in FY 2017/2018, including international and domestic cargo handled at both public and private terminals in port areas, remained stable at just over 110 million tons (it registered a nominal 0.5 percent decrease).

EXHIBIT #26

FLORIDA WATERBORNE TRADE BY SEAPORT (BY TONNAGE) AND FY 2022/2023 PROJECTIONS

PORT	FY 2015/2016*	FY 2016/2017*	FY 2017/2018*	FY 2022/2023*
Canaveral	5,524,478	5,990,735	6,417,125	7,522,694
Everglades	24,681,331	25,233,820	25,734,854	30,046,200
Fernandina	296,874	285,279	277,000	1,425,000
Fort Pierce	56,600	82,000	69,370	85,000
Jacksonville	19,017,794	19,743,799	20,739,400	26,603,064
Manatee	6,888,757	7,797,889	8,968,898	11,157,625
Miami	8,777,974	9,162,340	9,611,960	12,000,000
Palm Beach	2,519,255	2,449,039	2,567,393	2,935,626
Panama City	1,880,401	1,748,387	1,706,595	3,295,000
Pensacola	201,009	231,935	114,714	225,000
Tampa	37,525,453	38,101,623	34,060,821	47,100,000
TOTAL	107,369,926	110,826,846	110,268,130	142,395,209

Data Source: Individual seaports

* No cargo reported or projected for ports of Citrus, Key West, Port St. Joe or St. Petersburg at this time, and all figures subject to rounding error

EXHIBIT #27

CARGO TONNAGE AT FLORIDA SEAPORTS FY 2008/2009 TO FY 2017/2018 AND FY 2022/2023 PROJECTIONS

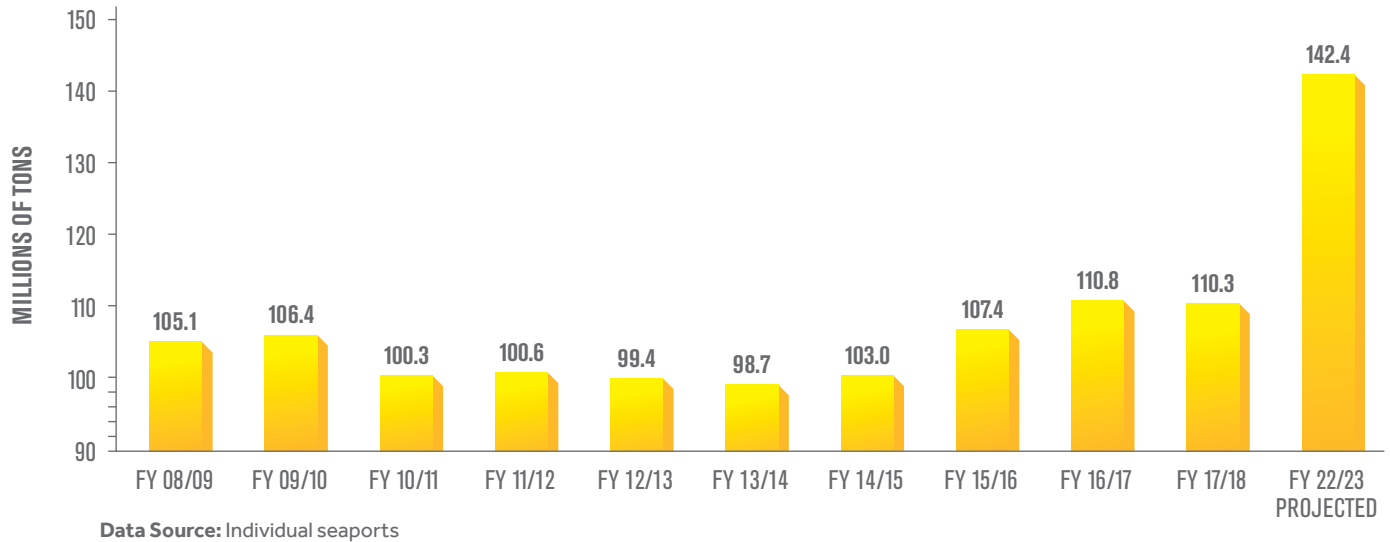


EXHIBIT #28

FLORIDA WATERBORNE IMPORT, EXPORT AND DOMESTIC BY SEAPORT (BY TONNAGE) FY 2017/2018 (WITH PRIOR YEAR COMPARISONS)

PORT*	IMPORTS	EXPORTS	DOMESTIC	TOTAL
Canaveral	4,361,135	131,817	1,924,173	6,417,125
Everglades	7,892,005	3,685,088	14,157,761	25,734,854
Fernandina	27,000	250,000	0	277,000
Fort Pierce	0	49,670	19,700	69,370
Jacksonville	9,876,636	2,326,281	8,536,483	20,739,400
Manatee	2,930,249	249,350	5,789,299	8,968,898
Miami	5,203,652	4,408,308	0	9,611,960
Palm Beach	594,571	1,459,078	513,744	2,567,393
Panama City	543,388	1,110,249	52,958	1,706,595
Pensacola	98,673	16,041	0	114,714
Tampa	7,202,327	4,205,777	22,652,717	34,060,821
TOTAL FY 2017/2018	38,729,636	17,891,659	53,646,835	110,268,130
TOTAL FY 2016/2017	35,407,319	17,637,575	57,781,952	110,826,846
TOTAL FY 2015/2016	35,807,685	16,287,415	55,274,826	107,369,926

Data Source: Individual seaports

* No cargo reported for ports of Citrus, Key West, Port St. Joe or St. Petersburg at this time, all figures subject to rounding error, and, each port's tonnage may be subject to reassignment between categories

TONNAGE TRENDS

All Florida seaports continue to forecast growth over the next five years.

Among triggers for growth in international trade is the expanded Panama Canal. Deep-draft ports on Florida's eastern seaboard are serving an increasing number of these new mega-ships, and ports throughout the state see opportunities to draw additional cargo volumes through related niche opportunities.

Larger vessels make fewer port calls but deliver higher volumes of international tonnage to the ports that they choose to call.

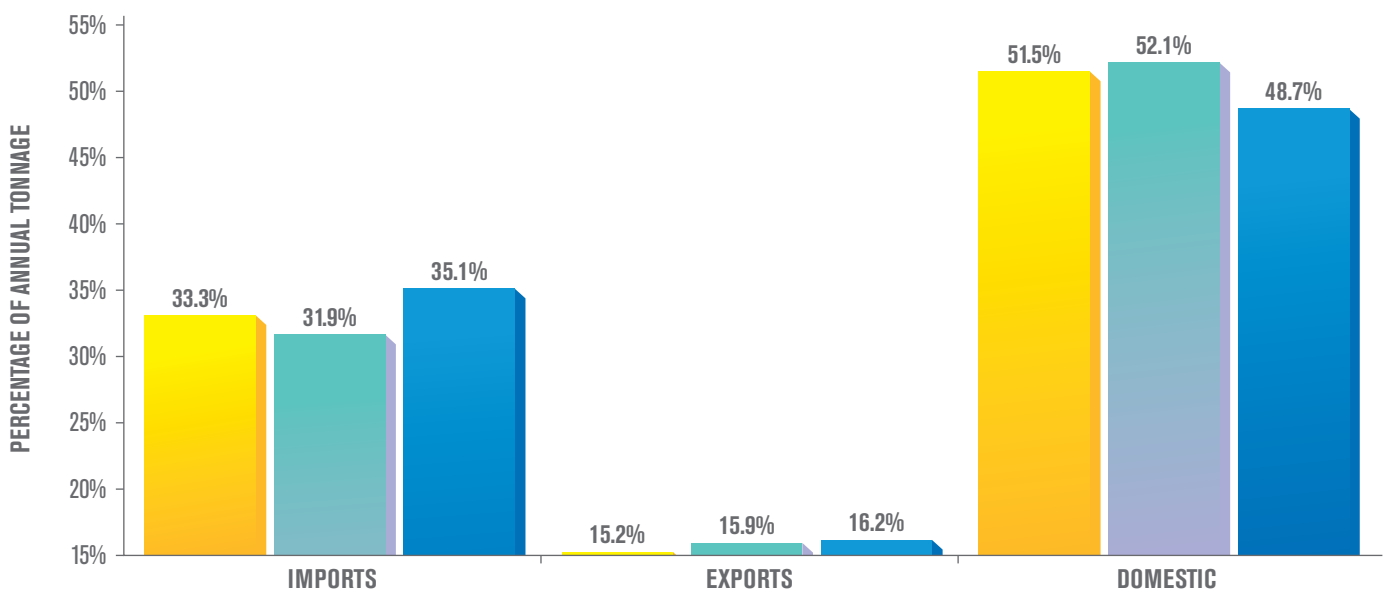
In FY 2017/18, the average import ton of cargo was valued at roughly \$1,400 and the average export ton through Florida ports was valued at about \$1,900 per ton. These figures are slightly skewed due to calendar year versus fiscal year differences, but the higher value of export commodities remains accurate.

Domestic cargo is the predominant tonnage moving across Florida's road and rail infrastructure to consumer markets throughout the state and includes Florida's traditional liquid and dry bulk commodities such as petroleum and phosphate products as well as sugar and aggregates. A large component of Florida seaport domestic tonnage comprises the petroleum products essential to meeting the state's fuel needs, as well as materials used in construction.

Imports (38.7 million tons) represented 35.1 of the total 110.3 million tons of cargo handled by all Florida seaports in FY 2017/2018. Exports (17.9 million tons) represented 16.2 percent of the seaport total tonnage, making up slightly more of the overall tonnage mix than in the prior year. Finally, domestic cargo (53.6 million tons) represented 48.7 percent of FY 2017/2018 tonnage.

EXHIBIT #29

FLORIDA WATERBORNE IMPORT, EXPORT AND DOMESTIC TONNAGE PERCENTAGES FY 2015/2016 TO FY 2017/2018



Data Source: U.S. Census Bureau - the total 2018 international trade value basis is \$156.9 billion

2015/2016 2016/2017 2017/2018

TONNAGE BY CARGO TYPE

Dry bulk (including fertilizers, cement and aggregates, among other commodities) represented 22 percent of total cargo in FY 2017/18, and fell 8.6 percent. Liquid bulk, representing 48.9 percent of cargo, and break-bulk cargo, representing only 6.4 percent of cargo, grew nominally. Container cargo, comprising 22.7 percent of waterborne cargo, showed strong growth at 4.3 percent. Movements in liquid bulk and containerized cargo also grew as a percentage of total port cargo tonnage. Together, container cargo and breakbulk, which includes vehicles and all non-containerized general cargo, make up 29.1 percent of all port waterborne tonnage, up slightly from 28 percent in the prior year.

EXHIBIT #30

WATERBORNE CARGO TYPES HANDLED BY FLORIDA SEAPORTS (BY TONNAGE) FY 2017/2018 (WITH PRIOR YEAR COMPARISONS)

PORT*	DRY BULK	LIQUID BULK	BREAK-BULK**	CONTAINER CARGO	TOTAL
Canaveral	1,964,301	3,982,524	403,398	66,902	6,417,125
Everglades	1,337,159	16,704,802	327,139	7,365,754	25,734,854
Fernandina	12,000	0	205,000	60,000	277,000
Fort Pierce	0	24,743	43,743	884	69,370
Jacksonville	5,940,105	5,685,869	3,830,138	5,283,288	20,739,400
Manatee	1,970,340	6,022,616	590,695	385,247	8,968,898
Miami	0	0	4,711	9,607,249	9,611,960
Palm Beach	513,744	491,178	139,670	1,422,801	2,567,393
Panama City	844,239	33,068	631,485	197,803	1,706,595
Pensacola	75,157	0	12,753	26804	114,714
Tampa	11,615,300	20,929,455	939,839	576,227	34,060,821
TOTAL FY 2017/2018	24,272,345	53,874,255	7,128,571	24,992,959	110,268,130
TOTAL FY 2016/2017	26,550,528	53,232,234	7,090,591	23,953,493	110,826,846
TOTAL FY 2015/2016	24,687,075	53,282,490	7,043,176	22,357,185	107,369,926
TONNAGE CHANGE 2017/2018 OVER 2016/2017	-2,278,183	642,021	37,980	1,039,466	-558,716
Percentage of Tonnage Change 2017/2018 over 2016/2017	-8.6%	1.2%	0.5%	4.3%	-0.5%

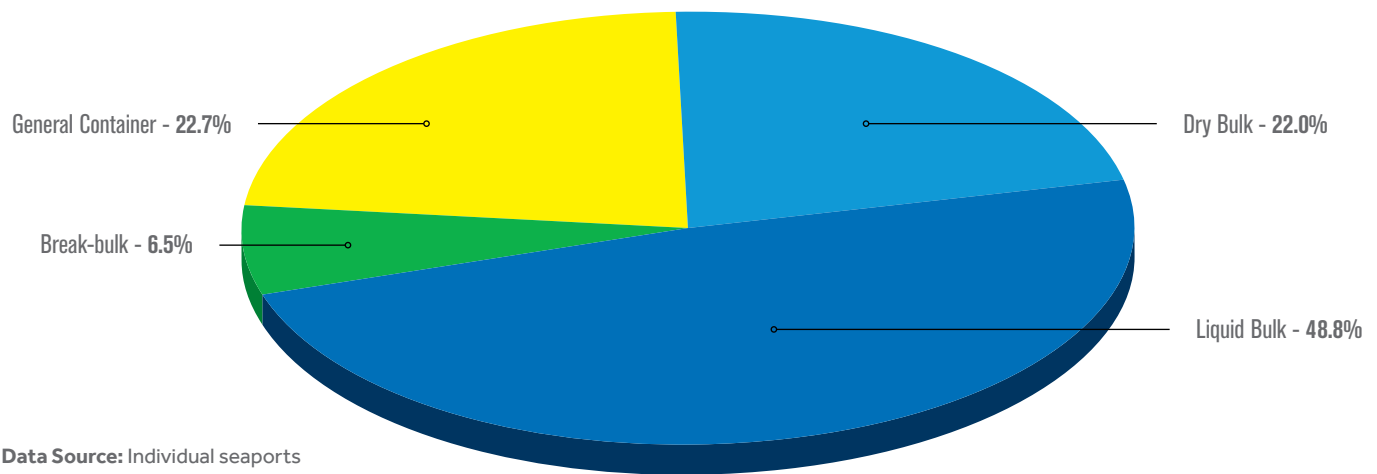
Data Source: Individual seaports

* No cargo reported for ports of Citrus, Key West, Port St. Joe or St. Petersburg at this time, all figures subject to rounding error, and, each port's tonnage may be subject to reassignment between categories

** Break-bulk is defined to include all non-containerized general cargo

EXHIBIT #31

PERCENTAGE OF WATERBORNE CARGO TYPES HANDLED BY FLORIDA SEAPORTS FY 2017/2018



Data Source: Individual seaports

Total FY 2017/2018 cargo volume is 110.3 million tons

Break-bulk is defined to include all non-containerized general cargo

Container movement is measured in three ways – value, tonnages and 20-foot container counts. In FY 2017/2018, container twenty-foot equivalent units (TEU) movements at Florida's seaports increased by 10.3 percent to 4.1 million. By comparison, container tonnage was up by 1 million tons, about 4.3 percent, and containerized cargo values were up slightly more.

These statistics all indicate growth and contribute to the conclusion that containers, on average, were slightly lighter in FY 2017/2018 at 6.1 tons per TEU versus 6.4 tons in the prior year. Their contents were, on average, less valuable too, at \$14,002 per box, versus the prior year, at \$14,629, than in the prior year (these numbers are broad estimates, skewed by a comparison of fiscal year tonnage to calendar year values).

When TEU counts are taken into consideration, and compared to tonnage figures, it becomes evident that average box weight varies by trade lane, number of empties repositioned, and therefore, by port. Seaports in South Florida and along Florida's Gulf Coast handled the heaviest boxes.

EXHIBIT #32

THREE-YEAR COMPARISON OF CONTAINER TEUs HANDLED BY FLORIDA SEAPORTS FY 2015/2016 TO FY 2017/2018

PORT	FY 2015/2016	FY 2016/2017	FY 2017/2018	FY 2017/2018 RANKING	PROJECTED FY 2022/2023
Canaveral	2,745	11,394	7,126	8	126,213
Everglades	1,037,226	1,076,893	1,108,466	2	1,595,145
Fernandina	0	0	88	11	0
Fort Pierce	8,133	10,006	8,000	9	100,000
Jacksonville	1,124,742	1,189,531	1,431,391	1	1,763,309
Manatee	26,210	39,726	38,199	6	61,520
Miami	1,028,156	1,024,335	1,083,586	3	1,370,000
Palm Beach	267,280	279,290	292,304	4	337,000
Panama City	29,954	29,456	38,092	7	80,000
Pensacola	17	0	3,448	10	4,000
Tampa	49,716	56,555	87,526	5	225,000
TOTAL	3,574,179	3,717,186	4,098,226		5,662,187

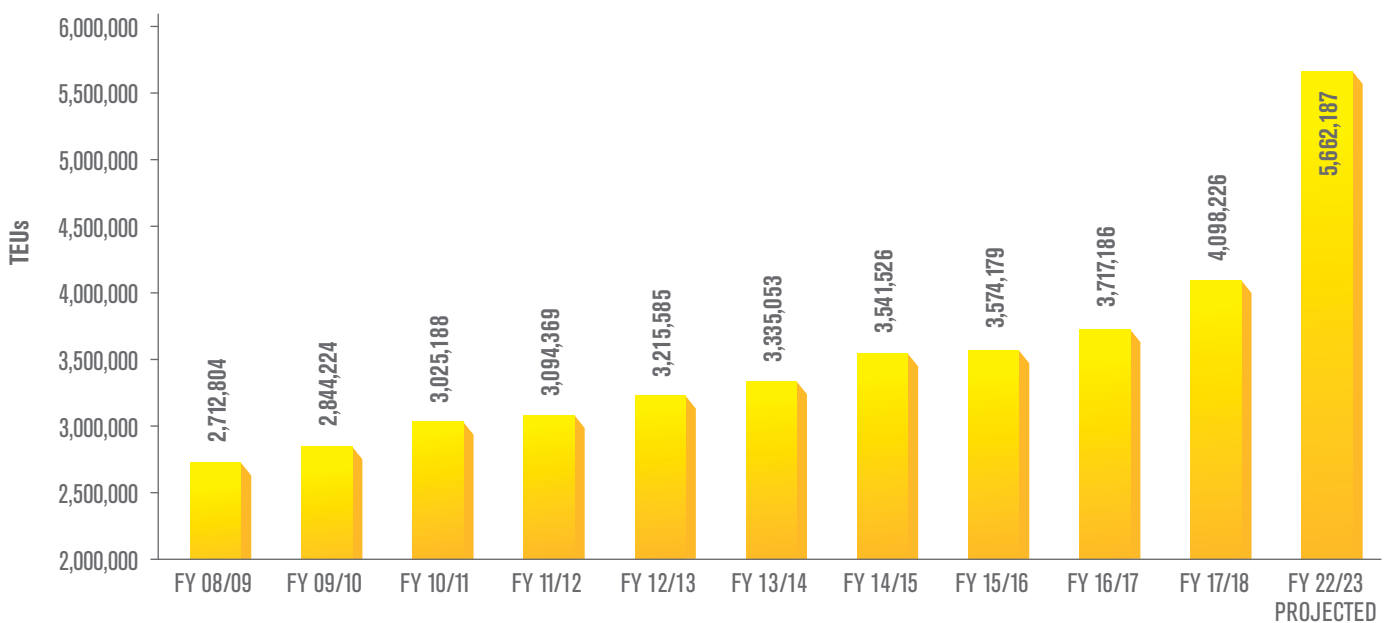
Data Source: Individual seaports; all figures subject to rounding



Exhibit 33 shows the history of container movements since FY 2008/2009. There has been 3.4 percent annualized growth in TEUs since the low in FY 2008/2009. Projections are for growth to continue.

EXHIBIT #33

CONTAINER TEUS HANDLED BY FLORIDA SEAPORTS FY 2008/2009 TO FY 2017/2018



CRUISE

KEY TAKEAWAYS

- **16.8 million cruise passengers (4.2% increase)**
- **Cruise industry supports 149,020 direct jobs in Florida**
- **Florida welcomed largest cruise ship in the world**
- **5 new ships in 2018**
- **Florida is home to the top 3 top cruise ports in the world**
- **Florida ports handle a third of the world's cruise passengers and nearly two-thirds of cruise passengers in the U.S.**

DESTINATION: ANYWHERE

Setting a new record, Florida seaports handled 16.8 million passengers in FY 2017/2018. 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 60 million revenue passengers.

The number of multi-day cruise passengers increased 8.6 percent to 16.4 million, exceeding all records. All multi-day cruise ports saw overall increases in passenger counts. The three most active – Miami, Canaveral and Everglades – saw single digit increases. Jacksonville enjoyed a double-digit increase. The one-day passenger count held its own after three years of decline, gaining 2.7 percent on small volumes. One-day cruises were offered in 2018 at Canaveral, Everglades, Miami and St. Pete.²

The cruise industry supports 149,020 direct jobs in Florida according the Cruise Lines International Association (CLIA), and contributes \$7.97 billion in direct spending by tourists visiting the state.

Keeping an eye on industry dynamics and gearing their cruise outreach and offerings to this fast-growing line of business, Florida ports continue to provide an incomparable cruise experience, for vessels, passengers, ground transportation companies, and suppliers. They maximize cruise-related jobs and other benefits for their communities. Last year 60 percent of all U.S. cruise passengers boarded from PortMiami, Port Everglades Port Canaveral, Port Tampa Bay, or JAXPORT.

² For cruise statistics, all Florida ports count passengers upon embarkation and disembarkation.

REVENUE CRUISE PASSENGERS AT FLORIDA SEAPORTS FY 2017/2018 (WITH PRIOR YEAR COMPARISON AND FY 2022/2023 PROJECTIONS)

	FY 2016/2017			FY 2017/2018			PROJECTED FY 2022/2023
PORT	ONE-DAY	MULTI-DAY	TOTAL	ONE-DAY	MULTI-DAY	TOTAL	TOTAL
Canaveral	285,684	4,240,942	4,526,626	272,572	4,568,431	4,841,003	5,773,351
Everglades	125,410	3,738,252	3,863,662	128,934	3,741,408	3,870,342	4,585,973
Jacksonville	0	177,417	177,417	0	199,899	199,899	199,899
Key West	0	818,866	818,866	0	865,909	865,909	887,800
Manatee	0	0	0	0	0	0	208,000
Miami	25,722	5,314,837	5,340,559	48,863	5,503,212	5,552,075	8,500,000
Palm Beach	0	432,585	432,585	0	462,674	462,674	490,000
St. Petersburg	2,500	0	2,500	755	0	755	5,000
Tampa	0	960,901	960,901	0	1,043,329	1,043,329	1,100,000
TOTAL	439,316	15,683,800	16,123,116	451,124	16,384,862	16,835,986	21,750,023

Data Source: U.S. Census Bureau - total 2018 international trade value basis is \$156.9 billion; total waterborne trade value is \$87.3 billion

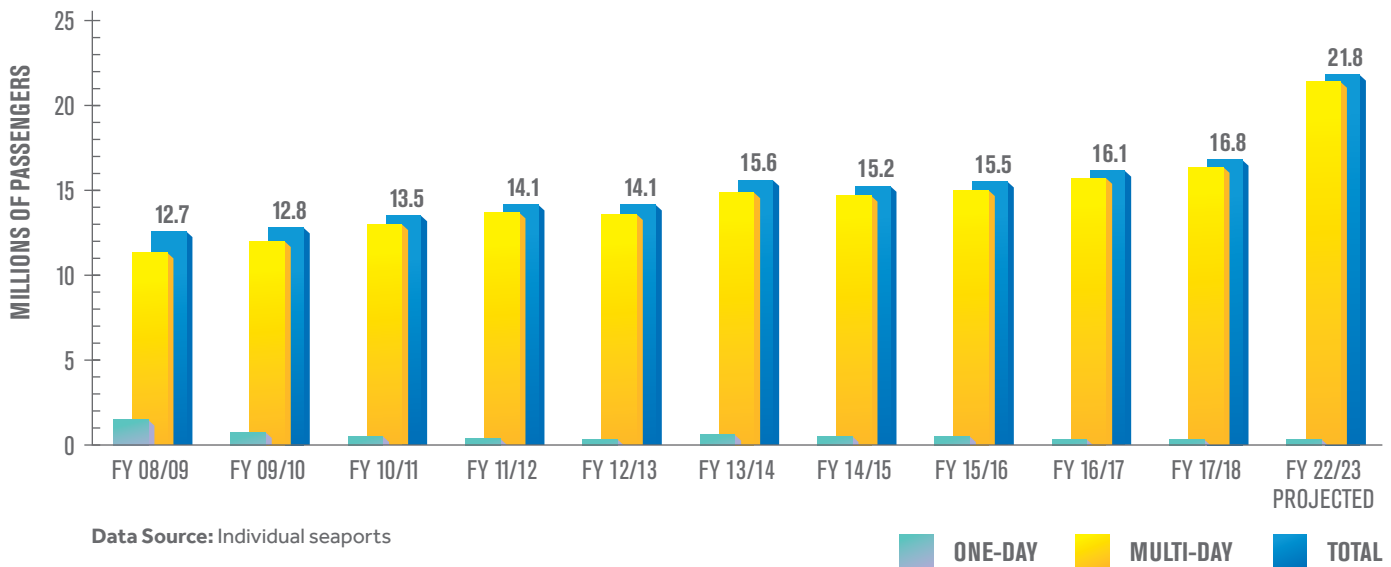
The One-Day columns includes passenger counts from casino cruises, day cruises, and passenger-only ferries, but excludes harbor tours and fishing excursions; the Multi-Day columns include passenger counts from home-ported vessels and port-of-call vessels



“Florida is home to some of the world’s busiest cruise ports making Florida’s seaports critical to tourism, which supports more than 1.4 million jobs. These ports help attract visitors and their families to Florida where they can enrich their vacation itinerary and explore our state’s diverse experiences. Florida’s seaports help strengthen our vital industry and contribute to VISIT FLORIDA’s vision of establishing the Sunshine State as the world’s number one travel destination.”

– DANA YOUNG, President & CEO,
VISIT FLORIDA

REVENUE CRUISE PASSENGERS AT FLORIDA SEAPORTS FY 2008/2009 TO FY 2017/2018



The hub of all aspects of the cruise industry, Carnival Corporations & plc., Royal Caribbean Cruises, Ltd., Norwegian Cruise Line Holdings, MSG Cruises (USA) Inc., and Disney Cruise Lines all have their headquarters in Florida. The state's location at the door to the Caribbean, as well as its sophisticated passenger facilities, air service and other amenities, continue to buoy the business.

CLIA CRUISE INDUSTRY OUTLOOK


The Cruise Line International Association's (CLIA) Cruise Industry Outlook 2019 anticipates cruise passengers worldwide to exceed 30 million passengers; counted for embarkations and disembarkations, this represents about 60 million revenue passengers.

Cruise travel continues to outpace general leisure travel growth in the U.S. Counting the number of global passengers, the cruise market has grown 32.4 percent over the past five years, up to approximately 28.2 million passengers in 2018. Consumer optimism in the U.S. spurs the industry, because about half of world cruise passenger are from the U.S.

It is a dynamic industry, made more complex by the continuing evolution of cruising and cruise vessels. At last count, there were 18 new cruise ships set to be deployed in 2019. Many passenger vessels on order are dual-fueled ships; ports are already preparing for this new vessel type which will demand new processes, infrastructure and even community outreach.

Market growth is expected to continue in 2019, but the cruise industry is evolving, which may dictate changes in port facilities and services. Today's cruise passengers are digitally savvy and demand smart tech while traveling and internet access. Ports can't ignore these demands. Today's travelers can impact a port or carrier's reputation with one click.

The passengers are interested in wellness, and a restorative vacation experience, but many will still work while on vacation. They like to 'achieve', more than 'experience', during their travels. The Generation Z tourists in particular also search out their favorite niche pastimes on cruises, such as music festivals at sea. Cruise passengers are conscious of the impact they make and want to ensure they do not tread on environmental or historic or cultural treasures.



PORT OF KEY WEST – Historic Preservation at its Best

The City of Key West Port and Marine Department not only oversees the city's cruise business but also owns and operates two marinas.

One of those marinas, the Key West Historic Seaport and Marina, which includes both upland properties and a 188-slip marina, has been carefully preserved and developed. Since the mid-1800s, the seaport has been the center of activity in Key West. Before it became a gathering place and marina, it was a commercial hub for inbound fish, sponge and shrimp. In 1992, the seaport was acquired by the city and developed into a popular destination with boat charters, art galleries, restaurants and other venues.

It is a heritage gem of tremendous architectural and historical significance. It was recently awarded a Florida Trust for Historic Preservation award, in the category of Historic Landscapes, for its meritorious performance in the field of organizational achievement.

The Port of Key West has been able to successfully and collaboratively improve the destination experience along the harbor walk, while advancing the city's historic preservation efforts, to the great benefit of the community.

MEGAYACHTS

Megayachts continue to get bigger. Like cruise ships, they may sport spas, pools or theaters, and they may carry helicopters, watercraft, and road vehicles. They often carry a staff of dozens. Where to dock these floating palaces is an ongoing problem.

The world's fleet of super or mega yachts – those 100 feet or so in length have the ability to travel the world, but many visit Florida for repairs or to port. Florida ports have offered anchoring privileges to large private vessels for years, but a dock is much more alluring, especially for passengers, crews, and provisioning, and can be a source of much greater economic benefit for a port and region.

Port St. Pete markets itself as the only superyacht marina on Florida's Gulf Coast. Its location in the heart of downtown St. Petersburg, near shops, golfing, restaurants, parks, beaches, the world-renowned Dali Museum, as well as scores of other galleries and museums, presents the ideal package to super yacht itinerary planners.

The Port of Fort Pierce has approved a deal with Derecktor Shipyards to establish and operate a Fort Pierce megayacht refit facility.

The Port of Palm Beach leases out Berth One International as a megayacht berth. It can berth up to two 180-foot yachts, or one as long as 400 feet.

BENEFITS & OPPORTUNITIES

KEY TAKEAWAYS

- **900,000 jobs and \$40 billion in income is associated with Florida's 15 deepwater seaports**
- **13.3% of state GDP is tied to their activities**
- **Port infrastructure, services, and initiatives align with opportunities to grow benefits**
- **Port investments serve the needs of the state's population and economic growth**
- **Ports use waterfront assets to enhance the mobility of freight and passengers, to move production to destinations efficiently, and to put the right products on store shelves at the right price**
- **Diligence for port and community safety and security is a highest priority**
- **Ports invest in broad community efforts that provide educational or recreational opportunities, protect species and ecosystems, support regional beautification, preserve history, deliver hurricane relief, or simply give back to those most in need**

THE POWER OF PORTS

The services and connectivity provided by Florida ports is important to the international competitiveness of Florida businesses, which import raw materials and component products and export finished goods through port facilities. Florida's 21st century seaports are so important to the state's economy that 13.3 percent of state Gross Domestic Product is tied to their activities.

The total economic value of activity at Florida seaports, which reflects marine cargo and vessel operations, is estimated at nearly \$117.6 billion. This reflects the revenue and value added at each stage of moving an export to port or an import inland from the marine terminals.

Of that figure, \$14.5 billion is the direct business revenue. That is the money received by firms that are directly dependent on seaports; they are the ones that provide maritime and/or inland transportation services to the cargo handled at the ports or to the vessels calling the ports. Another \$5.4 billion of local re-spending and consumption expenditures is also generated. The remainder, \$97.7 billion, represents the value of the output to the state of Florida that is created due to the cargo moving via each of the ports.³

In addition to ongoing economic impacts, every port construction project generates immediate jobs and spending.

³ Economic data is from the Statewide Economic Impact of Florida Seaports publication issued by the Florida Ports Council and Florida Seaport Transportation and Economic Development Council in December 2016

MASSIVE ECONOMIC BENEFITS

Cruise Jobs:

762,000

Cargo Jobs:

138,000

Average salary for
port-related jobs:

\$62,800

Personal Income:

\$40 Billion

Total Economic Output:

\$118 Billion

Port-sector Local
Purchases:

\$3 Billion

Taxes Paid:

\$4 Billion

The port development projects of today are predicated on responsible and responsive two-way communication with seaport communities. Seaports are tasked with striking a conscientious balance between industry, public safety, security, and the environment. Sustainable and engaged port operations benefit the state now and lay the groundwork for enduring benefits for future generations.

CAREERS

Learning about a typical day in the life of a maritime worker builds interest and maintains a pipeline of future employees for Florida's seaports, logistics, and multimodal industries. The maritime and transportation industry offers a broad range of high-paying jobs for skilled laborers. Individuals that fill these positions are on a port's front-line; they can make or break the success of a port, and its impact on regional prosperity.

Ports support direct and indirect jobs to over 900,000 individuals. Direct jobs created by maritime activity at the Port's terminals are those jobs with firms directly providing cargo handling, cruise vessel provisioning and other vessel services, including trucking companies, terminal operators, members of the International Longshoremen's Association (ILA), stevedores, customhouse brokers, vessel agents, pilots and tug assist companies. Indirect jobs are created throughout the state as the result of purchases for goods and services by the firms directly impacted by the port activity, including the tenants, terminal operators and the firms providing services to cargo and cruise.

"Approximately 350,000 tons of freight are transported by trucks every day in Florida. The Florida ports are integral to our industry's continued economic growth by providing cargo that keeps our drivers on the road."

**—KEN ARMSTRONG,
President, Florida Trucking Association**





PORT OF FERNANDINA -

Cultivating the Workforce of Tomorrow

By cultivating career interest today, the Port of Fernandina is encouraging future candidates to acquire the skills for a job for tomorrow. The port's community career initiative partnered with students from four county high schools. Port executives shared a picture of the world of international seaports, trade, transportation, port operations, local history, and world geography. Offering a glimpse into the daily operation of a port, students were able to explore different career paths within the industry in their region. The timing of their visit aligned with a milestone for the port, as they received delivery of new cranes.

DISTRIBUTION CENTERS

The warehousing and distribution sector has grown significantly in Florida over the past 20 years from close to 5,000 employees in 1995 to more than 32,000 in 2015. This represents a more than six-fold increase in employment in the sector (slightly under the national average), while the population in Florida increased by 40 percent over the same period and tourism by 162 percent. As a peninsula Florida can leverage their ports to promote near port distribution centers, intermodal logistics center, and e-commerce fulfillment centers within a 1 to 2 day drive time of 21 million residents and annual tourist base of 126 million people.

Given the large population, tourism base, and related market access Florida is a prime venue for near-sourcing, the practice of producing products near where they will be sold. The favorable personal and corporate income tax make the state a prime location for a company to locate multiple DC's here for a fraction of the price of competitors states for trucking, land prices, energy costs, and taxes.

SUPPLY CHAIN TRANSFORMATIVE TECHNOLOGIES

Ports have a responsibility to be efficient, and they can increase their efficiency by adopting connected, smart advancements on the waterfront and across industries. Technology helps modern supply chains enhance efficiency, reliability, safety, and security.

Buyers want lean global supply chains. Scale economies have helped, but now ports and their logistics partners are turning to technology to cut out just a little bit more fat.

There are technologies to predict pricing and to book cargo, reset inventories and reroute trucks, and just about anything else that has historically been done manually in transportation and logistics.

Drones are in use to help survey sites; technology that enhances visibility leads to efficiency. Integrated software platforms for intelligent roadways can increase road capacity without construction and reduce accidents – for ports with thousands of trucks per day, expedited road traffic is a clear advantage.

Seaports are continuing to embrace and introduce automation, artificial intelligence, autonomous vehicles and more.

Intelligent transportation systems (ITS) integrate advanced, wireless communications technologies into transportation infrastructure and vehicles to help process and share information that can prevent vehicle collisions, reduce congestion, facilitate traffic flows and reduce environmental impacts. For example, road technology in parts of Florida already includes dynamic messaging signs for port truck traffic and adaptive traffic signal controls.

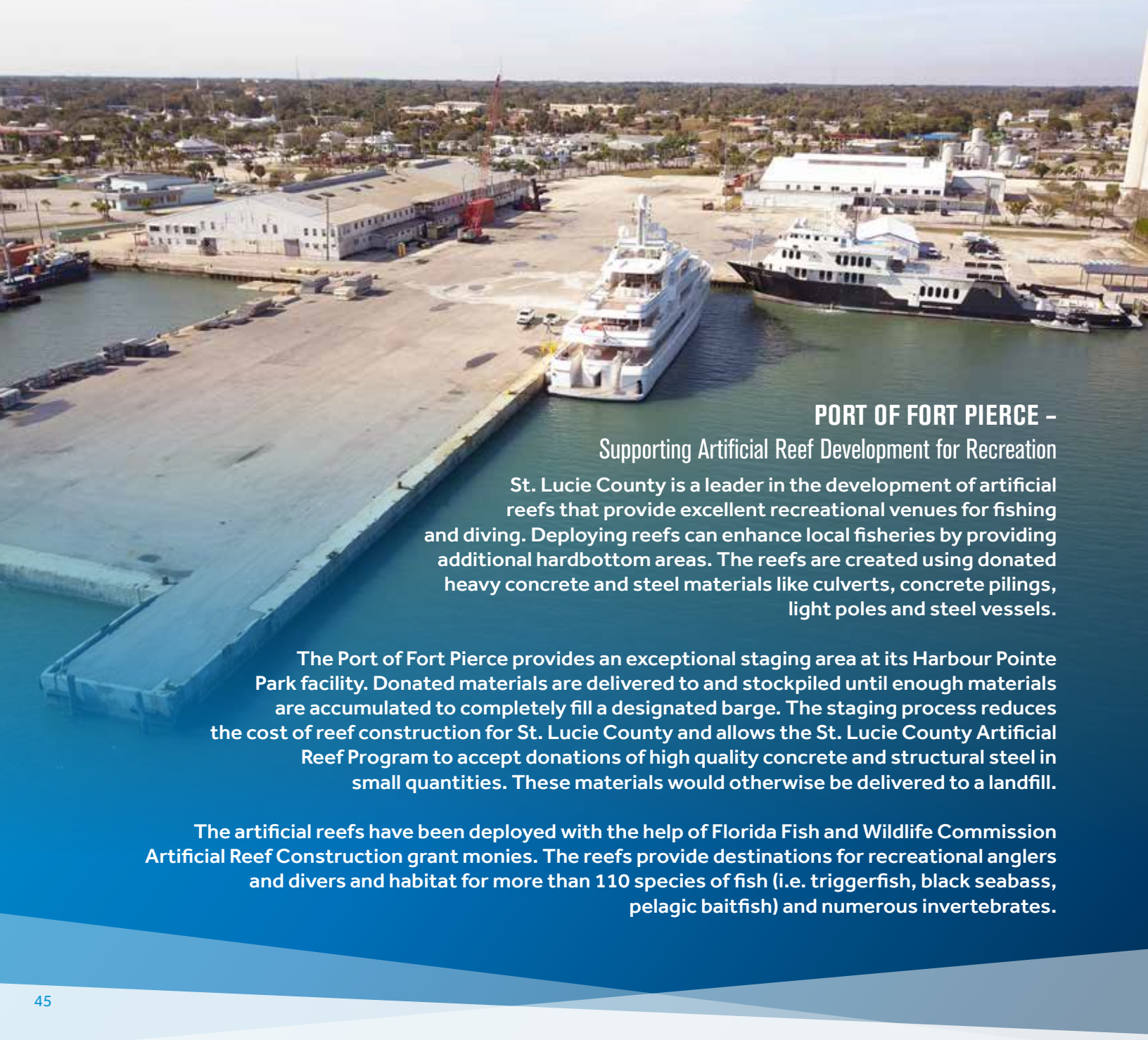


ENVIRONMENT

Florida seaports are dedicated to environmental stewardship to protect the state's natural resources through initiatives for clean air and water, fish and wildlife habitat, recycling, energy and fuel efficiency, and emergency preparedness.

Our shared commitment to sustainable port operations benefits our state and Florida's future generations. Florida ports have developed award-winning ecological best practices involving air, wetland enhancement and restoration, air emission studies, wildlife sanctuaries, and preservation projects that are being mirrored nationwide.

The Florida Ports Council is a member of Green Marine, a rigorous, transparent and inclusive initiative that addresses key environmental issues through 12 performance indicators. Several Florida seaports are certified by Green Marine's environmental certification program for the North American marine industry.



PORT OF FORT PIERCE –

Supporting Artificial Reef Development for Recreation

St. Lucie County is a leader in the development of artificial reefs that provide excellent recreational venues for fishing and diving. Deploying reefs can enhance local fisheries by providing additional hardbottom areas. The reefs are created using donated heavy concrete and steel materials like culverts, concrete pilings, light poles and steel vessels.

The Port of Fort Pierce provides an exceptional staging area at its Harbour Pointe Park facility. Donated materials are delivered to and stockpiled until enough materials are accumulated to completely fill a designated barge. The staging process reduces the cost of reef construction for St. Lucie County and allows the St. Lucie County Artificial Reef Program to accept donations of high quality concrete and structural steel in small quantities. These materials would otherwise be delivered to a landfill.

The artificial reefs have been deployed with the help of Florida Fish and Wildlife Commission Artificial Reef Construction grant monies. The reefs provide destinations for recreational anglers and divers and habitat for more than 110 species of fish (i.e. triggerfish, black seabass, pelagic baitfish) and numerous invertebrates.

PORT CANAVERAL – Protecting Dolphins

In 2018, a new visitor education program was initiated at Port Canaveral to help protect dolphins in nearby waters. In partnership with the U.S. National Oceanic and Atmospheric Administration-Fisheries, and Hubbs-SeaWorld Research Institute's Marine Mammal Stranding Program, new signage reminds the public of detrimental effects related to feeding marine life or discarding fishing gear.

Port staff and summer interns worked together to place placards at key locations around the port cautioning visitors not to feed, tease or harass wild dolphins. Such activities are illegal under the federal Marine Mammal Protection act of 1972. Sharing this information with visitors is important – uninformed transgressors could face a fine up to a \$100,000. The port wanted to do their best to familiarize visitors with both the law and the importance of protecting these awe-inspiring mammals.

As a proud Green Marine-certified port, this education initiative illustrates Canaveral's commitment to strong environmental stewardship.



STORMWATER RUNOFF

Florida ports manage stormwater runoff from their facility operations and projects, whether generated on land or in water. They are subject to federal, state and local stormwater requirements.

Recognizing that a great deal of the damage to water quality comes from regional development and population increases, several Florida ports have launched or joined larger regional initiatives to prevent nitrogen overloading of their coastal waters, to enhance educational "Drains to Bay" outreach, and/or provide similar programs.



PORT OF PENSACOLA –

Cleaning Bay Waters via Oyster Project

The Port of Pensacola is making great strides cleaning bay and estuary water by utilizing oysters and local students to filter up to 55 gallons of water per day. Pensacola children help raise oysters with bags tied to the end of residential docks through a project organized by port tenant and water quality advocates Pensacola Bay Oyster Co. (PBO) and the non-profit Bream Fishermen Association. Once the students' oysters are fully grown, the Bream Fishermen Association places them in area reefs so they can continue to filter water and serve as a habitat for other marine species.

PBO set up shop at the port last year to cultivate the oyster “spat” not only for their own use in growing oysters for sale but to also sell to other aquaculture operations across the Gulf Coast. The company pumps Pensacola Bay water right off the port’s berths. The water then goes back into the bay cleaner than when it came out.

RESILIENCY

Natural and man-made disasters threaten seaports and their neighboring communities. Ports and supply chains are indispensable to the recovery effort and getting them back on line is always a priority.

Florida ports have pioneered port resiliency efforts. They recognize the value of lost economic activity, and immediate repercussions like temporarily closed workplaces, non-functional manifolds that can't pump gasoline into tanker trucks to keep gas stations open, and inaccessible cold storage facilities with rotting perishables.





PORT PANAMA CITY - Hurricane Support

Port Panama City suffered \$15 million in damages during Hurricane Michael in 2018, but recovered quickly despite facility damage they began receiving ships and cargo within seven days.

In the aftermath of Hurricane Michael, Port Panama City donated the use of seven acres of space at a bulk transfer facility, and ten acres at a certified industrial site, as a staging ground for hurricane relief. Several agencies arrived in short order, bringing necessities to the region including food, water and portolets. The port provided a complimentary staging area for cell phone companies to hasten restoration of cellular service, for Gulf Power to help store and distribute replacement power poles, and to Wells Fargo's mobile banking system.

Ports often loan facilities in the event of emergencies. While most of Port Panama City's relief stations workers were gone within three months, the degree of damage to area homes, businesses and assets was so great that some of the staging areas were still in use five months after the event.

FUEL AND ENERGY

Domestic, not International: Florida's inbound fuel is largely sourced domestically. While U.S. domestic fuel reserves are now more accessible than ever, the nation does continue to import large fuel volumes (including crude, processed petroleum oil and petroleum gases). Florida's lack of refineries means that almost all of its inbound fuel is already processed.

Blanketing the State: Port Tampa Bay and Port Everglades are established hubs for receiving and distributing petroleum products including gasoline, jet fuel and alternative fuels. Port Canaveral and Port Manatee are also emerging entry points. Florida's seaports combined efforts to meet roughly half of the state's energy needs.

Massive Volumes: Tens of millions of gallons of petroleum products are delivered each day via tank ship and barge to Florida ports, where it is stored or shipped via pipeline, train or truck. Every time a driver visits a gas station in the state and fuels a vehicle, it is because these port gateways are doing their job.

Future in LNG: LNG-fueled vessels are already served at Florida ports. JAXPORT has been at the forefront of LNG development with liquefaction or regasification plants, marine terminals, bulk and ISO-container cargo, bunkering operations and LNG fueling stations. Port Canaveral will be welcoming the first LNG cruise ship in the U.S. in 2020 the Carnival *Mardi Gras*.

MARITIME SECURITY

Seaports work in cooperation with federal agencies like the Department of Homeland Security, U.S. Coast Guard, the Department of Agriculture, and U.S. Customs and Border Patrol (CBP). Their efforts are crucial to protecting Florida and the rest of the nation from threats against terrorism, community safety, consumer and industrial goods safety, and environmental integrity.

To enhance the efficiency of the supply chain and ensure freight and passenger mobility, Florida ports have become important advocates for adequate resources for CBP; who check manifests, screen cargo, inspect cargo, passengers, and crew.

PORT MANATEE – Retaining Fishing Ground Access in Era of Hardened Security

Port Manatee has created an extensive set of security programs over the past decade that has certified over 1,000 security officers and is certified by MARAD. One of the ports most successful security initiatives involves a partnership with the community. Under a program called *Zone Watch*, delivered in affiliation with the U.S. Coast Guard, boaters join a community-based policing effort that assists in the enforcement of a security zone in waters near Port Manatee. Under federal regulations, boating enthusiasts require Coast Guard permission to enter the zone. *Zone Watch* provides a mechanism to grant this access while maintaining area security.

In an era when recreational access to traditional fishing grounds may be jeopardized by new security initiatives, Port Manatee has found a way to enhance security while still giving recreational boaters an opportunity to visit their favorite waters.



U.S. CUSTOMS AND BORDER PROTECTION

Ports and the cruise industry continue to struggle with federal U.S. Customs and Border Protection staffing to ensure efficient embarkation and debarkation of cruise passengers. Ports and the cruise industry continue to advocate for more federal funding for increased staffing, as well as funding for screening technology like facial recognition systems to process passengers.

BLOCKCHAIN

A blockchain is a database for storing transactions that is shared among all vested parties within a network. It serves as an encrypted ledger for information. The platforms would track arrival times of vessels and containers, to produce documents such as customs releases, commercial invoices, and bills of lading in real time within a protected encrypted environment.

While all supply chain industries might eventually migrate to a single, trusted, standardized network, in the meantime, some ports have joined existing blockchains. The platforms are designed to allow parties to interact efficiently through real-time access to shipping data and shipping documents, including internet of things, and sensor data. Due to the history being locked past transactions can't be changed or altered, ensuring that fraud levels are reduced. This provides a clearer understanding for where inefficiencies are occurring within a supply chain for logistics companies and ports.

COLDCHAIN

The supply chain loves temperature-controlled products, whose special care commands a premium for carriage and storage. A port with plenty of cold cargo storage facilities is attractive to carriers, and more carrier competition, routes and destinations can help Florida build international markets and suppliers. Florida refrigerated warehouse operations and other coldchain participants to develop business volumes.

All of the state's container ports, and a number of bulk ports are in the temperature-controlled business. Even some liquid bulk commodities are moved cold. Port Manatee has developed a cold warehouse facility that brings in 48 million pineapples a year, and 1 billion bananas.

PortMiami has launched a new Latin American perishable business. In the last two months, (which included Valentine's Day) PortMiami welcomed more than 10 million stems from four countries; they arrived on Seaboard Marine's new rapid routings for Caribbean Basin and Latin American cargo.

PELLETIZED DRY BULK

Dense, uniform products make storage, handling and shipping easier translating to lower costs to market. Supply chains are evolving, and Florida ports are developing strategies to develop hub facilities and services to help pellet shippers reach their Florida and global markets efficiently.

The extreme density and low moisture content of pellets is one of their main advantages, making them an efficient fuel that can be burned with high combustion efficiency. Wood pellet fuels are heating fuels made from compressed biomass – typically from compacted sawdust or other wastes from wood product manufacturing. They can be conveniently transferred from a tanker to a storage hold or silo. The Port of Panama City has leveraged location to mills in the U.S. Southeast to have an advantage in attracting the exporting of this cargo.

A side product of petrochemical plants, plastic pellets are made in vast quantities along the nation's Gulf Coast. First, high-temperature furnaces crack ethane and propane into ethylene and propylene. Usually a dedicated pipeline ships these products to a plastic converter, where a catalyst is added, and through a process called polymerization, small plastic pellets are made. The low cost of natural gas means these pellets can be made in enormous batches, making the manufacture very cost effective. Typically the pellets are bagged and containerized, often shipped out of Texas ports, or railed to the west coast.

FLORIDA PORT PROFILES

PORT CANAVERAL

PORT EVERGLADES

PORT OF FERNANDINA

PORT OF FORT PIERCE

JAXPORT

PORT OF KEY WEST

PORT MANATEE

PORT MIAMI

PORT OF PALM BEACH

PORT PANAMA CITY

PORT OF PENSACOLA

PORT OF PORT ST. JOE

PORT ST. PETE

PORT TAMPA BAY

PORT CANAVERAL

Canaveral Port Authority (Canaveral Port District)

FOREIGN TRADE ZONE #136

Port Canaveral is a world-class strategic gateway for Central Florida, now the 10th largest consumer market in the United States with economic growth well above the national average. The port and its FTZ #136 serve as a unique quadramodal transportation hub, linking sea, land, air and space. Port Canaveral offers cruise lines, cargo carriers and shippers, businesses and visitors a first-class deep-water port with the benefits of easy access and an uncongested setting.

With 75-percent of the Port's total revenue derived from cruise business, and its growing cargo portfolio diversity, the Port must invest in infrastructure to continue to promote solid growth and economic prosperity for the region. State-of-the-art facilities and deep-water berths are critical to ensure the Port can meet the needs of today's largest and most sophisticated vessels while being well positioned for the demands of the future.

In conjunction with harbor improvements that include the recently completed deepening of the West Turning Basin to -43' to accommodate larger vessels, Port Canaveral's investments in cruise terminals and berthing infrastructure add value to the Port's capabilities by providing multi-purpose/multimodal capacity to enhance business activity at this local, regional, and national strategic asset.

GOALS & OBJECTIVES

- Accommodate the highest demand for bulkhead in Port's history
- Meet the handling needs of diverse cargo
- Provide accommodation for larger cruise ships
- Increase berthing capacity for growing number of cruise ship calls
- Accommodate the growing seaport requirements for commercial space operations
- Ensure safe handling and fueling operations for LNG powered vessels and prepare to welcome the first LNG powered cruise ship in North America, scheduled to homeport in Port Canaveral beginning October 2020

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Construction of new Cruise Terminal 3 complex and roadway expansion

- Construction of multipurpose North Cargo Berth 8, uplands improvement and pier extension
- Renovations to Cruise Terminals 8 and 10 and northside roadway network expansion
- Upgrade Port-wide wayfinding and signage






ACCOMPLISHMENTS

- \$103.8 million total revenue achieved in FY 2018 – highest in Port's history
- Historic long-term 25-year agreement signed with Carnival Cruise Line; includes homeporting Carnival's largest and newest class of ship – also the first LNG powered cruise ship in North America – and building \$163 million 188,000 sq. ft. cruise terminal and adjacent 1,800 vehicle parking garage – the largest single construction project in Port history






- More than 6 million tons of cargo, over \$10 million in revenue earned in FY 18, the highest in Port history thanks to growing diversity of cargo, including new auto imports arriving on Post-Panamax RO/RO vessels; transportation fuels; lumber and aggregate imports to support the high growth greater Orlando/Central Florida market – now the 10th largest in the U.S.

TOP TRADE PARTNERS (by value)

IMPORTS

-  Canada
-  Bahamas
-  Japan
-  Venezuela
-  Netherlands

EXPORTS






-  Bahamas
-  Puerto Rico
-  Netherlands
-  United Kingdom
-  Costa Rica

TOP COMMODITY TRADED (by value)

IMPORTS

-  Petro
-  Granite
-  Limestone
-  Slag
-  Salt

EXPORTS

-  Slag
-  Salt
-  Petro
-  Project/Machinery
-  Containers



2018 CRUISE ACHIEVEMENTS

4.6 MILLION CRUISE PASSENGERS | a 7.7% increase



1,402 SHIP CALLS

12 HOMEPORT CALLS

First LNG powered cruise ship in North America will arrive and homeport in Port Canaveral beginning in October 2020



portcanaveral.com

PORT EVERGLADES

Broward County Board of County Commissioners

FOREIGN TRADE ZONE #25

Port Everglades is an economic powerhouse for the South Florida region and is consistently ranked one of the top 3 busiest cruise ports in the world. The Port's diversified cargo mix includes container, refrigerated cargo (5th in the U.S.), dry bulk, breakbulk, project, RO/RO and liquid bulk market sectors and is served by the Florida East Coast Railway's international and domestic intermodal container transfer facility (ICTF). Petroleum companies located at the port provide fuel to 12 Florida counties and jet fuel to 4 international airports.

The total value of economic activity at Port Everglades is more than \$30 billion, and 230,747 Florida jobs are directly impacted by the Port. Port Everglades is the first seaport in the U.S. to launch and pilot high-profile Customs programs including Global Entry and Mobile Passport Control. Offering the Global Entry program in all terminals provides guests expedited processing in conjunction with U.S. Customs and Border Patrol (CBP). Port Everglades is in the heart of one of the world's largest consumer regions with a constant flow of seasonal visitors, and up to a combined 110 million residents and seasonal visitors within a 500-mile radius. The Florida East Coast Railway's 43-acre ICTF makes it possible for cargo shipped to Port Everglades to reach Atlanta and Charlotte within two days and 70% of the U.S. population in four days.

GOALS & OBJECTIVES

- Complete upcoming infrastructure projects
- Expand the cruise market

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Southport Turning Notch Extension and Crane Rail Infrastructure project, which will lengthen the existing deep-water turn-around area for cargo ships from approximately 900 feet to 2,400 feet and allow for up to five new cargo berths and new Super Post-Panamax gantry cranes
- Harbor Improvement Project, to include deepening of the Port's navigational channels from 42 to 48 feet and widening narrow sections of the Intracoastal Waterway

ACCOMPLISHMENTS

- Opening of Cruise Terminal 25 as the winter home for Celebrity Cruises and its revolutionary new ship, Celebrity Edge
- Exceeding 1 million TEUs for five consecutive years
- Obtaining a signed Chief's Report and Congressional authorization for the U.S. Army Corps of Engineers Port Everglades Harbor Improvement Project
- Securing more than \$2.25 million in U.S. port security grants to advance firefighting capabilities and enhance the seaport's security infrastructure



TOP TRADE PARTNERS (by value)

IMPORTS

- Dominican Republic
- Honduras
- Italy
- Guatemala
- Chile

EXPORTS

- Dominican Republic
- Brazil
- Chile
- Honduras
- Peru

2018 CRUISE ACHIEVEMENTS

3,870,342 CRUISE PASSENGERS

858 SHIP CALLS

34 HOMEPORT CALLS

TOP COMMODITY TRADED (by value)

IMPORTS

- T-Shirts
- Gasoline and Other Fuels
- Sweaters
- Medical Instruments
- Motor Boats and Yachts

EXPORTS

- Computers
- Printers
- Motor Vehicles
- Cotton Yarn
- Motor Vehicle Parts



porteverglades.net

PORT OF FERNANDINA

Ocean Highway and Port Authority, Nassau County

The Port of Fernandina is located on Florida's Atlantic coast and provides terminal service to more than 14 pulp and paper producers located throughout Florida and the Southeastern United States, as well as steel export services to several steel companies with mills in the Southeast.

To better accommodate customers, capital investments of \$15 million are planned for the coming years to modernize the Port's on-dock paper warehouse, add cranes and cargo handling equipment, and complete a berth extension. The Port currently has 250,000 square-feet of on-port warehouse facilities, over 100,000 square-feet of off-port warehouse facilities, and daily on-dock rail service. It also has a fully-certified Container Freight Station, and will soon be adding Foreign Trade Zone designation.

GOALS & OBJECTIVES

- Formulating long term master plan/capital improvement plan with emphasis on impacts to environment
- Increase containerized cargo
- Diversify breakbulk commodities
- Explore additional revenue streams to Port Authority

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Berth deepening
- 1000' Pier extension
- 500,000 square foot on-dock warehouse

ACCOMPLISHMENTS

- Successful transition of port operations from Kinder Morgan to Worldwide Terminals Fernandina
- Matched 2017 cargo volume within the first six months of 2018 and is projected to increase year end by 35%
- Addition of new mobile harbor crane and lighting upgrades to the facility



TOP TRADE PARTNERS (by value)

IMPORTS

- Europe
- Asia
- South America
- Dominican Republic
- Bermuda

EXPORTS

- South America
- Dominican Republic
- Bermuda
- Africa
- Asia

TOP COMMODITY TRADED (by value)

IMPORTS

- Lumber
- Wood Pulp
- Oats

EXPORTS

- KLB
- Lumber
- Steel
- Beneficial Lignin Products
- Machinery



PORT OF FORT PIERCE

St. Lucie County

FOREIGN TRADE ZONE **#218**

St. Lucie County owns the working waterfront of the Port of Fort Pierce, having acquired the former Indian River Terminal in 2018. The County is committed to repurposing the terminal from cargo operations to the Maintenance, Refit and Overhaul (MRO) of large yachts, a growing market segment that can be well-served by the terminal's deep water, extensive berths and quick, obstruction-free ocean access.

The acquisition is being followed by the selection of a private "partner" to develop and operate the Terminal, which will include the acquisition of equipment necessary to serve vessels that are truly world-class in this segment, over 400-ft in length. This role makes the Port of Fort Pierce unique among Florida's ports.

GOALS & OBJECTIVES

- Transformation from a dormant cargo port into the megayacht MRO sector
- Growing diversity with mixed uses that can include commercial fishing and artificial reef development
- Development of Fisherman's Wharf as recreational/entertainment or commercial waterfront

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Major market-driven improvements such as a large mobile hoist and drydock
- Packing House demolition/Dock apron rehabilitation
- Fisherman's Wharf bulkhead / boat ramp/ road improvements

ACCOMPLISHMENTS

- Acquisition of the former Indian River Terminal
- Completion of the North 2nd Street Roadway Improvement
- Completion of the new North Entrance (2nd Street)



Port of Fort Pierce



stlucieco.gov

JAXPORT

Jacksonville Port Authority

FOREIGN TRADE ZONE #64

The Jacksonville Port Authority (JAXPORT) is an independent agency responsible for the development of public seaport facilities in Jacksonville. JAXPORT owns, maintains and markets three cargo terminals, an intermodal container transfer terminal, and a passenger cruise terminal along the St. Johns River.

According to the most recent economic impact study, JAXPORT generates 132,000 jobs and more than \$27 billion in annual economic impacts for Northeast Florida.

A diversified, international trade seaport, JAXPORT offers service from more than 40 ocean carriers to key markets worldwide and is a growing player in the Asia trade lane from the world's leading ocean carrier alliances through both the Panama and Suez canals. The Port's exceptional intermodal options include on-dock rail and 40 daily train departures from three railroads, while more than 70 million consumers live within a day's truck drive. FTZ #64 covers an eight-county area in Northeast Florida, saving shippers time and money. The deepening of Jacksonville's shipping channel to 47 feet is ahead of schedule and expected to be complete in 2023 based on continued funding from all partners, and will allow the largest container ships serving the U.S. East Coast to call on JAXPORT more fully loaded.

GOALS & OBJECTIVES

- Complete the deepening of the harbor to 47 feet, part of a 13-mile authorized project with funding provided by JAXPORT, and federal, state and local governments
- Attract additional distribution centers, warehouses, and manufacturing to Northeast Florida
- Add new trade lane services, supporting the strategy of revenue diversification

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Harbor Deepening
- Berth 33/34 Rehabilitation
- Paving for Tenant Expansion at Blount Island






ACCOMPLISHMENTS

- Reached a long-term agreement with experienced terminal operator SSA Atlantic for the development and operation of a state-of-the-art, \$238.7 million international container terminal at Blount Island
- Modernized major Port facilities, including the development of the Intermodal Container Transfer Facility, to prepare for arrival of post Panamax vessels
- Produced five years of double-digit growth in Asian trade lane business, supporting the strategy of revenue diversification
- Reached a long-term agreement with Carnival Cruise Line to extend Carnival cruise service from Jacksonville through at least May 2021 and potentially through 2027
- JAXPORT is the only U.S. East Coast port with on-dock LNG fueling capabilities, and four LNG-powered vessels are homeported at JAXPORT








TOP TRADE PARTNERS (by value)

IMPORTS





-  China
-  Japan
-  Brazil
-  Mexico
-  Republic of Korea

EXPORTS





-  Brazil
-  China
-  Turkey
-  United Arab Emirates
-  Argentina

TOP COMMODITY TRADED (by value)

IMPORTS

-  Motor Vehicles
-  Machinery
-  Medical
-  Electronics/ Instruments

EXPORTS

-  Motor Vehicles
-  Machinery
-  Beauty Care
-  Medical

2018 CRUISE ACHIEVEMENTS

199,899 CRUISE PASSENGERS



77 SHIP CALLS

1 HOMEPORT CALLS



jaxport.com

PORT OF KEY WEST

City of Key West



The Port of Key West consists of three docking facilities: Mallory Square, the Navy's Outer Mole Pier, and the privately-owned Pier B at the Margaritaville Key West Resort. These facilities constitute one of the busiest cruise 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, resulting in an economic impact annually of \$85 million. The port provides 1,250 direct and indirect jobs to the 25,000 citizens of Key West, while contributing 15 percent of the city's total tax revenue.

Key West is one of the most popular ports in the Caribbean, and is typically included in 7- and 10-day Western Caribbean or Bahamas itineraries. As a general rule, cruise ship passengers can expect to spend between 6 and 10 hours ashore in Key West; the average port calls to the city in 2018 lasted 7¾ hours, while in 2019 the average port calls to the city lasted 8¼ hours. Additionally, the Port of Key West 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. These passengers are introduced to the unique charm of Key West without contributing vehicular traffic to the overburdened US-1 corridor.

GOALS & OBJECTIVES

- Mallory T-Pier Extension and Plaza improvements
- Improvements in passenger port of call experiences
- Improvements in passenger movement and disbursement

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Mallory T-Pier Berthing Improvement
- Security Check Point Enhancements
- Emergency repairs to breasting dolphin damaged by cruise ship

ACCOMPLISHMENTS

- Truman Waterfront Park Development Outer Mole Pier: the 33-acre former site of the Key West Naval base was redeveloped into an exceptional urban park to offer residents and visitors an opportunity to experience the historical origin of Key West
- Truman Waterfront Security Access Entry Points Outer Mole Pier
- Mallory T-Pier & Bollards refurbishing & repairs



2018 CRUISE ACHIEVEMENTS

865,909 CRUISE PASSENGERS



383 SHIP CALLS



PORTMIAMI

Board of County Commissioners, Miami-Dade County

FOREIGN TRADE ZONE #281

PortMiami is Miami-Dade County's second most important economic engine contributing \$43 billion annually to the local economy and supporting more than 334,500 jobs in South Florida. It is recognized as the cruise capital of the world and a cargo gateway of the Americas.

PortMiami is a landlord port that maintains lease agreements with cargo terminals operators. The Port remains the world's leading cruise port and it continues to advance its No. 1 homeport status with more ships and additional leading-edge passenger terminal facilities.

Millions of passengers travel through PortMiami every year and with 22 cruise lines berthing 55 ships, including six of the world's megaships, PortMiami continues to be the departure destination of choice for cruises to the Bahamas, the Caribbean, Mexico, and other exciting destinations.

GOALS & OBJECTIVES

- Maintain, improve, and enhance cruise facilities necessary to accommodate the projected number of cruise passengers and ships to grow business
- Maintain, improve, and enhance cargo facilities necessary to accommodate the projected cargo volume demands to grow our business
- Continue operating with top security measures, and ensure compatibility of facilities and operations with surrounding communities and the natural environment

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- New Cruise Terminals B (for Norwegian, opening in 2020 with a capacity of 5,500 passengers), H, AA/AAA (MSC line plans to increase its annual passenger throughput and to design, build, and operate two new cruise facilities at PortMiami to be completed by 2020), F expansion (Signature Cruise Terminal F has been renovated and expanded to accommodate the cruise industry's new generation of cruise vessels including MSC cruises' mega ships)

- New and rehabilitated bulkheads/berths
- Cargo container yard improvements


ACCOMPLISHMENTS

- Major infrastructure improvements, including the Rail Intermodal Yard and the Port Tunnel
- Channel Improvements, including deepening the channels to a controlling draft of -50'
- New operating agreements with guaranteed cruise passenger increases and/or cargo TEU increases
- An increase of 5.8% in containerized cargo movements for the 2018 fiscal Year with a total of 1,084,000 TEUs and an increase of 4.7% in cruise visitors with a total of 5,552,075 passengers
- Welcomed more than 250 Post-Panamax vessels



TOP TRADE PARTNERS (by value)

IMPORTS






-  China
-  Honduras
-  Dominican Republic
-  Nicaragua
-  Guatemala

EXPORTS






-  Honduras
-  Dominican Republic
-  El Salvador
-  Indonesia
-  Jamaica

TOP COMMODITY TRADED (by value)

IMPORTS

-  Apparel
-  Machinery
-  Aluminum
-  Electronics
-  Manufactured Plastic Products

EXPORTS

-  Machinery
-  Waste Products
-  Textiles
-  Motor Vehicles
-  Other Food Products

2018 CRUISE ACHIEVEMENTS

5,592,000 CRUISE PASSENGERS



2,205 SHIP CALLS

37 HOMEPORT CALLS

PORTMIAMI

miamidade.gov/portmiami

PORT MANATEE

Manatee County Port Authority

FOREIGN TRADE ZONE #169

Located at the entrance to Tampa Bay, Port Manatee is the closest U.S. deep-water seaport to the expanded Panama Canal. The Port handles a variety of bulk, break-bulk, containerized, and heavy-lift project cargoes, and offers nearly 70 acres of lay-down area, one million square feet of warehouse space, and 207,000 square feet of refrigerated space. With room to grow, the Port is surrounded by 5,000 acres of green space ripe for development and intermodal connectivity. Port Manatee generates more than \$2.3 billion in annual economic impact for the local community, while supporting more than 24,000 jobs.

Port Manatee's on-port International Trade Hub serves as a vital link between markets in Florida and throughout the world. The hub provides expert advice and support tools to local and global firms, assisting them with production, distribution and related activities, including development of innovative supply chain solutions. Recently, the hub has hosted trade officials from many countries, including Canada, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Germany, Guatemala, Honduras, Japan, Mexico, Peru, Poland and Spain. Hub events are often coordinated with the Manatee Chamber and/or the Economic Development Council. Port outreach has been extended to encompass counties nearby Manatee County to ensure that the port and the International Trade Hub can be utilized to further regional community initiatives in international trade.

GOALS & OBJECTIVES

- Cruise Terminal Ferry
- New perishable cargo business
- Continued container expansion which is expected to see double-digit growth over the next five years

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Intermodal Container Yard Phase II
- Port-wide roadway improvements
- Continued berth rehabilitation






ACCOMPLISHMENTS

- Significant increases in revenue and tonnage
- Diversification of cargo; no single user represents more than 10% of revenue
- Only seaport in the country certified by the US Maritime Administration to teach Facility Security Officer (FSO) training
- On-port International Trade Hub








TOP TRADE PARTNERS (by value)

IMPORTS

-  Brazil
-  Argentina
-  Costa Rica
-  Russia
-  Mexico

EXPORTS





-  Colombia
-  Australia
-  Mexico
-  Guatemala
-  Costa Rica

TOP COMMODITY TRADED (by value)

IMPORTS

-  Wood Products
-  Brazilian NFC Orange Juice
-  Aluminum Bars
-  Sulfur
-  Phosphate Rock

EXPORTS

-  General Merchandise
-  Monoammonium Phosphate
-  Diammonium Phosphate
-  Paper Craft



portmanatee.com

PORT OF PALM BEACH

Board of Port Commissioners (Port of Palm Beach District)

FOREIGN TRADE ZONE #135

Located in Riviera Beach, 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 Florida. The Port and its tenants combine to provide approximately 2,400 direct and indirect jobs, which contribute \$260 million in business revenue and \$12 million in state and federal taxes/revenues.

The Port of Palm Beach offers cruise and cargo services to more than 30 onsite tenants and users. At 162 acres, the Port's efficiency is unparalleled, processing more than \$7 billion in commodities and 2.5 million tons of cargo. Operations include containerized, dry bulk, liquid bulk, breakbulk, heavy-lift and RO/RO cargos. Offering on-dock rail, Florida East Coast Railway provides twice daily service to the port's rail interchange, while the Port owns and operates a locomotive and 6.5 miles of track. The rail operations can accommodate 20-axle rail cars with 450-tin capacity.

GOALS & OBJECTIVES

- To increase commodity diversity
- To maximize revenue per acre
- To explore possible land acquisitions and related opportunities

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Maritime Office Building (MOB) Teardown / Refrigerated Container Yard Construction
- Berth 1 Bulkhead Replacement
- On port rail replacement and expansion

ACCOMPLISHMENTS

- Recent signing of a long-term operating agreement of 30 years, including all options, with Tropical Shipping, the Port's largest tenant
- Completion of \$45 million in capital projects without incurring any debt
- The Port's bond rating has been increased from Ba1-Negative Outlook in 2010 to Baa3-Positive Outlook in 2017 per Moody's Investors Service



TOP TRADE PARTNERS (by value)

IMPORTS

- Canada
- Virgin Islands
- Bahamas
- Leeward & Windward
- Dominican Republic

EXPORTS

- Bahamas
- Virgin Islands
- Leeward & Windward
- Turks & Caicos
- Netherlands

2018 CRUISE ACHIEVEMENTS

462,674 CRUISE PASSENGERS



224 SHIP CALLS

2 HOMEPORT CALLS

TOP COMMODITY TRADED (by value)

IMPORTS

- General cargo
- Vegetables
- Spirits
- Electronic Products
- Shellfish

EXPORTS

- General Cargo
- Grocery Products
- Miscellaneous Equipment
- Boats and Parts
- Sugar



portofpalmbeach.com

PORT PANAMA CITY

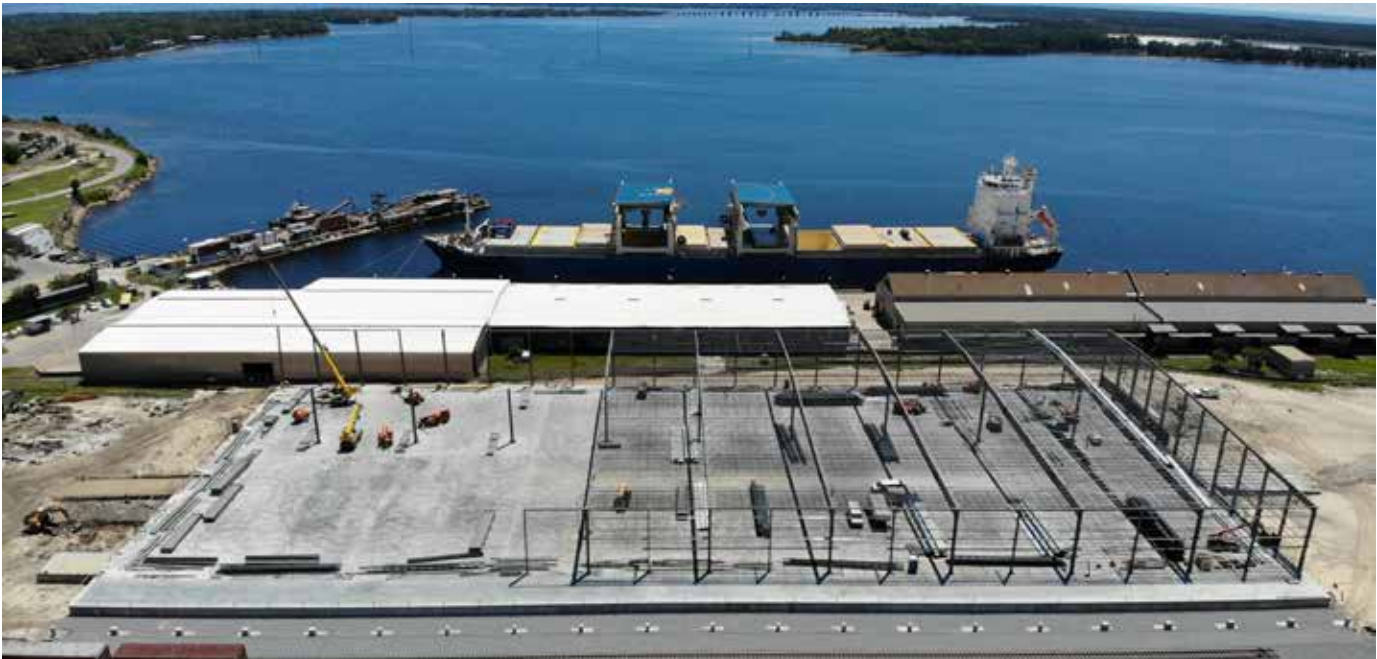
Panama City Port Authority

FOREIGN TRADE ZONE #65

Port Panama City is an operating port, administered by the Panama City Port Authority. The Port is situated on the Gulf Intracoastal Waterway, providing easy access to the Gulf of Mexico. In recent years the Port has invested over \$75 million in new facilities and equipment, including the development of a new forest products terminal.

The Port’s land includes two deep water cargo terminals and a 250-acre Intermodal Distribution Center. As a dynamic and growing port, Port Panama City handles a wide range of cargo including copper, linerboard, wood pulp, steel plate, steel pipe, steel coils and containerized cargo. The Port also handles bulk cargo including aggregate, wood pellets, and molasses.

Northwest Florida is focused on supporting and attracting manufacturing and Port Panama City plays a central role in these economic development efforts. It prioritizes port services in support of the needs of regional industries and is actively developing industrial sites for them. With another \$55 million in improvements planned over the next five years, the Port expects to increase its cargo tonnage to an annual level of approximately 3 million tons by 2023.



GOALS & OBJECTIVES

- Complete phase II of the East Terminal development
- Attract new forest product imports and exports to the East Terminal
- Expand the Port’s container trade to Mexico and Central America

ACCOMPLISHMENTS




- First phase development of new East Terminal
- Construction of distribution warehouse at IDC
- Construction of bulk transfer facility

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS




- Phase II development of East Terminal
- Deepening East Channel to 38 feet
- Expansion of containerized cargo facility
- Adding additional storage capacity for wood pellets

TOP TRADE PARTNERS (by value)

IMPORTS





-  Chile
-  Mexico
-  Germany

EXPORTS





-  United Kingdom
-  Mexico
-  Costa Rica

TOP COMMODITY TRADED (by value)

IMPORTS

-  Copper
-  Apparel
-  Fruits/Vegetables
-  Lumber

EXPORTS

-  Wood Pellets
-  Container Board
-  Textiles
-  Machinery/ Equipment



PORT OF PENSACOLA

City of Pensacola

FOREIGN TRADE ZONE #249

The Port of Pensacola, only 11 miles from the first sea buoy with no overhead obstructions, is one of the quickest transits in the Gulf of Mexico. Offering stevedoring and marine terminal services for bulk, break-bulk, unitized freight, and special project cargo, the Port serves as a trade and logistics gateway and a tactical solution for national, international, and multi-national shippers who demand unmatched flexibility, capability, and customer service.

The Port offers eight berths ranging in depth from 16 to 33 feet, seven warehouses with 265,000 square feet of available indoor storage area, covered railcar loading and unloading, and four acres of open, outside lay-down storage with 8-10 additional acres available for future development. Multimodal connections to a Class I rail line, I-10, and the Pensacola International Airport are directly accessible from the port.

EMPHASIS ON COMMUNITY

The Port is home to an oyster farming facility that increases water quality by circulating Bay water in the growing process. The facility provides "spat," or baby oysters, to be used for oyster farming or aqua-culture. Tours of the oyster operation are offered to various civic groups and organizations.

Other community involvement efforts include the recently contracted Ferry Landing facility, which will allow the public to enjoy views of working areas of the Port and waterfront, especially as it relates to vessel traffic, mooring, and cargo operations.

GOALS & OBJECTIVES

- Expand Maritime Maintenance, Modification, Repair and Overhaul M/MMRO operations and facilities on Port
- Diversify Port tenant base to include marine research and subsurface technology activities
- Merge Port tenants and operations seamlessly into the adjacent areas while maintaining core maritime Port activities including cargo operations and vessel maintenance repair and overhaul

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Berth 6 rehabilitation
- Dredging
- On-Port Rail rehabilitation and modernization

ACCOMPLISHMENTS

- Berth 6 rehabilitation construction project
- Warehouse 1 building modification and crane installation
- New Ferry Service Terminal



TOP TRADE PARTNERS (by value)

IMPORTS

- US - Alabama/ Domestic
- Bahamas
- Mexico

EXPORTS

- Mexico
- Israel
- Brazil

TOP COMMODITY TRADED (by value)

IMPORTS

- Aggregate
- Monoammonium Phosphate
- Scrap Metal

EXPORTS

- Wind Energy Components
- Woodpulp
- Linerboard
- Cement



PORT OF PORT ST. JOE

Port St. Joe Authority

Located in Gulf County, the Port of Port St. Joe offers a deepwater seaport with nearly 1,900 linear feet of frontage. The Port of Port St. Joe 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. With much of the basic infrastructure in place, the Port Authority and private partner, The St. Joe Company, have marketing efforts underway to ensure additional investment projects align with defined demand and support identified markets.

GOALS & OBJECTIVES

- Dredging of the shipping channel
- Port expansion and modernization to keep up with increasing domestic and international trade activity in the Panhandle
- Ensuring recovery from the Deep Water Horizon Oil Spill and Hurricane Michael as it is essential to maintain the economic dynamism of the Region and State while increasing employment opportunities and generating critical public revenues

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Dredging of the channel to a depth of 35 feet plus 2 feet
- Modernize Port operations, rail expansion and the development of bio mass, forestry, LNG and other industry production facilities

ACCOMPLISHMENTS

- Utilization of port facilities and machinery by Neal Land & Timber Co. in post-Hurricane Michael recovery efforts
- The county along with the St. Joe Company has built a gravel road from Highway 98 to the shipping bulkhead for the loading of timber products onto barges



portofportstjoe.com

PORT ST. PETE

City of St. Petersburg

FOREIGN TRADE ZONE **#193**

Port St. Pete, located on Tampa Bay, is a multi-use facility that capitalizes on its unique assets within the city of St. Petersburg. The Port is located in the heart of downtown St. Petersburg, just a short walk from local shops, restaurants and bars, pristine parkland, and scores of galleries and museums, including the world-renowned Dali Museum.

Port St. Pete is the only superyacht marina on Florida's Gulf Coast. Superyacht owners, captains, and crew know the unique needs of their vessels, and the team at Port St. Pete provides the experience and facilities to meet those needs. The Port features a four-acre facility with outdoor storage areas and easy access to interstates, major highways and two international airports.

GOALS & OBJECTIVES

- Secure interest and funding for a new passenger processing facility and small cruise operation out of St. Pete
- Construct new docking area for large yachts and other large vessels

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Build 45,000 sq.ft. NOAA Research Facility
- Wharf renovations to accommodate a wider variety of vessels
- Build new passenger processing facility on Port

ACCOMPLISHMENTS

- Port wharf renovation and installation of six power pedestals for large yachts to reduce their generator usage while docked
- Leased port building to Marine Exploration Center (MEC) to open a new interactive marine educational facility

2018 CRUISE ACHIEVEMENTS



stpete.org/port

PORT TAMPA BAY

Tampa Port Authority

FOREIGN TRADE ZONE **#79**

Port Tampa Bay is the largest of the Florida ports by acreage and is a critical economic engine for all of Central Florida. From a wide-ranging cargo mix to its cruise passenger popularity to its ample capacity for shipbuilding and repair, the Port is among the nation's most diverse seaports.

Port Tampa Bay is located in one of the fastest growing regions of the state, and contributes \$17.2 billion annually to the local economy while supporting more than 85,000 direct and indirect jobs. To service this and future growth – including the announcement of 2 new direct Asia container shipping services within a recent 3 month period, Port Tampa Bay and terminal operator partner, Ports America, have installed two new post-Panamax cranes to complement the existing three gantry cranes and heavy-lift mobile harbor crane already in place. In the near future, more post Panamax cranes will likely be requisitioned punctuating the Port's rate of growth. Together, Port Tampa Bay and Ports America have a multi-phased build-out plan to quadruple the size of the Port's Container Terminal from its current 40 acres with 2,800 linear feet of berth, to more than 160 acres and berth length of 4,000 feet.

GOALS & OBJECTIVES

- Expand and diversify the Port's business base through executing a supply chain sales strategy that meets surging demand in Central Florida
- Fulfill Central Florida's long-term energy requirements
- Leverage public and private partnerships to maximize the future growth and development of the Tampa Bay Region

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Hooker's Point Intermodal cargo yard expansion
- East Port Development Phase 2

ACCOMPLISHMENTS

- Complete the deepening and widening of the Big Bend Channel
- Unprecedented opening of west coast of Florida to the Asia trade lanes as a direct result of purchasing and operationalizing two new 65-ton gantry cranes to handle 9,000+ TEU to continue growing the Port's container business
- Completed a public private partnership to construct a 130,000 square foot refrigerated warehouse on Hooker's Point
- Facilitated the signing of "a 5P" partnership agreement with U.S. Army Corps of Engineers, FDOT, Tampa Electric Co. and Mosaic Co. to deepen and widen the Big Bend Channel – dredge
- Invested \$30 million into growing the Port Redwing maritime complex that the Big Bend Channel serves
- Surpassed 1 million cruise passengers for the first time in 2018 and will achieve this again in 2019



TOP TRADE PARTNERS (by value)

IMPORTS

- Mexico
- Trinidad/Tobago
- Canada
- Honduras
- Bahamas

EXPORTS

- Brazil
- India
- Mexico
- Columbia
- Turkey

TOP COMMODITY TRADED (by value)

IMPORTS

- Aggregates
- Fertilizers
- Petroleum Products
- Industrial Chemicals
- Cement/Gypsum/Limestone

EXPORTS

- Fertilizers
- Industrial Chemicals
- Household Goods/Misc.
- Steel Products
- Paper

2018 CRUISE ACHIEVEMENTS

1,043,329 CRUISE PASSENGERS

223 SHIP CALLS

1 HOMEPORT CALLS



porttb.com

FLORIDA SEAPORTS RESOURCE LIST

FLORIDA PORTS COUNCIL STAFF

DOUG WHEELER

President and CEO

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*

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Florida Seaport Transportation and Economic Development Council

flaports.org  

Port Canaveral | 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 of Pensacola | Port of Port St. Joe | Port St. Pete | Port Tampa Bay