

PORT PROFILES

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,

Kevin J. Thibault, P.E.
Secretary

www.fdot.gov

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

2018 TOP STATISTICS

\$57.4 Billion
Container cargo
values (5% increase)

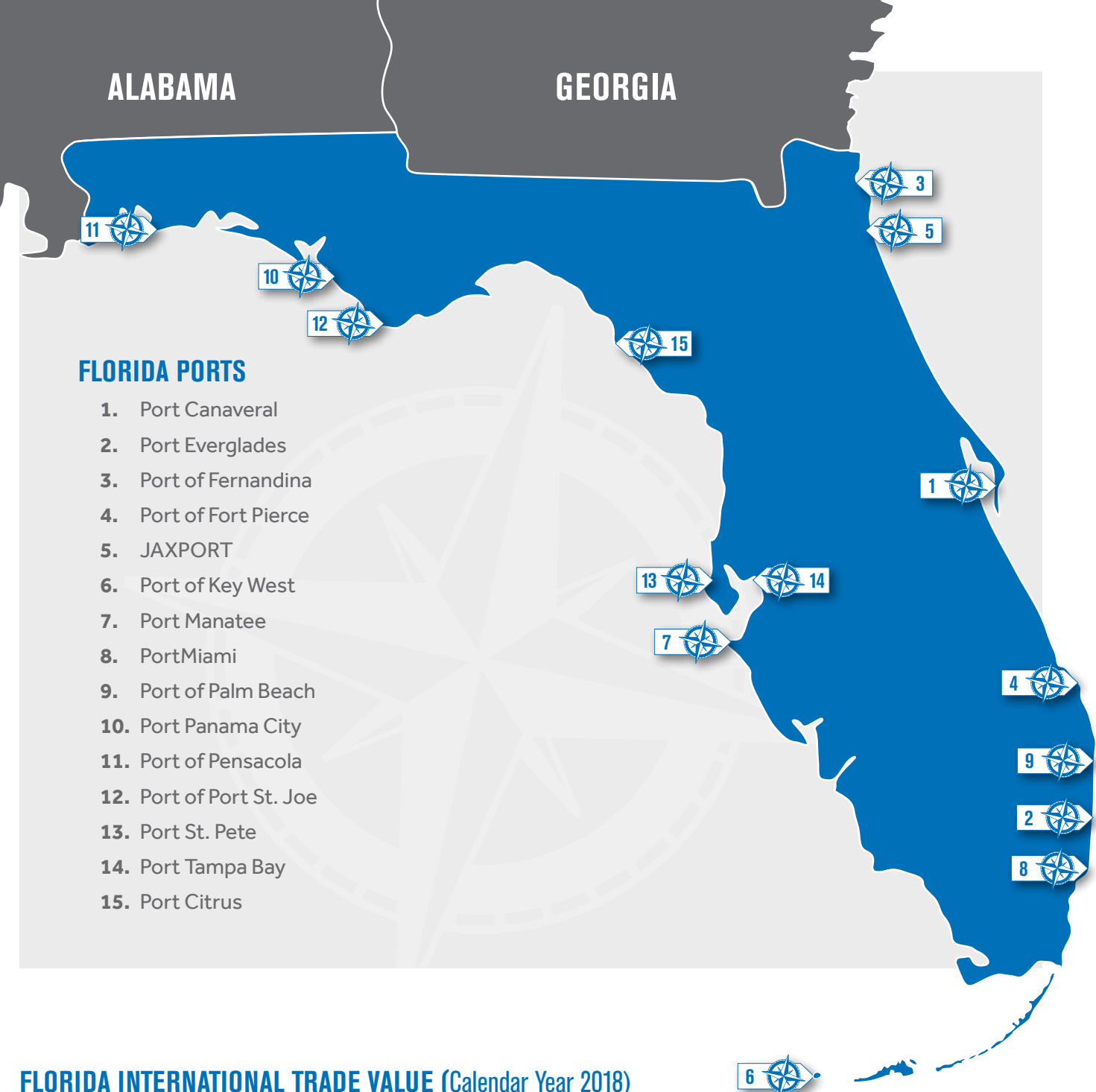
110 Million
Tons of cargo

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)



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
- Nuclear Reactors, Boilers, Machinery, and Parts Thereof* is the top export commodity

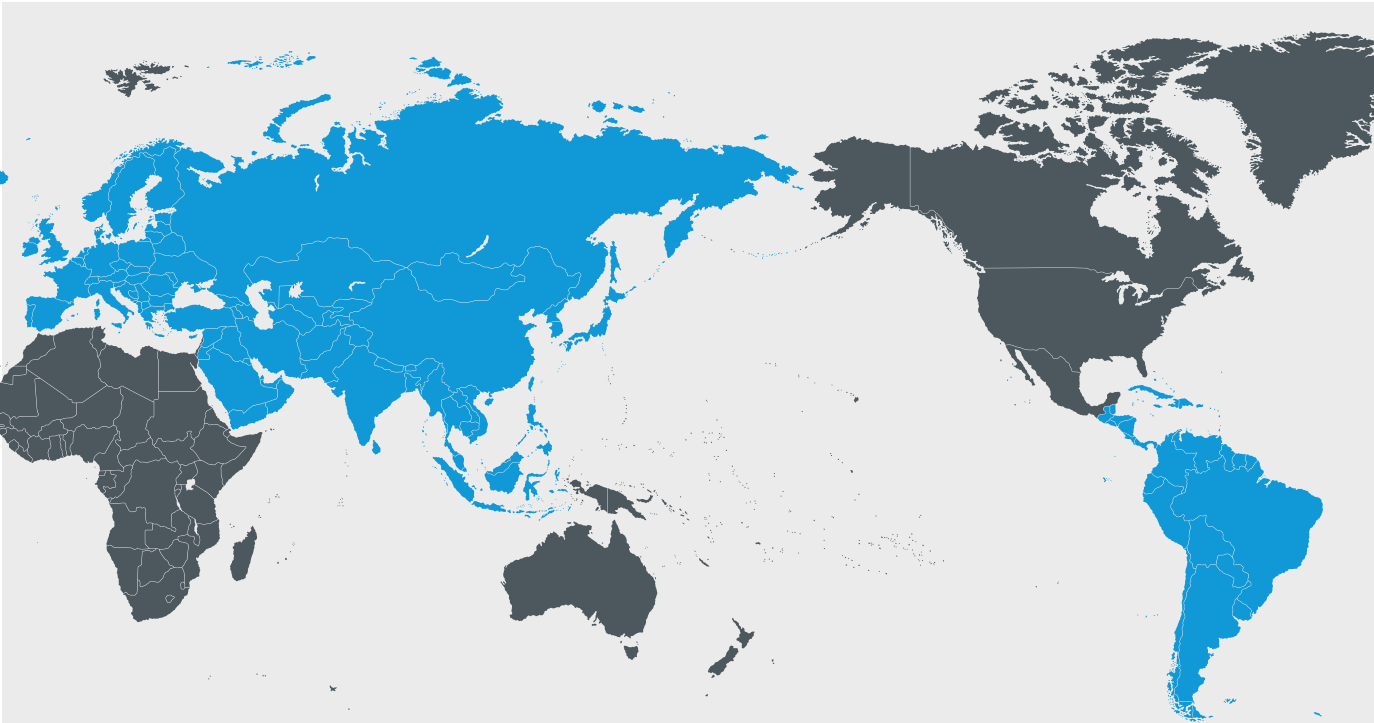
DOLLAR VALUE CARGO STATISTICS – BY DIVERSE TRADE REGION (Calendar Year 2018)

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 in waterborne cargo
- Brazil remains the top export country by water
- China is the top import partner 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



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



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

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 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

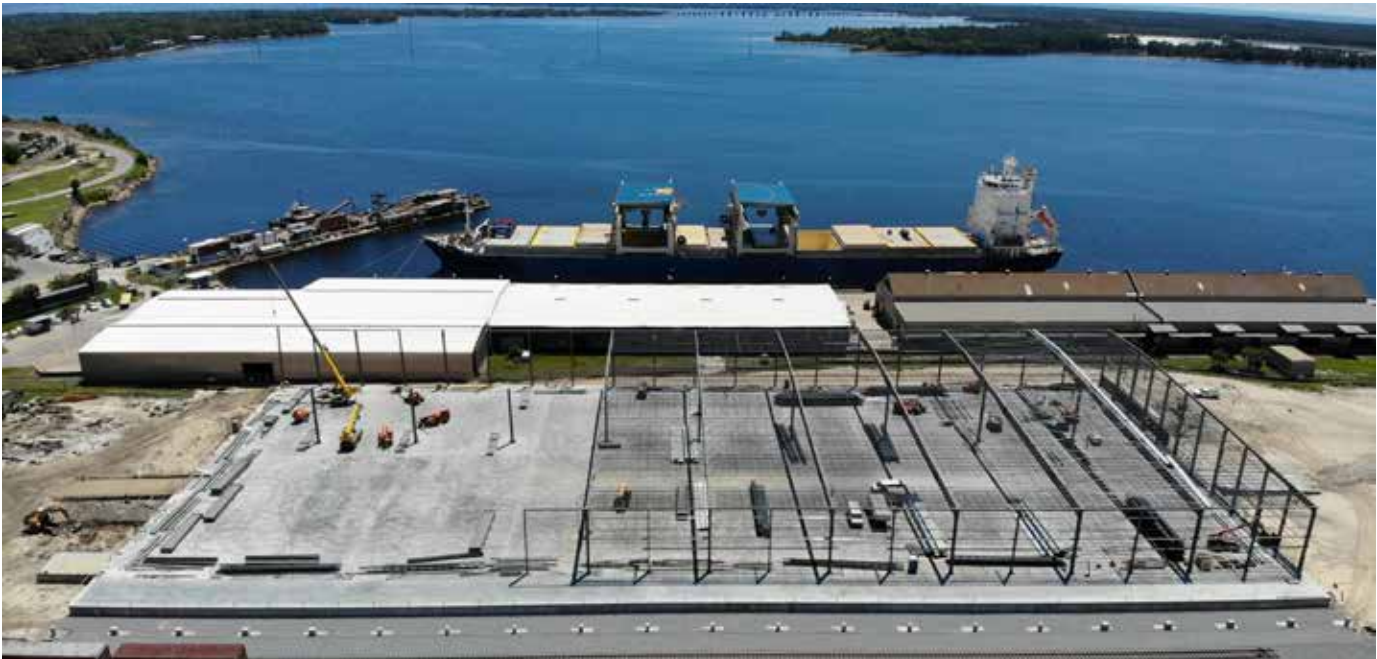
Panama City Port Authority

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

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

ACCOMPLISHMENTS


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

TOP TRADE PARTNERS (by value)

IMPORTS





-  Chile
-  Mexico
-  Germany

EXPORTS





-  United Kingdom
-  Mexico
-  Coast 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

CHRISTY GANDY
Director of Administration

CASEY GRIGSBY
*Vice President of Programs
and Planning*

MIKE RUBIN
*Vice President of
Governmental Affairs*

JESSIE WERNER
Vice President of Public Affairs

Florida Seaport Transportation and Economic Development Council
502 East Jefferson Street | Tallahassee, Florida 32301 | flaports.org   

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FLORIDA SEAPORTS

PORT CANAVERAL
445 Challenger Road, Suite 301
Cape Canaveral, FL 32920
portcanaveral.com

PORT EVERGLADES
1850 Eller Drive
Fort Lauderdale, FL 33316
porteverglades.net

PORT OF FERNANDINA
501 N 3rd Street
Fernandina Beach, FL 32034
portoffernandina.org

PORT OF FORT PIERCE
2300 Virginia Avenue
Fort Pierce, FL 34982
stlucieco.gov

JAXPORT
2831 Talleyrand Ave
Jacksonville, FL 32206
jaxport.com

PORT OF KEY WEST
201 Williams Street
Key West, FL 33040
cityofkeywest-fl.gov

PORT MANATEE
300 Tampa Bay Way
Palmetto, FL 34221
portmanatee.com

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

PORT OF PALM BEACH
1 East 11th Street, Suite 600
Riviera Beach, FL 33404
portofpalmbeach.com

PORT PANAMA CITY
5321 West Highway 98
Panama City, FL 32401
portpanamacityusa.com

PORT OF PENSACOLA
700 South Barracks Street
Pensacola, FL 32501
portofpensacola.com

PORT OF PORT ST. JOE
406 Marina Drive
Port Saint Joe, FL 32456
portofportstjoe.com

PORT ST. PETE
250 8th Avenue
Saint Petersburg, FL 33701
stpete.org/port

PORT TAMPA BAY
1101 Channelside Drive
Tampa, FL 33602
porttb.com



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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