





RICK SCOTT

March 11, 2015

Dear Friends:

Florida is on a mission to keep growing and become the global destination for job creation, and our ports are a vital part of that mission. That is why I have made our seaports a top priority.

During the past four years, we've invested over \$850 million to improve Florida ports and their capacity to create jobs and drive Florida's growing economy. This is part of our commitment to invest \$1 billion in our ports over the course of our administration. The Florida Ports Council has been an important partner as we continue to promote Florida as the place for businesses to compete and succeed globally.

Our investments in ports are working, with over 150,000 trade jobs added by Florida's 15 seaports in the past four years. Our seaports currently support 680,000 jobs for Florida families and generate more than \$96 billion in economic activity. By continuing to make our ports a priority, we are taking crucial steps toward outcompeting the rest of the world.

The 2015 State of the Florida Ports is an outstanding look at the Florida port system and the critical investments being made across the state to enhance our infrastructure and attract business to Florida. The projects featured in the individual Florida port profiles show the strides Florida ports are making to create jobs and ensure that Florida is competitive in the global market.

I look forward to working with Florida's ports to expand Florida's international trade and creating jobs for Florida families.

Sincerely,

Rick Scott

Governor

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Seaports are experiencing a cycle of important change that is reshaping Florida's logistics landscape, heavily influencing planning, investment, operations and marketing.

Seaports - Florida's Lasting Advantage

Florida ports are the backbone of the state's economy. Blessed with geography convenient to global markets, Florida's coasts are lined with 15 seaports, each with its own strengths and market assets. They vary in size and location and capabilities, but do not vary in their steadfast commitment to moving people and freight quickly and securely. They respect the fragile coastal ecosytem, support millions of well-paying jobs, and together inject billions of dollars into the economy.

Flexible and responsive by nature, the ports have embraced the dawn of a new era in global logistics. Planning, investment, operations and marketing have been broadly impacted by this cycle of important change. Equipment, infrastructure, connectivity and services are being aligned with demand and potential demand to ensure Florida seaports continue to prosper for future generations. Clever, collaborative and innovative analysis and solutions will lead to the conversion of more opportunities into victories and the continuing success of the Sunshine State's seaports, ultimately leading to a better standard of living for Floridians.

Ports Strengthen

"Our investments in ports are working, with over 150,000 trade jobs added by Florida's 15 seaports in the past four years. Our seaports currently support 680,000 jobs for Florida families and generate more than \$96 billion in economic activity. By continuing to make our ports a priority, we are taking crucial steps toward out-competing the rest of the world."

- Florida Governor Rick Scott

Leading the Nation

Florida ports are fortunate to be part of a statewide freight initiative whose momentum leads the nation.

An unprecedented level of state support has helped strengthen port assets in preparation for vast new business opportunities. A \$850 million state investment over the last five years has accompanied a multi-billion dollar capital project campaign by seaports to address critical port infrastructure needs ranging from berth redevelopment to intermodal transfer facilities to cruise parking garages to

warehouses. Continuing investments are crucial to productivity enhancements and competitiveness.

The Port of Pensacola, for example, recently completed a major port dock maintenance dredging project which, when combined with U.S. Army Corps of Engineers' projects to dredge Pensacola Pass, Caucus Channel and Pensacola Harbor, will fully restore maritime access to a depth of 33 feet from the sea buoy to dock. Port Panama City's project to relocate a bulk storage facility allowed it to add container handling capacity including a Panamax crane and refrigerated container racks, enhancing competitiveness in container markets. The Port of Palm Beach's refurbishment and expansion of Slip 3 and adjacent infrastructure will improve the efficiency of cargo operations and open up new opportunities, such as markets for roll on/roll off cargo.

Florida's ports are far more competitive today than ever before, offering some of the most cost-effective and efficient facilities in the world. They continue to identify and address opportunities for improvement, especially those related to connectivity and logistical elements outside traditional port jurisdiction.

While Florida is arguably the most aggressive state in the nation in working with its seaports as conduits for competitiveness and job growth, federal guidance and support has been less than forthcoming. Aging transportation infrastructure across the nation, coupled with agonizingly slow and bureaucratic dredging authorizations and appropriations for harbor deepening have been the main culprits. In recent months, however, some welcome steps, such

as the signing the Surface Transportation Act into law and passing the Water Resources Development Act, are giving Florida ports reason for cautious hope. When the federal government embraces the indisputable link between cargo movement and economic competitiveness and makes an integrated national freight system more of a priority, maritime infrastructure will become more efficient.

Each Florida seaport has certain niche strengths. Together, there is no business they can't handle.

The ports readily acknowledge that investment alone does not attract new business, and therefore they continually reinvest earnings, implement new cost-saving measures, conduct targeted and aggressive marketing campaigns, and search out technological and operational innovations. Acknowledging that they are just one, albeit an important one, of the many touch-points in a global supply chain, they increasingly innovate in the design and delivery of facilities and services offered at other touch-points. For example, JAXPORT is robustly supporting development of various regional clean energy initiatives, which in turn will bolster the port's LNG



interests ranging from containerized exports to LNG-powered vessels and trucks. Similarly, Port Manatee has been cooperatively promoting logistical assets and local financial incentives to attract manufacturers. Dynamic initiatives like these are part and parcel of the new logistics era.

Sharpening the Competitive Edge

Ports must continually find ways to enhance passenger and freight mobility. To anchor optimal supply chains that inspire more business and continue to boost economic activity, they need to perform better than the competition in other states.

To continually improve and develop requires planning for financial sustainability. Creative capital funding and financing, with an increasing emphasis on publicprivate partnerships and long-term commitments, has proven critical.

Florida seaports have leveraged their earnings with grant funding, bond financing, private sector partnerships and other diverse sources, and done an enviable job of managing their on-port asset base. They are currently addressing on-port infrastructure upgrades; the next step is to streamline their inland connectivity to market, and deepen (or finish deepening) their channels. Neither is an easy task.

Examples of off-port connectivity efforts range from Port Tampa Bay's support of the widening of Causeway Boulevard to better serve its expansion at East Bay, to Port Canaveral's endeavors to bring a four-mile commercial connection to the Kennedy Space Center rail line. Another example is the Port of Fernandina's work developing a logistics center on the west side of Nassau County at a site served by two interstates, two Class 1 railroads and two pipelines.

Enhancing a port's total logistical experience can only be done with collaboration on multiple levels. To do that, Florida's ports have become adept at analyzing challenges and opportunities within the marketplace. By anticipating future market needs, port efforts to improve their supply chains will meet with more success.

Playing to Strengths

Florida ports have been faced with preparing for industry changes of considerable proportion. Vessel size will continue to grow, so plans to deepen ports cannot come to fruition soon enough. Free trade agreements, access to capital by suppliers in emerging markets, and currency exchange rates all confuse the predictability of growth on a given commodity trade or trade lane, requiring ports to continue to diversify, thus spreading the risk. Carriers are not making port-of-call decisions lightly, and with larger vessels indicating fewer calls and more stress on inland supply chains in a compressed window, ports must fine-tune their competitiveness beyond their gates.

Florida's logistics industry has had plenty of experience with discovering optimal supply-chain solutions for clients. In a state hard hit by the economic recession of 2008/2009, transportation partners have emerged with lean organizational structures. Some of them outsourced logistical components to third-party logistics experts (3PLs), some diversified revenue lines to spread risk, and others turned inward to master supply chains for a particular commodity, trade lane, type of equipment, or method of handling.

Seaport transportation systems are adapting to the recovery in consumer spending, construction, tourism and similar industries. Transportation capacity must continue to expand in order to prepare for the economic realities of the future which include global trade growth for at least the next decade. Florida trade is expected to grow as well. It will be highly impacted by shifts of production to the Indian Subcontinent, increased Suez Canal transits, cargo shifts through the Panama Canal from the U.S. West Coast, new free trade agreements such as those with Panama and Colombia, and by growing north-south trade attributable to emerging consumer markets in the Americas. Growth may be moderated by U.S. debt policy and currency exchange rates, rising energy prices, rising standards of living in China and Southeast Asia, and instability in Europe and the Middle East.

Every Florida port is impacted by one or more of these global developments. They are tailoring projects and plans to tap into global trade growth. The state's smaller and emerging ports are working hard to establish their advantages and take advantage of unfilled niches. St. Lucie County's Port of Fort Pierce is availing itself of a new master plan to leverage existing facilities and a superb location; it may prove to be a good choice for smaller vessels serving the Caribbean (and potentially Cuba), or feeder vessels. The Port of St. Petersburg has set its sights on accommodating research vessels and mega yachts, among other opportunities. In the northwestern part of the state, the Port of Port St. Joe, working hand in hand with private industry and public partners, has assembled waterfront sites with footprints that appeal to large-scale operations with few options elsewhere in the state and Port Citrus plans to use an existing portion of the Cross Florida Barge Canal for very specific heavy commodities, creating sustainable economic opportunities and jobs in a county hard hit by the decline of the construction industry.

Cruise Connections

Florida's ports also serve the state's vast visitor market in a variety of ways, from environmental stewardship of waterways to Caribbean cruises. The tourism markets are very different from freight markets, but often have overlap and synergies. Florida's ports recognize the role and importance of both. The state's modern cruise terminals are the best in the world. Extensive and progressive port passenger amenities and unsurpassed seaport services make Florida's indisputably superb location even more of a draw for cruise lines, their headquarters, their vessels and their vacationers.

The more than 14 million passengers that embark and disembark at Florida seaports each year spend time and money in our state, dine, visit attractions and shop, contributing greatly to the Florida economy. In Key West, for example, the cruise industry contributes 15 percent of the city's total tax revenue.

Gaining Depth

Infrastructure developments for the cruise industry are ongoing. Port Canaveral's latest cruise facility – a 188,000-square-foot cruise terminal, including berth, gangway and parking garage – opened in December 2014. Port Everglades' Cruise Terminal 4 has recently completed an extensive renovation, expansion and reconfiguration. At PortMiami, infrastructure improvements totaling more than one billion dollars are com-

pleted or nearing completion; many of these projects will jointly serve the port's cruise and cargo businesses.

If time and money were no object many of our ports would be deep enough for every ship. But, currently, there are many larger ships that can't access Florida ports fully laden or at all, and getting necessary federal help to deepen is a task of epic proportion. Recognizing the scale of vessels on the world's container and bulk vessel orderbooks, several of Florida's seaports have tackled the task of dredging their channels. The potential payoff to Florida, especially from Asian-direct vessels already transiting the Suez Canal and from those expected to pass through the Panama Canal after the completed expansion, is tremendous and cannot be gained without deeper channels.

Deepening projects at PortMiami (which at 50-feet is one of only four ports on the U.S. East Coast with a 50-ft depth), JAXPORT, Canaveral, and Everglades are either authorized or anticipated near term to help ready the state for handling new-Panamax sized vessels.

Alert to Opportunity

Florida seaports move 100 million tons of cargo each year. Their volumes are growing. They are preparing to serve the larger vessels of the future. They are changing the way they operate and market in an era of pervasive supply-chain adjustment. They understand freight movement needs beyond their gates and, indeed, beyond state and U.S. borders. That is where much of the opportunity of tomorrow will originate.

In late 2014, the Florida ports commissioned a study by Lancaster, Pennsylvania-based Martin Associates, through the Florida Seaport Transportation Economic and Development Council, to help identify a list of too-good-to-be missed growth opportunities. The resulting report, called An Analysis of Global Opportunities and Challenges for Florida Seaports, identified three main opportunities and a number of strategies to convert the opportunities into increased cargo through Florida ports.

Global Opportunities for Seaports

Florida is uniquely positioned to capture significant economic benefits from expanded international trade. Its ports are key to retrieving the state's existing consumer goods, attracting new freight, streamlining barriers to freight movement, and thereby achieving greater economic prosperity for the state.

THE GOALS

Goal #1

Capture Existing Freight

Capture cargo now moving through non-Florida ports by adopting aggressive marketing plans and by developing infrastructure for growth and connectivity.

Goal #2

Attract New Cargo

Attract distribution centers and manufacturers to Florida by employing a comprehensive and broadly supported growth plan that makes Florida a logistics gateway to the Southeast.

Goal #3

Streamline Regulatory Burdens

Work with policymakers and officials at all levels to streamline regulatory processes and ensure Florida's competitiveness in serving markets.

Background

To capture freight that has been moving over non-Florida ports, logistics solutions via Florida ports must be competitive. Although the cost of delivered goods may be most visibly reduced by deeper drafts and on-dock rail and other big ticket infrastructure, clever supply chain management, such as that conveyed by the use of a foreign trade zone (FTZ) or by matching northbound shipments to backhaul chassis, will also cut logistics costs and sway routing.

Florida's population continues to grow, driving up demand for inbound consumer goods. By extension, Florida trade will continue to grow. Trade around the globe will increase steadily for at least the next decade. An all-out effort to attract both manufacturers and distribution centers will bring jobs and the influence they possess in determining cargo routing.

There are innumerable regulatory barriers to trade. Those generated by a local, state or U.S. government department that diminish competitive performance should be addressed. Many such burdens have been identified and are being addressed one by one to enhance port and state prosperity.

Florida Can Access Up to 3.5 Million Additional TEUs

A large volume of cargo using non-Florida ports originates in or is destined for Florida markets – about 3.5 million TEUs of containerized goods alone. Florida ports are currently capturing about one in two available TEUs. Capturing even a fraction of this untapped potential could mean a significant increase in economic impact from what is already one of the state's top job-generating and lifestyle-enhancing industries.

The Potential Pool for New Freight is Almost Limitless

Having the right port facilities and carrier options in place will help attract more manufacturers and distribution centers (DCs) to the state. Increasing manufacturing will help grow imports of supplies and will contribute to the state's export base, but building this type of industry is a tall order with relatively long planning time frames. It is important also to build the DC network. Defined broadly to include every cross-dock, pick and pack, break and consolidate, warehousing type of operation, DCs touch almost every product on a Florida retail shelf. A state that values DCs will help prevent them from siting offshore by removing barriers and even offering incentives for their site selection. More DC options help businesses of every size, from a "Mom and Pop" importer in Palm Beach to a capacious factory in Pennsylvania.

Complex Markets Dictate Strategy

The composition of trade (by dollar value) moving via Florida ports registers substantial surpluses in break-bulk and bulk cargo. There is a trade deficit in containerized cargo, but it is both the fastest growing cargo and offers the most opportunity for growth to Florida.

Focus on Containers

While Central American and Caribbean import trades mostly use Florida ports, Asian imports are more unpredictable, with 154,000 TEUs moving out of Southeast Asia into Florida in 2013 via non-Florida ports. Most of that volume is actually railed across country from the west coast. Similarly, South American imports and North European imports are under-served, with, for example, 12.8 percent of imports from South America moving through just the port of New York/New Jersey (due substantially to the level of steamship service). Florida ports can aim to bring home as many as 52,000 TEUs of imports from South America alone.

Challenges

- Florida's share of the U.S container market has fallen from 8.3 percent in 2000 to 7 percent in 2013.
- More than half the state's imports from, for example, Northern Europe, moved into the U.S. through non-Florida ports.
 In 2013, 309,000 TEUs of imports arrived through ports outside the state.
- 252,000 TEUs moved into Florida from the nearby massive distribution hubs in Georgia.
- 285,000 TEUS moved into Florida from distribution centers in Texas and Louisiana where large-scale distribution centers (DCs) are located for individual companies like Walmart and Home Depot, and for commodity clusters such as furniture and coffee.
- 57,000 TEUs moved from Mexico to Florida by rail and truck.
- Another 371,000 TEUs moved into Florida via intermodal rail from a variety of other areas, including west coast ports directly to Florida, and Midwest intermodal transfers into Florida.
- With the right logistics mix, the amount of import containerized cargo available to Florida ports is 1.3 million TEUs.
- The entire TEU potential is 3.3 million because for every import container, there are about 1.5 empty and export container movements generated.
- Another 307,000 TEUs originate in Florida but are exported through out-of-state ports.

While \$37.6 billion of imports and \$42.2 billion of exports use Florida ports, the import/export ratio tilts decidedly in favor of exports on a tonnage basis. Heavier commodities tend to stick to ports closer to home for a variety of reasons. Ocean freight is almost always the least expensive form of transportation, so inland transportation costs are better minimized by using nearby ports. Irrespective of other cost components, this strategy typically results in lower delivered costs of goods.

...And on Asian Import and South American Export Trades

Overall 70 percent of export containers originating in Florida move through Florida ports – leaving 300,000 TEUs that do not. Houston, New York, Savannah and Charleston are the key ports used for Florida exporters to South America. Florida export trade lanes to Northern Europe, the Mediterranean, Southeast Asia, Middle East, Africa, Far East and other countries all reflect a lack of vessel service at Florida ports.

The top opportunity to gain Florida import cargo and re-route it through Florida ports is on Asian trade lanes and the best opportunity to increase export cargo and re-route it through Florida ports is on the South American trade lane.

With respect to containers imported into Florida, about 58.4 percent move through Florida ports. Less than 50 percent of the containerized imports into Florida from Asia and Northern Europe use Florida ports. The key non-Florida ports used by Florida importers of Asian cargo are Los Angeles, Long Beach and Savannah. For the European trade, the key non-Florida ports used to serve the Florida import market include Charleston and New York.

Target Major Ocean Carriers Under-serving the Florida Market

The degree of commitment to using Florida ports varies by ocean carrier. Regional carriers serving north-south export trades are doing a better job of utilizing Florida ports. Use by global carriers varies greatly. Carriers serving the Asian import trade offer the greatest potential in terms of volume for Florida ports to capture cargo now moving through out-of-state ports.

Market Logistics Advantages to Attract DCs and Manufacturers

Inspiring confidence in Florida's supply-chain logistics will help grow healthy manufacturing in Florida. A main challenge for Florida's current and potential importers, manufacturers and producers is to reliably and profitably meet global demand. Unfortunately, outsourced supply manufacturing, lengthy global supply chains, a large number of suppliers, and volatile demand all create uncertainty for manufacturers. They worry that their supply base cannot deliver on the promises they have made. If improved routing can help manufacturers firm up lead times, production runs and labor schedules, eradicating disruptions, Florida seaports will become a true supply-chain partner.

Challenges

- DCs and import beneficial cargo owners (BCOs) need deep ports who serve as a global carrier's first inbound port-of-call, expediting arrivals.
- Export-oriented manufacturing facilities need ports that serve as a carrier's last outbound call on a particular coast, maximizing production windows and effectively increasing export production capacity.
- Florida and neighboring states export
 many heavy commodities, such as forest
 products. Carriers facing draft issues or
 subsequent port calls along a seaboard
 may have to limit heavy cargo taken on
 in Florida. Additional depth, and last outbound call services eliminate this issue.
- South Carolina, Georgia, Virginia and other states are offering incentives to manufacturers and DCs to locate in their states, using tax breaks, credits, grants, regulatory and sales tax exemptions and training assistance.

New strategies are needed to become this type of value-added partner. The new way of doing things calls for collaboration. Collaboration can enhance supply-chain visibility and prevent manufacturers from doing things like building up inventory to guard against risk, and working with inaccurate lead times that end up lowering customer satisfaction.

Attract First Inbound and Last Outbound Calls

Deeper draft will convey important logistics costs advantages to DCs and import beneficial cargo owners (BCOs). They especially benefit from ports that offer a global carrier's first inbound port-of-call, because arrivals are expedited. This is critical with just-in-time inventory management.

Export-oriented manufacturing facilities appreciate ports who serve as a carrier's last outbound call on a particular coast, maximizing production windows and effectively increasing export production capacity. The main determinants to attract either first or last calls are port location and depth. Shipping is an economy-of-scale business. Because half of the container vessels on order around the world exceed 8,000 TEUS, requiring a channel depth nearing 50 feet under full load (versus only seven percent of today's ships that require such depth), and because bulk ships are similarly becoming super-sized, Florida ports must dig deeper in order to just stay in the game.

Continue Financial Commitment

The efforts by Florida ports and the state of Florida to invest hundreds of millions of dollars in port capacity and efficiency around the state have not gone unnoticed by the global maritime industry. Florida is one of the leading states for the import and export of goods. However, in this era of global competition for jobs and tax revenues, Florida's ports must continue to build on its competitive logistics infrastructure. Important projects related to on-port infrastructure and channel depth upgrades still need approval and funding.

Work with State to Connect New Business with Incentives

Outreach by the state and regional governments is vital in attracting DCs and manufacturers. South Carolina,

Georgia, Virginia and other states offer incentives both to locate in their states, using such tools as tax breaks, credits, grants, regulatory and sales tax exemptions and training assistance. The right incentives will attract more of these businesses.

Use Florida's Cost Advantage to Retrieve Florida Cargo

Florida ports have a logistics cost advantage for BCOs and carriers handling Florida origin/destined cargo via out-of-state ports to serve a potential of an additional 3.3 million TEUs.

Florida ports have a cost advantage for some cargo originating/destined out of state too. Increasing this discretionary market will allow additional economies-of-scale for carriers to help cement their presence at Florida's seaports.

Market growth is not the only reason that this is a timely juncture to 'retrieve' Florida cargo. For example, the U.S. West Coast port congestion issues raging throughout the latter half of 2014 and into 2015, provides ample incentive to target Florida cargo currently using western gateways. The fact that non-vessel operating common carriers have taken the radical step of rerouting U.S. outbound shipments away from congested West Coast ports presents Florida seaports with a rare opportunity, especially for time-sensitive cargoes such as perishables and holiday stock. Due to the fact that congestion issues are driven by national trade growth, the opportunities will be long lasting.

Florida BCOs and distribution centers are concentrated in three areas: Orlando/I-4 Corridor, Jacksonville, and South Florida. The greatest population growth is in Northeast Florida and Central Florida. Central Florida is thereby a key market for all Florida ports to serve.

Florida has many clear-cut logistics cost advantages that can be marketed and utilized.

Attract More Cargo from Other States

All of the advantages that Florida ports have in place to increase cargo that originates in or is destined for Florida also set the stage for Florida to attract cargo originating in or destined for regions to the north. As a consumer state Florida has 500,000 more trucks leaving it than arriving in it each year. The imbalance of truck flows to and from the state should become an important strategy for the ports and the state to market to ocean carriers, BCOs, distribution center developers and manufacturers. With the imbalance of full inbound truckloads to empty northbound returns, carriers, manufacturers, and distribution centers should be able to secure very favorable backhaul rates for northbound distribution of imported containerized cargo and transloaded cargo, further enhancing the attractiveness of Florida ports.

Currently, it is difficult for trucking companies and BCOs to secure backhaul when it occurs, due to the lack of a real-time match/availability system. There is an opportunity to create a real-time truck backhaul matching system.

Florida sends 500,000 empty trucks northbound each year and those truck rates are highly competitive.

Alleviating Regulatory-Process Burdens Helps Ports

The industry of trade is plagued by pervasive, sometimes overlapping regulations. Actively managing regulatory impacts can offer Florida ports a competitive advantage. While the state has been responsive to calls to minimize regulatory barriers, federal regulatory burdens may prove more onerous to correct. In many ways, Florida ports feel an out-sized impact from federal regulations due to the state's proximity to so many other countries whose competing hubs are subject to more permissive regulatory environments.

For example, transshipment activity disappeared from Florida ports because of redundant and onerous security regulations, lack of depth/larger vessels, growth of transshipment facilities in the Caribbean and Central America, and because of various federal regulations, such as the unnecessary enforcement of U.S. regulations on transshipped goods never intended for distribution.

In a recent federal Cold Treatment Pilot Program for Perishables at specific south Florida ports, it was illustrated that Florida is more competent in securing its own agriculture commodities and implementing stricter, more advanced protocol measures than its sister ports to the north. This will open up opportunity for Florida ports to aggressively market to the ocean carriers now bringing perishable cargoes destined for Florida via northern ports, and to target key importers of perishables now restricted from using Florida ports. Serving Florida and U.S. Southeast markets using Florida ports has already been identified as more cost-effective for the Chile and Peru trades. It is likely other trades will follow.

Work to Ease Regulatory Barriers

Florida's ports value their partnerships with regulatory agencies and respect their responsibilities to secure and protect. They collaborate to find ways to shift negative impacts on trade to competitive advantages to develop trade. They help promote and participate in programs designed to address regulatory delays or reduce the cost of shipping through Florida, such as the Customs and Border Protection Trusted Trader Program or the Food and Drug Administration's Secure Supply Chain Pilot Program.

There are tremendous competitive advantages to be gained from embracing the many federal initiatives already in place which aim to improve acknowledged barriers to trade. Educating carriers and other port users about administrative burdens that have become routine, reduced, or counteracted by efficiencies is an ongoing task.



Clear Direction

There are significant benefits to growing trade through Florida ports and with the new report, Analysis of Global Opportunities and Challenges for Florida Seaports, in hand, there is crystal clear direction to help gather those benefits and expand Florida's position in global trade.

Continue to Invest

Florida's competitive position in global trade is continually improving. It is addressing the effects of the Panama Canal expansion, growing containerized trade worldwide, emerging shifts in the flow of goods to and through regional distribution centers, growing trade with Mexico and many other industry developments, in part by streamlining goals and improving infrastructure.

Florida's leadership and the Florida Department of Transportation (FDOT) have been proactive partners in addressing deficiencies and improving the state's freight transportation system. The state of Florida is well ahead of other states in identifying wise transportation system investments and securing the state's economic future. Its impressive support of ports is generating more global trade and export-oriented manufacturing. Ongoing investment by the seaports,

Strategies

- Continue to invest in port infrastructure and channel upgrades to provide Florida with the ability to be the first inbound and last outbound port-of-call.
- Create an aggressive marketing campaign to attract to Florida those BCOs and carriers that are importing and exporting cargo through non-Florida ports.
- Provide necessary state or local incentives to entice import distribution centers and export-oriented manufacturing companies to locate in Florida.
- Remove or modify any undue regulatory burdens on Florida's freight system resulting in increased efficiency in moving trade through Florida seaports.

the private sector, and the state is crucial to continuing to improve competitive position and tap opportunities.

Aggressively Market, Provide Incentives, and Reduce Regulatory Burden

Florida seaports are sufficiently diversified to handle almost any cargo in the world. With modernized infrastructure, deeper waterways, diligent safety and security programs, and excellent inland connections, they have the resources needed to make other businesses in the state, and elsewhere, grow. To be the seaports of choice for each and every business in Florida, and for many businesses in the Southeast and further north, the seaports must demonstrate end-to-end supply chain advantages.

They are adopting aggressive marketing programs aimed at BCOs and carriers, and building on their ongoing infrastructure and connectivity plans. They are working with private- and public-sector leaders to attract distribution center and manufacturing to the state to help support ocean carriers and build economies of scale into the transportation system. They are working with BCOs and the logistics industry to identify regulatory burdens, alert policymakers, and champion change.

Competitive, Committed, Connected

Florida's ports are competitive, powerfully committed to supporting the state's consumers and businesses, and increasingly well connected to global markets.

They stimulate the economy and have helped to position the state as one of the nation's premier logistics gateways and a leader in world trade.

With a strong foundation of infrastructure, cooperation, and innovation, Florida's ports are embarking on a remarkable, broadly supported effort to seek additional trade, and with it, more well-paying jobs, tax revenues, economic growth and prosperity for the state.

Major Capital Projects by Port Through FY 2017/2018

Port	Project Name	Objective
Canaveral	Channel Widening/Deepening Project	46' depth to increase capacity and safety for cruise and cargo
	New Cargo Berth Construction	Provide flexible facilities as part of multi-phased approach
	Cruise Terminals 1 and 3	Better accommodate growing cruise industry
	Rail Connectivity	Build marketability for port cargo and spaceport commerce
Everglades	Southport Turning Notch Extension	Allow larger vessels and up to five new berths
	ACOE Deepening/Widening Program	Accommodate post-Panamax vessels and provide for transit safety
	Intermodal Container Transfer Facility	Improve connectivity and expand hinterland while reducing emissions and ros congestion
	Slip 2 Extension/Cruise Terminal 4 Expansion	Modernization of terminal and berth extension for largest cruise vessels
	Super Post-Panamax Cranes/Crane Rails	Serve post-Panamax container vessels
Fernandina	New Bulk and General Cargo Berth	Increase berth capacity for current and new users
	Expanded On and Off-Port Warehousing	Capture more linerboard exports, lumber imports and discretionary cargo
Jacksonville	Mile Point Improvement	Better accommodate deeper draft vessels
	Harbor Deepening	Better accommodate deeper draft vessels
	Blount Island & Talleyrand MT Wharf Rehab	Rehabilitate aging infrastructure and prepare for growth
	Dames Point ICTF	Enhance container competitiveness
Manatee	Rehabilitation and Reconstruction of Berths	Upgrade and extend useful life
	Cold Storage Warehouse	Allow tenant expansion and space for additional tenants
	Port Tunnel	Expedite port traffic and reduce downtown traffic
	Deep Dredge	Accommodate post-Panamax vessels bringing growing trade volumes
/liami	Restoration of On-Port Rail	Serve a greater portion of U.S. consumers and business
	Port-wide Infrastructure and Cranes	Better accommodate growth
	Cruise Facilities	Better accommodate growing cruise industry
Palm Beach	Intermodal Cruise Terminal Transfer Facility	Attract additional cruise ships
	Waterside Cargo Terminal Redevelopment	Redevelopment of waterside cargo staging area
	Inlet and Channel Dredging	Enhance vessel maneuverability and port competitiveness
	On-Port Intermodal Rail Facility Expansion	Increased on-port rail capacity to support new business
Panama City	Container Yard Expansion	Double container capacity - added cranes, equipment
	Intermodal Distribution Center	Support growing import and export trade with Mexico
Pensacola	Warehouse 9 Improvements	Diversify use
	Berth 6 Rehabilitation	Extend life of facility
Port St. Joe	Channel Dredging	Maintenance dredging of channel to regain traffic
Tampa	Hookers Point Developments	Serve regional growth needs and increase container business
	Port Redwing Development	Provide added capacity for bulk and intermodal transportation
	Eastport Improvements	Accommodate deeper draft bulk and general cargo vessels
	Navigational Improvements	Better accommodate vessels and attract deeper draft vessels



Port Profiles

Florida's seaports bring high-paying jobs and economic benefits to communities while moving goods around the globe efficiently and seamlessly.

Port Canaveral

Port Citrus

Port Everglades

Port of Fernandina

Port of Fort Pierce

JAXPORT

Port of Key West

Port Manatee

PortMiami

Port of Palm Beach

Port Panama City

Port of Pensacola

Port of Port St. Joe

Port of St. Petersburg

Port Tampa Bay



"Serve the district and region by facilitating waterborne commerce, creating employment, accommodating port-related business and industry, and otherwise positively impact the economic growth of the district."

PORT CANAVERAL

www.portcanaveral.com 🔰 📊



GOVERNING BODY: Canaveral Port Authority (Canaveral Port District)



Introduction

Port Canaveral is a fast-growing seaport with cruise traffic expected to double and cargo projected to increase 20-fold during the next five years. Already home to three seasonal ships and eight year-round cruise ships from Carnival Cruise Lines, Disney Cruise Line and Royal Caribbean International, Norwegian Cruise Line will also homeport at Port Canaveral during winter 2015.

In 2014, Port Canaveral welcomed 4.2 million passengers. By year end 2014, Canaveral Port Authority will have invested \$354 million in seven cruise terminals and it is preparing for continued demand for berths and larger ships. In December 2014, a new 188,000-square-foot cruise terminal and 1,000-space parking facility opened to accommodate the largest cruise ships in the world. Port-of-call business remains strong, growing to 147 calls in 2014. A gaming ship sails twice daily from Port Canaveral on three-hour Atlantic cruises.

As part of overall expansion plans, and with a goal of accommodating larger vessels, Phase 1 of a dredging project began in May 2014 to widen Canaveral's 3.5mile channel by 100 feet, expanding the current width to 500 feet overall and initiating the harbor entrance deepening project that will continue into 2015. The port plans to deepen the harbor eventually to 55 feet.

Port Canaveral is extending its cargo reach with development of intermodal facilities in the north and central areas of Brevard County while pursuing ondock rail to a new state-of-the-art container terminal in the north cargo area. The Port Authority purchased two post-Panamax ship-to-shore container cranes; they are being refurbished and will be operational by mid 2015 in conjunction with the opening of a new container terminal that GT USA will operate as part of a lease agreement with Gulftainer. An auto terminal and car import/export processing facility is being planned. Cargo activity is expected to increase significantly with additional deep-water container cargo berths nearing completion, enabling access to more than 60 acres for development, as well as additional berthing for break-bulk and ro/ro cargoes.



Goals and Objectives

- Construct and expand port facilities and iConstruct and expand port facilities and infrastructure for cruise and cargo in an orderly manner to meet the growth needs of Brevard County and the central Florida region, the cruise/tourism industry, the area's industrial base of imports and exports, the foreign trade zone (FTZ), local military bases, and the space industry, and, to meet the recreational demands of the community.
- Widen channel and deepen harbor.
- Provide new bulk, break-bulk, auto import processing, and containerized cargo facilities.
- Improve railroad connection with 11-mile extension to NASA line to connect to Florida East Coast Railway (FECR) in 2017.
- Achieve cooperative utilization of federal land now occupied by the Department of Defense with an Air Force Enhanced Use Lease in place.
- Support development of 270-acre inland distribution center at I-95 and SR 524 – Global Logistics Business Park.

Accomplishments

- Opened new Royal Caribbean Cruise Line terminal in 2014.
- Crafted container terminal agreement with GT USA.
- As part of redevelopment of the waterfront on the south side of the harbor, the Exploration Tower was completed, featuring a seventhfloor observation deck and exhibits dedicated to local history. Also, a team has been selected to redevelop The Cove, the port's tourism and entertainment area, with construction beginning in 2015.
- Celebrated 28 years of not exercising local taxing authority and operating from revenues generated along with assistance from state and federal grants.
- On target to grow 15,000 jobs in 10 years.
- Honored with 23rd consecutive CAFR Award for excellence in financial reporting.
- Plans are progressing for a garage auto processing terminal – it will be the first such facility in the nation.
- New scrap steel terminal opened in fall 2014.

Investments

Cruise: Construction was completed in December 2014 for a new 188,000-square-foot cruise terminal, including berth, gangway and parking garage, along with new public boat ramps. The project is expected to generate 736 direct and induced jobs along with 744 jobs in construction. Its economic impact will exceed \$405 million. Future plans include construction of an additional cruise facility – a 188,000-square-foot terminal, with gangway and parking to support the newest generation of mega-cruise ships, accommodating 5,400 passengers or more. The project provides an expected economic impact of \$470 million, with more than 1,400 new direct, induced and construction jobs.

Northside Development Projects: These are well under way and expected to be completed by mid 2015. These projects include new berths and cargo terminal, backup area with regional storm water improvements, and purchase and refurbishing of two post-Panamax ship-to-shore container cranes. They will enable Port Canaveral to service its newest cargo partner, GT USA, and current customers, and enhance port marketability and reach. The economic impact will start at an estimated \$120 million and create 1,728 new and induced jobs with an additional 385 construction jobs.

Channel: The widening and deepening of Port Canaveral's channel continues. This project will facilitate expansion of cruise and cargo activity, allowing safe passage for the newer mega-cruise and cargo vessels. Completion of this phase is expected in mid 2015. The new direct and induced jobs from this project number 2,450, plus 428 construction jobs. Future plans for the Port Canaveral Channel include Phases 2, 3 and 4, which would take the channel to a depth of -55 feet. The port is unique in the southeastern U.S. in that its channel can be deepened to -55 feet at an affordable investment with a strong ROI and on-dock direct access. The initial economic impact of the project is \$445 million; 8,560 direct and induced jobs and 1,685 construction jobs.

Rail: On-port rail is a vital component of the growth planned for Port Canaveral. Efforts to bring a four-mile connection to the Kennedy Space Center Rail with a two-mile upgrade to the existing rail have begun. The construction will include dikes at North side of Port, and trestle and bridge connections over the Banana River. Currently in the study stage, this project would offer broad potential for connecting the port's cargo customers to cargo facilities and services, and to distribution centers. An initial economic impact of \$250 million is expected; there would be 3,300 new direct and induced jobs and 780 additional construction jobs associated with the project.

Autos: A multi-level 7,500-car parking garage and 9,500-vehicle multi-user auto processing facility is in the planning stage. With 783,000 square feet per floor and speed ramps up and down, this vehicle preprocessing and truck loading facility would provide distribution throughout Florida. The initial economic impact is expected to be \$97 million. The direct and induced new jobs are estimated at 813, with an additional 532 in construction.

Top Trade Partners and Commodities

Imports: Principal imports are petroleum, aggregates, salt, slag, fertilizer and perishables. They include lumber, slag, cement and petroleum from Europe; cement, pumice and vehicles from the Mediterranean; cement, petroleum and juice concentrates from South America; cement, limestone and salt from the Caribbean Basin; lumber and forest products, and aggregates/granite from Canada; perishables, juice concentrates and limestone from Central America; and petroleum, slag and cement from Asia. In 2015, imports will include containers as well as new autos from Mexico and Europe.

Exports: Principal exports are fresh citrus and single-strength juice, juice concentrates, automobiles and heavy equipment. They include juice concentrates and juices moving to Europe; vehicles and heavy equipment to Central America; vehicles, heavy equipment and general cargo to the Caribbean; fresh citrus to Asia; and vehicles and heavy equipment to Africa. In 2015, exports will include autos and containers.

Hinterland

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

"Port Canaveral has built a reputation for professionalism and service that closely matches that of the Gulftainer Group. As one of the most respected and innovative ports in the country, Port Canaveral is a natural partner for the Gulftainer Group, as together we seek to constantly deliver more value to our customers. We have a common purpose in our ambition, in our professionalism, and in our dedication to putting our clients first."

- Peter Richards, Gulftainer

"Port Canaveral is a great destination for vacationers to embark on an unforgettable cruise. Not only is Port Canaveral a great year-round homeport, but also a wonderful destination for cruise guests to enjoy the rich history and excitement of Florida's Space Coast on a port call. The world's first *Smartships*, Royal Caribbean International's *Quantum of the Seas* and *Anthem of the Seas*, will regularly visit Port Canaveral in the winter of 2015 and 2016 as a must-have call on their Bahamas cruises."

- Juan Trescastro, Royal Caribbean Cruise Line





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

PORT CITRUS

www.portcitrus.com

GOVERNING BODY: Citrus County Port Authority



Introduction

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

Goals and Objectives

Port Citrus will take full advantage of a valuable asset: the Cross Florida Barge Canal. The region encompasses many underutilized public works projects, and development of the port will turn those unique physical assets into sustainable economic opportunities and jobs. The existing direct connection to the Gulf of Mexico offers clear potential for port development.

Initial feasibility studies completed in 2013 assessed markets and competitive position, preliminary and future infrastructure needs, development costs and potential funding sources. A determination of port development feasibility was made, with a market analysis refined to identify potential users, and a business model to yield the greatest feasibility. The consultant identified the optimal port facility location and recommended a sequenced development strategy.

That strategy will maximize port development efficiency and growth potential and minimize development costs while growing a sustainable revenue stream.

A Memorandum of Understanding is pending final execution between the Citrus County Port Authority and Port Tampa Bay, to a develop a strategic partnership in creating a barge feeder service for bulk commodities, enhancing the port corridor supply chain and expanding international trade between the ports. The partnership would initially focus on rock aggregate movements.

"The establishment of Port Citrus affords the County Commission a unique opportunity to take the long view of northwest Citrus County. This area contains many existing and underutilized public works projects. Port Citrus allows us the chance to turn those unique physical assets into sustainable economic opportunities, jobs, tax space and increase public infrastructure."

- Dennis Damato, Citrus County Port Authority



"As a powerhouse for international trade, travel and investment, Port Everglades leverages its worldrecognized South Florida facilities and innovative leadership to drive the region's economic vitality and provide the highest levels of service, safety, environmental stewardship and community accountability."

PORT EVERGLADES

www.porteverglades.net

GOVERNING BODY: Broward County Board of County Commissioners



Introduction

As one of south Florida's leading economic powerhouses, Port Everglades is an important gateway for international trade and cruise vacations. Already one of the busiest cruise ports in the world, it is also a leading container port and South Florida's main seaport for receiving petroleum products including gasoline, jet fuel and alternative fuels. The Port Everglades Department is a self-supporting Enterprise Fund of the Broward County government, with operating revenues of approximately \$153 million in fiscal year 2014. It does not rely on local tax dollars for operations. The total value of economic activity at Port Everglades in fiscal year 2013 (latest data available) was approximately \$26 billion. More than 203,700 Florida jobs are impacted by the port, including those of almost 11,400 people who work for companies that provide direct services.

Goals and Objectives

Expand role as a cargo hub, capitalizing on the port's geographical position at the crossroads of north-south and east-west trade lanes. Expansion efforts include the Florida East Coast Railway's (FECR) new rail facility, deepening and widening the port's navigation channels, and adding new cargo berths - to ensure capacity for handling the growing volumes of Latin American and

Caribbean cargos as well as cargo from Europe and Asia.

- Capitalize on state funding opportunities to strategically maximize investment in on-port intermodal rail infrastructure and seamless highway links to major north-south corridors such as I-95, I-75 and Florida's Turnpike, thereby improving connectivity with transportation corridors and logistic centers.
- Complete renovations ensuring world-class facilities at eight multi-day cruise terminals serving more than 40 ships cruising to the eastern and western Caribbean, Panama Canal, South America, Central America and Transatlantic.
- Augment the volume of perishable produce coming from Latin America by making the Florida Perishable Trade Coalition pilot program a permanent program, and expanding the program to other types of produce from more countries, in cooperation with the U.S. Department of Agriculture, U.S. Customs and Border Protection and the Florida Department of Agriculture and Consumer Services.
- Invest in infrastructure renovations and construction to protect our prominence as a top petroleum port in Florida, annually handling some 112 million barrels of petroleum products, as well as alternative fuels.



Accomplishments

- Port Everglades reached two major milestones, with more than one-million TEUs and more than four-million passenger moves, including a record 3,880,033 multi-day passenger moves, during fiscal year 2014 (preliminary, unaudited). This is the first time Port Everglades has reached one-million TEUs, which is attributed to continued growth in existing and new containerized cargo services. This year's four-million passenger count was achieved through additional summer sailings.
- In a model public-private partnership, the FECR built an Intermodal Container Transfer Facility (ICTF) on 43.4 acres provided by Broward County's Port Everglades. The ICTF, which was completed in 18 months and opened in July 2014, is used to transfer international intermodal containers between ship and rail, and the reverse. Prior to completion of the new facility, such containers were drayed to and from Port Everglades to off-port rail terminals. The ICTF also transfers domestic cargo destined to or originating from South Florida.
- The port began land preparation for its Upland Mangrove Enhancement Project, which is a critical part of the Southport Turning Notch Extension that will provide up to five new cargo berths. The Mangrove Project includes creating a new 16.5acre upland enhancement area with approximately 70,000 new mangrove and wetland plants. It will replace 8.7 acres of existing habitat in the port where the existing 900-foot Turning Notch will be extended westward by 1,500 feet.
- King Ocean consolidated several eastern
 Caribbean services to Port Everglades that are expected to generate 30,000 additional container moves through the port annually.
- To enhance productivity and efficiency for overthe-road container movement, Port Everglades completed the reconstruction of McIntosh Road, the main roadway in the port's Southport containerized cargo area, into a multi-lane loop road. The road project was partially funded by a Florida Department of Transportation (FDOT) grant and supported approximately 130 construction jobs.

Investments

- Cruise Terminal 4: This terminal underwent
 a complete renovation, expansion and
 reconfiguration effort to provide a modern,
 efficient facility with separate embarkation and
 disembarkation processing areas. After the
 reopening in January 2015, the port will apply for
 LEED certification for Terminal 4 due to the many
 environmentally-friendly, energy efficient features.
- Slip 2 Extension: Adjacent to Cruise Terminal 4, Slip 2 will be extended by 250 feet for a total of 1,150 feet of berth length to accommodate larger cruise ships. The Slip 2 extension is slated for completion by the end of 2016.
- Southport Turning Notch Extension and Upland Mangrove Enhancement: The Southport Turning Notch Extension (STNE) project will lengthen the existing STNE from approximately 900 feet to 2,400 feet. This project will provide for up to five additional berths and new Super Post-Panamax gantry cranes for the STNE and existing cargo berths in Southport. Port officials worked closely with port users, the environmental community, and the Florida Department of Environmental Protection to develop the plan to replace 8.7 acres of an existing mangrove conservation easement with an upland enhancement. This project is estimated to create 3,045 construction jobs and support 5,529 direct and indirect local/regional jobs, and to be completed and in operation by 2019.
- Harbor Deepening and Widening: In partnership with the U.S. Army Corps of Engineers (USACE), Port Everglades is advancing an 18-year effort to deepen and widen its navigational channels and turning basin to handle larger cargo ships. The Port already handles post-Panamax ships, but the ships must be lightly loaded, and older fleets are being replaced with much larger ships. The project is to deepen the main navigational channels from 42 to 48 feet (50 feet with allowances) and to widen the Entrance Channel and the maneuverability-constrained Southport Access Channel, including the 'knuckle' area between berths 23-26. The USACE estimates the project will create a total of 2,222 direct and 2,567 indirect construction jobs. It is anticipated that the completed project will support 1,491 direct and indirect local/regional jobs. The project is expected to be competed by 2022.

Investments (continued)

Eller Drive Overpass: The FDOT completed an overpass from I-595 to Eller Drive to allow the Florida East Coast Railway to bring two new rail tracks at ground level into the facility. The new rail tracks expand into six working tracks totaling approximately 18,000 linear feet to service up to a 9,000-linear-foot train, and also include a separate 500-foot spur to handle project cargo.

• Seaport and Convention Center Security Improvement Project: The security checkpoint on Eisenhower Boulevard will be moved further south and a security perimeter will be created around the Northport Parking Garage to carve out the Greater Fort Lauderdale/Broward County Convention Center from the controlled access area of the port.

Top Trade Partners and Commodities

Honduras, Guatemala, Costa Rica, Dominican Republic, Bahamas, Italy and Colombia.

Hinterland

Cargo shipped into Port Everglades can reach Atlanta and Charlotte in two days, Memphis and Nashville in three days, and 70 percent of the U.S. population in four days.

Cruise: The Caribbean, Central America, South America, Panama Canal and Europe.

"We have begun educating our customers on the strategic benefits of having the ICTF literally in our backyard in Port Everglades. Our breakbulk and out-of-gauge customers are particularly enthusiastic about being able to have their cargo off the ship and on the rail in a fraction of the time. That's good for everyone."

- Bob Weist, Crowley Maritime

"Hamburg Süd is proud to have been selected to carry the first refrigerated cargo load of fresh Peruvian grapes to Florida. With our state-of-the-art refrigerated cargo containers and our fixed-day of the week liner service between Peru and Port Everglades, we are uniquely positioned to cater to this exciting new business. Port Everglades is the first U.S. port of call for our South American West Coast/United States service and we are looking forward to serving the South Florida fresh produce import community."

- Juergen Pump, Hamburg Süd North America





"The Ocean Highway and Port Authority was created in 1941 and authorized to carry out public purposes of benefit to the citizens of the county of Nassau and the state of Florida."

PORT OF FERNANDINA

www.portoffernandina.org | www.kindermorgan.com GOVERNING BODY: Ocean Highway and Port Authority, Nassau County



Introduction

The Port of Fernandina provides terminal service to numerous pulp and paper producers located throughout Florida and the Southeast, and provides steel export services to several steel companies with mills in the Southeast. Fernandina supports a number of independent container lines serving Ecuador and Bermuda. The port's principal cargoes include exports of steel products (including billets, coils beams and rebar), machinery, forest products (including kraft linerboard, logs and treated lumber), corrugated cardboard waste, and building and construction material, as well as imports of grains, wood pulp, hardboard and building materials. The containerized commodities moving through the port include wood pulp, automobile and truck parts, lumber, chemicals, beverages, food stuff and chilled goods, machinery, consumer goods and building materials.

Goals and Objectives

- Promote economic development and create employment opportunities in Nassau County and northeast Florida.
- Support local industries by providing efficient port facilities, and reduce inland costs.

- Maintain port infrastructure to the highest standards to meet the increasing customer demand.
- Provide superior service to niche carriers and port users at a competitive price.
- Develop and provide an off-port logistics and distribution facility to serve northeast Florida.
- Work with state and local economic development agencies to attract manufacturing entities that import or export goods to Nassau County and northeast Florida.

Accomplishments

- New shipping service from Europe with bulk oats for the Florida and Georgia horse racing community.
- Initiated a new monthly break-bulk liner service to Central America and the Dominican Republic that will move to a bimonthly service in 2015.
- Initiated a new break-bulk liner service to the west coast of South America serving Peru, Ecuador and Chile. The initiative further enhances the efficiency of the local paper and pulp producing mills in Nassau County.

Accomplishments (continued)

- Initiated a new monthly breakbulk liner service to the Mediterranean.
- Completed rehabilitation of the break-bulk and container yard.
- Upgraded security infrastructure, including new video cameras, fencing and lighting. The Port of Fernandina is focused on becoming the safest port facility in the nation.
- Working with local, state and Florida Department of Transportation officials, the expansion of A1A/ SR-200 leading to the port, from four to six lanes, is fully funded in the current five-year work program. Actual construction began in September 2014. As the highway is expanded, it will create manufacturing opportunities and efficiencies within the port corridor, enhancing the attractiveness of the Port of Fernandina.

Investments

Logistics and Distribution Facility-West Side of Nassau County: The Port Authority is working to develop a logistics center at the Crawford Diamond Industrial Park. There are over 2,000 acres zoned industrial of which the logistics center would play a part in the handling of imported raw materials and exports of finished goods. The site is served by two Class I railroads with not one, but two gas pipelines nearby. In addition the site is easily accessible by truck from I-10 and State Rozad 301. These competitive advantages will help Northeast Florida capture a portion of the discretionary cargo currently moving through other out-of-state ports.

Top Trade Partners and Commodities

Ecuador, Dominican Republic, Bermuda, Panama, Spain and Colombia. Major export commodities include steel products, forest products, machinery, foodstuff and chemicals. The major import commodities are wood pulp and bulk oats.

Hinterland

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

"We celebrated our 1,000th voyage between the Port of Fernandina and Hamilton, Bermuda in late 2014. The last 28 years have been a great example of a strategic partnership based on trust, mutual gain, and service."

Robin Bishop, Somers Isles Shipping





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

PORT OF FORT PIERCE

www.stlucieco.gov

GOVERNING BODY: St. Lucie County



Introduction

St. Lucie County is exploring strategic options for the Port of Fort Pierce. The county owns 20 acres at the port, adjacent to 67 acres owned privately, as well as 12 acres that house the privately owned Indian River Terminal. The second phase report of a new master planning effort was issued in late 2013; the four key recommendations follow.

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

The county is striving to refresh the port's vision and direction and set strategies for revitalization, as well

as tackle heavy county unemployment. It is realigning strategic plans and goals. The new master plan may help fast-track port development and administration plans that are driven by opportunity and the community.

Accomplishments

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

Hinterland

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

Top Trade Partners and Commodities

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



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

PORT OF JACKSONVILLE

www.jaxport.com





GOVERNING BODY: Jacksonville Port Authority



Introduction

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

Goals and Objectives

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

Accomplishments

- In November 2013, Northeast Florida was selected to join the Brookings/JP Morgan Global Cities Initiative, a program aimed at increasing exports and foreign direct investment and strengthening the region's global competitiveness.
- In January 2014, a Strategic Master Port Plan was finalized including a valuation of terminals and assets, and a strategic assessment providing a comprehensive management decision tool.
- The North Florida Transportation Planning Organization, in January 2014, identified viable options for rail realignment that would reduce crossings and save time, the next step in a longterm project to improve the movement of rail freight through the region.
- Construction of TOTE, Inc.'s new Marlin Class vessels, the world's first liquefied natural gaspowered containerships, began at the General Dynamics NASSCO shipyard in San Diego in February 2014. The Marlins will begin service from JAXPORT to Puerto Rico in late 2015 and early 2016. Jacksonville-based Crowley Maritime Corp. will also have two LNG-powered ships operating out of Jacksonville by 2017.



Accomplishments (continued)

- Jacksonville celebrated 10 years of cruise service from Carnival Cruise Lines in 2014. More than 1.5 million passengers have embarked from JAXPORT's cruise terminal.
- In May 2014, construction began on the JAXPORT intermodal container transfer facility at Dames Point, which will provide on-dock rail service to JAXPORT's North Jacksonville marine terminals.
- President Obama signed the Water Resources
 Reform and Development Act (WRRDA) into
 law in June 2014. It included authorization for
 Jacksonville's Mile Point and Harbor Deepening
 projects.
- The U.S. Army Corps of Engineers began the preconstruction, engineering and design (PED) phase of the Jacksonville Harbor Deepening Project in mid 2014.
- An updated economic impact study reported that cargo activity through JAXPORT supports nearly
 \$27 billion in annual economic output.

Investments

JAXPORT is proceeding with the recently authorized project to deepen the St. Johns River to 47 feet. This project, currently in the planning, engineering and design phase, will create 15,396 direct, indirect and induced jobs and add nearly two million TEUs to the port's container volumes. The project's construction cost will be shared with the federal government. Recent economic calculations find that every dollar invested in the deepening project will return \$24.67 to the regional and state economy.

 Harbor Improvements: Two Jacksonville harbor improvement projects received federal authorization through the Water Resources and Development Act of 2014. The first project will improve the flow of the St. Johns River at Mile Point, where intracoastal and river currents pose navigational hindrances for deep-draft vessels during certain tidal conditions.

Construction on Mile Point is expected to begin in the first quarter of 2015. The second project will deepen the harbor from 40 feet to 47 feet from the mouth of the St. Johns River to JAXPORT's facilities at Dames Point to accommodate fully loaded deep-draft vessels. The initial engineering and design work was launched in June 2014 and is expected to take 18 months.

· Intermodal Container Transfer Facility:

Construction is underway for a new intermodal container transfer facility at Dames Point, which will facilitate the direct transfer of containers between vessels and trains. Opening in 2015, the new facility will allow for two unit trains each day (one inbound and one outbound) carrying up to 200 containers each.

- 100-Gauge Cranes: JAXPORT has contracted for construction of three new 100-gauge cranes for the Blount Island Marine Terminal which will be in operation by 2016. Berth 35 is being upgraded to handle the new cranes. The final design for the berth enhancements will be completed in early fall, with the 16-month construction period expected to start in January 2015.
- unveiled a newly rebuilt heavy-lift cargo berth at its Blount Island Marine Terminal. The berth now ranks as one of the nation's highest weight-bearing capacity docks, offering up to 1,800 pounds per square foot of load capacity. The infrastructure upgrade increased the heavy-lift berth rail capability to 78 kips per axle for heavy cargo.

Top Trade Partners and Commodities

Colombia, Brazil, China, Japan and Mexico. JAXPORT is also a leader in cargo movements to and from Puerto Rico.

Hinterland

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

"I've operated in and around most of the ports in North America as well as several overseas. The JAXPORT team gets it. They are forward thinking and closely monitor what is taking place in the market. Diversification is the key to survival today and JAXPORT has made a commitment to do just that "

 James Dillman, Diversified Port Holdings, Seaonus/Portus

"MOL/TraPac has always had a long-term plan envisioned for making Jacksonville a gateway port due to the natural resources and a full range of logistics opportunities that no other southeast ports have to offer."

- Dennis Kelly, TraPac Terminal





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

PORT OF KEY WEST

www.keywestcity.com

GOVERNING BODY: City of Key West



Introduction

The Port of Key West includes cruise berths at Mallory Square, the U.S. Navy's Outer Mole Pier, and the privately owned Pier B at the Weston Resort. The city also maintains a domestic ferry terminal in the Key West Bight. These facilities constitute one of the busiest ports of call in the nation and one of the state's strongest and most sustained ferry-port operations.

The Port of Key West is a major economic engine for the city and local businesses, bringing in almost a million total passengers per year, resulting in a local business impact of approximately \$85,000,000. The port provides 1,260 direct and indirect jobs to the citizens of Key West and contributes 15 percent of the city's total tax revenue. For a city with a total population of 22,000, these jobs represent a significant contribution to the overall economy.

Additionally, the Port of Key West supports cruise and ferry activities throughout the state, hosting cruise ships from Miami, Port Everglades, Canaveral, Tampa and Jacksonville as well as ferries from Fort Myers and Marco Island. These passengers are introduced to the unique charm of Key West without contributing vehicular traffic to the overburdened US-1 corridor.

Goals and Objectives

- Develop and maintain port-of-call facilities to accommodate the needs of the cruise ship industry and its passengers.
- Maximize the cruise industry and ferry operations benefits and revenues for the city and local businesses while sustaining the city's quality of life and preserve the historic features of old Key West.
- Design, build, and maintain a world-class park at the Truman Waterfront which serves as the gateway between a major cruise berth and the heart of the city. The redevelopment of the 28-acre former Key West Naval Base into an exceptional park offers both residents and visitors the opportunity to experience the historical origin of Key West, its waterfront.

Accomplishments

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

Hinterland

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



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

PORT MANATEE

www.portmanatee.com



GOVERNING BODY: Manatee County Port Authority



Introduction

Port Manatee is a multi-purpose deep-water seaport on Tampa Bay handling a variety of bulk, break-bulk, containerized and heavy-lift project cargoes. With its proximity to the Panama Canal, Port Manatee offers superior intermodal connectivity, competitive rates and a prime location with nearly 5,000 acres of surrounding green space ripe for development. Port Manatee features approximately 70 acres of lay-down area, one million square feet of public warehouse and office space, and 207,000 square feet of refrigerated space including 30,000 square feet of freezer space.

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

Goals and Objectives

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

Accomplishments

- New business includes new scrap-metal vessel calls, start of the new shipping line World Direct Shipping, attraction of additional juice imports through Louis Dreyfus Commodities, and new project cargo tied to the TECO power plant conversion.
- Development of the international trade hub to assist companies from throughout the world in advancing production, distribution and other business activities, including innovative global supply-chain solutions.
- Full federal funding for the first study phase of deepening the federal channel and harbor area of Port Manatee is included in the Obama administration's budget request for fiscal year 2015
- Readers of Logistics Magazine voted and honored Port Manatee for service excellence with a Quest of Quality award.

Investments

Port Manatee was awarded a \$1.8 million-plus security grant, facilitating advancement of three major projects.

- South Gate Modernization: This project will enable safe and efficient handling of project cargo and processing of all cargo and vehicle data at the South Gate.
- Port Security Emergency Communication Center: Upgrades and new equipment for the Port Security Emergency Communication Center will enhance coordination during emergency events.
- GIS: Purchase of new geographic information system software will help actively manage traffic patterns, as well as better identify and plan critical infrastructure.
- Dredging: Maintenance dredging was completed in 2015 to fully restore channel and berths to 40 feet of depth.

Hinterland

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

Top Trade Partners and Commodities

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

"We looked at a variety of options, and when we found Port Manatee, we saw that basically all ingredients were there, including the new berth and impeccable facilities. That was magic for us."

- John Pasha, The Pasha Group

"We did a search up and down the East Coast and Gulf Coast and we came across Port Manatee and we're thrilled."

 Sandy McLaughlin, Air Products and Chemicals, Inc.





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

PORT//II/A//II

PORTMIAMI

www.portmiami.biz





GOVERNING BODY: Miami-Dade County Mayor and the Miami-Dade Board of County Commissioners

Introduction

PortMiami is among America's busiest ports and is recognized around the globe as the Cruise Capital of the World and Cargo Gateway of the Americas. PortMiami once again surpassed the four-million mark for cruise passengers during the 2014 cruise season and that figure is expected to increase further in 2015. New for the upcoming cruise season is the arrival of Norwegian Cruise Line's new build ship, the Norwegian Escape which will sail year-round from Miami beginning in November 2015. Also, PortMiami will be the year-round homeport for Carnival Cruise Line's largest ship to date, the Carnival Vista, when it launches in winter 2016. In addition, many of the port's current cruise partners are expanding their Miami fleets. Infrastructure improvements totaling more than one billion dollars are completed or nearing completion.

Beginning in 2015, the port will be ready to welcome mega-size cargo ships – ahead of the opening of the expanded Panama Canal in 2016. The recently opened Port Tunnel, deepening the harbor by July 2015, and directly connecting the port to rail and highway systems, will enable PortMiami to increase its cargo and create thousands of new jobs throughout Florida. These investments will help the port grow as a global logistics hub for international trade and expand its role as the Cargo Gateway of the Americas. PortMiami contributes more than \$27 billion annually

to the South Florida economy and helps provide direct and indirect employment for more than 207,000 jobs.

Goals and Objectives

- Complete the -50/-52 foot channel deepening project in July 2015 before the opening of the expanded Panama Canal. The dredge project will enable PortMiami to accommodate the new generation of super post-Panamax container vessels allowing the port to capture new trade with Asian markets.
- Continue to meet customers' demands in providing a clean alternate fuel source of Liquefied Natural Gas (LNG). It is anticipated that the port will be LNG ready at the time the channel deepening project is complete.
- Continue to expand as an important north-south trade hub and to maximize trade opportunities with the growing Latin American markets.
- Expand intermodal infrastructure, including rail and highway links, and encourage commercial real estate development such as warehousing.
- Market PortMiami's Foreign Trade Zone 281 to make Miami-Dade County's international trading community more profitable and competitive by providing quick and easy access to FTZ benefits.



Goals and Objectives (continued)

- Continue to grow as the 'Perishables Gateway of the Americas' serving as shippers' preferred entry point to markets nationwide.
- On the drawing board is a plan for expansion

 the Master Plan includes new commercial development proposals, including new cruise berths and terminals as well as intermodal and parking facilities.

Accomplishments

- The Port Tunnel officially opened in August 2014. The Tunnel links the port with the U.S. Interstate Highway System, providing quicker and easier access for both cruise passengers and containerized cargo traffic.
- The U.S. Army Corps of Engineers issued the PortMiami Deep Dredge contract and work is scheduled to be completed in July, 2015.
- The U.S. Department of Commerce designated PortMiami as a foreign trade zone to enhance Miami-Dade County's status as a center for international trade and commerce, and help stimulate economic growth through tax savings, benefiting importers/exporters, warehouse operators, manufacturers and third-party logistics providers.
- PortMiami has been designated by U.S. Customs and Border Protection (CBP) as a Center of Excellence and Expertise for agriculture and prepared products. This enables CBP to provide tailored support to the port for increased processing efficiencies, and speeds the facilitation of cross-border commerce.

- Four new 65-long-ton super post-Panamax cranes were delivered to the port in November 2013.
 These new cranes provide increased capacity to handle the new super-sized container cargo vessels. The port now has a total of 13 cranes, six of which are super post-Panamax.
- PortMiami and the Florida East Coast Railway
 (FECR) reintroduced the on-dock rail Sunshine
 Gateway service. They restored and upgraded
 tracks to connect the port to the Hialeah Rail Yard
 with links from there to the national rail system.
 With on-port rail service, the PortMiami-FECR
 connection provides speedy intermodal service
 allowing shippers to reach 70 percent of the U.S.
 population in less than four days.
- The port completed the strengthening of its cargo bulkhead to accommodate both the new dredge depth of -50/-52 feet and the installation of the new super post-Panamax cranes. PortMiami is the first U.S. deep-water port to incorporate precast fascia panels on the project aimed at expediting construction and providing a clean uniform appearance of the port when viewed from Biscayne Bay.
- PortMiami is home to the world's leading cruise lines: Aida Cruises, Azamara Club Cruises, Carnival Cruise Lines, Celebrity Cruises, Costa Cruises, Crystal Cruises, Disney Cruise Line, Hapag Lloyd Cruises, MSC Cruises, Norwegian Cruise Line, Oceania Cruises, P&O Cruises, Regent Seven Seas Cruises, Resorts World Bimini, and Royal Caribbean International.

Investments

PortMiami is deepening its main cargo channel to -50/-52 feet to accommodate the new generation of super-sized cargo ships that will begin traversing the expanded Panama Canal. With its proximity to Panama, PortMiami expects to benefit from increased Asian trade. The deepening of Miami's channel is expected to create 33,000 new jobs, increase cargo throughput, and grow PortMiami's annual economic impact. The dredging project is managed by the U.S. Army Corps of Engineers and is expected to be completed by July 2015. Great Lakes Dredge and Dock Company, LLC, the contractor selected for the project, began dredging operations at the end of November 2013.

Hinterland

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

Top Trade Partners and Commodities

China, Honduras, Brazil, Dominican Republic, Panama, Guatemala, Netherlands and Indonesia.

"In today's global marketplace, shippers often need solutions that go beyond the United States borders and involve multiple modes to move goods from the point of origin to the final destination. In order to meet the needs of supply-chain managers, it is important for various modes of transportation to work together seamlessly. We are pleased with the positive impact we have seen as a result of our partnership with PortMiami and look forward to continuing to provide effective solutions for shippers."

- James R. Hertwig, Florida East Coast Railway

"The PortMiami Tunnel is a remarkable feat and one our community should be proud of. It upgrades the experience for our community, employees and our guests as they come to PortMiami – the Cruise Capital of the World."

- Richard D. Fain, Royal Caribbean Cruises Ltd.





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

PORT OF PALM BEACH

www.portofpalmbeach.com



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



Introduction

The Port of Palm Beach is a full-service, diversified landlord port that provides services through its private sector partners and is responsible for facilitating economic development within Palm Beach County, the region and the state of Florida. The port generates approximately 2,850 direct and indirect jobs in its community. The 162-acre port is located 80 miles north of the city of Miami.

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

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

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

Goals and Objectives

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

Accomplishments

- Currently undertaking a fully-funded \$45-million refurbishment/expansion of Slip 3 and adjacent infrastructure.
- Secured a new secondary metals exporter, which will provide a minimum guarantee of \$500,000 in revenue annually to the port. This creates new jobs and generates a positive environmental impact to the region.
- Refunded series 1999A Bonds with privately-placed series 2013 bonds; saving nearly two million dollars in interest costs.

Investments

- Slip 3 Redevelopment: The redevelopment of Slip 3 and the surrounding area will improve the efficiency of cargo operations, while keeping the same width and length. The fully funded project improves to the existing infrastructure to include the addition of two ro/ro ramps, at different elevations, and the demolition of an adjacent warehouse. The project supports 511 direct and indirect jobs and will have an impact of \$759 million over life of the project. The project is scheduled for completion in 2015.
- Berth 17: Once the Slip 3 project is complete, the reconstruction of Berth 17 will begin. The project will replace the existing 60-year-old sheet pile and includes improvements to the adjacent upland drainage system, utilities, existing and future tenant loading/unloading facilities and associated work required for the project. A 'mini slip' will be cut into the existing dock, allowing for the stern-in mooring of a 350-foot vessel conducting ro/ro operations. This project will expand current business and allow for possible new business at the site without interrupting the closely located sugar operation. This project is fully funded, will have an economic impact of \$19 million per year, and will create 60 direct and indirect jobs.
- Inlet and Channel Dredging: The U.S. Army Corp of Engineers conducted a market analysis to identify market trends and future needs of the port. The previous channel improvement occurred in 1963. The feasibility study aimed to determine areas in the Lake Worth Inlet that, once improved, would allow the port to handle slightly larger ships, while increasing navigational safety. The project has been approved by the USACE, was included in the 2014 WRRDA, and is currently waiting for Congressional funding.

Hinterland

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

Top Trade Partners and Commodities

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

"Having one of Florida's largest ports located in our city has had a profound impact upon our city's economic growth and vitality. It has provided jobs for our residents and international exposure for our community. I am proud of our close working relationship between the city and the port, which I am confident will continue for many years to come."

– The Honorable Dawn Pardo, Councilwoman, City of Riviera Beach, Florida, and Council Liaison to the Port





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

PORT PANAMA CITY

www.portpanamacityusa.com

GOVERNING BODY: Panama City Port Authority



Introduction

Port Panama City is a dynamic and growing port. It handles more than 1.7 million tons of cargo per year including containerized cargo, copper cathodes, steel plate, steel coils, kraft paper, wood pellets and aggregates. The port provides essential support service for five major manufacturing companies, including two located on the port.

Goals and Objectives

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

Accomplishments

- Completed refurbishment of west warehouse.
- Added a new container handling crane with the capacity to handle Panamax vessels.
- · Expanded container handling capacity.
- Attracted a London Metal Exchange warehouse operator to Panama City.

Investments

- Completion of Container Yard Expansion: The port will add additional container handling capacity by relocating a bulk storage facility, adding heavy paving, constructing racks to allow the stacking of refrigerated containers, and upgrading its interchange gate.
- Expansion of Distribution Warehouse: The port will add 100,000 square feet to its distribution warehouse in the port's Intermodal Distribution Center. This space will accommodate trans-loading and distribution operations for importers and exporters utilizing the port.

Investments (continued)

 Construction of Bulk-Transfer Facility: The port is constructing the first phase of a bulk-transfer facility within the Intermodal Distribution Center. This facility will support the transfer of bulk products between rail cars and bulk containers.

Hinterland

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

Top Trade Partners and Commodities

Chile, Mexico, United Kingdom, Panama and Germany. Commodities include copper and articles thereof, manufactured products, wood pellets, steel, and paper. "Every day we see the value of the port with both existing companies and the prospects we are trying to attract to the region. This strategic infrastructure is vital to our economic development efforts and we approach companies knowing that we have a true partnership with the port team."

– Neal Wade, Bay Economic Development Alliance





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

PORT OF PENSACOLA

www.portofpensacola.com



GOVERNING BODY: City of Pensacola



Introduction

Since its formal establishment in 1754, the Port of Pensacola has served as northwest Florida's gateway to the world. From its early shipments of regionally harvested lumber, locally made bricks and sailing ship masts, to the locally manufactured paper and power plant components being moved today, the port has always existed, at least in part, to serve local and regional business interests. The port is committed to providing an efficient and cost-effective port for national, international and multi-national shippers seeking a congestion-free, service-oriented alternative.

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

Goals and Objectives

Diversify port's business lines in order to maximize revenue generation, regional job creation, and economic impact, with the current focus being primarily on attracting business

- partners that provide services to the offshore oil and gas industry and related vessels.
- Invest in port infrastructure improvements to meet the operational needs of the port's business partners and breed customer loyalty.
- Diversify the port's business lines in order to attract new business partners that will create jobs and grow local port-related employment opportunities.
- Generate operating revenues to fund all operating expenses other than depreciation.

Accomplishments

- Exports of wind turbine nacelles from GE's Pensacola manufacturing facility continue to increase.
- Sapphira Shipping's two-year old break-bulk liner service to the Caribbean continues to grow, expected to increase to 24 calls by 2015.
- Offshore Inland/DeepFlex selected Port of Pensacola from among six competing ports for the location of a major new offshore flexible pipe manufacturing plant. The project will result in more than \$50 million in new investment at the port and the creation of more than 200 new jobs.

Investments

- Warehouse 9 Improvements: The improvements include a raised-ceiling 'high hat' bay with 30-foot + hook height to support two overhead bridge cranes with 30-ton capacities. The facility provides for private-sector job growth in a business sector that represents a non-traditional, diversified use of port facilities.
- Berth 6 Rehabilitation: This project is repairing areas of spalling on the Berth 6 substructure by removing loose concrete, rust and mill scale. It is replacing damaged reinforcing steel as necessary, applying a manufacturer-recommended primer to exposed surfaces and applying shotcrete. The rehabilitation will return an existing port berth to full utility, retaining up to 20 jobs, and creating potential for additional jobs and revenue.
- Infrastructure Improvements: This is a project to improve internal port roadways and infrastructure to provide capacity for intra-terminal transport of project and heavy-lift cargoes, including under-grounding of utilities and other related improvements. This project is in support of the continued growth of the port's non-traditional business lines in light manufacturing, assembly and other value-added operations.
- Pensacola Ferry Terminal: This project will develop passenger ferry ticketing, embarkation/ disembarkation and ferry boat landing facilities at the port's Commendencia Slip area, which will tie in to ferry facilities being developed by the Santa Rosa Island Authority (SRIA) at Pensacola Beach and by the National Park Service at Fort Pickens/ Gulf Islands national Seashore. Simultaneously,

the National Park Service in collaboration with the port and SRIA is developing a solicitation package for private-sector operators interested in operating the service, with ferry vessels provided in part through a federal grant.

Hinterland

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

Top Trade Partners and Commodities

Central and South America, Mexico, Caribbean Basin, Mediterranean, Africa, Baltic Region and Asia.

"Hundreds of jobs will be created during the engineering and construction of these projects. But the real economic value is in building the arteries that get products to and from market. A burst of construction getting that infrastructure in place will help our communities attract and keep growing businesses that need skilled workers for decades to come."

– Former Senate President Don Gaetz





"... to enhance the economic vitality and quality of life in the Port St. Joe area and northwest Florida region by fostering the growth of domestic and foreign commerce."

PORT OF PORT ST. JOE

www.portofportstjoe.com

GOVERNING BODY: Port St. Joe Authority



Introduction

Located in Gulf County, Florida, the Port of Port St. Joe offers a deep-water seaport with nearly 1,900 linear feet at the ship channel turning basin. The port is well suited for bulk and cargo shipments, offering access to rail, the U.S. Gulf Intracoastal Waterway, and state and U.S. highways.

One of the port's greatest assets is the approximately 300 acres of combined ready-to-be-leased lands adjacent to the bulkheads and the more than 5,000 acres of land available for immediate development. Businesses wishing to establish facilities have plenty of room to build and expand. Additionally, much of the bulkhead area has water, sewer and electric in place.

Goals and Objectives

- · Complete and adopt the new Port Master Plan.
- Attract appropriate users port tenants, shippers and manufacturers – to bring the job creation and economic development opportunities desired by the community.
- Initiate the process of resuming maintenance dredging of the ship channel.
- Enhance the Apalachicola Northern Railway (AN Railway) line that serves the port and connects with the CSXT Class I mainline.

Accomplishments

- A permit was issued by the U.S. Army Corps of Engineers to allow for spoil disposal as part of the planned dredging of the port's navigational channel to the maximum authorized depth of 37 feet.
- The Port signed a Letter of Interest (LOI) with Holland M. Ware Charitable Foundation regarding transporting materials via the port and the AN Railway contingent on dredging and rail improvements.
- The St. Joe Company signed a LOI with Enova Energy Group, a clean-energy development company regarding moving a minimum of one-million-metric tons per year of wood pellets to overseas markets, contingent on maintenance dredging.
- The St. Joe Company signed a LOI with Green Circle Bio Energy, Inc., a producer of biomass-based renewable energy, regarding leasing a site along the AN Railway to develop a wood pellet facility, contingent upon the Port receiving funding to complete maintenance dredging.

Hinterland

North Florida, Alabama and Georgia.

"We are excited about the possibility of leveraging our strong presence in Northwest Florida, further job and economic development in the region, and look forward to the successful dredging improvements of the shipping channel."

- Morten Neraas, Green Circle Bio Energy, Inc.



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

PORT OF ST. PETERSBURG

www.stpete.org/port
GOVERNING BODY: City of St. Petersburg



Introduction

The Port of St. Petersburg, located on Tampa Bay, is exploring opportunities to create a multi-use facility that capitalizes on its unique assets within the city of St. Petersburg. These include opportunities to attract research vessels and other vessels, including large yachts, as well as to attract and enhance the benefits of marine science/research facilities on port property.

Goals and Objectives

- Continue to provide and improve port facilities, including terminal, berths, parking and public access, to attract revenue-generating users and to expand potential maritime operations.
- Diversify revenue and similar investment opportunities by creating an atmosphere that will attract research vessels, large yachts and other marine-related businesses that complement each other.
- Continue to take advantage of the port's proximity to the adjacent University of South Florida-St. Petersburg, College of Marine Science, the Albert Whitted Airport, U.S. Coast Guard Sector St. Petersburg, and a variety of other marine/ maritime-oriented entities located close to the

port (and which comprise the St. Pete Ocean Team), through joint use and programming, to complement the city's downtown redevelopment plans.

- Implement a cost-effective, phased development approach.
- Obtain funding assistance for capital improvements.

Accomplishments

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

Investments

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

Hinterland

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

"We could not be happier with the decision we made last November to spend over six months alongside at the port . . . The location adjacent to the University of South Florida and the new contacts and friends we have developed at the port and the College of Marine Sciences made our lives so much easier. Your relationship with the University and the ease at which we fit into a routine with both your staff and the University staff enabled us to complete our goals . . . We completed over \$1.6 million of maintenance and upgrades to the vessel and found, with the help of you and your staff and staff at the University of South Florida, local contractors to work aboard. The quality of workmanship was excellent . . ."

- Ian Kulin, E/V Nautilus





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

PORT TAMPA BAY

www.porttb.com

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GOVERNING BODY: Tampa Port Authority



Introduction

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

Unique to Port Tampa Bay is its vast and growing acreage. Private and public properties comprise 5,000 acres across the entire port complex, of which more than 300 are currently available. These land assets are vital in attracting new business and stimulating manufacturing, which create jobs and economic value for the region. The port continues to build its container business to serve the immediate central Florida region, and beyond, providing a more costeffective alternative for carriers and shippers, whose concentration of distribution centers along the I-4 corridor represent Florida's largest and are rivaled by only Atlanta in the entire Southeast. Port Tampa Bay is also a vital energy products gateway to all of central Florida and is an important global distribution point for fertilizer.

Goals and Objectives

The port's recently updated Strategic and Master Plan, a widely collaborative effort with the port community, provides a multi-faceted strategic direction focused six key factors.

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



Accomplishments

- General Cargo and Container Advancements:
 Ongoing container terminal expansion is providing greater capacity and efficiency for cargo movements, such as those initiated in 2012 by Atlantic RoRo Carriers and American Honda Motor Co., Inc., as well as opportunities for shippers.
- Road and Rail Developments: A dedicated express truck ramp links the port directly with the nation's interstates, greatly enhancing connectivity to customers in west central Florida and beyond. It was part of the FDOT's I-4/Selmon Expressway Connector project.
- Gateway Rail Project: Completed in 2012, this joint TPA/CSX Corporation/Kinder Morgan Energy Partners initiative was the first on-dock multipurpose unit train facility for ethanol and intermodal containers in Florida. Located adjacent to the Hookers Point Container Terminal, it serves the energy sector and enhances intermodal efficiency for a range of general cargo.
- Land Acquisition: The port acquired 150 acres at Port Redwing, conveying an important competitive advantage with new capacity for cargo growth and industrial expansion.
- Industrial Development: NexLube Tampa LLC
 has joined the port family, building a, 24-milliongallon, used-oil recycling facility. To prepare, the
 port undertook reconstruction of an access road,
 creating a new rail spur adjacent to the site, and
 installing six miles of piping for processing water.
- Financial: The port remains the leading economic driver in west central Florida. Its diverse infrastructure results in a constant revenue stream. This, coupled with prudent expense control, has made it possible to invest in projects with excellent growth potential.

Investments

- Hookers Point Developments: The multi-phased development at the south end of Hookers Point will, at full build out, comprise 160 acres, enough capacity to satisfy the future container needs of the rapidly growing local market. Recent enhancements include the acquisition of gantry cranes, a berth extension to 2,800 feet and a container terminal yard expansion to 40 acres. The upcoming development phases will add berthing, laydown space, transit sheds, reefer plugs, a gate complex, equipment and expanded rail. These initiatives will help Florida's shippers expand and/or enter international markets. Farther north on the peninsula, improvements to Berth 201/202 are planned, including a pier extension for ro/ro cargo and improvements to the adjacent transit sheds. The project supports 1,399 direct, indirect and induced jobs, 525 construction jobs and 2,500 existing jobs, and complements the recently completed Gateway Rail Project and the Berth 201/202 improvements.
- Petroleum Facilities Development: Port Tampa Bay is the energy gateway for West Central Florida and its nine million residents. The premiere energy facility was recently rebuilt, improving logistical reliability and efficiency, enhancing safety, protecting and preserving the environment and extending the facility's life by 30 years. Owned by the TPA and used by diverse private companies, it is one of only two fully integrated, multimodal liquid-bulk facilities in a state that completely relies on inbound receipts of petroleum products for its energy needs. This project created 461 construction jobs, protects 2,444 permanent jobs, saves tens of millions of gallons of fuel versus trucking fuel to the region, and, along with the Central Florida Pipeline, decreases truck traffic by about 125,000 longdistance truck moves annually.

- Port Redwing Development: Port Redwing, a 128acre Greenfield site situated several miles south of the city of Tampa and near I-75 and the CSXT rail mainline, will complete critical infrastructure needed to provide capacity for additional bulk trade and intermodal transportation activities. Cargo capacity at full build out could reach 12 million tons. A recent 150-acre acquisition at adjacent properties now can attract large, exportdriven manufacturing plants that until now have had to look at sites outside the state. The port has invested in berths, roads and utilities to support the aggregate terminal already in operation. The current phase includes a new access road connecting to US-41, rail track connecting to the CSXT mainline, and security infrastructure and utilities. Design and permits for the improvements are nearly complete. This project creates 845 permanent and 75 construction jobs, and supports 25 existing jobs. At build out, Port Redwing could provide 5,765 jobs, while avoiding 59 million truck miles.
- Eastport Improvements: The port is preparing for deeper draft bulk and general cargo vessels. The current phase of the Eastport development includes design and construction of a Berth 150 finger pier with 43 feet of depth, and a partial roadway relocation to improve upland access. The full site plan includes the creation of eight berths and a 102- acre multi-purpose cargo facility. Permitting and dredging are complete. The project will create 676 permanent and 50 to 60 construction jobs.
- Navigational Improvements: Port Tampa Bay is
 the local sponsor for federal work to improve and
 maintain the 40-plus miles of deep-water federal
 channels that provide access to seaports within
 Tampa Bay. The port also dredges to maintain
 and improve 62 deep-water ship berths. This
 project will dredge approximately 140,000 cubic

yards from one-third of the port berths during the September through March dredging window. The project creates 1,552 permanent and 60 construction jobs, and supports 6,211 jobs.

Hinterland

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

Top Trade Partners and Commodities

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

"We are strong supporters of the addition of new and expanded container services via the Port of Tampa."

- Ali Hosein, Rooms to Go

"CSX and its subsidiary Transflo are pleased to participate in this efficient solution to deliver ethanol to the Central Florida market. This

ethanol to the Central Florida market. This cooperative venture also enhances future cargo growth opportunities for CSX and the Port of Tampa."

- Clarence Gooden, CSX



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