



2022 - 2023

SEAPORT MISSION PLAN

FLORIDA PORTS

**Florida Seaport Transportation and
Economic Development Council**

flaports.org

RELIABLE  RESILIENT  READY

FLORIDA'S SEAPORTS: U.S. GATEWAY TO THE WORLD

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INTRODUCTION

Florida is a top maritime trade state and is home to the world's largest cruise ports. Since 1990, the Florida Seaport Transportation and Economic Development Council (FSTED) has produced the Seaport Mission Plan to meet the legal standards of the State of Florida. The plan serves the people and businesses of Florida through a historical accounting of the overall health, capabilities, and trends in the important work that our seaports perform for our economy and people. This document is specifically intended to provide key port information for our State and Federal legislatures, Florida residents, Port community stakeholders, and facility users capturing the recent past and focusing on the mission for the future.

Today, that mission for the future is Reliable, Resilient, and Ready. The crisis of the last two years demonstrated that ports and shipping matter greatly for a well-functioning global economy. It has also allowed ports to revitalize their organizations, sharpen their focus, and build teams that are reliable and resilient, and ready to take on the challenges that lie ahead.

The United Nations Conference on Trade and Development (UNCTAD) "Review of Maritime Transport 2022" called for increased investment in maritime supply chains, declaring that ports, shipping fleets, and hinterland connections need to be better prepared for future global crises, climate change, and the transition to low-carbon energy¹.

As such, Florida seaports are taking action to shape a future that is more reliable, resilient, and ready for the future. They are engaging in environmental resilience to reduce their carbon footprint, improve the quality of life for the surrounding community, and prepare for sea level rise, hurricanes and large storm surges through a wide variety of initiatives. They are focused on boosting supply chain resilience to disruptive shocks and preparing better for future challenges by enhancing intermodal infrastructure, improving port performance, and diversifying business opportunities. Finally, they are focused on workforce resilience by developing apprenticeships, internships, and training programs to foster the labor pool necessary to support, operate, and maintain Florida seaports well into the future.

The Florida seaports' goal is to invest to establish more reliable, resilient, and sustainable ports that will improve the business climate, allow them to seize the opportunity to become a global hub and capture a larger share of international trade and related commercial activities, and above all, shape a more resilient future for tomorrow.

1. <https://unctad.org/news/maritime-supply-chains-need-urgent-investment-boost-resilience-future-crises>



FSTED'S GUIDING PRINCIPLES

Overview

Florida is a top maritime trade state and home to the world's leading cruise ports. Florida's seaports facilitate trade in the global marketplace, but each is firmly rooted in a unique Floridian community, meaning project development begins at the local level with community outreach and public engagement.

Given the importance of international trade to the state's economic progress and job creation, the Florida state legislature created the Florida Seaport Transportation and Economic Development (FSTED) program in 1990 under Chapter 311, Florida Statutes (F.S.) to finance port transportation projects². The state legislature realized the value of enhancing port infrastructure and capacity to align with the consumer demands of Florida's growing population.

The port directors from each of Florida's 16 publicly owned seaports participate in the FSTED Council, as well as a representative from the Florida Department of Transportation and the Department of Economic Opportunity.

What began as a modest venture with an initial investment of **\$8 million** has expanded to a **\$25 million** state financing program.

Our Mission

Seaports work to enhance economic vitality and quality of life in Florida by fostering the growth of domestic and international waterborne commerce. The Florida Seaport Transportation and Economic Development Council (FSTED) is charged with facilitating efforts by Florida seaports to enhance trade, promote cargo flow, increase cruise passenger movements, increase port revenues, and provide economic benefits to the state.

Our Mandate

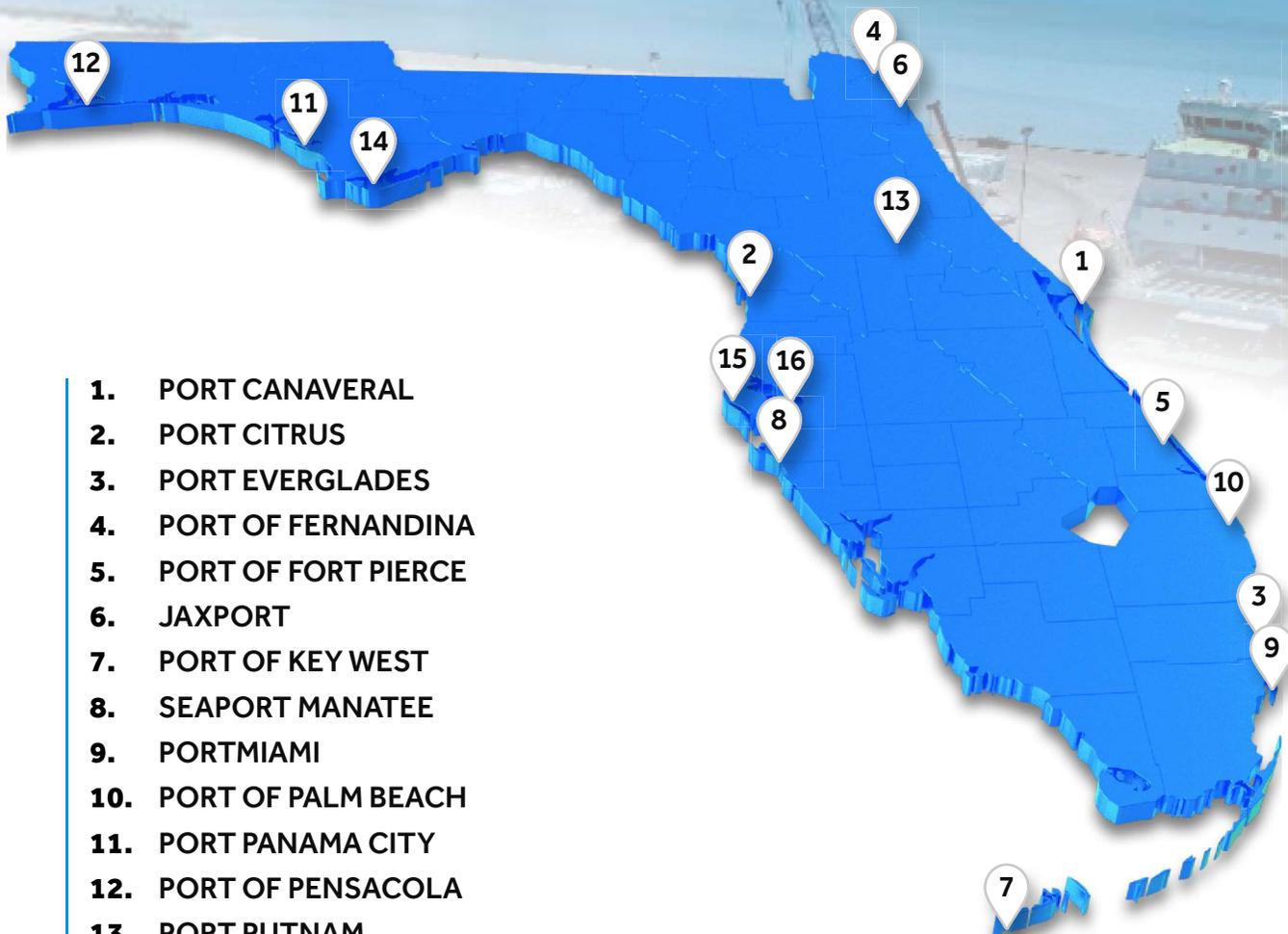
Florida's deepwater seaports, as mandated by Chapter 163, Florida Statutes, prepare master plans to guide their development and expansion. Regularly updated plans, consistent with the comprehensive plans of the seaports' respective local governments, establish goals and objectives, address forecasted 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

2. <https://www.fdot.gov/seaport/programs.shtml>

FLORIDA SEAPORTS AT A GLANCE



1. PORT CANAVERAL
2. PORT CITRUS
3. PORT EVERGLADES
4. PORT OF FERNANDINA
5. PORT OF FORT PIERCE
6. JAXPORT
7. PORT OF KEY WEST
8. SEAPORT MANATEE
9. PORTMIAMI
10. PORT OF PALM BEACH
11. PORT PANAMA CITY
12. PORT OF PENSACOLA
13. PORT PUTNAM
14. PORT ST. JOE
15. PORT ST. PETE
16. PORT TAMPA BAY

ECONOMIC IMPACTS OF PORTS

Florida seaports act as an economic multiplier, contributing billions to the state's economy and creating jobs and a higher standard of living for residents. Strategic investment in ports and associated infrastructure is necessary for Florida's seaports to remain competitive and continue generating prosperity in the Sunshine State.

Based on the latest Economic Impact Study for Florida Seaports³, these 16 ports, through cargo and cruise activities, support 900,000 direct and indirect jobs in the state of Florida and contribute \$117.6 billion in economic value, or 13.3% of Florida's Gross Domestic Product.



900,000

Direct & Indirect Jobs



\$117.6 B

Economic Value



13.3%

Florida's GDP

Port Everglades supports more than 206,000 Florida jobs, including 7,000 people who work for companies providing direct services.

JAXPORT's cargo activity supports more than 139,000 jobs in Florida and more than \$31.1 billion in annual economic impact.

SeaPort Manatee generates more than \$5.1 billion in annual economic impact while supporting more than 37,000 jobs, all without the benefit of local property tax support.

PortMiami contributes approximately \$43 billion and more than 334,000 jobs annually to Florida's economy.

Port Tampa Bay contributes \$17 billion in economic impact supporting more than 85,000 jobs in Central Florida.

Data Source: only the individual seaports who provided economic impact information are highlighted in this section

3. <https://flaports.org/wp-content/uploads/EconomicImpactsofFloridaSeaports.pdf>

TRADE & CARGO

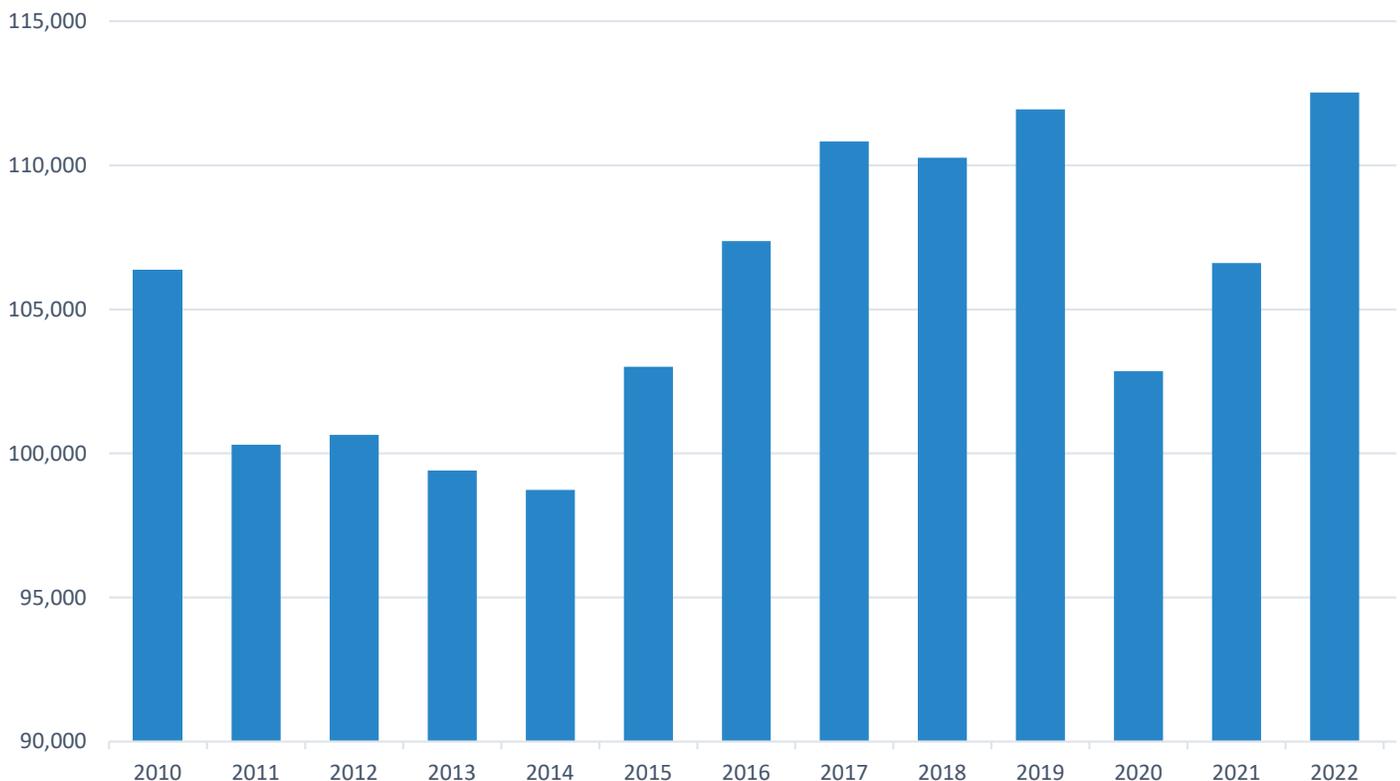
The growth of Florida ports and the evolving mix of trade partners reflect Florida's global reach. The trade partner and commodity trends reveal a great deal about Florida seaport strengths, and trade trend analysis is critical to help them optimize growth and benefits for Floridians. Ten of Florida's 16 established and emerging seaports handled cargo in 2022, 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.

Florida has invested heavily in its seaports to ensure that they have the capacity to serve as much cargo as possible. The state has also prioritized infrastructure investments in roadways and other freight mobility infrastructure to ensure the capability of handling freight movements. These investments allowed Florida seaports to respond to severe supply chain disruptions stemming from the COVID-19 pandemic, and almost all Florida seaports have reported record cargo activity. In fact, in 2022, the total tonnage across all Florida seaports reached a new record high, totaling 112.5 million tons of cargo, a 6% increase over 2021, and a 0.5% increase over 2019, the previous record-holding year.

Many Florida ports attribute the increased cargo due to supply chain challenges and port congestion stemming from the global pandemic, with shippers looking for alternative, noncongested ports to move cargo, especially into large, growing consumer markets such as Florida. This shift is anticipated to continue to fuel growth at Florida ports.

Moving forward, Florida ports see opportunities coming from the supply chain crisis and most believe they are positioned well to continue handling diverted cargo. Of the nine Florida seaports that provided 2027 forecasted figures, they all forecast tonnage growth over the next five years.

Exhibit 1: Total Tonnage by All Florida Seaports (in thousands), 2010 – 2022



Data Source: Individual Seaports, all data is provided in fiscal year.



Exhibit 2: 2022 Import, Export, and Domestic Cargo by Seaport (Total Tonnage)

Florida Seaport*	Imports	Exports	Domestic	Total Tonnage
Port Canaveral	4,813,722	7,428	1,743,701	6,564,851
Port Everglades	8,345,548	3,271,678	15,723,282	27,351,508
Port of Fernandina	222,409	116,591	32,180	371,180
Port of Fort Pierce*	0	0	0	0
Jaxport	7,467,274	1,680,603	9,012,465	18,160,342
Port of Key West*	0	0	0	0
SeaPort Manatee	4,196,181	525,999	6,074,784	10,796,964
PortMiami	7,373,495	2,480,150	0	9,853,645
Port of Palm Beach	549,390	1,528,441	482,631	2,560,462
Port Panama City	688,296	1,322,098	13,037	2,023,431
Port of Pensacola	394,062	3,199	24,177	421,438
Port of Port St. Joe*	0	0	0	0
Port of St. Pete*	0	0	0	0
Port Tampa Bay	7,851,393	3,365,275	23,211,516	34,428,184
2022 TOTAL	41,912,770	14,301,462	56,317,773	112,532,005
2021 TOTAL	40,401,372	14,575,203	51,633,087	106,608,662
2020 TOTAL	35,687,952	16,204,671	50,953,147	102,845,770
2019 TOTAL	40,555,852	17,307,504	54,072,193	111,935,549
2018 TOTAL	38,729,636	17,891,659	53,646,835	110,268,130

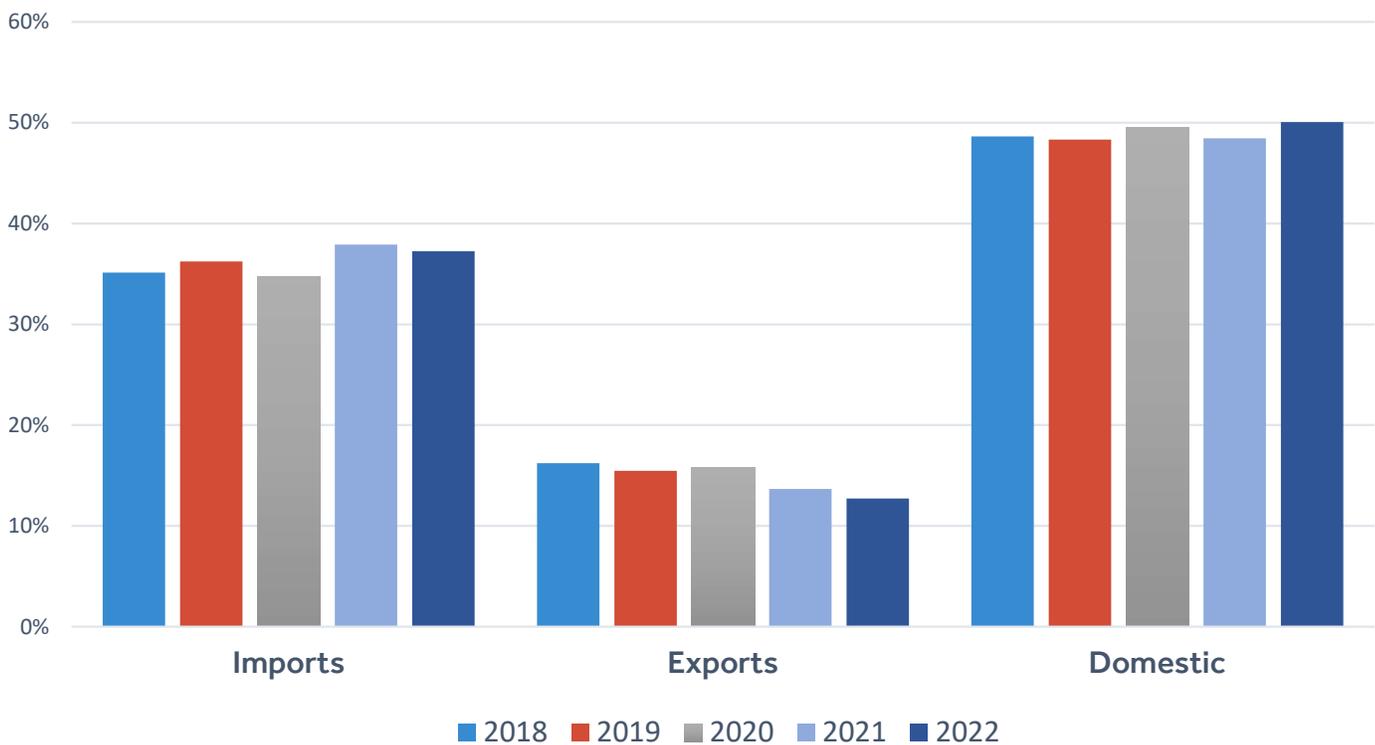
Data Source: Individual Seaports, all data is provided in fiscal year.

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.

* The ports of Fort Pierce, Key West, St. Joe, and St. Pete did not report cargo tonnage for 2022. Additionally, the ports of Citrus and Putnam did not provide data for 2022.



Exhibit 3: 2018 – 2022 Import, Export, and Domestic Cargo (Total Tonnage)



Data Source: Individual Seaports, all data is provided in fiscal year.

Looking at tonnage by cargo type, liquid bulk continues to make up the largest percentage, representing 49% of cargo tonnage in 2022, growing 10% year-over-year (YOY), up from a 47% share in 2021. The second largest cargo type, containers, accounts for 23% of cargoes and grew nominally at 2% YOY. Dry bulk (including fertilizers, cement, and aggregates, among other commodities) represents 20% of total cargo in 2022 and fell 4% YOY. The smallest cargo type, breakbulk cargo, represents only 8% of cargo, but saw the largest YOY increase, at 14%.

Port Tampa Bay attributed its breakbulk increase in 2022 due to the continued growth of the Florida construction and building industry, and space constraints/congestion at other ports; this included increases of 56% in steel and 105% in lumber in Port Tampa Bay’s breakbulk business.

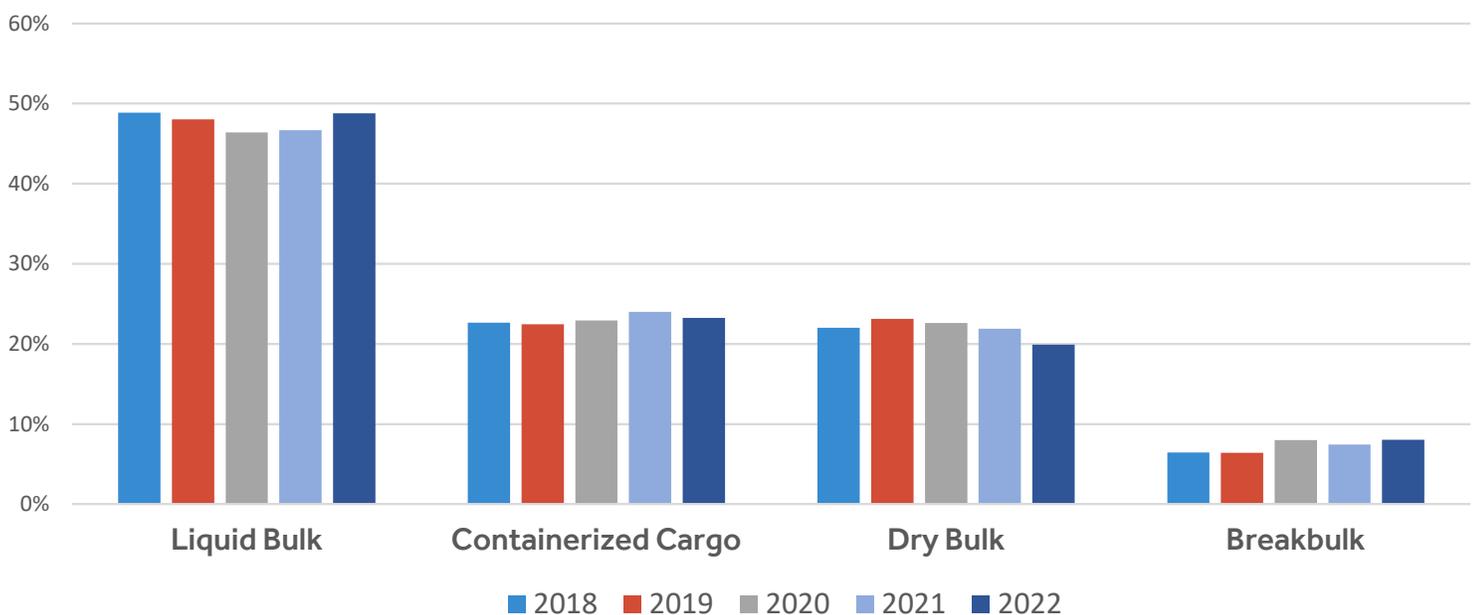
Exhibit 4: 2022 Cargo Types by Seaport (Tonnage)

Florida Seaport*	Dry Bulk	Liquid Bulk	Breakbulk	Containerized Cargo	Total
Port Canaveral	2,190,360	3,332,983	1,033,578	7,930	6,564,851
Port Everglades	1,868,559	17,861,541	287,058	7,334,350	27,351,508
Port of Fernandina	5,559	0	299,572	66,049	371,180
Port of Fort Pierce*	0	0	0	0	0
Jaxport	3,842,127	4,900,668	4,407,184	5,010,363	18,160,342
Port of Key West*	0	0	0	0	0
SeaPort Manatee	2,268,502	6,367,900	807,632	1,382,930	10,790,964
PortMiami	0	0	0	9,853,645	9,853,645
Port of Palm Beach	577,579	393,238	106,178	1,483,467	2,560,462
Port Panama City	9891,314	22,070	828,306	191,741	2,023,431
Port of Pensacola	364,993	0	55,691	754	421,438
Port of Port St. Joe*	0	0	0	0	0
Port of St. Pete*	0	0	0	0	0
Port Tampa Bay	10,357,793	22,020,724	1,213,696	835,971	34,428,184
2022 TOTAL	22,426,786	54,899,124	9,038,895	26,167,200	112,532,005
2021 TOTAL	23,328,585	49,771,541	7,932,491	25,576,045	106,608,662
2020 TOTAL	23,275,649	47,742,080	8,241,469	23,586,572	102,845,770
2019 TOTAL	25,907,808	53,747,037	7,165,820	25,114,884	111,935,549
2018 TOTAL	24,272,345	53,874,255	7,128,571	24,992,959	110,268,130

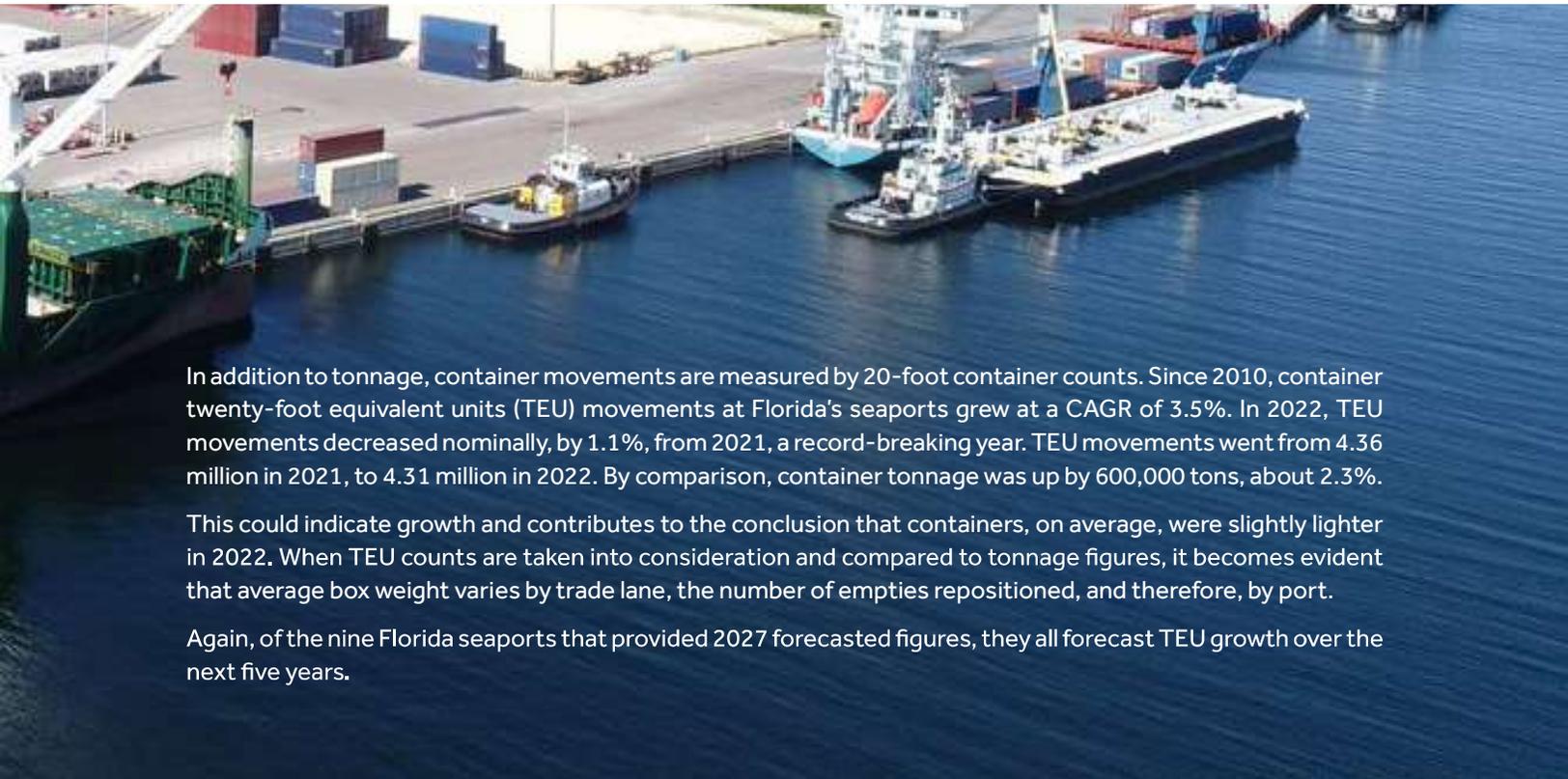
Data Source: Individual Seaports, all data is provided in fiscal year.

* The ports of Fort Pierce, Key West, St. Joe, and St. Pete did not report cargo tonnage for 2022. Additionally, the ports of Citrus and Putnam did not provide data for 2022.

Exhibit 5: 2018 – 2022 Cargo Types (Tonnage)



Data Source: Individual Seaports, all data is provided in fiscal year.

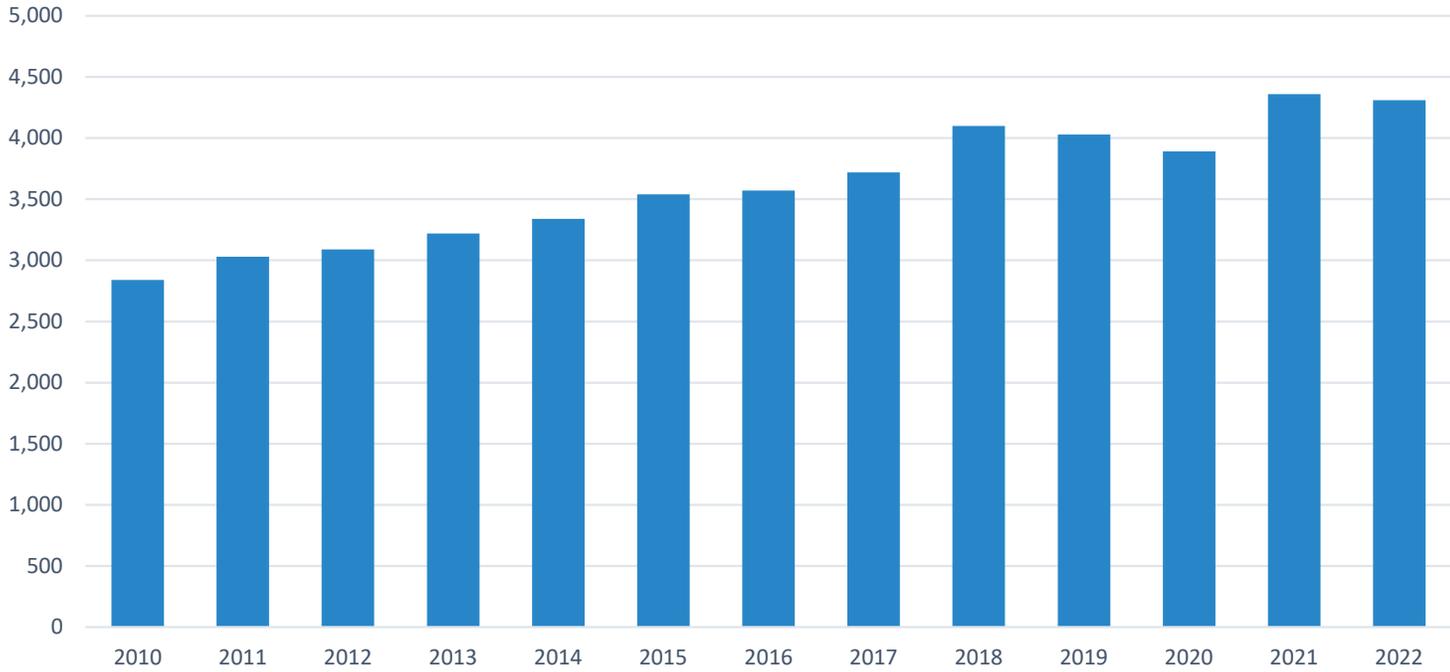


In addition to tonnage, container movements are measured by 20-foot container counts. Since 2010, container twenty-foot equivalent units (TEU) movements at Florida’s seaports grew at a CAGR of 3.5%. In 2022, TEU movements decreased nominally, by 1.1%, from 2021, a record-breaking year. TEU movements went from 4.36 million in 2021, to 4.31 million in 2022. By comparison, container tonnage was up by 600,000 tons, about 2.3%.

This could indicate growth and contributes to the conclusion that containers, on average, were slightly lighter in 2022. When TEU counts are taken into consideration and compared to tonnage figures, it becomes evident that average box weight varies by trade lane, the number of empties repositioned, and therefore, by port.

Again, of the nine Florida seaports that provided 2027 forecasted figures, they all forecast TEU growth over the next five years.

Exhibit 6: Total Containerized Cargo by All Florida Seaports (TEUs, in thousands), 2010 – 2022



Data Source: Individual Seaports, all data is provided in fiscal year



Exhibit 7: 2022 Containerized Cargo by Seaport (TEUs)

Florida Seaport*	TEU Imports	TEU Exports	TEU Domestic	Total TEUs
Port Canaveral	1,067	963	20	2,050
Port Everglades	536,768	570,778	0	1,107,546
Port of Fernandina	3,781	3,781	2,480	10,042
Port of Fort Pierce*	0	0	0	0
Jaxport	226,346	265,712	827,246	1,319,304
Port of Key West*	0	0	0	0
SeaPort Manatee	88,223	88,885	0	177,108
PortMiami	618,539	579,125	0	1,197,664
Port of Palm Beach	112,760	149,473	0	262,233
Port Panama City	27,336	27,456	0	54,792
Port of Pensacola	0	678	0	678
Port of Port St. Joe*	0	0	0	0
Port of St. Pete*	0	0	0	0
Port Tampa Bay	89,857	88,780	0	178,637
2022 TOTAL	1,704,677	1,775,631	829,746	4,310,054
2021 TOTAL	1,764,940	1,812,254	781,262	4,358,456
2020 TOTAL	1,535,791	1,524,102	825,808	3,885,701
2019 TOTAL	1,621,188	1,627,542	781,708	4,030,438
2018 TOTAL	1,466,435	1,732,469	899,322	4,098,266

Data Source: Individual Seaports, all data is provided in fiscal year.

* The ports of Fort Pierce, Key West, St. Joe, and St. Pete did not report cargo tonnage for 2022. Additionally, the ports of Citrus and Putnam did not provide data for 2022.

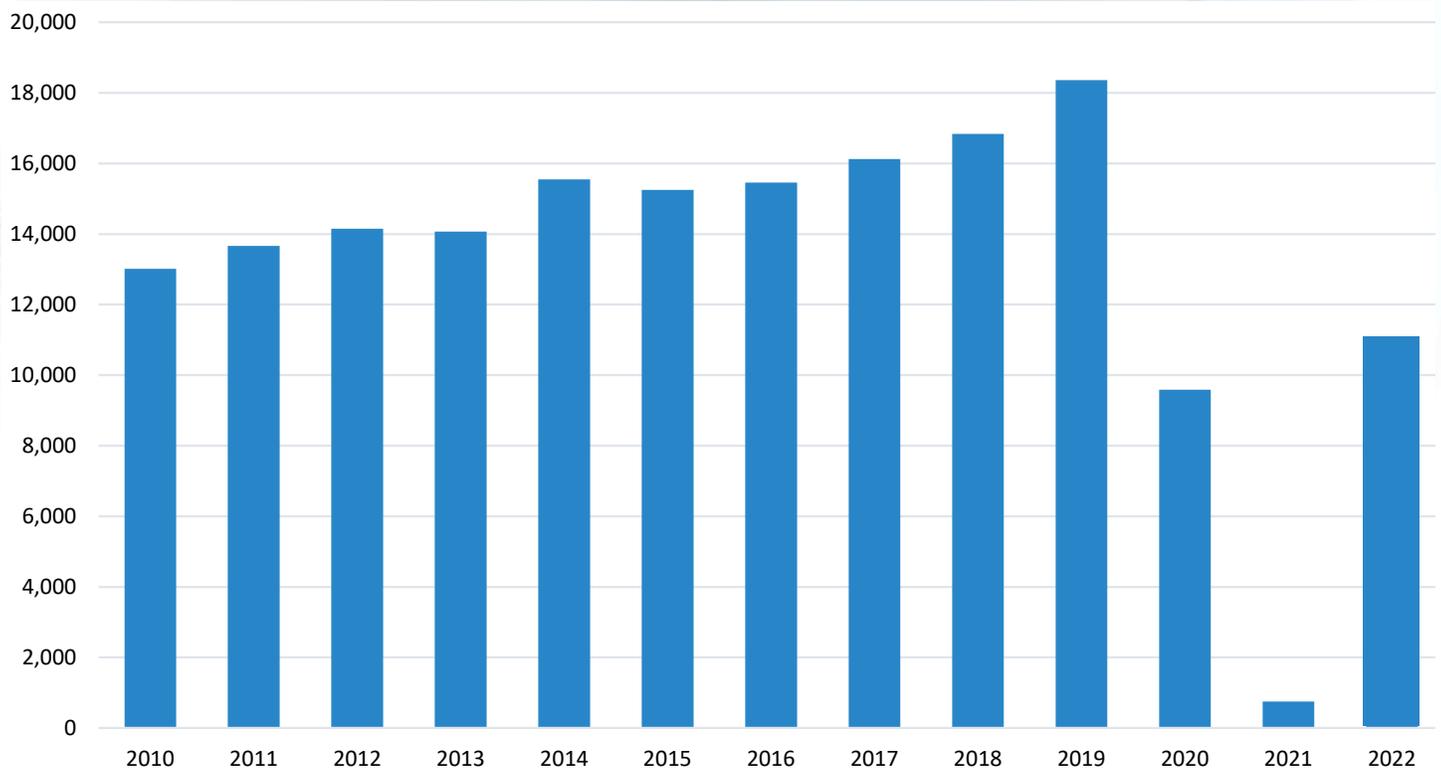
CRUISE & LEISURE

CRUISE

Cruising has been integral to Florida's economic competitiveness for decades and strategic investments in community-friendly facilities have allowed Florida's cruise ports to remain true to the goals of exceptional service, efficient operations, and local partnership. As such, Florida has benefited not only from decades of steady cruise passenger growth (excluding the COVID-19 pandemic) but also continues to claim the world's top three cruise homeports – PortMiami, Port Canaveral, and Port Everglades – and is home to the largest cruise ships in the world, with carrying capacities surpassing 6,700 passengers and gross tonnage exceeding 225,000 tons. This is up from an average of just over 2,000 passengers and approximately 80,000 gross tons twenty years ago⁴.

The ability to accommodate the largest cruise ships in the global fleet distinguishes Florida's "big three" cruise ports from most other seaports in the U.S. and around the world and gives them a competitive advantage in terms of attracting future cruise activity. By constructing world-class cruise infrastructure and using cutting-edge technology, all three of these ports have established themselves as industry leaders and forward-thinking partners of the cruise industry. These ports, as well as Palm Beach, Port Tampa Bay, and JAXPORT provide homeport facilities and are investing in their futures that will continue to grow and shape the industry in the coming years.

Exhibit 8: Total Cruise Passengers by All Florida Seaports (in thousands), 2010 – 2022



Data Source: Individual Seaports, all data is provided in fiscal year.

- <https://www.cruzely.com/chart-see-the-dramatic-rise-in-the-size-of-cruise-ships>
- Individual Seaports Reported Volumes 2010 – 2022; BA Analysis
- <https://cruising.org/-/media/research-updates/research/2019-usa-cruise-eis.ashx> (p.42)
- <https://cruising.org/-/media/research-updates/research/2019-usa-cruise-eis.ashx> (p.43)
- Cruise Industry News Annual Report, 2022



Statistics from the industry before COVID-19 show that Florida’s embarkations increased by 41% between 2010 and 2019, at a compound annual growth rate (CAGR) of 3.9%⁵. In 2019, Florida ports accounted for 60.1% of total U.S. cruise passenger embarkations. As a result, the industry’s direct expenditures generated 158,992 jobs and \$8.1 billion in income across the state⁶. Florida-based cruise activity also generated more than \$9.0 billion in direct revenue for Florida businesses in 2019. Approximately \$4.0 billion of these direct expenditures went to tourism-related businesses, with more than \$2.1 billion going to the manufacturing industry⁷.

Carnival Corporation, Royal Caribbean Group, Norwegian Cruise Line Holdings, MSC Cruises (USA) Inc., Disney Cruise Lines, Virgin Voyages, Ritz-Carlton Yacht Collection, Crystal Cruises, Azamara, Bahamas Paradise Cruise Line, and American Queen Voyages are also all headquartered in Florida, which adds corporate and workforce spending and investment to the economic impacts of vessel operations at ports.

Today, the cruise industry continues its recovery, with 41% fewer passengers carried in 2022 when compared to 2019. However, Florida ports have led the recovery due to the access they provide to the key cruise market of the Bahamas/ Caribbean, a market that accounted for 38.7% of the global cruise industry in 2019⁸.

In July 2022, the CDC discontinued its voluntary COVID-19 program for cruise ships. This was a strong signal of confidence by the CDC that the industry’s mitigation and management plans are robust and effective. This very positive development paved the way for all major operators to relax COVID-related protocols and align with the rest of the hospitality industry. It is anticipated that Florida ports should reach 2019 levels in 2023.

Exhibit 9: 2022 Cruise Passengers by Seaport

Florida Seaport*	Single Day	Multi-Day	Total Passengers
Port Canaveral	137,864	4,072,396	4,210,260
Port Everglades	96,692	1,621,216	1,717,908
Port of Fernandina	66	0	66
Port of Fort Pierce*	0	0	0
Jaxport	0	90,241	90,241
Port of Key West*	0	198,411	198,411
SeaPort Manatee	0	0	0
PortMiami	44,556	3,977,988	4,022,544
Port of Palm Beach	0	188,235	188,235
Port Panama City	0	0	0
Port of Pensacola	0	0	0
Port of Port St. Joe*	0	0	0
Port of St. Pete*	0	0	0
Port Tampa Bay	0	418,200	418,200
2022 TOTAL	279,178	10,566,687	10,845,865
2021 TOTAL	184,907	562,581	747,488
2020 TOTAL	183,190	9,402,713	9,585,903
2019 TOTAL	468,219	17,887,113	18,355,332
2018 TOTAL	451,124	16,384,862	16,835,986

Data Source: Individual Seaports, all data is provided in fiscal year.

* The ports of Fort Pierce, Manatee, Panama City, Pensacola, St. Joe, and St. Pete did not report cruise passenger activity for 2022. Additionally, the ports of Citrus and Putnam did not provide data for 2022



YACHTING

Florida has for many years been an important global hub for mega yachts, also referred to as superyachts. These large leisure yachts arrive for extended marina stays after long voyages and increasingly request and undergo maintenance, refit, and overhaul services (MRO) in Florida. Several of Florida's public seaports are active in the growing MRO market.

Port St. Pete markets itself as the only superyacht marina on Florida's Gulf Coast. In addition to providing the many services and amenities needed by large yachts for maintenance and repair, its location in the heart of downtown St. Petersburg gives passengers and crew easy access to numerous local and regional recreational opportunities. This large yacht opportunity for the port has evolved with the proliferation of large yacht construction throughout the world, and they continue to focus on this market. The city and port staff are actively engaged with yacht captains on an interpersonal level, developing connections and contacts through events, boat shows, visits, and media events. Additionally, the port recently completed a \$5 million wharf renovation that installed six power pedestals to meet the electrical needs of these large vessels.

The Port of Palm Beach leases a berth and related facilities to Berth One Palm Beach, which is a dedicated mega yacht facility located at the northern end of the port. Berth One Palm Beach offers dockage to luxury yachts up to 450 feet long with drafts as deep as 30 feet. Like Port St. Pete, the Port of Palm Beach recently invested \$1.5 million to add shore power to the mega yacht berth.

The Port of Fort Pierce is a new entrant into the market. After seeing the growing opportunity, in 2019, the St. Lucie Board of County Commissioners purchased the former Indian River Terminal and transformed it into a "purpose-built" facility for MRO of yachts over 200 feet in length and large sailing vessels; the former a growing market worldwide and the latter a niche unfilled by any western hemisphere port. Derecktor Fort Pierce, LLC began operations in 2019. Within a year, it will erect the world's largest mobile vessel hoist, boasting 1,500 tons. Once fully operational, Derecktor Fort Pierce will be a full-service shipyard capable of accommodating yachts up to 500 feet in length.

Derecktor is also working with Indian River State College, the Economic Development Council of St. Lucie County and the Marine Industries Association of the Treasure Coast to create a yacht service technician apprenticeship program to develop a highly skilled and specialized workforce to support the local marine industry.

Several of Florida's seaports also handle the importing and exporting of boats, yachts, and related products. **Fort Lauderdale**, which is often referred to as the yachting capital of the world, has more than 50,000 registered yachts and over 300 miles of inland waterways. It is also home to one of the largest boating shows in the world.

CAPITAL IMPROVEMENT PLAN

RELIABLE, RESILIENT, AND *READY FOR THE FUTURE*

Florida is the only U.S. state, other than Alaska and Hawaii, that is bordered by water on three sides. Because of this, Florida's ports have a long history of providing access and economic opportunity to importers, exporters, residents, and visitors. To provide this access, ports must have the infrastructure necessary to accept and move trade as well as passenger vessels. Port infrastructure must therefore meet and adapt to not only the physical demands of the industry but also the environmental demands.

Florida's 16 seaports, therefore, invest in developments and projects that coincide with the anticipated market demand for their services and are highly integrated into the state's transportation infrastructure. Together, the Florida seaports comprise a major component of the state's annual capital investment and economic output.

Annually, each seaport develops a rolling five-year capital improvement plan (CIP) that includes infrastructure improvements to meet the needs of tomorrow. These plans anticipate and capitalize on growth opportunities while maintaining sufficient flexibility to adapt to changes in market conditions and evolving industry trends.

From these opportunities, seaport executives identify investment plans that will grow and sustain the demands of their customer base, attract new customers, protect public assets, and positively impact trade, tourism, and commerce. These CIPs identify a wide range of projects, including channel and harbor deepening, land acquisition, intermodal connections, zero-emission solutions, and terminal development and improvements, among other priorities.

Combined, Florida's 16 seaports have identified more than \$3.9 billion of investments through their CIPs for the period beginning in 2023 and running through 2027. Port Miami's five-year CIP features the highest investment, totaling more than \$1.3 billion over the next five years. Port Tampa Bay, Port Everglades, JAXPORT, and Port Canaveral round out the top five with a combined CIP of \$1.9 billion. These top five ports account for 83% of the planned CIP budget over the next five years.

Florida's 16 seaports have identified more than \$3.9 billion of investments through their CIPs for the period beginning in 2023 and running through 2027.

The largest planned investments in the current CIP are for Berth Rehabilitation and Repairs (\$774 million, 20%), Site Improvements (\$703 million, 18%), Cargo Terminals (\$698 million, 18%), and Cruise Terminals (\$636 million, 16%).

The Florida seaports' goal is to invest to establish modern, reliable, resilient, and sustainable ports that will improve the business climate, allow them to seize the opportunity to become a global hub and capture a larger share of international trade and related commercial activities, and above all, shape a more resilient future for tomorrow.

Projects are focused on climate adaptation, carbon mitigation, and resilience. The following sections outline CIP projects focused on each port's resiliency planning and represent the continued trajectory toward more sustainable, and resilient, Florida seaports.



Exhibit 10: Combined Five-Year Capital, 2023 - 2027

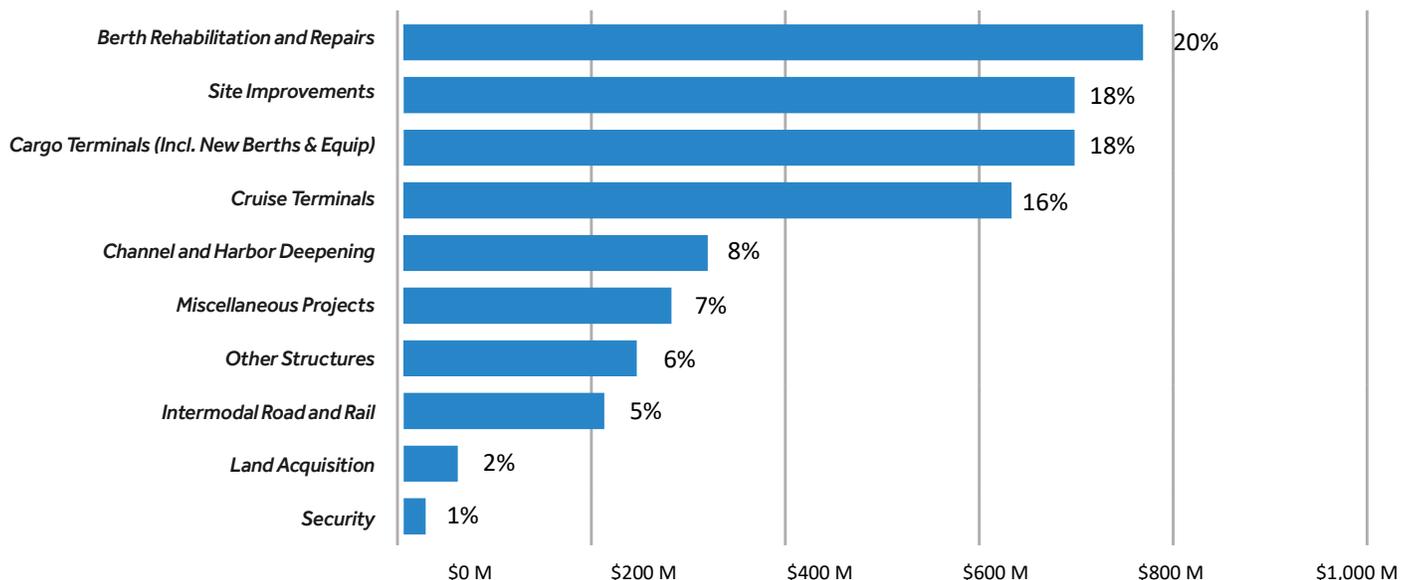
Florida Seaport*	2023	2024	2025	2026	2027	Total
Port Canaveral	\$76,195,000	\$56,026,000	\$83,118,000	\$62,006,000	\$59,925,000	\$337,270,000
Port Everglades	\$117,694,000	\$111,829,000	\$147,938,000	\$73,609,000	\$51,185,000	\$502,255,000
Port of Fernandina	\$2,940,000	\$300,000	\$-	\$-	\$-	\$3,240,000
Port of Fort Pierce*	\$6,000,000	\$5,000,000	\$27,500,000	\$5,000,000	\$-	\$43,500,000
Jaxport	\$273,410,182	\$80,625,110	\$7,877,110	\$66,617,110	\$21,667,110	\$450,196,622
Port of Key West*	\$3,048,890	\$-	\$-	\$-	\$-	\$3,048,890
SeaPort Manatee	\$111,847,487	\$72,750,000	\$30,768,034	\$54,123,867	\$9,000,000	\$278,489,388
PortMiami	\$179,038,336	\$435,772,893	\$486,199,036	\$130,149,524	\$111,116,667	\$1,342,276,456
Port of Palm Beach	\$10,120,000	\$15,420,000	\$12,220,000	\$6,720,000	5,570,000	\$50,200,000
Port Panama City	\$26,495,000	\$14,045,000	\$18,970,000	\$16,350,000	\$5,140,000	\$81,000,000
Port of Pensacola	\$26,967,539	\$29,967,540	\$34,028,962	\$37,458,962	\$22,684,175	\$154,107,178
Port of Port St. Joe*	\$35,000,000	\$40,000,000	\$-	\$-	\$-	\$75,000,000
Port of St. Pete*	\$-	\$-	\$-	\$-	\$-	\$-
Port Tampa Bay	\$76,775,000	\$112,300,000	\$107,200,000	\$121,900,000	\$230,340,000	\$648,575,000
TOTAL	\$948,531,434	\$974,035,543	\$955,819,142	\$573,934,463	\$516,837,952	\$3,969,158,534

Data Source: Individual Seaports, all data is provided in fiscal year.

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 port of St. Pete did not provide a CIP. Additionally, the ports of Citrus and Putnam did not provide data for 2022

Exhibit 11: Combined Five-Year Capital Improvement Plan by Project Type, 2023 - 2027



Data Source: Individual Seaports, all data is provided in fiscal year.

Notes: Project categories used in this document are sorted by major investment type, but sometimes a project will cross over into two or more categories. A specific breakdown for each port and its top projects along with the allocation of its CIP by project type can be found in the individual port profile sections.

* The port of St. Pete did not provide a CIP. Additionally, the ports of Citrus and Putnam did not provide data for 2022.



SUPPLY CHAIN RESILIENCY

The supply chain crisis of the last two years drove shippers to explore alternatives to traditional routes to move cargo into and through North America. During this time, Florida ports have demonstrated that they are more reliable gateways ready for international trade than their congested out-of-state counterparts, as cargo owners sought to diversify and remove risk from their supply chains.

Other recent crises, such as hurricanes, have also shown that a mismatch between the demand and supply of maritime logistics capacity leads to surges in freight rates, congestion, and critical interruptions to global value chains. Ships carry over 80% of the goods traded globally, hence the urgent need to boost reliability and resilience to disruptive shocks and prepare better for future challenges and transitions.

For ports, this includes enhancing intermodal infrastructure and improving port performance. The seaports of Florida continue to ready themselves and identify key supply chain projects and opportunities to allow for growth of the state and southeastern region of the United States to promote trade, economic, and employment prospects.

The seaports of Florida continue to identify key supply chain projects and opportunities to allow for growth of the state and southeastern region of the United States to promote trade, economic, and employment prospects.

PortMiami, for example, is currently working on updating its master plan from 2035 to 2050. As part of the master plan, the port has consolidated its capacity and sustainability projects into a program called Net Zero Supply Chain Program. The goal is to increase its overall cargo capacity while expanding its previously implemented sustainability investments. The Net Zero Supply Chain Program provides for emission reduction projects starting from the ship to shore, through the port, to inland centers, and out to distribution centers.

Additional projects are underway across Florida seaports.



Port Performance



Infrastructure Improvements



Inland Port Planning

PORT EVERGLADES

- Added three live traffic cameras to allow truckers to better anticipate peak wait times and worked with U.S. Customs and Border Patrol to extend the hours of operation for the Radiation Portal Monitors

PORT OF FERNANDINA

- Currently operates two inland locations for storage and distribution and is exploring demand for increased capacity or new locations. The Port Authority is also working with Economic Development Agencies in Nassau County and Southeast Georgia to support investment in inland terminal infrastructure



JAXPORT

- Completed the deepen the Jacksonville shipping channel from 40 feet (12.2 meters) to a depth of 47 feet (14.3 meters) to allow the port to receive fully loaded Panamax class vessels
- Considering Inland Port in the next Master/Vision Plan update

SEAPORT MANATEE

- Rehabilitating, in phases, Berth 4, 10, and 11, to create additional berthing capacity to meet demand. These rehabilitations will create additional berthing capacity at Berths 6, 7, 8, 9, 12, and 14
- Expanding the capacity of Southwest Florida's primary shipping container yard
- Planning to study inland port areas for emergency management purposes (i.e. store data and equipment during tropical storm events) and develop capacity for logistics purposes

PORTMIAMI

- Embarking on a major investment that will include two off-port facilities to receive and handle imports and export cargo as well as empty container storage to allow the port to quickly move cargo on or off the port creating additional terminal capacity to handle additional container volumes expected in the coming years
- Expanding capacity in advance of increased demand, working on additional e-RTG acreage, modernizing and optimizing truck gates not previously improved, and issuing an RFQ for four new Super Post Panamax Cranes with options to increase the number of cranes ordered

PORT OF PALM BEACH

- Exploring the possibility of adding additional rail service to the port with different connection options to provide alternative options in the event one rail operation has challenges
- Developing Strategic Master Plan that will address participation in an Inland Port

PORT PANAMA CITY

- Updating its five-year Strategic Master Plan, which will focus on the expansion of the East Terminal
- Planning to pursue Federal Funding grant opportunities in 2023 that will focus on port expansion and bulkhead rehabilitation
- Including additional Inland Port planning and development at the Intermodal Distribution Center (IDC) in the next Strategic Master Plan

PORT OF PENSACOLA

- Seeking \$53 million in Triumph Gulf Coast grant funding to complete the first phase of elements of its three-phase Supply Chain Enhancement Project which will improve on-port ocean transportation efficiency, support the creation of more effective logistics patterns, resolve outdated infrastructure, attract investment, bring 210,000 square feet of active warehousing and light manufacturing maker space online, and ultimately increase tonnage and job growth in Northwest Florida

PORT TAMPA BAY

- Expanding container gate complex, adding three additional post-Panamax ship-to-shore gantry cranes, and constructing a third deep-water berth
- Expanding container East Port berth and uplands, and constructing new berth 301 at Port Redwing, along with site development at the adjacent Southbay Greenfield
- Rehabilitating Channelside North Slip



ENVIRONMENTAL RESILIENCY

Today, with an increasing focus on decarbonizing the shipping industry, a large focus is now on environmental resiliency. Florida seaports face numerous environmental challenges as they meet the demands of expanding port business and further development of infrastructure for cargo, cruise, and commercial opportunities.

More specifically, the major environmental challenges Florida ports identified today include (i) reducing CO2 emissions and contributing to cleaner air quality for the surrounding community, (ii) shifting to low- and zero-emissions vehicles and equipment, (iii) improving the resiliency of cranes, equipment, buildings, and property, (iv) infrastructure enhancements to improve port resiliency considering revised FEMA floodplain and sea level rise, and (v) investing in these initiatives.

Florida seaports are focused on engaging in environmental stewardship to mitigate their environmental footprint, improve the quality of life for the surrounding community, and prepared for sea level rise, powerful hurricanes and large storm surges through a wide variety of initiatives.



Emission Reduction Initiative



Infrastructure Resiliency Initiative



Environmental Protection Initiative

PORT CANAVERAL

- Sustains a long-term water quality monitoring and testing program in Canaveral Barge Canal (Banana River and Indian River Lagoon), Canaveral Harbor, and adjacent beaches, with a database going back to the early 1990s

PORT EVERGLADES

- Completed a ten-year energy-efficient equipment upgrade project to produce annual reductions of CO2 (- 9.8 million pounds), Sulfur Dioxide (- 61,101 pounds), and Nitrous Dioxide (- 17,091 pounds)
- Florida Power & Light (FPL) is conducting a feasibility study to provide electrical shore power to all eight cruise berths (\$495 k)
- Finished Geographic Information System (GIS) mapping of all 4,247 exterior lights, with the next phase underway to upgrade the program to high-efficiency light-emitting diode (LED) fixtures
- Migrated additional port cars to electric vehicles and installed electric vehicle charging stations at the administration building
- Installed NOAA National Ocean Service Physical Oceanographic Real-Time System, and its microwave sea level records are currently being analyzed to detect trends in sea level rise
- Replacing approximately 1,650 linear feet of bulkheads at Berths 16, 17, and 18; new bulkheads are designed to account for sea level rise and accommodate new generations of larger cargo and cruise vessels
- Collaborating with the FWCC and South Florida Association of Environmental Professionals to establish a citizen-scientist coral research and propagation nursery offshore and at the non-profit Reef Discovery Center

PORT OF FERNANDINA

- Infrastructure resiliency to protect against flooding



JAXPORT

- Electrified 2,400 linear feet of berthing space at Blount Island to support up to 10 fully electric container cranes, including three currently in use and three additional scheduled to arrive in February 2023
- Supporting the continued growth of liquefied natural gas (LNG) as a clean marine fuel, offering on-dock and near-dock LNG fueling capabilities for ships, including the arrival of North America's largest LNG bunker barge
- Launched the JAXPORT EXPRESS Project, a large-scale investment in zero- and near-zero-emission cargo-handling equipment technologies, to achieve greenhouse gas reductions, expand energy-efficient terminal infrastructure, increase cargo throughput, and develop a plan to transition to lower-emission port infrastructure and maritime operations (\$47 m)

PORT OF KEY WEST

- Water quality testing program partnership with College of the Florida Keys

SEAPORT MANATEE

- Collaborating with various agencies to protect, manage, and improve habitat and water quality in Southwest Florida's three national estuaries

PORT MIAMI

- Received honorary recognition for Cruise Terminal B as the first cruise ship terminal in the world to be certified as LEED Gold New Construction v4.0. Additionally, Cruise Terminal V is anticipated to receive LEED gold in the upcoming months
- South Florida Container Terminal Cargo Yard (SFCT) replaced 36 of its cargo terminal utility tractor rigs (UTRs) with new UTRs containing Tier 4 engines to reduce greenhouse gas emissions as well as 12 diesel top loaders with six eRTGs. Additionally, SFCT's new cargo gate opened in 2021 which increased yard efficiency and minimized diesel emissions by decreasing the truck idling times to, from, and within the yard
- Seaboard Marine Cargo Yard replaced seven UTRs with new UTRs containing Tier 4 engines, two Top Loaders, and one 8,000 lb. Diesel forklift

- Developing the nation's first end-to-end net zero carbon emission supply chain in line with the County's goal of a 50% reduction in emissions by 2030. The program began with the electrification of key elements of the supply chain, including conversion to electric cargo handling equipment and transportation, and the provision of shore power for ships at port. In addition, it proposes an expansion of rail infrastructure and operations to eliminate fossil fuel-burning trucks from the road

PORT OF PALM BEACH

- Added shore power to the mega yacht berth to reduce vessel emissions (\$1.5 m)
- Overhauling the port's intermodal rail system to allow for more efficient operations and provide significant gains in air quality by transporting more cargo by rail; the project is estimated to eliminate 29,000 truck trips a year from interstates (\$26.4 m)
- Underground power relocation for resilience during hurricanes
- Consideration of increase in bulkhead height during redesign such that the completed mega yacht berth incorporated structural design to allow increased elevation of cap and berth areas
- Invested in large-diameter fendering to protect the Florida manatees that transit the vessel slips (\$700 k)

PORT PANAMA CITY

- Electrified the port's three mobile harbor cranes
- Studying expanding the use of zero-emissions cargo handling equipment as part of the five-year Strategic Plan

PORT TAMPA BAY

- Received a \$6M state grant toward implementing a \$15M power resiliency project that will support energy and other port facilities
- Partnering with Audubon Florida, USACOE, Florida Fish and Wildlife, U.S. Fish and Wildlife Service, and many local partners in the protection of globally significant migratory nesting shorebird populations through its Migratory Bird Protection Interagency Committee



WORKFORCE RESILIENCY

In addition to investing in capital projects, ports today invest in training programs which are key to ensuring long-term development and growth of Florida ports. Florida seaports sponsor apprenticeships, internships, and trade school training programs with a focus on developing the labor pool necessary to support, operate, and maintain Florida seaports well into the future. As such, a few examples of these workforce resiliency programs are illustrated below.

The Canaveral Port Authority provides a paid internship program for college students with the opportunity to gain supervised experience and insights in the cruise and leisure, cargo, engineering, and public administration areas. Additionally, CPA has an active internship program with several state maritime academies including Maine Maritime Academy, Massachusetts Maritime Academy, SUNY Maritime Academy, and Texas A&M Galveston Maritime Academy.

Port Everglades provides an environmental internship program to provide relevant on-the-job training and work experience for 15 local university environmental students.

Derecktor **Fort Pierce**, together with Indian River State College, is developing educational and trade programs to educate the community in various shipyard-related operations.

JAXPORT is creating a workforce development curricula together with the Electric Vehicle Infrastructure Training Program (EVITP) and the higher education institutions in Northeast Florida to establish the labor pool necessary to support, operate, and maintain zero-emissions cargo-handling equipment, charging stations, and future widespread deployment of zero emissions technologies.

SeaPort Manatee is partnering with the New College of Florida to develop an internship/mentoring program.

PortMiami is a department of Miami-Dade County and participates in county-wide leadership programs. Such programs offer internships to students across all universities and high schools within the County.

Port of Palm Beach is planning to have a college internship program in the summer of 2023.

Port Panama City is studying the opportunities available for co-op and training programs offered by local colleges and technical schools to develop the future workforce of the Port, focusing on the maintenance and operations of the next generation of general cargo, bulk, and container handling equipment.

Port of Pensacola offers training programs with American Magic - America's Cup sailing and the University of West Florida.

Port Tampa Bay offers high school and college internships in maritime, government, finance, business development, engineering, and other areas within the port.





FUNDING THE FUTURE

Governance structures play a role in how ports are funded and how they generate revenue. A characteristic that separates seaports from other types of infrastructure is just how unique they are in governance and operations from one another. Some states – such as Maryland, Virginia, the Carolinas, and Georgia – manage their seaports through the state government. Elsewhere, such as in Los Angeles and Long Beach, California, seaports are part of a city government. Others still are managed by counties and public authorities.

Florida seaports offer a window into the wide array of seaport governance structures. While JAXPORT is an independent authority of the City of Jacksonville, Port Everglades is a self-supporting enterprise fund of the Broward County government. Canaveral Port Authority is an independent governmental agency, complete with an elected board of commissioners.

Furthermore, seaports vary based on the operating model. Some ports use an owner/operator model, while others are considered “landlord” ports and sign lease agreements with private companies to occupy and manage cargo or cruise operations on port property. Lease agreements may detail shared cost arrangements between seaports and private companies to undertake facility upgrades on port property. Not all port real estate is industrial – some seaports lease land to hotels, dining, and retail businesses.

As a result of the varying port structures, seaports may choose to fund projects by (i) using revenue generated through port operations, (ii) seeking financing and funding tools available from federal, state, or local governments, or (iii) a combination of the two.

Funding and financing options for capital projects include a combination of working capital, state grants, federal grants, construction bonds, bank loans, commercial mortgages, and private capital. As such, Florida seaports work with their state, federal, private, and association partners to underwrite funding and financial incentives. The following is a list of grant and loan programs available to Florida seaports, administered at the state and federal levels.

Together, Florida seaports received over \$400 million in state and federal funding in 2021/2022⁹.

9. SMP workbooks 2022-2026 – (BA analysis)

STATE OF FLORIDA PROGRAMS

Florida Seaport Transportation and Economic Development (FSTED) Program: The FSTED Program makes available a minimum of \$25 million a year for specific types of port facilities or port transportation projects, requiring a 50-50 state-local match¹⁰.

Strategic Port Investment Initiative (SPII): FDOT-managed fund which makes available a minimum of \$35 million to the initiative each year¹¹. State funding is matched by the local port, requiring either a 50-50 or 75-25 state-local match. The Initiative is funded primarily through FDOT's Strategic Intermodal System (SIS).

Strategic Intermodal System (SIS): Funding pool administered by FDOT to focus the state's limited transportation resources on the facilities most significant for interregional, interstate, and international travel¹².

Florida's State Infrastructure Bank (SIB): 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 proceeds¹³.

Triumph Gulf Coast Grants: Following the 2010 Gulf 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 Florida will receive a total of \$2 billion until 2033. These funds are available to generate increased economic activity in the disproportionately affected counties, which are all located in the Florida Panhandle¹⁴.

Florida Resilient Coastlines Program: Through the Florida Resilient Coastlines Program, the Florida Department of Environmental Protection continues its efforts to help ensure collaboration among Florida's coastal communities and to offer technical assistance and funding to coastal communities dealing with increasingly complex flooding, erosion, and habitat shifts. These funds promote and ensure a coordinated approach to sea level rise planning among state, regional, and local agencies¹⁵. In FY21-22, \$3.6 million in funding was awarded to coastal Florida communities.

FEDERAL PROGRAMS (ALL STATES)

Inflation Reduction Act: The inflation Reduction Act includes \$3 billion over five years to establish a new grant program to install electrified equipment and reduce emissions at ports, as well as funding for ports seeking to purchase alternative-fueled cargo-handling equipment, shore power systems, microgrids for energy resiliency, electric grid infrastructure, and more¹⁶. The Inflation Reduction Act was signed into law in 2022, marking the most significant action Congress has taken on clean energy and climate change in the nation's history.

Infrastructure Investment and Jobs Act (IIJA): The IIJA, also known as the Bipartisan Infrastructure Bill, is a federal statute signed into law in 2021. The legislation includes around \$550 billion in new federal investment in America's roads and bridges, water infrastructure, resilience, internet, and more¹⁷. The bill invests \$17 billion in port infrastructure to address repair and maintenance backlogs, reduce congestion and emissions near ports and airports, and drive electrification and other low-carbon technologies.

10. <https://flaports.org/about/florida-seaport-transportation-and-economic-development-program/>

11. <http://www.leg.state.fl.us/Statutes/index.cfm>

12. <https://www.fdot.gov/planning/sis/default.shtm>

13. <https://www.fdot.gov/comptroller/pfo/sibintro.shtm>

14. <https://www.myfloridatriumph.com/about/frequently-asked-questions/>

15. <https://floridadep.gov/rcp/florida-resilient-coastlines-program>

16. <https://www.aapaseaports.com/index.php/2022/08/18/president-signs-inflation-reduction-act-granting-3-billion-to-ports-for-electrification-projects-into-law/>

17. <https://www.whitehouse.gov/briefing-room/statements-releases/2021/08/02/updated-fact-sheet-bipartisan-infrastructure-investment-and-jobs-act/>





American Rescue Plan Act of 2021: The American Rescue Plan Act provides \$350 billion to help states, counties, cities, and tribal governments cover increased expenditures, replenish lost revenue, and mitigate economic harm from the COVID-19 pandemic¹⁸.

Port Infrastructure Development Program (PIDP): Federally managed grant program funded through an appropriations omnibus bill that included a \$450 million port infrastructure development grant program in FY 2023¹⁹. PIDP is the first and only federal grant program wholly dedicated to investments in port infrastructure²⁰.

Infrastructure for Rebuilding America (INFRA): Federally managed grant program with approximately \$1.5 billion available in FY 2022 for highway, multimodal freight, and rail projects that will make the nation's transportation systems safer and more resilient, eliminate supply chain bottlenecks, and improve critical freight movements²¹. In addition to providing direct federal funding, the INFRA program aims to increase the total investment by the state, local, and private partners.

Mega Grants: Federally managed grant program with approximately \$1 billion allotted in FY 2022. The Mega Program supports large, complex projects that are difficult to fund by other means and likely to generate national or regional economic, mobility, or safety benefits²². Grants are awarded to projects greater than \$500 million in cost, and projects greater than \$100 million but less than \$500 million in cost. A 40% match is required.

Rebuilding American Infrastructure with Sustainability and Equity (RAISE): Federally managed multimodal grant program to help urban and rural communities move forward on projects that modernize roads, bridges, transit, rail, ports, and intermodal transportation and make the transportation systems safer, more accessible, more affordable, and more sustainable. The program was funded at \$2.2 billion in FY 2022²³.

U.S. Army Corps of Engineers (USACE) Work Plan: Plan that provides federal funding for harbor deepening and maintenance. These funds need to be matched at the local or state level²⁴.

Railroad Rehabilitation & Improvement Financing (RRIF): Federal Railroad Administration financing tool available for port rail projects. Some ports find program requirements burdensome, while some would prefer that it had a capital grants component, making continued advocacy important²⁵.

Port Security Grant Program (PSGP): Federally managed grant with \$100 million available in FY 2021. This grant provides funding to help protect critical port infrastructure from terrorism, enhance maritime domain awareness, improve port-wide maritime security risk management, and maintain or reestablish maritime security mitigation protocols that support port recovery and resiliency capabilities²⁶.

Diesel Emissions Reduction Act (DERA): Federally managed grant to improve air quality at the nation's ports. In FY 2021, the U.S. EPA anticipates awarding \$46 million for emissions and idle control devices, aerodynamic equipment, engine and vehicle replacements, and alternative fuel options²⁷.

18. <https://home.treasury.gov/system/files/136/SLFRP-Quick-Reference-Guide-FINAL-508a.pdf>

19. <https://www.maritime.dot.gov/PIDPgrants>

20. <https://www.whitehouse.gov/briefing-room/statements-releases/2021/11/09/fact-sheet-the-biden-harris-action-plan-for-americas-ports-and-waterways/>

21. <https://www.transportation.gov/grants/mpdg-announcement>

22. <https://www.grantsoffice.com/GrantDetails.aspx?gid=60728>

23. <https://www.transportation.gov/RAISEgrants>

24. <https://www.usace.army.mil/Media/News/NewsSearch/Article/3042747/us-army-corps-of-engineers-releases-work-plan-for-fiscal-2022-civil-works-appro>

25. <https://www.transportation.gov/buildamerica/financing/rrif/railroad-rehabilitation-improvement-financing-rrif>

26. <https://www.fema.gov/grants/preparedness/port-security>

27. <https://www.epa.gov/dera>



FOREIGN-TRADE ZONES

Created in 1934 to encourage international trade, a Foreign-Trade Zone (FTZ) is a land area located in or near a U.S. port of entry that is legally considered outside the national customs territory.

There are 20 FTZs located in the state of Florida, second only to Texas²⁸. FTZs provide economic incentives to companies importing or exporting international goods²⁹. Duty-free treatment is applied to items that are re-exported and duty payment is deferred on items sold in the U.S. market.

These savings are advantageous to shippers: one of JAXPORT's largest FTZ users, Mazda North America Operations, saves approximately \$100,000 annually on merchandise processing fees³⁰. Collectively, FTZs across the state of Florida supports some 11,000 jobs statewide³¹.

28. <https://ofis.trade.gov/Zones>

29. <https://www.trade.gov/foreign-trade-zones-board>

30. <https://www.JAXPORT.com/hidden-savings-opportunity-the-merchandise-processing-fee/>

31. <https://www.trade.gov/sites/default/files/2020-11/AR-2019.pdf>



KEY TAKEAWAYS

- Florida is a top maritime trade state and home to the world's largest cruise ports.
- Today's mission for each of Florida's 16 publicly owned seaports is reliable, resilient, and ready. The crisis of the last two years demonstrated that ports and shipping matter greatly for a well-functioning global economy. It has also allowed ports to revitalize their organizations, sharpen their focus, and build teams that are reliable and resilient, and ready to take on the challenges that lie ahead.
- Ten of Florida's 16 established and emerging seaports handled cargo in 2022, and eight handled passenger movements by cruise ship, ferry, and/or day-cruise vessel. While no two ports are alike in their facilities or ability to accommodate ships, cargo, or passengers, however, taken together, Florida's ports are ready to handle virtually anything that moves.
- Florida ports act as an economic multiplier, supporting 900,000 direct and indirect jobs in the state of Florida and contributing \$117.6 billion in economic value, or 13.3% of Florida's Gross Domestic Product.
- In 2022, the total tonnage across all Florida seaports reached a new record high, totaling 112.5 million tons of cargo, a 6% increase over 2021, and a 0.5% increase over 2019, the previous record-holding year.
- Many Florida ports attribute the increased cargo due to supply chain challenges and port congestion stemming from the global pandemic, with shippers looking for alternative, non congested ports to move cargo, especially into large, growing consumer markets such as Florida.
- This shift is anticipated to continue to fuel growth at Florida ports. Moving forward, of the nine Florida seaports that provided 2027 forecasted cargo figures, they all forecast tonnage and TEU growth over the next five years.



2022 KEY FIGURES

TEUs	4,310,054
Container Tons	26,167,200
Dry Bulk Tons	22,426,786
Liquid Bulk Tons	54,899,124
Breakbulk Tons	9,038,895
Total Tonnage	112,532,005
Vehicles	631,157
Passengers	10,769,213
Five Year CIP	\$3.9 billion

- Florida continues to claim the world’s top three cruise homeports – PortMiami, Port Canaveral, and Port Everglades – and is home to the largest cruise ships in the world; in 2019, Florida ports accounted for 60.1% of total U.S. cruise passenger embarkations.
- Florida-based cruise activity’s direct expenditures generated 158,992 jobs, \$8.1 billion in income across the state, and more than \$9.0 billion in direct revenue for Florida businesses in 2019.
- Florida’s embarkations increased by 41% between 2010 and 2019, at a compound annual growth rate (CAGR) of 3.9%. Today, the cruise industry continues its recovery, with 41% fewer passengers carried in 2022 when compared to 2019. It is anticipated that Florida ports should reach 2019 levels in 2023.
- For many years, Florida has been a global hub for mega yachts, both for extended marina stays and, increasingly, for maintenance; this trend is expected to continue.
- The combined five-year capital improvement plan (CIP) for Florida’s 16 seaports totals more than \$3.9 billion for the period from FY2022/23-2026/27.
- The largest planned investments in the current CIP are for Berth Rehabilitation and Repairs (\$774 million, 20%), Site Improvements (\$703 million, 18%), Cargo Terminals (\$698 million, 18%), and Cruise Terminals (\$636 million, 16%).
- In addition to revenue generated by port activity, seaports may access a variety of private, state, and federal funding and financing tools for infrastructure development. Together, Florida seaports received over \$400 million in state and federal funding in 2021/2022.
- A significant value-add to international shippers and manufacturers are the 20 Foreign-Trade Zones (FTZs) in the state of Florida, second only to Texas.





PORT PROFILES

PORT CANAVERAL

PORT EVERGLADES

PORT OF FERNANDINA

PORT OF FORT PIERCE

JAXPORT

PORT OF KEY WEST

SEAPORT MANATEE

PORT MIAMI

PORT OF PALM BEACH

PORT PANAMA CITY

PORT OF PENSACOLA

PORT ST. JOE

PORT ST. PETE

PORT TAMPA BAY

* Port Citrus and Port Putnam did not provide profiles.



PORT CANAVERAL

CANAVERAL PORT AUTHORITY

www.portcanaveral.com

Established in 1953

Foreign-Trade Zone #136

Linear Ft of Berths: 16,006 ft

Project Depth: 43 ft

Port Canaveral is a world-class deep-water seaport for global trade. For nearly seven decades, the Port has served as a critical gateway connecting commerce and consumers throughout Florida and the southeastern United States. Today, the Port continues to play a vital and historic role in supporting U.S. military operations, government, military, and commercial space exploration, and international commerce. Port Canaveral holds a significant responsibility in building and sustaining a strong economy on Florida's Space Coast and the Central Florida region, which is the tenth largest consumer market in the U.S. with economic growth well above the national average. The deep-water seaport serves as a unique quadra-modal transportation hub linking sea, land, air, and space with the benefits of easy and efficient highway access, unrestricted air draft, 43-foot deep-water sea access, and multipurpose berthing.

Approximately 75% of the Port's total revenue is derived from its cruise business, which is why Port Canaveral is perhaps best known for being the second busiest cruise port in the world, welcoming nearly five million multi-day cruise passengers in FY22 across its seven cruise terminals. It serves as a homeport for several of the cruise industry's largest and most sophisticated ships operated by the largest cruise brands in the world. In 2021, Port Canaveral became the first cruise port in North and South America to support LNG-powered cruise vessels. The Port also has an increasingly diversified cargo portfolio while playing an important role in supporting Florida's commercial space industry.

	2022	2027 (estimated)
 TEUs	2,050	2,275
 Tonnage	6,564,851	7,123,000
 Cruise Passengers	4,210,260	6,434,000
 Homeport Cruise Ships	11	14

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	ASESION	1	GERMANY
2	BAHAMAS	2	CANADA
3	FRANCE	3	BAHAMAS
4	SAUDIA ARABIA	4	SWEDEN
5	SUDAN	5	JAPAN

TOP COMMODITIES BY VALUE

Exports		Imports	
1	PETROLEUM	1	PETROLEUM
2	MACHINERY & EQUIPMENT	2	LUMBER
3	CONTAINERS	3	GRANITE
4	SALT	4	LIMESTONE
5	ROLL-ON/ROLL-OFF (RORO)	5	SLAG

The Port is investing in increasing its operational capabilities and infrastructure capacity to meet the needs of today's larger, more sophisticated, vessels, add value to the Port's business portfolio, and maintain its competitive position for handling current and future business demands. The Port's five-year capital improvement program is focused on harbor and landside infrastructure improvements, such as renovating cruise and cargo terminal facilities, and building and refurbishing multi-purpose deep-water berths to keep pace with demands and promote economic prosperity for the region.

GOALS & OBJECTIVES

- Diversify business portfolio with cargo terminal expansion and uplands development projects to accommodate more bulk and breakbulk cargo, energy products storage, and distribution (transportation fuels and LNG)
- Increase cargo handling capabilities and add capacity to accommodate diverse commodities and increased heavy lift and project cargo for expanding commercial space operations
- Improve berth capacities and capabilities to accommodate increasing vessel size and tonnage of cargo and cruise ships

ACCOMPLISHMENTS

- Sustained business operations during the pandemic despite losing nearly 80% of operating revenues
- Launched North Cargo Berth 3 rehabilitation and renovation project
- Reached record level of year-over-year cruise business revenue and cargo business tonnage

TOP CAPITAL PROJECTS

- North Cargo Berth 3 renovation
- North Cargo Berth 4 renovation
- Northside Improvement Project

GRANTS AWARDED

- **\$72.2 million** from the State of Florida's American Recovery Act allocation for Florida Seaports

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Cargo terminals (including upgrades, new berths, and equipment)</i>	\$27,029,000	\$40,150,000	\$35,850,000	\$9,500,000	\$5,000,000	\$117,529,000
<i>Channel or harbor deepening (including spoil sites)</i>	\$4,437,000					\$4,437,000
<i>Berth rehabilitation and repair</i>						
<i>Cruise Terminals</i>	\$9,436,000	\$4,976,000	\$28,976,000	\$28,000,000	\$50,000,000	\$121,388,000
<i>Miscellaneous projects (such as research, environmental, equipment, repairs, fees)</i>	\$16,902,000	\$7,654,000	\$4,199,000	\$2,653,000	\$3,855,000	\$35,263,000
<i>Intermodal road and rail</i>	\$8,093,000	\$452,000	\$1,078,000		\$55,000	\$9,678,000
<i>Site improvements (excluding spoil sites)</i>	\$2,091,000	\$284,000	\$11,800,000	\$18,200,000		\$32,375,000
<i>Land acquisition</i>						
<i>Other structures</i>	\$5,010,000	\$1,220,000				\$6,230,000
<i>Security</i>	\$3,197,000	\$1,290,000	\$1,215,000	\$3,653,000	\$1,015,000	\$10,370,000
TOTAL	\$76,195,000	\$56,027,000	\$83,118,000	\$62,005,000	\$59,925,000	\$337,270,000



PORT EVERGLADES

BROWARD COUNTY, PORT EVERGLADES DEPARTMENT

www.porteverglades.net

Established in 1927

Foreign-Trade Zone #25

Linear Ft of Berths: 26,722 ft

Project Depth: 45 ft / 42 ft / 48 ft¹

	2022	2027 (estimated)
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TEUs

1,107,456

1,426,227



Tonnage

27,351,508

29,882,610



Cruise Passengers

1,717,908

5,176,280



Homeport Cruise Ships

30

35

An epicenter for international trade, Port Everglades is positioned in one of the world's largest consumer regions, including a combined 110 million residents and seasonal visitors within an 80-mile radius. Port Everglades is the second largest U.S. gateway for trade with Latin America, moving 12.5% of all U.S./Latin American trade. The port's diversified cargo mix includes containers, refrigerated cargo, new and used automobiles and trucks, dry bulk, breakbulk, project cargo, RO/RO, and liquid bulk. Approximately one-third of the transportation fuels consumed in Florida are stored and distributed by companies located within Port Everglades, including jet fuel for five international airports. In addition to cargo operations, Port Everglades hosts nearly four million cruise passenger movements annually.

With its proximity to the popular Caribbean, Port Everglades is the third busiest cruise homeport in the world. It is a leading container port in Florida and one of the most active cargo ports nationally. Port Everglades is also South Florida's main seaport for receiving energy products, including gasoline and jet fuel.

1. Outer Entrance of Channel - Current Depth: 45 feet; Remainder of Channel - Current Depth: 42 feet; Approved Future Depth: 48 feet

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	DOMINICAN REPUBLIC	1	HONDURAS
2	BRAZIL	2	DOMINICAN REPUBLIC
3	CHILE	3	GUATEMALA
4	COSTA RICA	4	COLOMBIA
5	HONDURAS	5	NICARAGUA

TOP COMMODITIES BY VALUE

Exports		Imports	
1	NUCLEAR REACTORS, BOILERS, MACHINERY, PARTS	1	APPAREL ARTICLES AND ACCESSORIES, KNIT OR CROCHET
2	ELECTRIC MACHINERY, SOUND & TV EQUIPMENT, AND PARTS	2	FISH, CRUSTACEANS & AQUATIC INVERTEBRATES
3	VEHICLES, EXCEPT RAILWAY OR TRAMWAY, AND PARTS	3	BEVERAGES, SPIRITS, AND VINEGAR
4	PLASTICS AND ARTICLES THEREOF	4	MINERAL FUEL, OIL, BITUMEN SUBST, MINERAL WAX
5	OPTIC, PHOTO, MEDIC OR SURGICAL INSTRUMENTS	5	SHIPS, BOATS, AND FLOATING STRUCTURES

Port customers benefit from direct highway access, an international airport within two miles, state-of-the-art foreign-trade zone warehousing, and a 43-acre international and domestic intermodal container rail transfer facility that makes it possible for cargo shipped to Port Everglades to reach Atlanta and Charlotte by rail within two days, and 70% of the U.S. population in four days.

Port Everglades follows an aggressive, comprehensive twenty-year Master/Vision Plan that focuses on modernizing its facilities to maximize productivity. The plan is updated every two to four years and reviews market trends and changes in the cruise, cargo, and energy industries, local planning initiatives, and evolving technologies. Through these plans, Port Everglades has identified 50 infrastructure improvements, with an estimated cost of up to \$3 billion that will increase the port's productivity over the next twenty years. More than half of the projects will be started and/or completed within the next five years.

A department of Broward County government, Port Everglades does not rely on local tax dollars for operations. The total value of economic activity related to Port Everglades exceeded \$30 billion in the fiscal year 2021. More than 206,000 Florida jobs are impacted by the port, including 7,000 people who work for companies providing direct services.

GOALS & OBJECTIVES

- Complete the Southport Turning Notch Extension and crane rail infrastructure project
- Improve on-port and near-port transportation connections
- Complete the U.S. Army Corps of Engineers Port Everglades Navigation Improvements Project

ACCOMPLISHMENTS

- Signed a 15-year agreement with Disney Cruise Line to homeport a ship year-round beginning in November 2023
- Opened the new berths in the Southport Turning Notch Extension project, including three new Super Post-Panamax Cranes and three additional cranes currently being manufactured for commissioning in December 2023
- Received approval from the U.S. Department of Transportation Maritime Administration for a new Marine Highway designation from Houston to Port Everglades to Puerto Rico

TOP CAPITAL PROJECTS

- Southport Turning Notch Extension
- Slip 1 Expansion for port's energy sector
- U.S. Army Corps of Engineers Navigation Improvements Project to deepen and widen the port's navigation channels

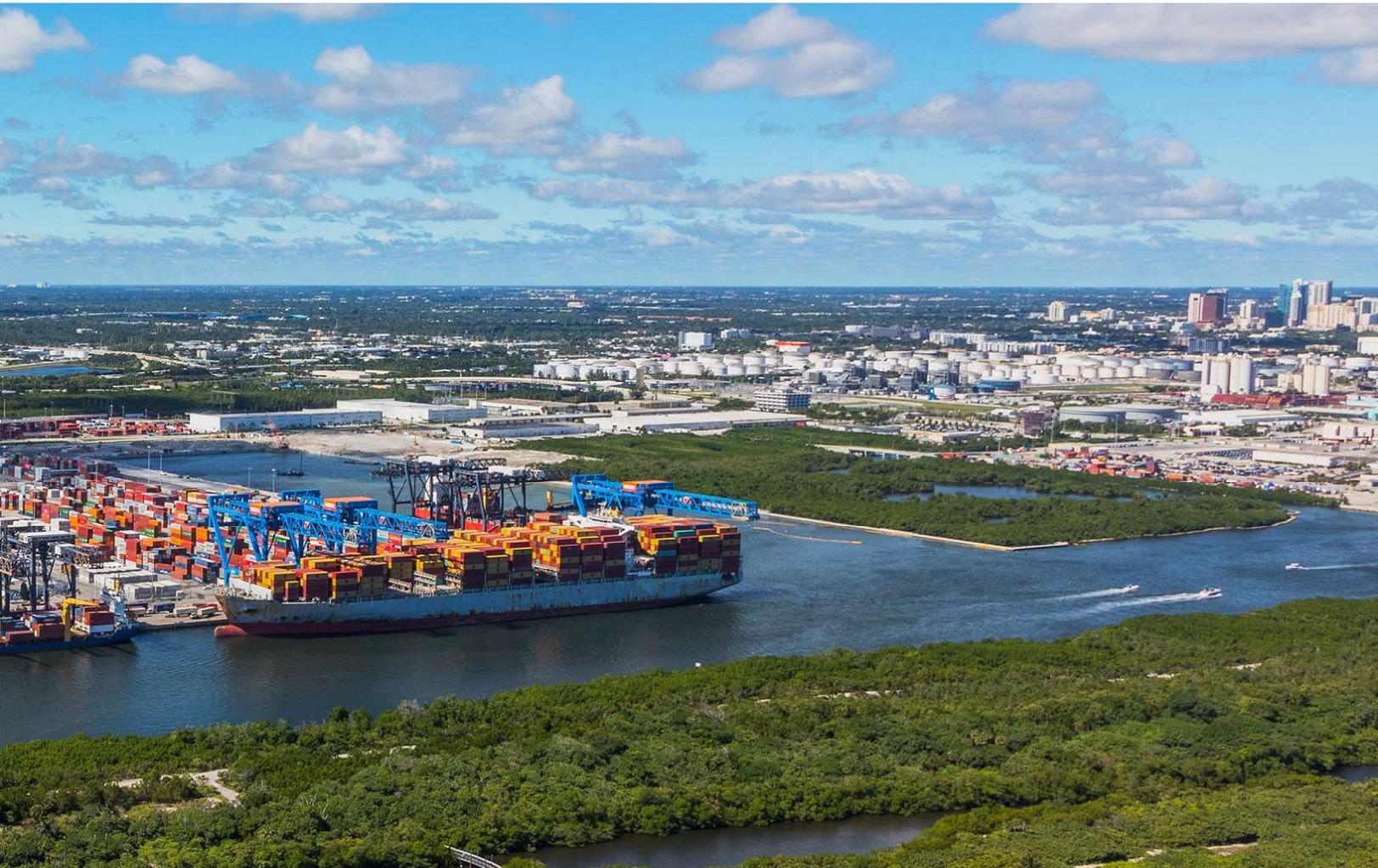
GRANTS AWARDED

- **\$1.98 million** from the FEMA Port Security Grant Program (PSGP) for upgrades to Security Operations
- **\$19.28 million** from the MARAD Port Infrastructure Development Program (PIDP) to replace the sea wall at three berths among other structural and environmental improvements
- **\$58.2 million** from the Florida Department of Transportation from the State of Florida's American Recovery Act allocation for Florida Seaports



FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs</i>	\$55,494,000	\$32,698,000	\$32,698,000	\$12,324,000	\$12,324,000	\$145,538,000
<i>Cargo Terminals (Incl. New Berths & Equip)</i>	\$22,650,000	\$27,466,000	\$27,466,000	\$624,000	\$4,800,000	\$83,006,000
<i>Channel and Harbor Deepening</i>			\$25,000,000			\$25,000,000
<i>Cruise Terminals</i>	\$25,000,000					\$25,000,000
<i>Intermodal Road and Rail</i>		\$6,109,000	\$6,109,000	\$19,511,000	\$19,511,000	\$45,131,000
<i>Land Acquisition</i>						
<i>Miscellaneous Projects</i>	\$14,300,000	\$40,900,000	\$40,900,000	\$40,900,000	\$14,300,000	\$151,300,000
<i>Other Structures</i>		\$15,515,000	\$15,515,000			\$26,030,000
<i>Security</i>	\$250,000	\$250,000	\$250,000	\$250,000	\$250,000	\$1,250,000
<i>Site Improvements</i>						
TOTAL	\$117,694,000	\$111,829,000	\$147,938,000	\$73,609,000	\$51,185,000	\$502,255,000





PORT OF FERNANDINA

OCEAN HIGHWAY AND PORT AUTHORITY, NASSAU COUNTY

www.portoffernandina.org

Established in 1941

Linear Ft of Berths: 1,200 ft

Project Depth: 40 ft

The Port of Fernandina is located on Florida’s Atlantic coast. The port provides port and terminal service for both imports and exports to more than fourteen pulp and paper producers located throughout Florida and the Southeastern US. It also supports local paper mills by exporting their products. In addition, the Port of Fernandina handles a diverse mix of cargoes, ranging from containers serving the Bermuda market to a growing bulk import market supporting the construction industry in the Southeastern US.

To better accommodate customers, capital investments of nearly \$10 million have been made, and additional investments are planned for the coming years. The port has deepened its berths to 40 feet MLW, added three new cranes, implemented a new Terminal Operating System, and replaced/upgraded its fleet of cargo handling equipment for all types of cargo.

The Port of Fernandina currently has 230,000 square-foot of on-port warehouse facilities, over 180,000 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.

The port is included in the M-95 Marine Highway designation and is pursuing opportunities with local industry for short-sea shipping to remove trucks from the over-the-road highway system. The port operator runs a fleet of six trucks to service its customers.

The Port of Fernandina is also developing an aggressive marketing campaign to attract more small luxury cruise lines for port-of-call visits to take advantage of the strong tourism infrastructure that exists in Nassau County.

	2022	2027 (estimated)
 TEUs	10,042	10,000
 Tonnage	371,180	600,000
 Cruise Passengers	0	4,500

2. The Port and Terminal Operator are in the process of developing a 5-year capital program that will be consistent with its upcoming Port Master Plan. It is anticipated that the following elements will be included in the list of projects to be pursued.

GOALS & OBJECTIVES

- Ensure that port operations are conducted in the safest manner possible
- Increase the utilization of the port facility through cargo diversification and expansion into other port sectors
- Ensure the resiliency of port facilities and improve the sustainability of its operations

ACCOMPLISHMENTS

- Reinvested into the port's infrastructure and equipment, including new cranes, a tugboat, and covered storage
- Developed port Master Plan with increased public participation
- Hired first full-time Executive Director through an American Rescue Plan Act grant

TOP CAPITAL PROJECTS²

- Infrastructure resiliency to protect against flooding
- Additional covered storage to increase breakbulk capacity
- Port of Call cruise facility
- Reinvestment in existing wharf facility

GRANTS AWARDED

- **\$800 thousand** from the State of Florida's American Recovery Act allocation for Florida Seaports



TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	ECUADOR	1	SWEDEN
2	BERMUDA	2	BRAZIL
3	N/A	3	CHINA
4	N/A	4	NETHERLANDS

TOP COMMODITIES BY VALUE

Exports		Imports	
1	KRAFT LINERBOARD	1	WOODPULP/LUMBER
2	BUILDING MATERIALS/ HOUSEHOLD GOODS	2	HARDBOARD
3	N/A	3	PLYWOOD
4	N/A	4	PEBBLE SAND

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
Berth Rehabilitation and Repair	\$1,200,000					\$1,200,000
Cargo Terminals (Incl. New Berths & Equip)	\$230,000					\$230,000
Channel and Harbor Deepening, Maintenance Dredging	\$330,000					\$330,000
Cruise Terminals						
Intermodal road and rail						
Land Acquisition						
Miscellaneous projects	\$80,000					\$80,000
Other structures	\$1,100,000	\$300,000				\$1,400,000
Security						
Site Improvements						
TOTAL	\$2,940,000	\$300,000				\$3,240,000



PORT OF FORT PIERCE

ST. LUCIE COUNTY

www.stlucieco.gov/departments-services/a-z/administration/port-of-fort-pierce

Established in 1920

Foreign-Trade Zone #218

On Florida's southeast Atlantic Coast, the Port of Fort Pierce is a deepwater seaport, made possible through the construction of the Fort Pierce Inlet. The Port of Fort Pierce has been unique among Florida ports in that its working waterfront, the Indian River Terminal, and much of the rest of the port, were held in private ownership.

In its early years, the port thrived, first as a hub for the coastwise, then international shipping of Florida citrus and produce. During World War II, the Port was converted to a U.S. Navy base before finally establishing itself as a shipping hub to the Bahamas. Because of shifting markets, however, the once-bustling cargo facility fell into stagnation.

That changed in January 2018, when St. Lucie County acquired the Indian River Terminal to transform it from a dated cargo facility to a purpose-built shipyard for the maintenance, retrofit, and overhaul of mega yachts and large sailing vessels.

Derecktor Shipyards began operations in 2019 and added the world's largest mobile boat hoist a year later. With continuing investments, the decades-old cargo terminal has now transformed into a modern mega-yacht facility. With the success of this facility, the County has begun the development of Harbour Pointe, its 20-acre site that can eventually support the County's vibrant artificial reef program, its commercial fishing heritage, and a much-needed public boat ramp.



Together, Derektor/Fort Pierce and Harbour Pointe could be the catalysts for the development of the large tracts of waterfront property that remain undeveloped. Facilities for small cruise ships, fast ferries, or niche commodities such as offshore wind farms or the import/export of yachts have been discussed as possible opportunities for the modern Port of Fort Pierce.

GOALS & OBJECTIVES

- Job creation and economic growth
- Develop undeveloped port properties (including County-owned Harbour Pointe)
- Develop robust job training/apprenticeship programs

ACCOMPLISHMENTS

- Acquired the former Indian River (Cargo) Terminal
- Selected Derektor Shipyards, Inc. for the operation and development of new mega yacht facility
- Completed new Port Master Plan

TOP CAPITAL PROJECTS

- Landside improvements and upgrades
- Terminal improvements, including paving to support heavy vessels
- Gate relocation and construction

GRANTS AWARDED

- **\$800 thousand** from the State of Florida's American Recovery Act allocation for Florida Seaports

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repair</i>		\$5,000,000				\$5,000,000
<i>Cargo Terminals (Incl. New Berths & Equip)</i>			\$15,000,000			\$15,000,000
<i>Channel and Harbor Deepening</i>						
<i>Cruise Terminals</i>						
<i>Intermodal Road and Rail</i>						
<i>Land Acquisition</i>						
<i>Miscellaneous projects - Harbour Pointe Development</i>			\$5,000,000			\$5,000,000
<i>Other structures</i>						
<i>Security</i>						
<i>Site Improvements - Stormwater, Utility Loop, Roadway</i>	\$6,000,000		\$7,500,000	\$5,000,000		\$18,500,000
TOTAL	\$6,000,000	\$5,000,000	\$27,500,000	\$5,000,000		\$43,500,000



JAXPORT

JACKSONVILLE PORT AUTHORITY

www.jaxport.com

Established in 1963

Foreign-Trade Zone #64

Linear Ft of Berths: 16,900 ft

Harbor Depth: 47 ft³

JAXPORT is Florida's largest container port by volume and one of the nation's top vehicle-handling ports. The port owns, maintains, and markets three cargo terminals, two intermodal rail terminals, and one passenger cruise terminal along the St. Johns River. As one of the nation's most diversified ports, JAXPORT has experienced labor for a variety of specialty cargos including breakbulk, fresh and frozen, forest products, high and heavy, U.S. Military, and project cargo.

Dozens of ocean carriers call JAXPORT, offering shippers competitive transit times to 140 ports in more than 70 countries. JAXPORT offers ocean carrier services to all major world regions, including direct container service connecting Jacksonville with Asia, Europe, South America, the Caribbean, and Central America. The world's leading ocean carrier alliances call JAXPORT, with regular services to destinations throughout Asia through both the Panama and Suez canals.

The port's largest growth initiative, deepening 11 miles of the Jacksonville shipping channel from 40 feet to 47 feet, which included constructing a vessel turning basin for larger ships to turn at Blount Island berths, was completed in 2022. An additional \$100 million in recently completed berth enhancements enable Blount Island to simultaneously accommodate two post-Panamax ships. More than \$72 million in phased yard improvements are also underway to modernize and expand container capacity at the SSA Jacksonville Container Terminal at Blount Island.

JAXPORT's terminals are located within minutes of three major Interstate highways – I-10, I-75, and I-95 – providing access to more than 98 million consumers within one day's drive. JAXPORT is served by more than 100 trucking firms and 40 daily trains via Class I railroads CSX and Norfolk Southern, and regional Florida East Coast Railway.

2022



TEUs

1,319,304



Tonnage

18,160,342



Cruise Passengers

90,241



Homeport Cruise Ships

1

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	PUERTO RICO	1	PUERTO RICO
2	EAST COAST SOUTH AMERICA	2	NORTHEAST ASIA
3	CENTRAL AMERICA	3	NORTHERN EUROPE
4	NORTHEAST ASIA	4	CENTRAL AMERICAN
5	AFRICA	5	SOUTHEAST ASIA

TOP COMMODITIES BY VALUE

Exports		Imports	
1	MISCELLANEOUS CARGO	1	MOTOR VEHICLES
2	STEEL PRODUCTS	2	MISCELLANEOUS CARGO
3	MEDICAL	3	MEDICAL PRODUCTS
4	MACHINERY	4	MACHINERY
5	ALUMINUM AND OTHER METALS	5	INDUSTRIAL CHEMICALS

The region is a global leader in the use of liquefied natural gas (LNG) as a clean marine fuel. JAXPORT is home to four LNG-powered ships and two LNG-fueling barges and is the only U.S. East Coast port to offer on-dock and near-dock LNG fueling capabilities for ships. A convenient, centrally located drive-to cruise market, Jacksonville is also home to the 2,052-passenger Carnival Elation, offering four- and five-day cruises to the Bahamas.

JAXPORT is Northeast Florida's economic engine, with cargo and cruise activity supporting more than 139,000 jobs in Florida and \$31.1 billion in annual economic impact.

GOALS & OBJECTIVES

- Expand container business through new ocean carriers, expanded trade lanes, and a new direct service from Northern and Western Europe, the Mediterranean, Mexico, and South America
- Expand vehicle capacity and volume by improving Ro-Ro berth capacity
- Expand breakbulk by constructing a new warehouse to accommodate the increasing need for covered storage space

ACCOMPLISHMENTS

- Completed the 47-foot Harbor Deepening project through Blount Island
- Modernization of deep-water container berths 33, 34, and 35 on Blount Island
- Added new direct container service with Europe, expanded connections to/from Asia

TOP CAPITAL PROJECTS

- Harbor deepening and widening air draft project
- SET Auto Processing Facility (89-acre development on Blount Island)
- Dames Point Marine Terminal Expansion

GRANTS AWARDED

- **\$23.5 million** from the Port Infrastructure Development Program (PIDP) to support SSA's Blount Island terminal modernization project
- **\$13.7 million** from the American Rescue Plan Act of 2021 for seaport relief

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs</i>	\$65,565,000	\$41,725,000	\$1,350,000	\$61,550,000	\$19,350,000	\$189,540,000
<i>Cargo Terminals (Incl. New Berths & Equip)</i>	\$145,879,500	\$31,739,500	\$1,170,000	\$800,000	\$800,000	\$180,389,000
<i>Channel and Harbor Deepening</i>	\$49,100,000	\$2,517,110	\$1,517,110	\$1,517,110	\$1,517,110	\$56,168,440
<i>Cruise Terminals</i>	\$747,000	\$2,035,000		\$500,000		\$3,282,000
<i>Intermodal Road and Rail</i>	\$2,150,000	\$2,400,000	\$3,840,000	\$2,250,000		\$10,640,000
<i>Land Acquisition</i>	\$4,000,000					\$4,000,000
<i>Miscellaneous Projects</i>	\$1,915,000					\$1,915,000
<i>Other Structures</i>						
<i>Security</i>	\$4,053,682	\$208,500				\$4,262,182
<i>Site Improvements</i>						
TOTAL	\$273,410,182	\$80,625,110	\$7,877,110	\$66,617,110	\$21,667,110	\$450,196,622



PORT OF KEY WEST

CITY OF KEY WEST

www.cityofkeywest-fl.gov/158/Cruise-Ships-Marine-Services

Established in 1823

Linear Ft of Berths: 664 ft

Project Depth: 35 ft

The Port of Key West, Florida's most southern port, consists of three docking facilities: Mallory Square, the Navy's Outer Mole Pier, and the privately-owned Pier B. These facilities constitute one of the most popular cruise ports-of-call in the nation and one of the state's strongest and most sustained ferry-port operations. The port hosts cruise ships from Miami, Port Everglades, Canaveral, Tampa, and Jacksonville as well as ferries from Fort Myers and Marco Island. Due to the cruise industry's recovery from the COVID pandemic, the port only hosted 198,411 cruise passengers in FY22. Key West is one of the most popular ports in the Caribbean and passengers are introduced to the unique charm of Key West without contributing vehicular traffic to the overburdened US-1 corridor or the ever-busier Key West International Airport.

	2022	2027 (estimated)
 Cruise Passengers	198,000	600,000

GOALS & OBJECTIVES

- Environmental stewardship
- World-class cruise ship visitor experience
- World-class ferry service visitor experience

ACCOMPLISHMENTS

- Instituted procedures that comply with both F.S. 311.25 and City of Key West resolution 22-073
- Maintained viable industry in light of COVID-19 challenges
- Maintained staffing levels in light of the housing crisis exacerbated by COVID-19 and storms

TOP CAPITAL PROJECTS

- Mallory Dock Pier Improvements
- Ferry Terminal Improvements
- Trumbo Road Shore Stabilization/Harborwalk

GRANTS AWARDED

- **\$5.0 million** from the State of Florida’s American Recovery Act allocation for Florida Seaports



FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs</i>	\$3,048,890					\$3,048,890
<i>Cargo Terminals (Incl. New Berths & Equip)</i>						
<i>Channel and Harbor Deepening</i>						
<i>Cruise Terminals</i>						
<i>Intermodal Road and Rail</i>						
<i>Land Acquisition</i>						
<i>Miscellaneous Projects</i>						
<i>Other Structures</i>						
<i>Security</i>						
<i>Site Improvements</i>						
TOTAL	\$3,048,890					\$3,048,890



SEAPORT MANATEE

MANATEE COUNTY PORT AUTHORITY

www.seaportmanatee.com

Established in 1970

Foreign-Trade Zone #169

Project Depth: 40 ft

SeaPort Manatee is one of Florida’s largest and fastest-growing deepwater seaports, handling a diverse array of bulk, breakbulk, containerized, and heavy-lift project cargos. Located at the entrance to Tampa Bay, SeaPort Manatee is the closest U.S. deepwater cargo seaport to the expanded Panama Canal and boasts fast transit times to Mexico and Latin America. In addition to direct access to the United States highway system, SeaPort Manatee is conveniently linked to CSX Railroads’ Class I mainline with daily rail service to the eastern half of the United States. As Southwest Florida’s primary seaport, SeaPort Manatee serves more than 8 million residents within a 2-hour drive and a majority of Florida’s 120 million visitors within a 3-hour drive time, including the distribution-center-filled Tampa/Lakeland/Orlando Interstate 4 corridor.

SeaPort Manatee plays a key role in fueling Southwest Florida’s economy, serving as a gateway for more than 400 million gallons a year of gasoline and related fuels that are distributed to 11 Florida counties. In addition, SeaPort Manatee is critical for the region’s construction industry, each year facilitating the movement of more than 472,000 tons of lumber products and 2.2 million tons of dry bulk cargo, mainly used for road building and construction projects.

As the preferred global gateway for beneficial cargo owners, manufacturers and farmers, SeaPort Manatee focuses on investing in U.S. seaport infrastructure to meet the demand of American supply chains. Based on the merit of the SeaPort’s infrastructure plans, the United States Department of Transportation (USDOT) awarded SeaPort Manatee an \$11.95 million federal grant in September 2022 for the expansion of Southwest Florida’s primary shipping container yard. The expanded yard will have enough capacity to safely and efficiently handle more than 350,000 shipping containers (TEUs) annually.

	2022	2027 (estimated)
 TEUs	177,108	299,913
 Tonnage	10,796,964	15,860,553
 Cruise Passengers	0	25,000
 Homeport Cruise Ships	0	1

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	MEXICO	1	MEXICO
2	PERU	2	BRAZIL
3	COLOMBIA	3	ARGENTINA
4	COSTA RICA	4	COSTA RICA
5	AUSTRALIA	5	PERU

TOP COMMODITIES BY VALUE

Exports		Imports	
1	PROJECT CARGO	1	FRUITS AND VEGETABLE JUICES
2	WOOD PULP	2	ALUMINUM
3	SCRAP IRON & STEEL	3	WASHING & DRYING MACHINES
4	PAPER & PAPERBOARD	4	BANANAS & PLANTAINES
5	FERTILIZER	5	REFRIGERATORS & FREEZERS

On the waterside, SeaPort Manatee is modernizing Berth 4 docking facilities to add berthing capacity and plans to update four of its berths as well as build three new ones over the next 20 years. In addition, the port is working with logistics providers to explore and develop cruise, bulk storage, and warehouse facilities.

SeaPort Manatee is one of Manatee County's leading economic engines, continuously focused on developing commerce and the creation of jobs. Logistics providers and beneficial cargo owners are increasingly drawn to the port and surrounding land, offering hundreds of new maritime and related industrial sector jobs. The port generates more than \$5.1 billion in annual economic impact while supporting more than 37,000 jobs, all without the benefit of local property tax support.

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs - Berth 4, 10, 11</i>	\$54,400,000		\$4,768,034	\$46,408,867		\$105,576,901
<i>Cargo Terminals (Incl. New Berths & Equip)</i>	\$22,100,000	\$5,000,000		\$1,000,000		\$28,100,000
<i>Channel and Harbor Deepening</i>	\$675,000			\$715,000		\$1,390,000
<i>Cruise Terminals</i>		\$50,000,000				\$50,000,000
<i>Intermodal Road and Rail</i>	\$29,672,487	\$10,750,000			\$3,000,000	\$43,422,487
<i>Land Acquisition</i>			\$20,000,000			\$20,000,000
<i>Miscellaneous Projects - Hazard Mitigation</i>		\$1,000,000				\$1,000,000
<i>Other Structures - Cruise/Ferry Terminal Parking</i>						
<i>Security</i>	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000
<i>Site Improvements - Maintenance</i>	\$4,000,000	\$5,000,000	\$5,000,000	\$5,000,000	\$5,000,000	\$24,000,000
TOTAL	\$111,847,487	\$72,750,000	\$30,768,034	\$54,123,867	\$9,000,000	\$278,489,388

GOALS & OBJECTIVES

- Provide highly personalized attention to customer service
- Rehabilitate and maintain infrastructure assets
- Proactively plan for projected growth through the SeaPort's 20-year planning horizon

ACCOMPLISHMENTS

- Expanded Southwest Florida's primary shipping container yard
- Added several truck access lanes at the two access gates from the U.S. highway system
- Modernized on-port railroad system, comprised of more than 7-miles of railroad track infrastructure

TOP CAPITAL PROJECTS

- Rehabilitate Berths 4, 10 & 11
- Expand Southwest Florida's Primary Shipping Container Yard
- Develop Southwest Florida's Intermodal Rail Yard

GRANTS

- **\$11.95 million** from U.S. DOT's INFRA grant to expand Southwest Florida's Primary Shipping Container Yard
- **\$2.48 million** from FDOT to develop Southwest Florida's Intermodal Rail Yard
- **\$23.75 million** from FDOT for rehabilitation of vessel berthing infrastructure



PORTMIAMI

MIAMI-DADE COUNTY, SEAPORT DEPARTMENT

www.portmiami.biz

Established in 1905

Foreign-Trade Zone #281

Linear Ft of Berths: 25,086 ft

Project Depth: 50/52 ft

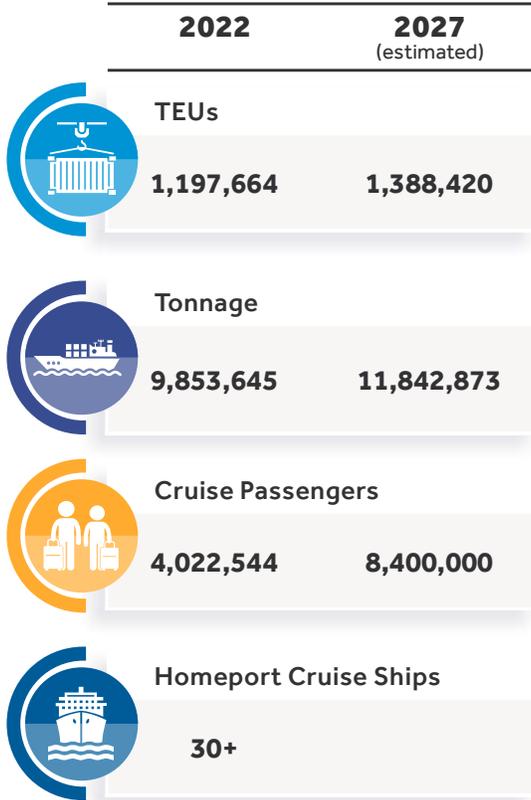
PortMiami, among the nation's busiest ports, contributes approximately \$43 billion of economic activity and more than 334,000 jobs annually to Florida's economy. Its sustained performance propels PortMiami to be recognized as the Cruise Capital of the World and the Global Cargo Gateway of the Americas.

In FY22, PortMiami achieved a monumental milestone by surpassing the four-million-mark passenger count, only one year after the reopening of the cruise industry, after a fifteen-month industry-wide shutdown due to COVID-19. PortMiami anticipates the number of cruise ship calls to increase by approximately 20% in the next year, on pace to exceed pre-pandemic numbers. As the cruise industry continues its recovery, PortMiami is proud to celebrate one of its busiest winter seasons in FY2023, with an exciting line-up of new, state-of-the-art ships setting sail in the upcoming months. Two new cruise terminals, and one cruise terminal expansion, were completed during the pandemic, equating to over \$500 million in investments. The world's largest cruise terminal, capable of handling three cruise ship calls simultaneously, will open in 2024 following an additional investment exceeding \$350 million.

PortMiami is Florida's top international cargo port and one of the State's busiest perishables gateway. For the eighth consecutive year, PortMiami has surpassed the 1 million TEU mark. In FY2022, cargo volumes at PortMiami recorded

1,197,664 TEUs, accounting for the second-best year ever, following FY2021, when PortMiami processed 1,254,062 TEUs. Fifteen (15) shipping lines moved cargo through PortMiami, for a total of 819 vessel calls in FY22. PortMiami has a significant trade relationship with three global regions, Latin America & Caribbean 53%, Asia 28%, and Europe 18%.

Continued cargo growth is propelled by more than \$1 billion of completed capital improvements. These investments include the deepening the channel to a depth of -50/52 feet, acquiring new super Post-Panamax gantry cranes, upgrading on-dock intermodal rail that provides connectivity to 70% of the US population in one to four days, and building a fast access tunnel link to the US interstate highway system. To date, the port has welcomed over 1,750 post-Panamax vessels that could not have called without the completion of these projects, including the 15,535 TEUs ship the CMA-CGM Osiris on November 17, 2022, the largest ship to ever call at a Florida port. The world's largest container shipping alliances have made PortMiami a preferred port, solidifying its position as a world-class global gateway, finishing 2022 as the tenth largest container port in the US. In 2021, PortMiami initiated a comprehensive Netzero / Resiliency Program which aims to electrify equipment, reduce emissions, increase cargo volumes, promote the use of intermodal rail use and develop an energy-efficient inland port(s).



TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	HONDURAS	1	CHINA
2	CHINA	2	DOMINICAN REPUBLIC
3	DOMINICAN REPUBLIC	3	HONDURAS
4	INDIA	4	ITALY
5	TAIWAN	5	VIETNAM

TOP COMMODITIES BY VALUE

Exports		Imports	
1	SCRAP METAL	1	MACHINERY
2	MACHINERY	2	APPAREL/TEXTILES
3	VEHICLES	3	FRUIT/VEGETABLES
4	APPAREL/TEXTILES	4	PLASTICS/RUBBER
5	FURNITURE	5	TOBACCO

GOALS & OBJECTIVES

- Operate and further develop the world's leading cruise port and the largest container port in the State of Florida
- Maximize assets and strengthen advantage for future growth, support sustainability, and operate in an environmentally responsible manner
- Promote international trade and commerce as a vital link between North and South America and a growing center for global trade

ACCOMPLISHMENTS

- Recognized by World Bank and S&P Global as the most efficient container port in Florida and the second most efficient container port in North America
- Received the Bond Buyer's U.S. Deal of the Year Award for the successful refinancing of \$1.24 billion debt
- Consistent cargo growth of over one million TEUs for 8 consecutive years
- Increased cruise growth to over four million passengers in FY22 and secured new contracts for long-term passenger commitments
- Continued safe and secure operations in a sustainable environment

TOP CAPITAL PROJECTS

- Cruise Terminal Developments: New LEED-Certified Cruise Terminals, Shore Power, Berth 10, roadway improvements, passenger boarding bridges, and north bulkhead expansion
- Cargo Container Yard Infrastructure Improvements: Infrastructure for eRTGs and cargo yard redevelopment, post-Panamax gantry cranes, state-of-the-art cargo gate facilities, and rail yard redevelopment with the goal of achieving net zero through decarbonization programs
- Resilient inland cargo consolidation center (Miami-Dade County): Intermodal rail yard and rail access, cargo yard development with reefer stacks and security gates, truck charging stations, and ancillary facilities

GRANTS AWARDED

- **\$160 thousand** from Florida Resilient Coastlines Program for sea level rise study and adaptation plan
- **\$200 thousand** from FSTED Port Security Program to enhance the restricted area border protection system
- **\$350 thousand** from FDOT for a Miami harbor navigation improvements feasibility study associated with the dredge project
- **\$941 thousand** from FEMA's Port Security Grant Program (PSGP) for security staffing and large-scale maritime training
- **\$3.2 million** from FSTED/FDOT for cruise terminal improvements
- **\$16 million** from RAISE for PortMiami's Net Zero Program: Cargo Mobility Optimization and Resiliency Project
- **\$66.9 million** from the State of Florida's American Recovery Act allocation for Florida Seaports





FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs</i>	\$10,000,000	\$3,750,000	\$37,966,667	\$36,866,667	\$33,116,667	\$121,700,001
<i>Cargo Terminals (Incl. New Berths & Equip)</i>	\$6,539,795	\$20,659,180	\$80,619,385	\$12,000,000		\$119,818,360
<i>Channel and Harbor Deepening</i>	\$1,745,429	\$2,386,857	\$1,282,857	\$1,282,857		\$6,698,000
<i>Cruise Terminals</i>	\$73,240,564	\$121,046,942	\$110,000,000	\$70,000,000	\$57,000,000	\$431,287,506
<i>Intermodal Road and Rail</i>	\$7,402,506	\$1,850,626				\$9,253,132
<i>Land Acquisition</i>						
<i>Miscellaneous Projects</i>	\$2,000,000	\$4,000,000	\$4,000,000	\$4,000,000	\$4,000,000	\$18,000,000
<i>Other Structures</i>	\$7,110,042	\$28,440,170	\$21,330,127		\$11,000,000	\$67,880,339
<i>Security</i>						
<i>Site Improvements</i>	\$71,000,000	\$253,440,170	\$231,000,000	\$6,000,000	\$6,000,000	\$567,639,118
TOTAL	\$179,038,336	\$435,772,893	\$486,199,036	\$130,149,524	\$111,116,667	\$1,342,276,456



PORT OF PALM BEACH

STATE OF FLORIDA, PORT OF PALM BEACH DISTRICT

www.portofpalmbeach.com

Established in 1915

Foreign-Trade Zone #135

Linear Ft of Berths: 6,500 ft

Project Depth: 33 ft

The Port of Palm Beach is a full-service diversified landlord port located in Riviera Beach, Florida. The port and its dozens of tenants are a powerful engine for economic development and job creation, employing more than 3,800 people in the South Florida region and the state.

The Port of Palm Beach consistently ranks as the fourth busiest container port of Florida's 16 seaports and is an important distribution center for commodities shipped all over the world, especially the Caribbean Basin. Operations include containerized, dry bulk, liquid bulk, break-bulk, Ro/Ro, and heavy-lift/project cargoes, with food being the port's primary export commodity. In fact, almost 80% of all goods passing through the port are exported, making the Port of Palm Beach one of only 16 "Export Ports" in the country. In total, the port is responsible for processing more than \$14 billion in commodities, or more than 2.5 million tons of cargo every year.

The port has three slips, 17 berths, and seven Ro/Ro ramps, and can accommodate vessels up to 700 feet long and 100 feet wide. The port is easily accessible from I-95, Florida's Turnpike, and the Florida East Coast Railway (FECR), allowing for seamless, cost-effective cargo movement. The FECR provides twice-daily service to the port's rail interchange. Offering the convenience of on-dock rail, the port owns and operates a locomotive and 6.5 miles of track. The industrial switching operation is capable of handling box, hopper, and double-stack rail cars, with 24/7 operations. Rail operations can accommodate 20-axle rail cars, with 450-ton capacity. The port's docks are a fifteen-minute transit from the first sea buoy.

	2022	2027 (estimated)
 TEUs	262,233	318,800
 Tonnage	2,560,462	3,410,026
 Cruise Passengers	188,235	574,000
 Homeport Cruise Ships	1	2

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	BAHAMAS	1	BAHAMAS
2	LEEWARD & WINWARD	2	VIRGIN ISLANDS
3	VIRGIN ISLANDS	3	CANADA
4	CAYMAN ISLANDS	4	LEEWARD & WINWARD
5	UNITED KINGDOM	5	DOMINICAN REPUBLIC

TOP COMMODITIES BY VALUE

Exports		Imports	
1	SHIPS & BOATS	1	EMPTY CONTAINERS
2	FURNITURE & BEDDING	2	PEARLS & PRECIOUS STONES
3	MEDICINAL PREPERATIONS	3	YACHTS & OTHER VESSELS
4	PHARMACEUTICAL INGREDIENTS	4	MOTORBOATS
5	AIRCRAFT & PARTS	5	POTATOES - FROZEN

The port also handles cruise business, offering two-night cruises to Grand Bahama Island. In May 2022, the port became home to the Margaritaville at Sea's first cruise ship, Margaritaville at Sea Paradise. The cruise line provides a unique ship to shore experience-allowing passengers to add a four- or six-night vacation at all-inclusive hotels on Grand Bahama Island.

The port is an independent special taxing district, a sub-division of the State of Florida governed by five elected commissioners. The Port of Palm Beach District has statutory authority to levy ad valorem millage taxes but has not done so in more than 47 years.

GOALS & OBJECTIVES

- Build out the three portions of the Port Infrastructure Development Grant
- Complete the 2022 Master Plan
- Purchase available land adjacent to the port's northern boundary

ACCOMPLISHMENTS

- Developed the Annex property for transportation usage (deeded by the Florida Department of Transportation)
- Turned Berth 1 into a berth that can accept superyachts up to 440ft in length and provides shore power

TOP CAPITAL PROJECTS

- Complete rebuild of the port's rail infrastructure (rebuild the intermodal rail yard and replace old rail)
- Relocate the "Main Gate Interchange" (include extensive automation, new lanes, and new Radiation Portal Monitors)
- Rebuild the main north/south road that runs through the port

GRANTS AWARDED

- **\$13.2 million** from the Port Infrastructure Development Program (PIDP) for the Intermodal Rail Project
- **\$4.1 million** from the State of Florida's American Recovery Act allocation for Florida Seaports

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs</i>	\$1,300,000	\$2,000,000	\$250,000	\$250,000	\$250,000	\$4,050,000
<i>Cargo Terminals (Incl. New Berths & Equip)</i>						
<i>Channel and Harbor Deepening</i>						
<i>Cruise Terminals</i>	\$500,000	\$500,000	\$100,000	\$100,000	\$100,000	\$1,300,000
<i>Intermodal Road and Rail</i>	\$2,000,000	\$3,500,000	\$3,500,000	\$1,000,000	\$1,000,000	\$11,000,000
<i>Land Acquisition</i>	\$3,000,000	\$3,000,000	\$3,000,000			\$9,000,000
<i>Miscellaneous Projects</i>	\$200,000	\$2,000,000	\$2,000,000	\$2,000,000	\$2,000,000	\$9,200,000
<i>Other Structures</i>	\$2,800,000	\$3,000,000	\$3,000,000	\$3,000,000	\$2,000,000	\$13,900,000
<i>Security</i>	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000	\$350,000
<i>Site Improvements</i>	\$250,000	\$250,000	\$300,000	\$300,000	\$300,000	\$1,400,000
TOTAL	\$10,120,000	\$15,420,000	\$12,220,000	\$6,720,000	\$5,720,000	\$50,200,000



PORT OF PANAMA CITY

PANAMA CITY PORT AUTHORITY

www.panamacityportauthority.com

Established in 1945

Foreign-Trade Zone #65

Linear Ft of Berths: 5,100 ft

Project Depth: 36 ft

Located on Northwest Florida's gulf coast, Port Panama City is a growing regional port that handles over two million tons of cargo annually. The port provides full terminal and handling services for a diverse mix of containerized, breakbulk, and bulk cargoes. The port also supports two, on-port heavy manufacturing companies and supports several large manufacturers in the region with vital port services.

The port has concentrated on expanding capacity and cargo handling capabilities over the last five years and continues to invest in modern port infrastructure, promote trade, and support industrial development initiatives on the local, state, and regional level. The port's largest growth project has been the development of the East Terminal and the deepening of the East Channel and turning basin. Additional capacity projects recently completed include the construction of a 70,000 square foot on-port container freight station at the West Terminal, and the delivery of a third Mobile Harbor Crane along with two container reach-stackers.

Currently, Port Panama City is expanding its bulk handling capabilities with the construction of a twenty-thousand-ton capacity storage dome which is scheduled to be completed in mid-2023. This will enable the port to handle an additional three hundred thousand tons of biomass exports per year. The port is also investing in capacity upgrades to the rail corridor connecting the East Terminal to the Bay Line Railroad.

The port is actively engaged in regional economic development efforts, working closely with the Bay County Economic Development Alliance and Florida's Great Northwest. As part of its commitment to attracting manufacturing and distribution companies to the region, the port developed a modern Intermodal Distribution Center (IDC) to promote warehousing and distribution services and provide shovel-ready industrial sites for new industries. A project to improve an additional fifty-four acres is nearing completion, adding to the port's portfolio of shovel-ready, heavy industry-zoned sites. The IDC is strategically located fifteen miles inland from both port terminals, and well connected to US HWY 231, the main truck corridor connecting Panama City to I-10 and I-65, and direct rail service to CSX and Norfolk Southern networks via the Bay Line Railroad.

The port generates \$1.6 billion in economic value for the region, with port and cargo activity supporting 10,790 jobs in the state of Florida.

GOALS & OBJECTIVES

- Update strategic five-year Master Plan
- Continue to invest in capacity expansion and cargo handling capabilities at the East Terminal
- Strengthen trade with Central and South America, and build upon the success of the port's Mexican container trade

ACCOMPLISHMENTS

- Completed new East terminal to expand the port's cargo handling capacity
- Site improvement project at Intermodal Distribution Center
- Bulk Biomass Dome expansion project at the West Terminal

TOP CAPITAL PROJECTS

- Construction of a second on-port warehouse and expanded terminal capacity at the East Terminal
- Extend berth six-hundred feet at the East Terminal
- Container terminal expansion at West Terminal

GRANTS AWARDED

- **\$2.15 million** from FSTED grant for cap and fender improvements at the West Terminal
- **\$150 thousand** matching grant to update the port's five-year Strategic Master Plan
- **\$800 thousand** from the State of Florida's American Recovery Act allocation for Florida Seaports

	2022	2027 (estimated)
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TEUs

54,792

63,500



Tonnage

2,023,431

2,500,000

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	UNITED KINGDOM	1	CHILE
2	COSTA RICA	2	MEXICO
3	FAR EAST	3	GERMANY
4	MEXICO	4	BAHAMAS

TOP COMMODITIES BY VALUE

Exports		Imports	
1	BIOMASS WOOD PELLETS	1	COPPER
2	KRAFT LINERBOARD	2	CONTAINERIZED CARGO
3	WOODPULP	3	LUMBER
4	CONTAINERIZED CARGO	4	AGGREGATE

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
Berth Rehabilitation and Repairs		\$2,800,000				\$2,800,000
Cargo Terminals (Incl. New Berths & Equip)	\$1,140,000	\$10,470,000	\$18,820,000	\$12,150,000	\$2,140,000	\$44,720,000
Channel and Harbor Deepening	\$815,000			\$4,000,000	\$1,500,000	\$6,315,000
Cruise Terminals						
Intermodal Road and Rail	\$1,640,000	\$775,000	\$150,000	\$200,000	\$1,500,000	\$4,265,000
Land Acquisition	\$6,000,000					\$6,000,000
Miscellaneous Projects						
Other Structures	\$13,325,000					\$13,325,000
Security	\$125,000					\$125,000
Site Improvements	\$3,450,000					\$3,450,000
TOTAL	\$26,495,000	\$14,045,000	\$18,970,000	\$16,350,000	\$5,140,000	\$81,000,000



PORT OF PENSACOLA

MUNICIPAL PORT OF THE CITY OF PENSACOLA

www.portofpensacola.com

Established in 1754

Foreign-Trade Zone #249

Linear Ft of Berths: 2,370 ft

Harbor Depth: 33 ft

With growing complexity in supply chain management, a realignment of infrastructure supporting global trade routes is underway at the Port of Pensacola. The Port is seeking \$53 million in Triumph Gulf Coast grant funding to complete the first phase of elements of its three-phase Supply Chain Enhancement Project. This project consists of the engineering and construction of the following elements, intended to maximize the use of 75% of the Port while achieving goals set forth by the Portside Vision Plan for the remaining 25%.

Element One focuses on Maritime Operations Modernization and accelerates on-Port infrastructure advancements in support of freight investment and waterway improvements to help better align roadways, rail, and infrastructure with market-driven opportunities. These improvements create efficiencies that increase stability in supply chains leading to faster transit times, allowing for volume increases and new opportunities for the port and its tenants in the Marine Maintenance Repair and Overhaul (MMRO) space, as well as new growth in ocean sciences research and development, boat building, and competitive sailing sectors.

Element Two focuses on the Maritime Center of Excellence and Light Manufacturing Complex and supports the build-out of approximately 10 acres of the north-east quadrant

and brings online more than 210,000 square feet of covered operational and dry storage space supporting existing and new tenants, boat building, ocean sciences and maritime technologies research and development, marine industry training, flexible maker's space (light manufacturing, fabrication and/or assembly) and a small boat testing facility, in addition to supporting two-acres of improved laydown area for large wind energy project cargo.

Element Three focuses on infrastructure improvements to support elements one and two. As tenant cargo, particularly wind energy special project cargo, gets larger and heavier, changes are needed to accommodate efficient truck and rail moves. Burying utilities in support of larger cargo handling and movement, especially for the northern part of the Port via the Heavy Load Roadway Project as well as the construction of internal service roads and additional rail infrastructure will further modernize port operations.

Supported by our tenant partners, the Port of Pensacola's supply chain enhancement project collaboratively improves on-port ocean transportation efficiency, supports the creation of more effective logistics patterns, resolves outdated infrastructure, attracts investment, brings 210,000 square feet of active warehousing and light manufacturing maker space online and ultimately increases tonnage and job growth in Northwest Florida

GOALS & OBJECTIVES

- Increase cargo throughput and vessel activity through the modernization of port infrastructure
- Execute specific elements of the 2022 Portside Vision Plan Capital Improvement Plan

ACCOMPLISHMENTS

- Triple-digit year-of-year increases in cargo tonnages and vessel calls
- Diversified tenants and port business partners
- Completed Hurricane Sally repairs to port infrastructure

TOP CAPITAL PROJECTS

- Berth #6 rehabilitation project
- NE port quadrant build-out per the 2022 Portside Vision Plan including expanding paved areas and upland improvement projects, including warehousing and manufacturing space
- Increase port rail resiliency and capability to support cargo activities

GRANTS AWARDED

- **\$846 thousand** from the State of Florida's American Recovery Act allocation for Florida Seaports
- **\$46 thousand** from the FEMA Port Security Grant Program (PSGP) for security enhancements
- **\$2.3 million** from FDOT for asphalt/and railbed rehabilitation and upland improvements

	2022	2027 (estimated)
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TEUs

678

2,000



Tonnage

421,438

1,500,000

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	SAUDI ARABIA	1	BRAZIL
2	N/A	2	MEXICO
3	N/A	3	BAHAMAS

TOP COMMODITIES BY VALUE

Exports		Imports	
1	WIND ENERGY COMPONENTS	1	WIND ENERGY COMPONENTS
2	N/A	2	BULK CEMENT
3	N/A	3	BULK AGGREGATE

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
Berth Rehabilitation and Repairs	\$8,202,916	\$8,020,917				\$16,041,833
Cargo Terminals (Incl. New Berths & Equip)	\$17,052,758	\$17,052,758				\$34,105,516
Channel and Harbor Deepening	\$1,577,365	\$1,577,365				\$3,154,730
Cruise Terminals						
Intermodal Road and Rail	\$3,271,500	\$3,271,500		\$3,430,000	\$2,617,000	\$12,590,000
Land Acquisition					\$6,752,500	\$6,752,500
Miscellaneous Projects						
Other Structures			\$30,175,462	\$30,175,462		\$60,350,924
Security	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$225,000
Site Improvements			\$3,808,500	\$3,808,500	\$13,269,675	\$20,886,675
TOTAL	\$29,967,539	\$29,967,540	\$34,028,962	\$37,458,962	\$22,684,175	\$154,107,178



PORT ST. JOE

PORT ST. JOE AUTHORITY
www.portofportstjoe.com
 Established in 1835

Linear Ft of Berths: 1,900 ft
 Project Depth: 35 - 37 ft



2022
Tonnage
24,000

Located in Gulf County, Florida, Port St. Joe is a deepwater seaport well-suited for bulk and cargo shipments, offering access to rail, the U.S. Gulf Intracoastal Waterway, and state and U.S. highways. The current cargo includes shipping oyster shells to Mississippi, rock to Tampa, and for the first time in more than 25 years, an international ship carrying wood chips to Honduras.

In addition to cargo shipping, one of the port's greatest assets is the approximately 213 acres of combined ready-to-be-leased lands adjacent to the bulkheads and thousands of acres of land in the port environs available for immediate development. At present, Eastern Shipbuilding is leasing 20 acres to build and repair ships.

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. The mission of the Port Authority is to enhance the economic vitality and quality of life in the Gulf County and Port St. Joe area and the Northwest Florida region by fostering the growth of domestic and foreign commerce, thereby providing jobs and economic opportunity to the region and the State of Florida.

GOALS & OBJECTIVES

- Dredge port shipping channel
- Repair rail line from Hofstra to the port bulkhead
- Attract jobs to the area

TOP CAPITAL PROJECTS

- Dredging the port shipping channel
- Repairing the rail line to the port

GRANTS AWARDED

- **\$15 million** from Triumph Gulf Coast grant for the dredging project
- **\$800 thousand** from the State of Florida's American Recovery Act allocation for Florida Seaports

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs</i>						
<i>Cargo Terminals (Incl. New Berths & Equip)</i>						
<i>Channel and Harbor Deepening</i>	\$30,000,000	\$25,000,000				\$55,000,000
<i>Cruise Terminals</i>						
<i>Intermodal Road and Rail</i>	\$5,000,000	\$15,000,000				\$20,000,000
<i>Land Acquisition</i>						
<i>Miscellaneous Projects</i>						
<i>Other Structures</i>						
<i>Security</i>						
<i>Site Improvements</i>						
TOTAL	\$35,000,000	\$40,000,000				\$75,000,000



PORT ST. PETE

CITY OF ST. PETERSBURG

www.stpete.org/port

Established in 1925

Foreign-Trade Zone #193

Linear Ft of Berths: 1,200 ft

Project Depth: 23 ft

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, bars, pristine parkland, and scores of galleries and museums, including the world-renowned Dali Museum. As such, the downtown waterfront area is a major strength for the City. The port features a four-acre facility with outdoor storage areas and easy access to interstates, major highways, and two international airports.

With its existing facilities and the presence of many governmental, institutional and academic agencies engaged in maritime research, Port St. Pete has both the institutional capacity and the infrastructure to fill a unique niche as an International Research Port. Working at the port is the St. Petersburg Ocean Team (SPOT), the premier consortium for marine science, oceanographic, and environmental research agencies and governmental institutions in the Southeast and one of the top such industry clusters in the nation.

Port St. Pete is also the only superyacht marina on Florida's Gulf Coast. The city and port staff are actively engaged with yacht captains on an interpersonal level, developing connections and contacts through events, boat shows, visits, and media events. Several large yachts have benefited from the amenities and services available at the port, including M/Y Tatoosh, one of the world's largest yachts at 302 ft with a crew of 30. This large yacht opportunity for the port has evolved with the proliferation of large yacht construction throughout the world.

The port recently completed a \$5 million wharf renovation that installed six power pedestals to meet the electrical needs of these large vessels. The power configurations now available at the port include 480v, 3-phase, and 600 amp service, as well as a variety of other electrical configurations including 220v and 208v service.

GOALS & OBJECTIVES

- New lease for part of port lot #2
- New fenders for wharf wall
- Renew lease of Port Building with USF St. Pete

ACCOMPLISHMENTS

- Executed new lease to the Innovation District "HUB" of the port's largest building

GRANTS AWARDED

- **\$800 thousand** from the State of Florida's American Recovery Act allocation for Florida Seaports



PORT TAMPA BAY

TAMPA PORT AUTHORITY

www.porttb.com

Established in 1945

Foreign-Trade Zone #79

Port Tampa Bay is Florida’s largest and most diversified seaport and the largest economic engine in West Central Florida. Located on the Interstate-4 Corridor, Port Tampa Bay supports varied maritime and related activities, including shipbuilding and repair facilities, cruise, and the largest cargo tonnage volume in the state. Building on a rich history as a leading bulk port, Tampa today accommodates a broad mix of bulk, break-bulk, roll-on/roll-off, and container cargo.

Port Tampa Bay’s growing container volume has been accommodated thanks to an aggressive terminal build-out program, working closely with terminal operator partner Ports America. The port recently completed 25 acres of additional paved storage bringing the total container terminal footprint to 67 acres, and will soon start construction on another 30 acres. Work will soon begin on the addition of a third berth which will bring the total to over 4,500 linear feet allowing three large ships to be worked at the same time. Expansion currently underway includes a new container gate complex and three additional gantry cranes, which will be operational by Summer 2023. This will bring the annual terminal capacity to 1 million TEUs—more than enough capacity to satisfy the future container shipping needs of the rapidly growing Central Florida market.

Linear Ft of Berths: 55,881 ft

Project Depth: 43 ft

	2022	2027 (estimated)
 TEUs	178,637	400,000
 Tonnage	34,428,184	40,000,000
 Cruise Passengers	418,200	1,600,000
 Homeport Cruise Ships	6	10+

TOP INTERNATIONAL TRADING PARTNER BY VALUE

Exports		Imports	
1	BRAZIL	1	SPAIN
2	ARGENTINA	2	MEXICO
3	COLOMBIA	3	NORWAY
4	MEXICO	4	CANADA
5	URUGUAY	5	CHINA

TOP COMMODITIES BY VALUE

Exports		Imports	
1	STEEL PRODUCTS	1	INDUSTRIAL CHEMICALS
2	FERTILIZERS	2	STEEL PRODUCTS
3	INDUSTRIAL CHEMICALS	3	HOUSEHOLD PRODUCTS
4	TEXTILES	4	MACHINERY
5	TOYS	5	FURNITURE

Since Port Tampa Bay is the closest port to Florida's hub for the grocery and food and beverage sector, another key facility is the new Port Logistics Refrigerated Services 135,000 SF cold storage facility. Port Tampa Bay is also the energy products gateway to West and Central Florida, importing the oil and gas needs for a huge regional market, as well as the jet fuel needs for the international airports in Tampa and Orlando. The port's main petroleum products terminal complex recently underwent massive expansion and modernization.

GOALS & OBJECTIVES

- Expand and diversify the business base by executing a supply chain sales strategy
- Fulfill West/Central Florida's long-term energy requirements
- Optimize Tampa bay's vessel access

ACCOMPLISHMENTS

- Expanded container services and terminal facilities
- Successfully relaunched cruise activity post-pandemic with over 1 million passengers forecasted this year
- Expanded and diversified breakbulk and bulk cargo activity

TOP CAPITAL PROJECTS

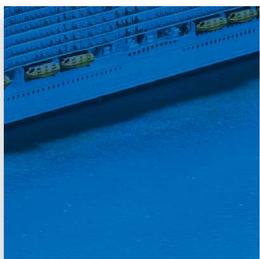
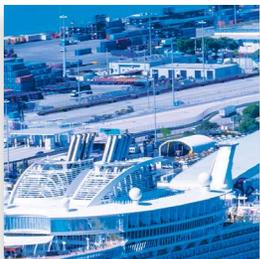
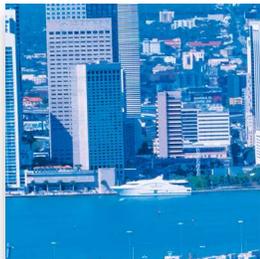
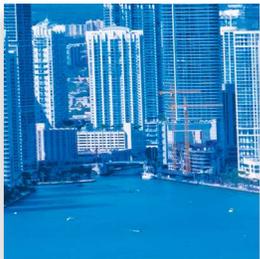
- Hooker's Point Improvements: new container berth 214, uplands, gate, warehouse, turning basin expansion, and maintenance dredging
- East Port and Redwing Improvements: 200-foot Berth 151 extension and 13-acre upland yard expansion, plus new Berth 301 and site improvements at Southbay, Port Redwing's upland expansion site
- Channelside Improvements / North Slip Rehabilitation: fill, dredge and construct 800-foot berth

GRANTS AWARDED

- **\$12.6 million** from RAISE to construct a new Berth 301 at the Port Redwing facility
- **\$10 million** from State and Federal partners to form a vulnerability analysis that considers critical assets, develops an action plan, and improves power service resiliency
- **\$20.1 million** from the American Rescue Plan Act of 2021 for seaport relief

FIVE-YEAR CAPITAL IMPROVEMENT PLAN

Project Type	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	TOTAL
<i>Berth Rehabilitation and Repairs</i>	\$13,000,000	\$5,500,000	\$27,500,000	\$15,000,000	\$1,000,000	\$62,000,000
<i>Cargo Terminals (Incl. New Berths & Equip)</i>	\$27,400,000	\$62,100,000	\$10,400,000	\$15,700,000	\$72,400,000	\$188,000,000
<i>Channel and Harbor Deepening</i>	\$10,225,000	\$4,000,000	\$9,600,000	\$54,000,000	\$104,000,000	\$181,825,000
<i>Cruise Terminals</i>		\$4,000,000				\$4,000,000
<i>Intermodal Road and Rail</i>	\$2,000,000	\$3,000,000	\$8,500,000	\$1,000,000	\$5,300,000	\$19,800,000
<i>Land Acquisition</i>		\$2,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000
<i>Miscellaneous Projects</i>	\$18,200,000	\$14,200,000	\$13,700,000	\$13,700,000	\$13,700,000	\$73,500,000
<i>Other Structures</i>	\$450,000	\$13,000,000	\$15,000,000	\$12,000,000	\$12,000,000	\$52,450,000
<i>Security</i>	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000
<i>Site Improvements</i>	\$4,500,000	\$3,500,000	\$20,500,000	\$8,500,000	\$20,000,000	\$57,000,000
TOTAL	\$76,775,000	\$112,300,000	\$107,200,000	\$121,900,000	\$230,400,000	\$648,575,000



FLORIDA
PORTS
COUNCIL

RELIABLE ▶ **RESILIENT** ▶ **READY**

FLORIDA'S SEAPORTS: U.S. GATEWAY TO THE WORLD



Florida Seaport Transportation and Economic Development Council

flaports.org

Port Canaveral | Port Citrus | Port Everglades | Port of Fernandina | Port of Fort Pierce | JAXPORT

Port of Key West | SeaPort Manatee | PortMiami | Port of Palm Beach | Port Panama City

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