



FLORIDA SEAPORTS
CHARTING OUR FUTURE

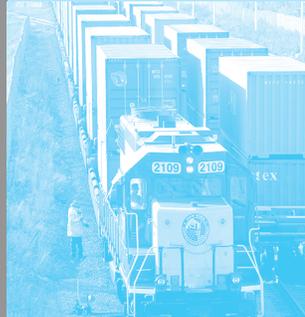
State of Florida Ports 2012/2013

The Seaport Effect

Port Canaveral
Port Citrus
Port Everglades
Port of Fernandina
Port of Fort Pierce
Port of Jacksonville
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 of Tampa

Florida Seaport Transportation and
Economic Development Council

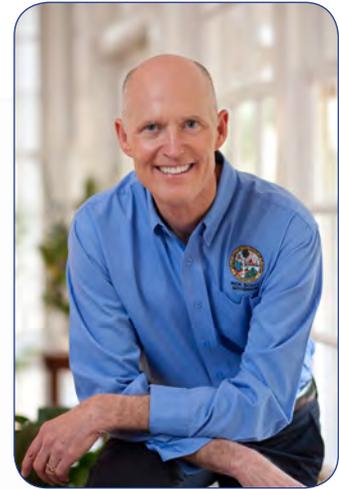
www.flaports.org





RICK SCOTT
GOVERNOR

February 2013



Dear Friends:

As Governor, I am committed to establishing Florida as the best state in the nation for businesses and to strengthening our position as a global hub for commerce.

Our ports are a vital part of Florida's economy, and I have made them a top investment priority during my administration. In the last three years, we invested \$421 million in our ports to take advantage of the benefits of trade with Central and South America, and to prepare our state for the expansion of the Panama Canal and the potential for increased trade with Asia. In fact, I have personally visited some of these countries on trade missions to highlight the value of our Florida ports, efficiency of our logistics network, and the quality of our workforce.

Strategic port investments are one of the reasons why Florida's economy continues to move in the right direction, creating more jobs and opportunities for Florida families. Florida's 15 seaports currently support 550,000 jobs for Florida families and continue to be a key driver of our economy. In 2011, more than \$42 billion in export goods left the United States through Florida seaports.

The 2013 *State of the Florida Ports: The Seaport Effect* 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 in expanding Florida's international trade and creating jobs for Florida families.

Sincerely,

Rick Scott
Governor

THE CAPITOL
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Florida Ports Council

Florida Seaport Transportation and Economic Development Council

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**FLORIDA
SEAPORTS**
CHARTING OUR FUTURE



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Coastal Communications and
Public Relations, Inc.*

SEAPORTS – FLORIDA'S LASTING ADVANTAGE

Florida provides a strong seaport transportation network that is invigorating the economy now and will continue to build it for future generations. The state's 15 seaports are a crucial conduit, helping to bring a full range of goods and services to people around the world. They operate safely and securely, with an unwavering commitment to safeguarding the environment, and they infuse millions of dollars into the economy, supporting millions of well-paying jobs in the process.

The state's seaports, and indeed the entire logistics industry, are facing a metamorphosis. They **are experiencing a cycle of important change that is reshaping Florida's logistics landscape, heavily influencing planning, investment, operations and marketing.**

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

With scores of small and large changes in the offing, stagnation is not an option. Florida's seaports are working hard to present an innovative front and even more – they are emerging as markedly different entities, complete with all the right equipment, infrastructure, connectivity and services to secure long-term success. Ultimately their success is critical to the creation of future opportunities and to the achievement of a better standard of living for Floridians.

PORTS STRENGTHEN

"Our ports are such a vital part of our job market; we have made them a top investment priority during my administration. In the last three years, we invested \$421 million in our ports to take advantage of the benefits of trade with Central and South America, and to prepare our state for the expansion of the Panama Canal and the potential for increased trade with Asia." – Florida Governor Rick Scott

Battle for Business

To keep generating jobs and boosting economic activity, ports have to stay ahead of the competition in other states. To attract more trade, to be a key part of an optimal transportation movement that impels businesses to blossom, and to create jobs, Florida ports are continuing to build, improve and develop.

They are continuing to do so in ways that are financially sound, astute and sustainable. Undoubtedly they've had to get creative in this capital-intensive world, where revenue sources are decreasing and infrastructure planning



timelines are lengthening. They've had to find ways to bolster earnings and grant funding, capitalize on bond financing and wholeheartedly embrace clever and innovative funding options such as private-public partnerships.

Port Everglades, for example will soon be able to serve vast volumes of rail traffic thanks in part to the 30-year lease with the Florida East Coast Railway LLC (FEC) to build and operate the port intermodal container transfer facility (ICTF). And PortMiami, in partnership with state, federal and private-sector partners, is investing more than \$2 billion in major improvements to support cargo and cruise growth – the program includes massive projects such as the access tunnel under Biscayne Bay, deep dredging the channel, and restored rail service. In Tampa, the Gateway Rail Project, completed in 2012, is a \$10.9-million joint Tampa Port Authority/CSX Corporation/Kinder Morgan Energy Partners initiative. It was the first on-dock unit train facility in Florida and its multi-purpose design means it can handle ethanol cars or intermodal containers.

Florida's ports have learned they cannot go it alone on funding – and the same goes for planning. They are part of the emerging cutting-edge statewide freight movement whose momentum leads the nation in a collaborative planning mindset. This is an extremely competitive business and Florida's ports have already stepped up to the plate.

Each Florida seaport has certain niche strengths. Together, there is no business they can't handle. They don't just accommodate cargo and passengers, Florida ports have in place the infrastructure, waterway depth and access, workforce, safety and security programs, inland connections, and other systems to make businesses grow. They plan to be the seaports of choice for every business in Florida, and for more and more shippers in the southeastern U.S. and further afield.

Investing in the Future

That is a grand goal, but well-suited to such a dynamic industry. Never complacent, Florida seaports are preparing for major changes. Vessel size will continue to grow, so plans are afoot for deeper channels. Currency exchange rates can wreak havoc with a particular trade, so diversification of lines of business is a continuing priority. Fleets will always play musical chairs with their port calls, especially during a time when logistics costs are changing rapidly. So, Florida's ports are searching out and solving supply-chain bottlenecks and collaborating on everything from ICTFs to expanded foreign trade zones in order to offer compelling competitive solutions for shipping lines.

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



Trade lanes can boom and bust, and the Panama Canal expansion will change the game, but Florida ports are making every effort to maximize long-term economic gain for the state.

Thanks in large part to substantial state investment in critical port infrastructure in the last few years, Florida's seaports are developing even more of the world's most cost-effective and efficient facilities and waterways, and streamlining logistical connectivity. Commendably, they are buttressing those investments by continually reinvesting earnings, employing cost-saving measures, conducting aggressive marketing, and tapping into technological and managerial innovation.

Done poorly, port developments could be wasteful. Done well, they will bring in a greater share of business during this period of growing global trade.

Done poorly, port developments could be wasteful. Done well, they will bring in a greater share of business during this period of growing global trade. Florida seaports are lined up to face all challengers and expect to not only meet the challenge, but exceed expectations.

The Economic Recovery

Florida was hit hard by the economic recession of 2008/2009. Heavily dependent on consumer spending for its GDP, the state suffered huge housing value losses that curtailed its revenues, led to lost jobs, and decimated its construction industry. Its seaports saw measurable losses in throughput. The depreciation of the U.S. dollar vis-à-vis many currencies also dealt a staggering blow to Florida's purchasing power, leading to a decline in imports.

Depending on the niches served, some Florida seaports weathered the recession better than others, and all have a renewed focus on strategic diversification to best prepare for the vagaries of the future. Consumer spending and tourism are again buoyant in most parts of the state. As the construction, manufacturing and automotive industries recover, cargo flows are rebounding steadily. Port and transportation systems must continue to expand in order to address the economic realities of the future. By all accounts, the volume of global trade will grow for the next decade and beyond. Florida trade will grow as well, perhaps moderated by factors including the critical state of U.S. debt and currency exchange rates, rising energy prices, and instability in Europe and the Middle East.

Conversely, trade will be given impetus by shifts of production to the Indian Sub-continent, increased Suez Canal transits, cargo shifts 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 dawning consumer markets in the Americas, among other factors.

As Florida's established seaports carry out insightful projects to tap into global trade growth, the emerging ports are working to identify unfilled niches, rounding out the state's waterfront offerings. St. Lucie County's Port of Fort Pierce is undergoing a new master planning effort, with a view to positioning

itself for opportunities from a variety of growth markets, perhaps becoming a niche for smaller vessels serving the Caribbean (and potentially Cuba), feeder vessels, and/or supplying the formerly heavily protected South Korean citrus market. Port Citrus plans to take full advantage of a valuable asset, the Cross Florida Barge Canal. It will turn several nearby underutilized public works projects into sustainable economic opportunities and jobs, for a county that suffered a severe regional impact after the falloff of the construction industry. In the northwestern part of the state, the Port of Port St. Joe, along with The St. Joe Company, a major landowner/developer, are shrewdly marketing their combined properties to broaden the state's scope of deepwater seaport offerings. With more than 5,000 acres to promote, companies who in the past looked to locate operations outside the state now have a large footprint within the state to consider. The Port of St. Petersburg is taking a cost-effective, phased approach to development, currently renovating its wharf, considering plans for a second berth, and preparing for improvements to various shoreside facilities, with a view to potentially accommodating mega yachts, among other opportunities.



The Race for Deeper Drafts

All seaports move cargo and/or passengers between vessels and inland transportation systems. They must do it well and quickly. Recognizing the world's shipbuilders continue to churn out larger vessels, some of Florida's seaports have joined the deeper draft race. The number and size of Asian-direct vessels already transiting the Suez Canal and those expected to pass through the Panama Canal after its expansion cannot be easily accommodated in the state of Florida. Yet.

But with PortMiami's funded 50-foot deepening (affording it elite status as one of the top four deepest ports on the U.S. East Coast), JAXPORT's commitment from President Obama to accelerate their Harbor Navigation Deepening Study, and possible near-term dredging projects at Canaveral, Everglades and Tampa, Florida is fast-tracking its readiness.

Ports undertake important projects like these with major throughput goals in mind. They also try to incorporate beneficial uses for their communities into almost every project. Dredging, for example, often has the side benefit of producing materials for islands that later are established as vital shore bird nesting grounds, or for the beach renourishment projects so vital to the tourism sector of the state's economy. Sand that naturally shoals within coastal inlets can interfere with navigation and must be dredged, so in close cooperation with the Florida Department of Environmental Protection, the U. S. Army Corps of Engineers and local governments, Florida's ports return sand to beaches.

Gateways to Opportunity

Florida's 15 seaports move more than 100 million tons of cargo each year and are actively growing those volumes, in part by optimizing investments. They are preparing to serve the vessels of the future, in all their iterations of silhouette and size. They have analyzed throughput costs and identified niches by business,

commodity, method of handling, mode, hinterland, service needs, and trading partner, and each port is working to be, not a solution for all freight and passengers, but a solution for those whom each can best serve.

The Port of Fernandina has invested years grooming certain facilities to best handle steel, and energetically marketing those assets for exports into Central and South America and the Caribbean. It has paid off – the port is now one of the leading semi-finished steel exporters in the nation.

Port Manatee is planning and building for the near term and the long term. It is focused on a tremendous asset – nearly 4,000 acres of largely undeveloped land located just outside the port’s gates. Having room to grow is rare enough for a port, but the port’s compelling business growth strategy gets a lift from extensive regional development incentives and a growing consumer base at hand.

The Port of Palm Beach has a unique capability among South Florida’s ports – it handles a variety of mid to small-sized vessels and commodities, forming an essential link in the freight movement system. The port’s project to improve and modernize seaport infrastructure and rail at Slip #3 and the surrounding area will improve the efficiency of cargo operations for these businesses, allaying transportation challenges at this diverse multimodal freight hub. Cargo arrives at Slip #3 by on-dock rail, truck, conveyor, pipeline and short-sea shipping.

A choice of Florida seaports is always critical to importers and to all shippers. Given a comprehensive competitive analysis examining vessel, port, and inland rail or truck costs, one gateway and routing may prove more advantageous for a particular shipment. No single port is best for all ...

A choice of Florida seaports is always critical to importers and to all shippers. Given a comprehensive competitive analysis examining vessel, port, and inland rail or truck costs, one gateway and routing may prove more advantageous for a particular shipment. No single port is best for all, but trading partners, shippers, logistics companies and others will benefit if educated about the greater efficiencies that can now be gained through a Florida port versus a competing port outside of the state.

Ports are working with current and potential tenants to fill their facilities, with cruise and cargo lines to serve those facilities, and with those who control freight and passengers to ensure vessels arrive and depart at capacity. They are focusing on liquid or dry bulk, containerized goods, other general cargo ranging from breakbulk to roll on/roll off to project cargo, cruise passengers, on-site manufacturing or wholesaling or mixed retail, warehousing or foreign trade zones, and any number of other initiatives. Their marketing programs, which may range from concentrated to broad-based, depending on their segment of the industry, are uniquely tailored to their individual strengths.

In the liquid bulk sector, the Port of Tampa, for example, is partnering with private sector customers and making a \$45-million investment in the REK pier, to handle up to 70 million barrels of fuel annually. This pier is indispensable to the West Central Florida region, which completely relies on inbound receipts

of petroleum products for its energy needs. In dry bulk news, Port Panama City recently completed an expansion at its South Berth 3, along with related dredging improvements. The additional dock length and depth will support the port's growing vocation in the export wood pellets trade, an industry that provides important regional jobs.

At the Port of Key West, officials are ensuring the cruise industry confers more than just economic impact; the city is building a world-class park at the Truman Waterfront, which serves as the gateway between a major cruise berth and the heart of the city, for the enjoyment of locals and visitors alike.

The Port of Pensacola is likewise developing new capabilities, such as Warehouse 9 where there will be an opportunity for sustainable, private-industry job growth in a business sector that represents a non-traditional, diversified use of port facilities. They are doing so while at the same time developing a port brand that is consistent with the city of Pensacola's overall brand identity. This clearly communicates the port's position as a city-owned enterprise, and reaffirms and conveys the port's economic value to the community.



Florida's seaports strive to synchronize efforts with the communities within which they operate – this makes them good corporate citizens, ensures they never operate in isolation from their constituents, and generates understanding of, direction for, and pride in the state's vital waterfront assets.

Florida ports are focusing on capturing cargo currently shipped through seaports and airports located outside the state. They are providing fundamental logistical links and potential throughput volumes to support and develop additional manufacturing facilities and distribution centers within key areas of the state. They are promoting cost-effective northbound backhaul trucking and rail. Florida seaports are working with private industry to build their own throughput, and setting the stage for other members of the supply chain to do the same. This is how Florida will sell its advantages in moving freight in the future.

Ports also have a hand in selling vacations. In a state in which some of Florida's most iconic tourist destinations, from Miami's art deco sights to Key West's Mallory Square sunsets to Canaveral's Ron Jon surf shop, reside right alongside passenger terminals, there are tremendous synergies to be had. The state's contemporary cruise terminals, 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 offices, their vessels and their vacationers.

PORTS ENHANCE

“Florida is the cruise capital of the world with 13.3 million passengers embarking and disembarking from Sunshine State seaports every year. Pre and post cruise, vacationers explore Florida communities, dine in our restaurants, visit attractions and shop in our stores, contributing greatly to the Florida economy. VISIT FLORIDA’s partnership with the cruise industry and the state seaports is critical to our vision of establishing Florida as the No. 1 travel destination in the world.” – Will Seccombe, VISIT FLORIDA

Port Canaveral’s new Cruise Terminal 6 will boast a retail shopping arcade, and its novel Welcome Center is expected to be the centerpiece of an extensive redevelopment of The Cove harborside dining and retail area, as well as a community hub, repository of local history, visitor magnet and gateway to the region’s attractions. The Port of Tampa’s established Channelside restaurant and shopping venue has become a popular extra-value experience for passengers to the Gulf Coast. PortMiami’s extensive water and landside infrastructure campaign is sure to expedite passenger access and affirm the port’s place in the record books for cruising. The Port Everglades \$54-million renovation project to update, expand and modernize Cruise Terminals 2, 19, 21 and 26, will allow simultaneous embarkation and disembarkation, a welcome advancement for travelers ready to go.

A State with a Plan

Florida’s geography makes it a logical contender for additional passengers and for new cargo generated by a number of developments in international trade and logistics. Keeping apprised of the many industry changes, current leaders within the state realized the critical need for a coordinated statewide logistics plan.

The Florida Department of Transportation (FDOT) has taken a refreshingly holistic approach to the current and future condition of the state’s freight transportation system, examining its condition, possible remedies for deficiencies, and future needs to support growth in all industry sectors in Florida. It is developing a policy for freight mobility by July 2013 and expects to prioritize those project funding needs within the following year.

FDOT created an *Office of Freight Logistics and Passenger Operations* to transform the state’s economy by becoming a global hub for trade, logistics and export-oriented manufacturing. This office has taken on the responsibility of pulling together the state’s long and short-term transportation and logistics plans, to guide state logistics, anticipating and eventually providing synergies with the federal government’s proposed national freight plan.

The Florida freight mobility plan is expected to build on what has turned out to be a solid set of interconnected research projects created by diverse public and private players. The vanguard publication in the series, the 2010 Florida Chamber Foundation work called the *Florida Trade and Logistics Study*, offered a seminal vision for Florida’s prosperity, communities and global competitiveness, and provided a framework for strategic planning with a commitment to measuring progress. Another highly regarded study, FDOT’s *2012 Florida Logistics Center Market Analysis Update*, by leading economist

Martin Associates, assesses the potential for additional distribution centers and warehousing activity in Florida and in doing so synthesizes the connectivity of the transportation system's appeal by region.

Equipped with an assortment of other compelling reports, especially the strategic plans of air and seaports and metropolitan planning organizations, **the state of Florida is well ahead of other states in guiding wise transportation system investments and securing the state's economic future via a definitive plan.**

... the state of Florida is well ahead of other states in guiding wise transportation system investments and securing the state's economic future via a definitive plan.

PORTS ELEVATE

"By expanding capacity, relieving congestion and moving people and freight more efficiently, we create a state that keeps down the cost of living for our citizens and makes Florida the best place to live, work and visit." – FDOT Secretary Ananth Prasad

For Economic Vitality

While the state seeks to define policies and investments that will enhance Florida's economic development efforts into the future, the federal government has fallen far short in its funding of port and waterway maintenance and infrastructure improvements. Nevertheless, Florida's seaports are doggedly pursuing federal approvals, appropriations and authorizations for deepenings, environmental missions, and other projects, and they are moving forward with determination. Waterside developments need more federal funding and expedited assistance in the future. In the meantime, ports persevere with meaningful projects with or without federal help.

Projects of great consequence span the state. On the east coast, for example, Port Canaveral's channel widening project, which included a West Turning Basin 'corner cutoff', not only increases the capacity for cruise and cargo vessels, but also does double duty by providing the space needed to build new container and multipurpose berths. The collection of rail connectivity projects in South Florida, including Port Miami's renewed rail connections, Port Everglades' ICTF and the off-port intermodal rail improvements at the Port of Palm Beach, will patch up deficiencies in the south Florida transportation system, inspire volume-based cost cutting, and ready the region to move substantial new volumes of freight inland by rail. The Port of Tampa's triple header of expansion projects, at Port Redwing, Eastport and Hookers Point, will provide capacity for bulk and general cargo growth across a wide swath of the state with a population edging over 20 million and escalating demand. In the northeast, JAXPORT already handles Suez-transit super post-Panamax vessels, and has firmly established itself as a viable option for Florida shippers routing cargo to out-of-state ports.

The Seaport Effect

Florida's seaports are creating momentum around economic vitality. They'll achieve it by improving global competitiveness and increasing mobility for people and freight. They have enhanced the diversity and flexibility of their assets, and are creatively optimizing their use. They are prioritizing capital investments and generally maximizing the use of scarce resources.

The Florida transportation industry, in a highly collaborative effort, has the opportunity to markedly expand its market reach, by changing the very foundation upon which costs and transit times are predicated. Evolving port gateway options will be a major component in this quest.

The ports of Florida face a staggering array of overlapping goals. Nevertheless, they continue to have the right combination of input and acumen to consistently elevate, enhance and strengthen the economic integrity of the state of Florida.

They create value. They support jobs. They generate momentum. That's the seaport effect.

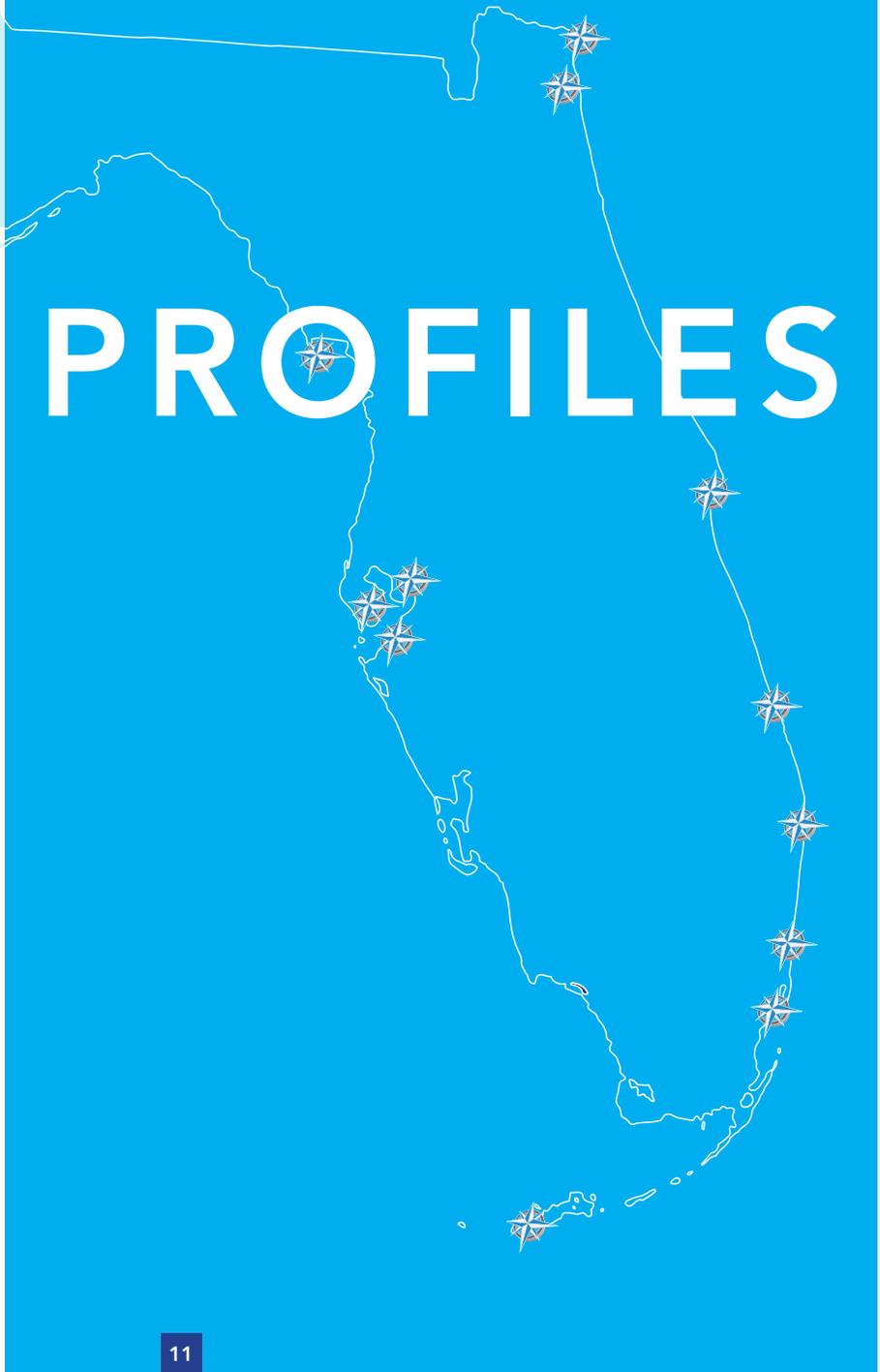




FLORIDA
SEAPORTS
CHARTING OUR FUTURE



PORT PROFILES



PORT CANAVERAL

www.portcanaveral.com 

GOVERNING BODY: Canaveral Port Authority (Canaveral Port District)



MISSION

“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.”

INTRODUCTION

Port Canaveral is currently home to seven year-round cruise ships from three major cruise lines – Carnival Cruise Lines, Disney Cruise Line and Royal Caribbean International. With the largest fleet of year-round vessels in the state, in fiscal 2012 Port Canaveral had a record 3.76 million revenue passengers, up 21 percent from 2011. In 2012 the port welcomed Disney’s second new mega ship, the 4,000-passenger *Disney Fantasy*, with year-round, seven-day cruises. Royal Caribbean International will bring the *Enchantment of the Seas* to Port Canaveral in April 2013 for year-round three and four-day cruises. The *Disney Magic* will return in January 2014, giving the port three Disney ships in 2014. To date, the Canaveral Port Authority has invested nearly \$300 million in seven cruise terminals designed to accommodate the world’s fleet of modern ships. Excellent beaches, recreational and cultural amenities, shopping, the Kennedy Space Center and the Orlando theme parks and attractions offer port-of-call visitors many options to fill their day.

Cargo activity at Port Canaveral is expected to increase significantly with the continued growth of the 2.8 million-barrel Seaport Canaveral fuel tank farm and the further development of bulk cargo facilities to serve the central Florida market. New deepwater cargo berths are under construction and will provide access to more than 60 acres available for development. Historically large imports of cement and lumber are expected to rebound as the national economy and housing markets recover, and plans are proceeding for potential containerized cargo via domestic marine highway or international feeder service to central Florida distribution hubs and consumer markets. The port is home to more than 200 tenant businesses, encompassing light manufacturing, professional services, restaurants, retail, marina and other port-related activities. In addition to these uses, the port provides major recreational facilities, including the Jetty Park campground and public beach and waterside parks, to serve both visitors and the local community. Port Canaveral also invests substantially in environmental initiatives, including inlet management, pollution prevention and invasive species control, reclaimed water irrigation, imperiled species monitoring and support, litter control, community environmental education, and energy efficiency.



GOALS AND OBJECTIVES

- Construct and expand port facilities and infrastructure 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, local military bases, and the space industry, and, to meet the recreational demands of the community.
- Widen channel, turning basin 'corner cutoff', and expand and dredge Middle and West Turning Basins.
- Provide new bulk, breakbulk, and containerized cargo facilities.
- Enhance intermodal connections to central Florida.

"The growth of Port Canaveral as a cruise departure point is truly extraordinary and millions of consumers have discovered the benefits of sailing from this convenient and centrally located homeport. The Canaveral Port Authority is an outstanding business partner and deploying a third year-round ship is a testament to our relationship with the port and our confidence in its continued success."

– Gerry Cahill, Carnival Cruise Lines

CURRENT OR PLANNED INVESTMENTS

Channel Widening Project

The channel widening project is crucial to Port Canaveral. It will increase capacity for cruise and cargo. The turning basin has not been wide enough to accommodate the latest generation of cruise ships whose average capacity has increased from 2,500 to 4,500 passengers. The first phases of the West Turning Basin widening and deepening project included the 'corner cutoff' which has enabled the port to allow larger vessels to come in, but without completion, issues about safety and continuity of service will arise. The 'corner cutoff' also provided an area to construct needed container and multipurpose berths. The port is ramping up to take advantage of the cargo pier once completed. There are also 17 adjacent upland acres available to develop, suitable for container, liquid or dry bulk commodities.

New Cargo Berth Construction

This project includes construction of deepwater seaport cargo berths, a receiving platform, shore mooring dolphins, dredging, and berth utilities. The berths will accommodate cargo ships of up to 850 feet in length alongside a dock dredged to 39 feet at the face of the wall. Plans allow for ship-to-shore crane rails on added pile when needed, power connections for cargo cranes, and conveyors and other ship unloading equipment. Next phases can include deeper dredging, cranes, cargo support systems, reefer racks, material handling equipment, and concrete paver heavy-duty backlands for yard support.

The Channel Widening and New Cargo Berth projects, combined, are estimated to create 3,494 permanent and 3,413 construction jobs.

Northside Development

To optimize use of the port's Northside area, expanding capacity, improving efficiency and opening up new container markets and other cargo possibilities, this project will include rerouting roads to provide efficient connectivity between SIS Highway Corridor 401 and the port's internal roads, expediting the movement of goods and increasing vehicular safety along SR-401. In addition, regional storm water improvements in the north cargo area will provide for more efficient land use as cargo developments occur. With the creation of more than 400 new jobs, the project will boost the local economy, support the growth of port cargo volumes, and pave the way for other new business.

New Visitor Attraction and Amphitheatre

To honor the past and celebrate the Space Coast's continuing achievements, an iconic structure is being raised seven stories



above a lakefront port site, highly visible for miles around. This new visitor attraction will be the centerpiece of an extensive redevelopment of The Cove harborside dining and retail area, as well as a community hub, repository of local history, visitor magnet and gateway to the region's attractions. This new visitor attraction is expected to establish itself as a destination with its own drawing power. There will be significant benefits to local businesses and Brevard County's overall economy, including the creation of an estimated 370 construction related jobs and an initial estimate of nearly 200 permanent jobs.

ACCOMPLISHMENTS

- In August 2012, Governor Rick Scott committed \$24.4 million in state funding to Port Canaveral's channel project. In October the Civil Works Review Board for the Feasibility Study for Canaveral Harbor, under Section 203 of the Water Resource Development Act of 1986, gave unanimous approval for submission of the project to the U.S. Army Corps of Engineers. There is now unanimous approval for the port's feasibility study to proceed to agency review, a critical step needed for expediting widening and deepening of Canaveral harbor.
- The port opened the \$66-million Mega Cruise Terminal 6, a sleek, modern 90,000 square-foot building with two-story atrium, 1,100-seat waiting area, exhibit space, and parking facility. It incorporates a covered walkway and first-level retail area.
- As part of redevelopment of the waterfront on the south side of the harbor, construction began on the seven-story Welcome Center; it will feature an observation deck, exhibits and event space. The project includes design and construction of a 6,000-seat amphitheater.
- The port authority celebrated 25 years of being off the local tax rolls and operating from revenue made and reinvested back into port operations.
- Port Canaveral was honored for the 21st year in a row with a Comprehensive Annual Financial Report award for excellence in financial reporting.



HINTERLAND

Cargo: The central and north Florida counties of Brevard, Polk, Indian River, Lake Okeechobee, Orange, Osceola, Seminole, Volusia and Southeast U.S.

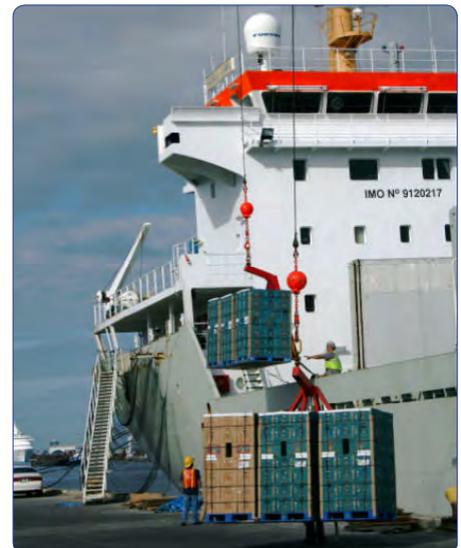
Cruise: The U.S., Europe, the Bahamas and the Caribbean.

"Port Canaveral is a major contributor to our \$2.8 billion tourism industry. Our partnership with the Canaveral Port Authority has allowed us to significantly grow our pre and post-cruise business. The growth of the port-of-calls at the port has exposed the Space Coast to millions of new potential customers." – Rob Varley, Executive Director, Space Coast Office of Tourism

TRADE PARTNERS

Imports: Principal imports are petroleum, aggregate materials, salt, slag, fertilizer and perishables. These 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 aggregate/granite from Canada; perishables, juice concentrates and limestone from Central America; and petroleum, slag and cement from Asia.

Exports: Principal exports are fresh citrus and single-strength juice, juice concentrates, automobiles and heavy equipment. These 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.





MISSION

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

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. In a few years the expansion of the Panama Canal will be complete. Global maritime commerce will change dramatically and Florida will be a major beneficiary. Citrus County will benefit as well.

"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

GOALS AND OBJECTIVES

The concept behind Port Citrus is to take full advantage of a valuable asset: the Cross Florida Barge Canal. The area encompasses many underutilized public works projects, and development of Port Citrus will facilitate turning 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. Diversification of the county's economy is essential to help moderate the severe regional impact of lost building industry jobs.

Property bordering the barge canal is a mix of state lands and privately owned sites. West of the US-19 bridge, the private lands along the north shore are owned by Citrus Mining & Timber. In 2009, Citrus Mining & Timber successfully petitioned for an amendment to the Citrus County Comprehensive Plan to develop a port land use plan for the north shore property, with a goal of facilitating its development as a working waterfront. The lands to the south of the barge canal are owned by Holcim, Inc., a subsidiary of Holcim, Ltd., one of the nation's leading manufacturers and suppliers of cement and mineral components.

Port Citrus has selected consultant TranSystems to conduct a feasibility study. The study will assess markets and competitive position, infrastructure needs, potential activity levels, current and future facilities, infrastructure development costs, and potential funding sources. The feasibility study is expected to be finished by the end of 2013.

"Two words define this [port feasibility] project: opportunity and possibilities. We have the possibility to focus on an underutilized existing asset in our county to help diversify our economy and grow jobs. As president of the Economic Development Council and Citrus County Commissioner, we must do everything we can to make that happen. This is one of many initiatives that give us the opportunity to do that." – Joe Meek, Citrus County Port Authority

GOVERNING BODY: Broward County Board of County Commissioners



MISSION

"... to manage the county's port-related assets to maximize the economic benefits to the citizens and businesses of Broward County and the state of Florida. The port will manage the county's assets in a financially responsible, environmentally sound manner, consistent with the local, state and federal rules and regulations that govern international and domestic trade, transportation and the port industry."

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 one of the nation's leading container ports and south Florida's main seaport for receiving petroleum products including gasoline, jet fuel and alternative fuels. The Port Everglades Department is a self-supporting Enterprise Fund of Broward County government with operating revenues of approximately \$143 million in fiscal 2012. It does not rely on local tax dollars for operations. The total value of economic activity at Port Everglades in FY 2011 (latest data available) was approximately \$15.3 billion. More than 160,000 Florida jobs are impacted by the port, including almost 11,400 people who work for companies that provide direct services to Port Everglades.

GOALS AND OBJECTIVES

- Increase waterborne import/export trade relationships with Central and South America and the Caribbean to expand and solidify the port's number one trade surplus position, and to develop new trade opportunities with Europe and the Far East.
- Capitalize on state funding opportunities to finance essential capital projects in preparation for substantive new trade impacts and a lively interest in cruising.
- Continue to strategically invest in Port Everglades and near-port intermodal infrastructure to improve connectivity with state transportation corridors and logistic centers, moving goods and passengers efficiently and cost effectively.
- Actively partner with private sector manufacturers and other companies willing to invest in expansion and create jobs while facilitating their import/export strategies. And, renovate to world-class levels those competitive cargo and cruise facilities needed to serve existing tenants and to attract new users.
- Support the on-going reduction of trade barriers and the creation of a stable investment environment so U.S. companies will find it easier and cheaper to import and export their products and services.

"A re-alignment of global trade routes is clearly underway, and Florida ports are strategically positioned to take maximum advantage of this opportunity. Our goal at Port Everglades is to invest in infrastructure, improve the business climate, and above all, seize the opportunity to become a global hub." – Raymond Jones, Florida East Coast Railway

CURRENT OR PLANNED INVESTMENTS

Southport Turning Notch Extension–Berth Additions

The Southport Turning Notch extension project will lengthen the current deepwater turn-around area for cargo ships from 900 feet to 2,400 feet, which will allow for up to five new cargo berths. This project is projected to provide a \$10.7-billion annual increase in economic activity related to the port, and to create 2,227 construction jobs in the near term and 5,529 regional jobs by 2027.

A critical part of the Southport Turning Notch expansion includes replacing 8.7 acres of an existing mangrove conservation easement with a 16.5-acre upland enhancement area on port property as well as completing a number of environmental improvements in West Lake Park. Port officials worked closely with port users, the environmental community, and the Florida Department of Environmental Protection to develop the plan for the new mangrove habitat.

U.S. Army Corps of Engineers Deepening and Widening Program

The project calls for deepening and widening the Outer Entrance Channel from an existing 45-foot project depth over a 500-foot channel width to a 57-foot depth with an 800-foot channel width, deepening the Inner Entrance Channel, Main Turning Basin, and Southport Access Channel from 42 feet to 50 feet, and widening the channels within the port to increase the margin of safety for ships transiting to berth. The total cost is estimated to be \$320 million, including a \$131-million investment by the port. Widening and deepening the channel at Port Everglades is projected to create 5,862 construction jobs in the near term and 1,491 regional jobs by 2027. The U.S. Army Corps of Engineers is expected to release its draft Feasibility Study/Environmental Impact Statement for public comment in 2013.

Intermodal Container Transfer Facility

Port Everglades took the first step to develop a near-dock intermodal container transfer facility (ICTF) on port property by breaking ground on the Eller Drive Overpass in July 2011. The Eller Drive Overpass will elevate I-595/Eller Drive to allow trains to access the port at ground level. FDOT is the lead agency on the overpass project, which is to be completed by late-2014 at a cost of \$42.5 million. A 30-year lease and operating agreement between Broward County and the Florida East Coast Railway LLC (FEC) to build and operate the ICTF was approved in January 2012, and construction began in January 2013. The ICTF will be used to transfer international containers between ship and rail instead of having trucks haul the containers to and from off-port rail terminals. The FEC also plans to relocate its existing domestic intermodal service from Andrews Avenue to the ICTF at Port Everglades. The ICTF, to be completed mid-2014, is expected to reduce congestion on interstate highways and local roadways and reduce harmful air emissions by diverting an estimated 180,000 trucks from the roads by 2029. FDOT recently approved a \$30-million Florida State Infrastructure Bank loan to the FEC to finance the development of the ICTF. The ICTF is expected to create 767 construction jobs (including the Overpass).

Berth 4 Extension/Cruise Terminal 4 Expansion

The Cruise Terminal 4 renovation, planned to begin in 2014, will change the terminal layout, add more baggage laydown area and add 172 surface parking spaces. The slip will be extended from 900 to 1,150 feet to handle all but the largest cruise ships.

McIntosh Road Loop

A new loop road for McIntosh Road in Southport will allow smoother access for trucks entering the terminals with right-hand-only turns and expanded staging lanes. The project is currently under construction and completion is expected by the end of 2013.

"In 2011 Greater Fort Lauderdale had over 11.1 million overnight visitors who spent \$9.01 billion dollars and stayed an average of 3.4 nights. Of those visitors, 255,740 were cruise passengers. These visitors spent an average of \$545 per day or \$147 million and stayed an average of 1.4 nights ... But that is only the tip of the iceberg. Of the more than 3.6 million multi-day cruise passengers who visited Port Everglades last year, over 15 percent of them passed through Greater Fort Lauderdale- Hollywood International Airport, infusing millions of additional revenue to U.S. airlines and millions more into the state and local economy via items such as passenger fees, meals, and sales taxes."

– Steve Nielsen, Princess Cruise Lines

Northport Bypass Road

This project will construct a bypass road that allows traffic to move through the port without entering security areas and removes the Broward County Convention Center from the secure area of the port. The construction start for the first phase of the bypass road – moving the security checkpoint – is expected in the summer of 2013.

Slip 1 Expansion

Expanding the petroleum berth slips will allow Port Everglades to safely handle wider tanker fleets, including those already coming from Europe and those that will be able to pass through the expanded Panama Canal. This project will be completed in two phases with Phase 1 beginning in the 2014 timeframe.

“With a well-planned layout of our yard, easy road access to the terminal and a master plan designed to continue expanding the cargo areas and infrastructure, plus a close relationship with port management, Florida International Terminal can focus on what we’re here for and what we do best – providing quality services to steamship lines, their clients and the trucking companies through our friendly, economical and efficient terminal operations.” – Jose Alberto Diaz, Florida International Terminal, LLC

ACCOMPLISHMENTS

- Port Everglades celebrated its third consecutive year of growth in cargo and in multi-day cruise passenger counts. Fiscal 2012 containerized cargo tonnage increased almost 3 percent over the previous year, to 5.9 million tons; container counts increased about 5 percent, to 923,600 TEUs (nearing the 2008 record level of 985,000); and bulk and breakbulk cargoes rose by 83 percent and 27 percent, respectively, with notable increases in cement and steel rebar. The number of multi-day cruise passengers grew slightly to 3,689,000 cruise guests.
- The Broward County commissioners approved a 30-year lease and operating agreement with FEC to develop an ICTF at Port Everglades, facilitating efficient freight movements between South Florida and the Southeast U.S. via rail.
- The port completed a \$54-million renovation project to update, expand and modernize Cruise Terminals 2, 19, 21 and 26, which serve more than 30 different Carnival Corporation vessels, as well as other lines. To allow simultaneous embarkation and disembarkation, three of the four terminals have increased significantly in size, and the fourth terminal has been reconfigured. All terminals have two passenger loading bridges, separate and larger baggage halls, improved ground transportation areas, and new Florida-inspired artwork.
- The consulting team for the Southport Turning Notch extension began working on the mangrove enhancement area design and related storm water drainage.

HINTERLAND

Cargo: Primarily southeastern Florida extending northward to a 24-county area (including Pasco, Polk, Osceola and Brevard), south to Monroe, and west to the Gulf of Mexico. In trade with Latin America, the hinterland is the entire U.S.

Cruise: All of North and South America and Europe.

TRADE PARTNERS

Honduras, Guatemala, Costa Rica, China, Colombia, Venezuela, Brazil, Dominican Republic, Bahamas and Panama.



PORT OF FERNANDINA

www.portoffernandina.org | www.kindermorgan.com

GOVERNING BODY: Ocean Highway and Port Authority, Nassau County



MISSION

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

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 mills in the Southeast. Fernandina supports a number of independent container lines serving Colombia, Ecuador, the Dominican Republic, Haiti, Jamaica, Aruba, Curacao and Bermuda. The port's principal cargoes include exports of steel products (including billets, coils and rebar), machinery, forest products (including kraft linerboard, and treated lumber), and building and construction material, as well as imports of wood pulp, hardboard and building materials. The containerized commodities moving through the port include wood pulp, automobile and truck parts, steel products, chemicals, beverages, food stuff, machinery, consumer goods and building materials.

"Our first container vessel called the Port of Fernandina in October 1986. Over the last 26 years we have had a true partner in the Port of Fernandina that has added value to our service and has been an important element in our success."
– Robin Bishop, Somers Isles Group

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.



CURRENT OR PLANNED INVESTMENTS

New Berth

The port will add a bulk and general cargo berth up to 610 feet long to accommodate current business and expand port utilization. This \$10 million project is permitted and construction could begin as early as the fourth quarter of 2013. The facility will increase the port's berthing capacity by 35 percent. A multi-million investment in gantry cranes and yard equipment to increase productivity and expand density will follow the berth completion.



Expanded On and Off-Port Warehousing

The port plans to expand on-port warehousing to capture additional kraft linerboard exports and lumber imports. The project, which is comprised of a 25,000-square-foot addition to an existing 200,000-square-foot footprint, will increase forest product warehousing capacity by 12.5 percent. The facility will be appropriate for a variety of other cargo as well.

The port is also planning to develop an off-port distribution and logistics center to capture discretionary cargo and provide value-added services. This project is in preliminary planning stages. Nassau County recently rezoned 1,000 acres for industrial development on the west side of the county; the location is one of two sites in Florida where two Class 1 railroads intersect. A second site is located 12 miles from the Port of Fernandina on US-17 North and offers a G & W Railroad siding. The port authority has recently solicited proposals from private industry partners.

Channel Deepening Project

The main entrance channel to the port is shared with Camden County, Ga., and has a draft of 46.5 feet. Once vessels make the turn south to the Port of Fernandina, the main channel draft drops to 36 feet MLW. The port is working to increase the draft to 40 feet MLW which will enable it to accommodate larger vessels and position it to benefit from growing global trade and the north-south trade lane developments.

ACCOMPLISHMENTS

- Developed steel exports into Central and South America and the Caribbean. The Port of Fernandina is now one of the leading semi-finished steel exporters in the nation.
- Initiated a new breakbulk liner service to the west coast of South America serving Peru, Ecuador and Chile. The initiative will further enhance the efficiency of the local paper and pulp producing mills in Nassau County.
- Completed rehabilitation of the breakbulk and container yard. The port's goal is to maintain the facility to the highest standards.
- Upgraded security infrastructure, including new video cameras, fencing and lighting. The Port of Fernandina is on a mission to be the safest port facility in the nation.
- Working with local, state and FDOT officials, the expansion of A1A/SR-200 leading to the port, from four to six lanes, is fully funded in the current five-year program. Actual construction will begin in 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.

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.

TRADE PARTNERS

Ecuador, Panama, Dominican Republic, Jamaica, Haiti, Bermuda, Sweden, Peru and Chile. Major export commodities include steel products, forest products, machinery, foodstuff and chemicals. The major import commodity is wood pulp.

PORT OF FORT PIERCE

www.stlucieco.gov

GOVERNING BODY: St. Lucie County



MISSION

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



INTRODUCTION

St. Lucie County is exploring strategic options for the port. 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 county continues to work with private companies in an effort to develop its 20-acre Harbour Pointe, a waterfront property slated for tourism, recreational and marine commercial uses. The second phase of a new master planning effort is beginning. It would strive to refresh the port's vision and its strategic direction and set strategies for revitalization, as well as tackle heavy county unemployment. New strategies are expected to address defining and optimizing the land-use mix, cargo opportunities, mega-yacht markets, and provision of preliminary infrastructure for mixed marine uses.

The port's privately-held facilities have served bulk, containerized and other general cargo traffic moving into the Bahamian and Caribbean islands. Future cargo growth could come from development-related projects that serve tourist and recreation markets in the islands. Principal imports, through the private terminals, have been aragonite and cement. Indian River Maritime is actively marketing its cargo facility to expedite the recovery of throughput.



GOALS AND OBJECTIVES

Realign its strategic plans and goals. The scope of the new master plan includes fast tracking the identification of infrastructure improvements consistent with mixed-use developments that are eligible for state/federal funding, as well as developing and assessing development alternatives, setting an investment strategy, and developing recommendations for a business-friendly development approval process.

CURRENT OR PLANNED INVESTMENTS

Taylor Creek Dredging

In October 2012 construction began on the spoil site for Taylor Creek Phase II. Permits have been obtained for the Phase II dredging project, and the port plans to advertise for the dredging work immediately following the completion of the spoil site, expected in May 2013.



Second Street Reconstruction

Design and permitting for the complete reconstruction of Second Street, the primary entrance road to the port, is nearing completion. The project will include installation of upgraded water, sewer and natural gas mains to serve the entire port area. It also includes a storm water collection and treatment system to handle the Second Street right-of-way area. Plans are to advertise the Second Street project for construction bids in late 2013.

“There’s some exciting opportunities out there for new and expanded shipping at the port, including three new trade agreements with Panama, South Korea and Columbia, which all have opened the doors for new opportunities.” – Jeff Weidner, FDOT

HINTERLAND

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

TRADE PARTNERS

Caribbean Basin, Bahamas, Far East and Europe.

ACCOMPLISHMENTS

- Completion of Phase I Taylor Creek restoration.
- Completion of Phase III shoreline stabilization.
- Completion of design for Phase II spoil site construction.



PORT OF JACKSONVILLE

www.jaxport.com



GOVERNING BODY: Jacksonville Port Authority



MISSION

"... to contribute to the economic growth and vitality of Northeast Florida by fostering and stimulating commerce through the Port of Jacksonville. The mission will be accomplished through the effective and fiscally responsible planning, development, management and marketing of the port's assets and facilities."

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 2009 study, generates 65,000 jobs and more than \$19 billion in annual economic impact for the north Florida region.

GOALS AND OBJECTIVES

- Pursue harbor improvement and deepening projects while further developing JAXPORT's terminals for intermodal, container, bulk and breakbulk business.
- Intensify international marketing efforts while diversifying trade lanes and cargo.
- Contribute to the economic well-being of the city, state and nation by developing new business, expanding foreign trade zone status into outlying counties and attracting cargo bound for in-state markets to move through JAXPORT rather than through out-of-state ports.
- Work with the FDOT to improve the connector system linking Jacksonville to the interstate road network.
- Explore off-terminal property opportunities.

"All of us that have multiple port operations work with various levels of executives throughout the port industry. This is one of the strongest teams that we work with on a day in, day out basis. We have talked with the executive management team. [We have had] discussions about wanting to invest additionally in the port." – Terry Brown, Diversified Port Holdings, Seaonus/Portus

CURRENT OR PLANNED INVESTMENTS

Mile Point Improvement

In May 2012, the U.S. Army Corps of Engineers (USACE) approved a project to 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. The Chief of Engineer's Report was forwarded to Congress for authorization in August 2012.

JAXPORT and USACE are committed to the design which includes relocation of the Mile Point Training Wall, restoration of Great Marsh Island as the Least Cost Disposal Method, and construction of a Flow Improvement channel. Pre-construction, engineering and design phase efforts are under way. The estimated total cost for the recommended plan is \$36.5 million, with a 65 percent federal cost-share. The key issues are obtaining congressional authorization in 2013 and state funding for construction.

Harbor Deepening

USACE is in the midst of a comprehensive, years-long economic, engineering and environmental study to find the optimum depth of Jacksonville's federal channel. President Obama's 'We Can't Wait' initiative includes expediting the study which cuts



14 months off the timeline. Key economic cost analysis, engineering and environmental studies are proceeding with significant cooperation by USACE and various federal and state agencies. With favorable study results, this project's timeline could coincide with the expansion of the Panama Canal, positioning JAXPORT as a first U.S. East Coast port-of-call for large vessels in the east-west trade lane.

The following two projects at Blount Island and Talleyrand will significantly enhance the port's capabilities by upgrading JAXPORT berths and supporting infrastructure. It will prepare the port for opportunities ahead using a phased approach, allowing tenant operations to continue efficiently during construction.

Blount Island Wharf Repair Project

This \$30 million project to rehabilitate berths 30 through 35 is expected to take more than three years to complete. It will include waterside crane rail beams, supporting pile infrastructure, work platforms, and replacement of on-dock rail links that have reached the end of their useful life. Completion of Berth 31 is scheduled for mid-March 2013. Work will begin immediately on Berth 32.

Talleyrand Marine Terminal Wharf Rehab Project

Phase I, a \$4.5 million project which replaced or repaired existing sheet pile walls along Berth 4 at Talleyrand, is complete. Phase II of the project is in design currently and construction is scheduled to start in October 2013. Phase II is identical in scope to Phase I and includes the installation of a new sheet pile wall behind the existing sheet pile wall and rehabilitation of the underside of the deck to extend its life. Over the next three years the existing sheet pile wall will be replaced along the entire dock length.

"We're certainly a company that is committed to investing in Jacksonville. We have very long term leases and we want to be here long, long term. We've been here 50 years. We love Jacksonville. It's a strategic port for us and very important to us and all of our employees." – John Callihan, AMPORTS

Dames Point Intermodal Container Transfer Facility

JAXPORT is developing an intermodal container transfer facility (ICTF) at Dames Point to facilitate the direct transfer of containers between vessels and trains. The U.S. Department of Transportation awarded JAXPORT a \$10-million grant toward the development of the facility, and FDOT has allocated \$20 million to fund the project. Forecast to open in December 2014, the new facility will complement existing on-dock rail facilities at JAXPORT's Talleyrand and Blount Island terminals and will further enhance the competitiveness of the TraPac Container Terminal.



ACCOMPLISHMENTS

- In October 2012, a contract was approved to develop a Strategic Master Port Plan with a consulting team led by Martin Associates, a leader in maritime analysis. The plan, expected in 2013, will include a valuation of terminals and assets, and a strategic assessment to provide a comprehensive management decision tool.
- *Logistics Management* magazine honored JAXPORT with their 2012 Quest for Quality award. JAXPORT was named the easiest port to do business with in the southern U.S., after having received the highest score among southern ports in the ease of doing business category.
- As part of his 'We Can't Wait' initiative, President Barack Obama named two JAXPORT projects to a list of seven priority infrastructure projects, pledging to accelerate the federal review process. The president committed that the Jacksonville Harbor Navigation Deepening Study will be completed by April 2013, a year ahead of schedule. In addition, the president pledged to expedite the federal review process for JAXPORT's ICTF allowing review completion by July 2013. The \$30-million ICTF will increase the port's capacity to move containers by on-dock rail, cutting truck traffic and increasing efficiency.
- In June 2012, JAXPORT, Mitsui O.S.K. Lines (MOL) and TraPac announced that Walt Disney Parks and Resorts is importing most of the merchandise headed to its central Florida parks through JAXPORT's TraPac Container Terminal at Dames Point, a shift that underscores the port's growing attractiveness to shippers while also supporting statewide efforts to move Florida cargo through Florida seaports. The move reflects the significance of MOL's investment in JAXPORT and commitment to Jacksonville. The Tokyo-based shipping company opened its \$300-million, state-of-the-art TraPac Container Terminal at Dames Point in 2009. TraPac is the U.S. terminal operating arm of MOL.

"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



- In January 2012, JAXPORT's TraPac Container Terminal at Dames Point welcomed the largest vessel to ever call on Jacksonville's seaport. The 6,600 TEU (containers) *Yang Ming Milestone* traveled from Southeast Asia through the Suez Canal calling on other U.S. east coast ports before arriving at TraPac. The *Milestone* is more than 1,000 feet in length and at a breadth of 131 feet is too large to fit through the current Panama Canal locks.

HINTERLAND

JAXPORT's hinterland is primarily defined as the U.S. Southeast and Midwest. Jacksonville's geographic location allows JAXPORT inbound cargo to reach 50 million consumers and 60 percent of the U.S. population within a 24-hour 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.

TRADE PARTNERS

Puerto Rico, China, Japan, Finland, Brazil, Saudi Arabia, Venezuela, Netherlands, Vietnam, Turkey and other countries around the world.



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 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.

MISSION

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



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.
- Manage the volume of cruise and ferry passengers to sustain 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. To be located on the under-utilized 28-acre former site of the Key West Naval Base, the city's redevelopment of this site into an exceptional urban park will offer both residents and visitors the opportunity to experience the historical origin of Key West, its waterfront.

CURRENT OR PLANNED INVESTMENTS

- A study is underway to determine whether to repair or replace the T-pier at Mallory Square. Either avenue will enhance the flow of passengers from the cruise ships to downtown Key West and reduce the structural impacts that large ships are having on Mallory Square, a major tourist destination.
- The port will replace police security barricades at Mallory Square with ornate permanent fencing. The new fencing will be more functional and will blend in with the historic architecture of the square.

ACCOMPLISHMENTS

Rewrote the port's facility security plans to reflect changes to Florida Statute 311's security requirements. The changes resulted in the ferry terminal being used for simultaneous ferry operations to the Dry Tortugas.

HINTERLAND

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

TRADE PARTNERS

Port of Key West is a cruise port-of-call only.



PORT MANATEE

www.portmanatee.com



GOVERNING BODY: Manatee County Port Authority



MISSION

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

INTRODUCTION

Port Manatee is a multi-purpose deepwater seaport on Tampa Bay serving bulk, breakbulk, container, heavy-lift/project and general cargo customers with the highest level of customer service, quality care and efficiency.

Comprised of 1,100 acres, Port Manatee is supported by nearly 4,000 acres of largely undeveloped land located just outside the port’s gates. With room to grow, extensive development incentives and a growing consumer base, 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 deepwater shipping port.
- Stimulate regional economic development.
- Serve community, state, national and international shipping needs generated by that development.
- Develop the Florida International Gateway.

“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.

CURRENT OR PLANNED INVESTMENTS

Berth 12 Expansion and Container Yard Project

Construction crews are working on the Berth 12 dock extension and 10-acre container yard project. Crews are on target for a mid-2013 completion. Berth 12 will be 1,584 feet long with a 40-foot draft, capable of handling Panamax-sized ships arriving at Port Manatee’s first dedicated container facility.

Two New Energy-Efficient Locomotives

The Manatee County Port Authority approved an addendum in October 2012 to accept \$2.5 million in federal TIGER II grant funding for the purchase of two new energy-efficient switch locomotives. These funds are in addition to \$9 million

the port was awarded in 2010 for the extension of its Berth 12 and development of a new, adjacent container terminal. The port has been awarded these U.S. Department of Transportation and U.S. Maritime Administration funds because of compelling opportunities for expansion, and for attracting new customers and retaining existing ones. The new energy-efficient locomotives help highlight the port's excellent cargo-moving and intermodal capabilities and its direct access to all of North America via the port's connection with the CSX mainline. They enhance Port Manatee's growing operational efficiencies, supporting its eight miles of track, 19 switches, nine crossings and 300-plus rail car capacity, and are expected to cost about \$3 million with the port providing a match of 20 percent.



Port Manatee South Gate Security Entrance

The port's South Gate security entrance is being overhauled and when complete will have full access control center capabilities. A new building will replace the existing one and new turn-out lanes will increase throughput efficiencies.

"We find the cooperation of port staff and Port Manatee's intermodal connectivity keys to Del Monte's success." – Brian Giuliani, Fresh Del Monte Produce

ACCOMPLISHMENTS

Completion of Berth 12 Dredging Project

The largest new construction dredging project on Tampa Bay in years has been completed. It launches South Port, the focus of Port Manatee's \$200-million decade-long expansion.

- The new berth can accommodate Panamax-sized vessels and sits adjacent to a new container terminal (under construction), aimed at attracting new Gulf of Mexico cargoes derived from expansion of the Panama Canal.
- Port Manatee's second mobile harbor container crane has been put in place.
- The Turning Basin, Berths 4, 5 and 12, and Main Ship Channel dredging to 40 +2 feet are complete.
- Dredging for the Phase II maintenance and expansion program is complete.

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.

TRADE PARTNERS

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





INTRODUCTION

PortMiami has been recognized around the globe with the dual distinction of being the *Cruise Capital of the World* and the *Cargo Gateway of the Americas*. It is charting a strong and steady course for future growth. The 2013 cruise season marks a large expansion of the port's cruise industry with an exciting roster of new cruise brands and newbuild ships joining the fleet. On the cargo side of the business, the port's goal is to double its container cargo traffic over the next several years.

One of the largest capital improvement programs in the port's history is now under way with investments totaling more than \$2 billion over the next several years. These projects include the construction of a port tunnel, the re-introduction of on-port rail and the deepening of the port's channel to -50/-52 feet. PortMiami continues to be a powerful economic engine contributing more than \$27 billion annually to the Florida economy. The port supports more than 207,000 permanent and well-paying jobs.

GOALS AND OBJECTIVES

- Complete the 50-foot channel deepening project in sync with the opening of the expanded Panama Canal in 2015 – the dredge project will enable PortMiami to accommodate the new generation of super post-Panamax cargo container vessels allowing the port to capture new trade opportunities with Asian markets.
- Continue to expand as an important north-south trade hub and to maximize trade opportunities with the growing Latin American market.
- Expand intermodal infrastructure, including rail and highway links, and encourage commercial real estate development such as warehousing.

MISSION

"... to operate and further develop as the world's leading cruise port and a top container cargo port in the state of Florida; to maximize its assets and strengthen its advantage for future growth; promote international trade and commerce as a vital link between North, South and Central America and a growing center for global trade; support sustainability and operate in an environmentally responsible manner."

"Bill Johnson is a staunch ally – and true friend – of the global cruise industry. Under his leadership, PortMiami, the world's busiest cruise port, has thrived. Owing to his tremendous vision and acumen, PortMiami's future is bright as it is in the midst of a one-of-a-kind capital improvement project that will make it even more convenient for cruise passengers." – Christine Duffy, Cruise Lines International Association

- Market the newly designated PortMiami Foreign Trade Zone 281.
- On the drawing board is an ambitious plan for expansion – the 2035 Master Plan that includes new commercial development proposals and plans for new cruise/cargo infrastructure.

CURRENT OR PLANNED INVESTMENTS

The port, in partnership with state, federal and private-sector partners, is investing more than \$2 billion in major improvements to support cargo and cruise businesses growth.

Port Tunnel

Scheduled for completion in the spring of 2014, the Port Tunnel will allow port traffic to move more expeditiously between port facilities and the interstate system, thereby reducing traffic in downtown Miami. The tunnel, comprised of two side-by-side tubes, will carry two lanes of traffic under Biscayne Bay.

Deep Dredge

Dredging will allow the port to accommodate the new, larger post-Panamax vessels that will begin traversing the expanded Panama Canal. PortMiami will be the only U.S. Atlantic port south of Norfolk, Virginia to be at the minus 50-foot depth when the expanded Panama Canal opens in 2015. The U.S. Army Corps of Engineers is scheduled to begin construction in 2013.

Restoration of On-Port Rail

In partnership with Florida East Coast Railway (FEC), PortMiami is restoring on-port rail with links to the national rail system. The new PortMiami-FEC service will move goods to 70 percent of the U.S. population in four days or less. The first phase of this project is scheduled for completion in 2013.

Super Post-Panamax Cranes

Four new super post-Panamax cranes with capacity to handle the new generation of larger container vessels are scheduled for delivery in mid-2013. PortMiami will have a total of 13 cranes by the end of the year with six in the super post-panamax category.

Cruise Facilities

PortMiami has invested more than \$20 million in recent upgrades to its cruise terminals including a major renovation of Terminal D, which accommodates Carnival Cruise Lines' newest and largest ship, the *Carnival Breeze*.

“Seaboard Marine carried more than 400,000 TEUs through the PortMiami facility in 2011. We believe that we can carry more in the future as we jointly work to modernize the Seaboard Marine terminal. The port has done an excellent job of meeting construction deadlines which will allow us to increase our efficiency and our capacity, which will allow for further growth and for more jobs and more economic benefits to not only Seaboard Marine, but the community as a whole.”
 – Bruce Brecheisen, Seaboard Marine

ACCOMPLISHMENTS

- PortMiami reached an agreement with community groups on environmental issues related to the deep dredge project as it moves toward the contracting phase.
- The Port Tunnel project has reached the halfway mark and is on budget and on schedule for a May 2014 completion date.
- The U.S. Department of Commerce approved PortMiami's bid for a foreign trade zone (FTZ) earlier this year. This effort will enhance Miami-Dade County's status as a center for international trade and commerce. FTZ 281 is expected to help stimulate economic growth through tax savings, benefitting importers/exporters, warehouse operators, manufacturers and third party logistics providers.

- Four new super post-Panamax gantry cranes have been purchased and are scheduled to arrive in 2013.
- Over a 12-month period, the port will have added three new cruise brands to its fleet: Disney Cruise Line, Regent Seven Seas, and MSC Cruises. Cruise Terminal D renovations are complete; they expand passenger capacity and facilitate processing for the Carnival Cruise Lines' newest vessel which arrived November 2012. Phase one renovations were completed for Cruise Terminal J for new, high-end cruise tenants. Phase II will continue to increase passenger capacity and ensure quick and easy check-in/boarding process.
- PortMiami's 2035 Master Plan won the 2012 Grand Award from the Florida Institute of Consulting Engineers.

HINTERLAND

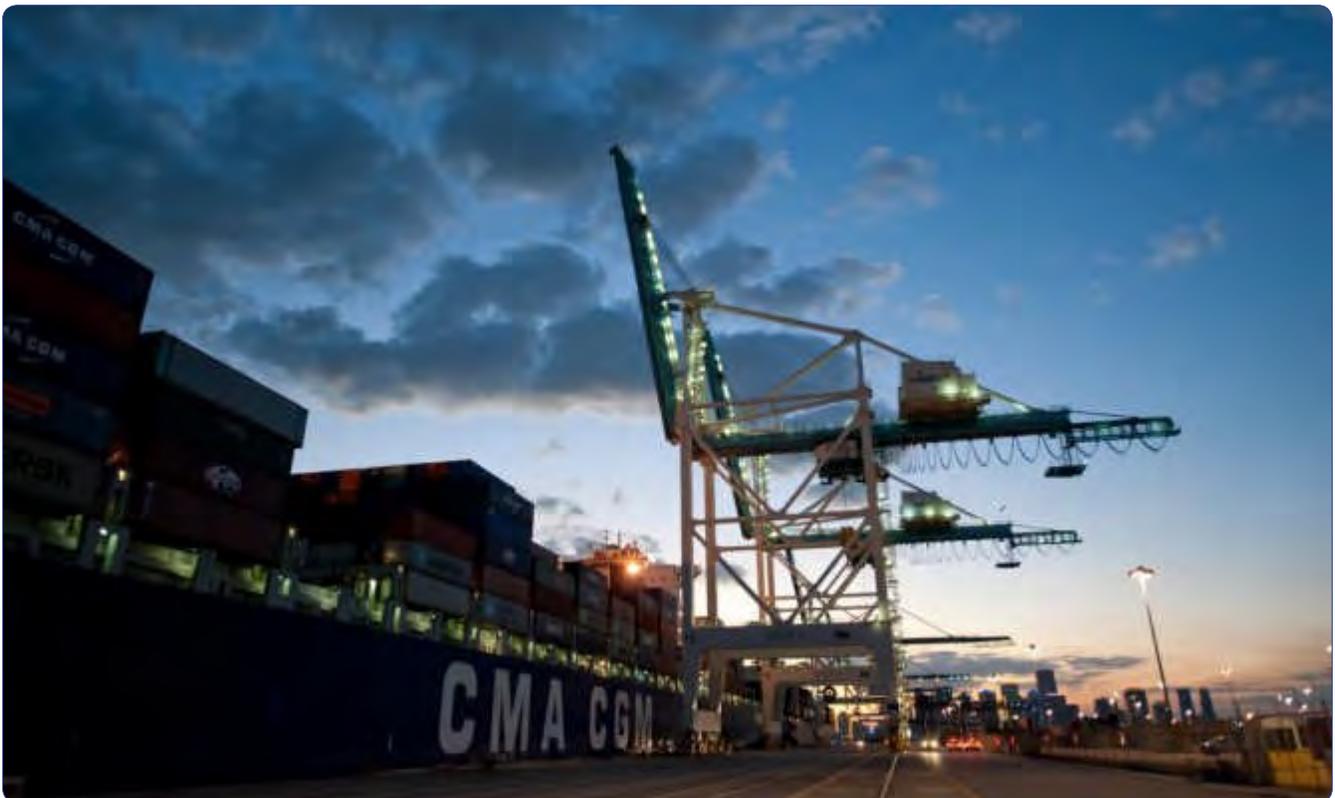
For east-west trade the hinterland extends from the south Florida counties of Miami-Dade, Broward, Monroe and Palm Beach throughout the state. For north-south trade it includes all of Florida and extends into the Southeast, Northeast and Midwest.

TRADE PARTNERS

Imports: Pacific Rim, Europe, and Central and South America.

Exports: Caribbean, Central and South America and the Far East.

"The infrastructure that Bill Johnson has initiated at PortMiami, what we call his three legged stool – the tunnel, the dredge and the on-dock rail – will bring good, high paying jobs to Miami. These projects will bring bigger ships than the ones that presently call at the port, some 8,000 containers, and that will in turn mean more cargo for Miami. In addition, Miami will be able to accommodate and process more cargo that comes from ports north of us as well." – Mark Baker, South Florida Container Terminal



PORT OF PALM BEACH

www.portofpalmbeach.com 

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



MISSION

“Provide quality deepwater 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.”

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 jobs in its community. The 160-acre port is located 80 miles north of the city of Miami and has a 300-foot wide inlet channel, with no aerial obstructions.

The port has three slips, seventeen berths, and four roll on/roll off ramps for 6,500 linear feet of berthing space to accommodate vessels up to 700 feet long and 100 feet wide. The port’s berthing is 20 minutes from the first sea buoy to anchorage, with operating drafts of minus 33 feet MLW. The non-union labor force and easy access to I-95 and Florida’s Turnpike allow for seamless, cost-effective cargo handling.

The Port of Palm Beach is an important distribution center for commodities being shipped all over the world, and especially the Caribbean Basin. Operations include containerized, dry bulk, liquid bulk, breakbulk, roll on/roll off and heavy-lift/project cargoes.

Palm Beach is the only port in South Florida with on-dock rail today. 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 accommodate 20-axle rail cars, with 450-ton capacity.

Additionally, the port has provided a Foreign Trade Zone to the region since 1987, which encompasses both port and private sector sites. Essential federal agencies having oversight for international trade and passenger flow are housed in the port’s maritime office complex, located adjacent to the cruise terminal which accommodates day cruises, coastal, multi-day and port-of-call cruises.

“We at BN Biofuels have had an outstanding experience working with the entire staff at the Port of Palm Beach. During our negotiations with our bank financing and our contract negotiations with the port, the senior staff at the port continued to be available during and after our critical and unique closings. BN Biofuel found an outstanding strategic location for our company to do business at the Port of Palm Beach.” – Tony Quinones, BN Biofuels, Powered by BN2

GOALS AND OBJECTIVES

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

"Rybovich has had the pleasure of working jointly with the Port of Palm Beach since 2004 in numerous capacities as both a tenant and as a strategic community partner. The Port of Palm Beach is a progressive thinking organization that understands customer service while embracing innovative solutions to everyday business problems... [the port] is improving the business of its tenants, increasing the economic impact to the community and enhancing the everyday lives of all who live, work or play near its perimeter. Rybovich is pleased to provide its highest endorsement for the Port of Palm Beach and its staff." – Carlos Vidueira, Rybovich



CURRENT OR PLANNED INVESTMENTS

Slip #3 Redevelopment

The redevelopment of Slip 3 and the surrounding area will improve the efficiency of cargo operations. The proposed slip layout will keep the same width and length that exists between the fenders today. The project involves improvements to the existing infrastructure that will include the addition of two roll on/roll off ramps at different elevations and the demolition of an adjacent warehouse, at an estimated project cost of \$26,375,000 which is currently fully funded. The project supports 511 direct/indirect jobs and an impact of \$759 million over life of the project. In the next phase a pile-supported pier will extend into the water off the south side of Slip #3, increasing the length of Berth 17 and allowing larger vessels to use the area while also extending the length of the south side of Slip #3. The addition of the pier will expand current business and allow for possible new business at the site, while not interrupting the sugar operation located on the south side of Slip #3. This phase, at a cost of \$10 million, will have an economic impact of \$19 million per year and will create 60 direct/indirect jobs.

Inlet and Channel Dredging

Following a market analysis that determined that the inlet and channel width and depth increasingly limit port growth, the port and U.S. Army Corp of Engineers invested in a



feasibility study to identify areas for improvement, ensuring larger and wider vessels are able to enter the inlet, increasing the channel depth from -33 feet MLW to -39 feet. The planned \$100 million dredging project will include areas in the immediate area around the port, enhancing vessel maneuverability and making the Port of Palm Beach more efficient and attractive to current and potential operators.

North Wharf Expansion/ Intermodal Cruise Terminal Transfer Facility

The port is currently exploring the feasibility of a private-public partnership to fund the lengthening of the north side of Slip #1. The \$15.4 million project would include

a new parking area and laydown/luggage handling facility to attract new and larger cruise vessels to the port. In addition, new cruise business would require new and upgraded passenger-to-ship access systems and security infrastructure.

Slip #2 Redevelopment

The proposed \$30 million project would expand the width and length of Slip #2 to gain additional berthing. Allowing longer, wider and/or additional smaller ships to use the slip will improve the efficiency of current cargo operations in this area and enhance attractiveness for new business.

“FDOT highly values our partnership with the Port of Palm Beach in support of economic growth in Florida. We have been successful in delivering key projects including the US-1 Skypass and the Cruise Terminal projects. We look forward to the improvement of port access with completion of capacity increase. This partnership focusing on our mutual goals supports not only the port’s development but the department’s statewide strategic plan.” – James Wolfe, FDOT

ACCOMPLISHMENTS

- Increased multi-day cruise operations by 12 percent in fiscal 2012 over the previous year. Secured a new casino cruise passenger operation providing the port additional annual revenue, with economic benefits to the area exceeding \$12 million annually, while returning one of the county’s largest past attractions to the region.
- Secured a new secondary metals exporter, to provide a minimum guarantee of \$500,000 + in new revenue annually to the port; while creating new jobs and generating a positive environmental impact to the region.
- Secured a new biofuel blending operator, providing the port in excess of \$200,000 in revenue annually, while creating clean fuel for industrial vehicles and others.
- Acquired 5.2 acres of land through a collaborative effort with FDOT.
- Finalized the 2011 Port Security Grant environmental requirements to release \$1.8 million in port security funding. Closed out 2007, 2008 and 2009 Port Security Grant Program grants and 2009 stimulus grants. Spending approximately \$5 million in security grant funding to ensure the safe and security operation of the seaport. Opened new TWIC® badging office.

HINTERLAND

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

“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

TRADING PARTNERS

Caribbean Basin, Canada, Central and South America, Australia, China, Ireland, Mexico, Russia and South Africa.

PORT PANAMA CITY

www.portpanamacityusa.com

GOVERNING BODY: Panama City Port Authority



MISSION

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

INTRODUCTION

Port Panama City is a dynamic and growing port. Today it handles more than 1.5 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 the container trade with Mexico and Central America.
- Expand the port’s warehouse distribution services at the Intermodal Distribution Center.
- Attract port-related manufacturing to the port’s Intermodal Distribution Center.
- Expand the bio-fuels trade.

CURRENT OR PLANNED INVESTMENTS

Container Yard Expansion

The port is moving forward with Phase II of its container yard expansion plans. This project includes additional paved areas, cranes and container handling equipment. The project will double the port’s container handling capacity to 150,000 TEUs per year.

Intermodal Distribution Center

The port is currently constructing a 150,000-square-foot distribution warehouse in its Intermodal Distribution Center. The facility will be used primarily to support growing import and export trade with Mexico.



The city of Panama City and port are working together to prepare a 50-acre construction-ready manufacturing site within the Intermodal Distribution Center. The rail siding has already been constructed to the site.

ACCOMPLISHMENTS

- Completed Phase I of the container yard expansion. These new facilities are already in use supporting new container handling activity associated with Seaboard Marine's services from Chile, Peru, Ecuador and Colombia.
- Added a second container handling crane with the capacity to handle Panamax vessels.
- Completed an expansion at South Berth 3, with related dredging improvements. The additional length and depth will support the growing wood pellet trade.

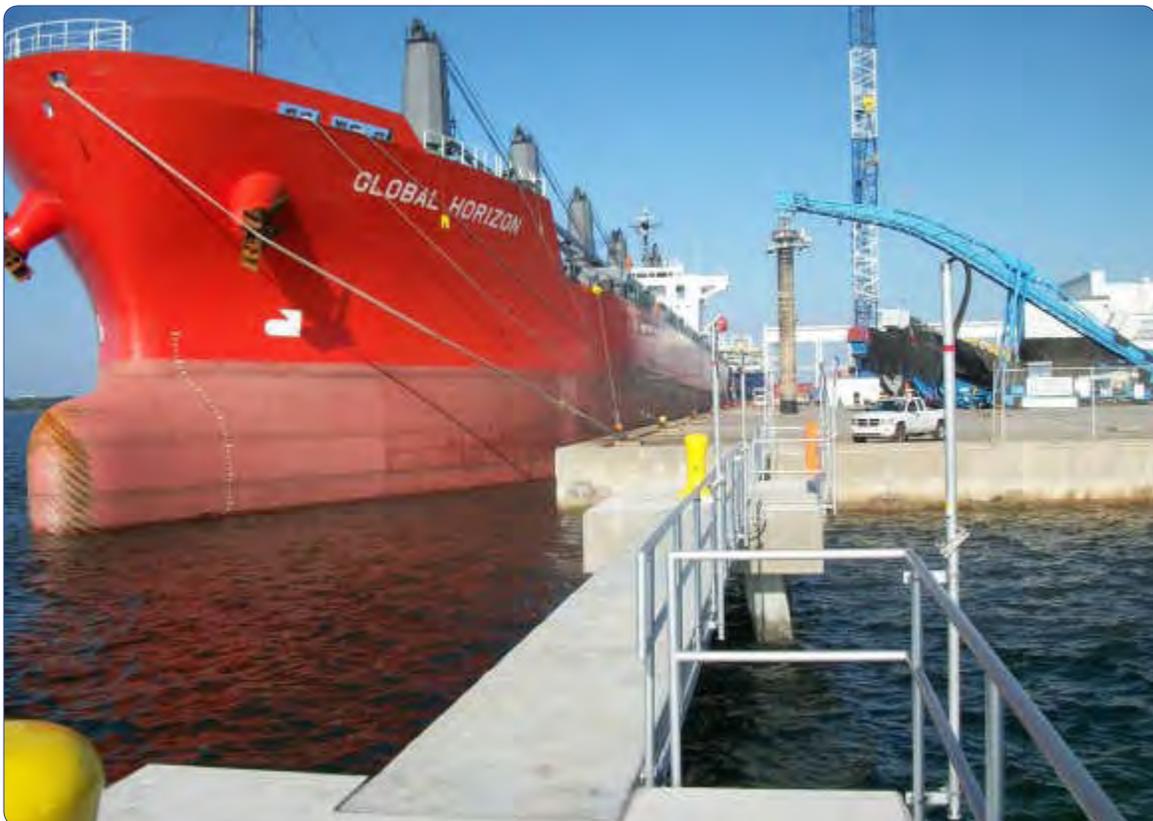
HINTERLAND

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

TRADE PARTNERS

Chile, Peru, Ecuador, Mexico, United Kingdom, Netherlands and Germany.

"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



PORT OF PENSACOLA

www.portofpensacola.com

GOVERNING BODY: City of Pensacola



MISSION

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

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 of Pensacola 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.

GOALS AND OBJECTIVES

- 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.
- Develop a port brand that is consistent with the city of Pensacola's overall brand identity, clearly communicates the port's position as a city-owned enterprise, adequately conveys the port's economic value to the community, and separates the port from its competition.

CURRENT OR PLANNED 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 project is scheduled to begin in early May 2013 and will create up to 100 jobs within five years of completion. It provides the opportunity for sustainable, private-sector job growth in a business sector that represents a non-traditional, diversified use of port facilities.

Shore Power Improvements

Three 120-amp, 440-volt, three-phase, 60-cycle shore power outlets will be installed, allowing vessels to connect to more economical, energy efficient and greener landside power sources while in port. This project was completed in December 2012.

Shoreside Utility Improvements

The construction/installation of three shoreside gray water/sewer discharge stations will allow vessels to discharge approved gray water and sewerage directly into the municipal sewer system rather than utilizing costly and inefficient pump trucks to haul away such waste. The project is scheduled for June 2013.

Berth 6 Rehabilitation

This project will repair areas of spalling on the Berth 6 substructure by removing loose concrete, rust and mill scale. It will replace damaged reinforcing steel as necessary, apply a manufacturer-recommended primer to all exposed surfaces and apply shotcrete. The rehabilitation will return an existing port berth to full utility in order to retain up to 20 jobs, and offers potential for additional jobs and revenue.

Full On-Port Rail Rehabilitation

The removal and replacement of approximately 7,000 linear feet, or 1.3 miles, of dockside and warehouse-adjacent, port-owned/operated rail (including track, ties, switches and immediately adjacent asphalt pavement) will restore the port's on-dock rail infrastructure to full utility at a load-bearing capacity of 1,000 per square foot. Up to 13 existing jobs will be retained, with potential for additional jobs and port revenue.

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.” – Senate President Don Gaetz



ACCOMPLISHMENTS

- Completed major port dock maintenance dredging project which, when combined with already completed and upcoming U.S. Army Corps of Engineers' projects to dredge Pensacola Pass, Caucus Channel and Pensacola Harbor, will fully restore maritime access to 33 feet from the sea buoy to dock.
- Attracted scheduled monthly breakbulk cargo vessel service.
- Completed major port dock maintenance dredging project which, when combined with the U.S. Army Corps of Engineers' projects to dredge Pensacola Pass, Caucus Channel and Pensacola Harbor, fully restores maritime access to 33 feet from the sea buoy to dock.

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.

TRADE PARTNERS

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

PORT OF PORT ST. JOE

www.portofportstjoe.com

GOVERNING BODY: Port St. Joe Authority



MISSION

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

INTRODUCTION

Located in Gulf County, Florida, the Port of Port St. Joe offers a deepwater seaport with two separate bulkheads – one featuring nearly 1,900 linear feet at the ship channel turning basin and the other offering nearly 900 linear feet on the Intracoastal Waterway. 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 in the port environs available for immediate development. Businesses wishing to establish facilities have plenty of room to build and expand. Additionally, much of the bulkhead area has water, sewer and electric in place.

GOALS AND OBJECTIVES

- Complete and adopt the new Port Master Plan 2013.
- 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 AN Railway line that serves the port and connects with the CSXT Class I mainline.

CURRENT OR PLANNED INVESTMENTS

While much of the basic infrastructure is in place, there remain many improvement projects that will be required to develop a fully operational seaport. The Port Authority and private partner, The St. Joe Company, affirm that any expenditure of funds on project development must be in response to market demands; the marketing effort now underway will help define that demand and the projects to support the identified markets.



ACCOMPLISHMENTS

- In 2012 the Port Authority and The St. Joe Company, a major landowner / developer, signed a memorandum of understanding to market their combined properties as a deepwater seaport to broaden the scope of offerings to potential customers.
- A lease with the first tenant has been signed that will create upwards of 200 direct jobs for the community.

HINTERLAND

North Florida, Alabama and Georgia.

TRADE PARTNERS

The recently implemented marketing initiatives are helping identify the Port of Port St. Joe's trading partners.

This is a great opportunity for Port Saint Joe. Launching this port is a game changer in turning the economic tide for the entire area. It will change the landscape of business not only for the short term but for years to come.
 - State Representative Halsey Beshears

PORT OF ST. PETERSBURG

www.stpete.org/port.htm

GOVERNING BODY: City of St. Petersburg



MISSION

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

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 mega yachts, research and other vessels, as well as to further enhance the benefits of a new Research and Development Center on the eastern end of the port.

GOALS AND OBJECTIVES

- Continue to improve port facilities, including terminal, berths, landscaping, parking and public access, to attract revenue-generating users.
- Provide facilities to expand potential maritime operations and attract a variety of vessels.
- Diversify revenue and similar investment opportunities by creating an atmosphere that will attract mega yachts, research vessels and other marine-related businesses that complement each other.
- Continue to take advantage of the port’s proximity to the adjacent Albert Whitted Airport, University of South Florida St. Petersburg campus, 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. Petersburg 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.

HINTERLAND

Port users would come from other parts of Florida and from around the world as the port focuses on the mega yacht business sector.

CURRENT OR PLANNED INVESTMENTS

- Renovations to wharf.
- Improvements to shoreside facilities, including potential upgrades to accommodate mega yachts, paving, parking and, potentially, development of a second 900-foot berth.
- Construction of new port-related facilities to enhance the waterfront area.

ACCOMPLISHMENTS

- Renovation of approximately 80 percent of the port wharf.
- Sheet pile replacement along the eastern 80 percent of the wharf.
- Improved port lighting.
- Moving forward with plans to complete wharf improvements, including utility installation along the wharf.
- Completion of construction of the Research and Development Center.
- Continued implementation of security upgrades, including camera coverage of the port.

PORT OF TAMPA

www.tampaport.com

GOVERNING BODY: Tampa Port Authority



TAMPA PORT AUTHORITY



MISSION

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

INTRODUCTION

The Port of Tampa is largest of the Florida ports by tonnage and area, and a critical economic engine for West Central Florida. Located in one of the fastest growing regions in the country, the port supports varied maritime and related activities, including some of the largest ship repair facilities between Norfolk, Va., and Pascagoula, Miss., and a vibrant cruise business. Building on a long and rich history as a significant bulk port, Tampa today accommodates a broad mix of bulk, breakbulk, roll on/roll off, neo-bulk and container cargo.

Unique to the Port of Tampa is its vast and growing acreage. Private and public properties comprise 5,000 acres, of which 250 are currently available. Land assets help attract business and stimulate manufacturing, creating jobs and economic value for the region.

The port continues to build its container business, providing a cost-effective alternative for carriers and shippers, including Florida’s largest concentration of distribution centers – positioned along the I-4 Corridor. It is also a vital energy products gateway to West Central Florida and an important global distribution point for fertilizer.

“We at Amalie have made sound investments in our terminal and our Tampa operations, and we have grown with the Port of Tampa over the last 32 years. The port authority has really been a partner in our growth.” – Denny Madden, Amalie Oil Co.

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 on:

- protecting and acquiring maritime land to build on the competitive advantage of already having room to grow,
- enhancing navigational access for current and future vessels,
- sustainable capital formation,
- supporting west central Florida’s long-term energy needs, and,
- aligning with evolving demand of the regional freight transportation system.

CURRENT OR PLANNED 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 bring opportunities for Florida's shippers to expand and/or enter international markets. Farther north on the peninsula, improvements to Berth 201/202 are planned, including a pier extension for roll on/roll off 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

The Port of Tampa is the energy gateway for West Central Florida and its nine million residents. The REK pier is the port's premiere energy facility – crucial to the economic vitality of the nation, the state and the region. 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. The 45-year old pier has reached the end of its useful life.



“CSX and its subsidiary Transflo are pleased to participate in this efficient solution to deliver 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

The pier reconstruction improves logistical reliability and efficiency, enhances safety, protects and preserves the environment and extends the facility's life by 30 years, all while continuing operations. The project is comprised of three berths and manifolds, pipelines, and related facilities for handling up to 70 million barrels of fuel annually. It is scheduled for completion in 2014. Creating economic vitality in an area of the state hit disproportionately hard by the downturn, this project will secure competitive, safe, efficient access to critical petroleum and liquid-bulk products, including gasoline for the region and aviation fuel for Orlando and Tampa airports. The total cost of the region's fuel would increase considerably if the pier is not rebuilt. This project creates 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 long-distance truck moves annually.

Port Redwing Development

Port Redwing, a 128-acre 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, and public and private investment could reach \$250 million dollars. A recent 150-acre acquisition at adjacent properties now positions the region to attract large, export-driven industrial 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 construction of a new access road connecting to US-41, three miles of rail track connecting to the CSXT mainline, and security infrastructure and utilities, facilitating growth of current and new business. 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 associated with varied and pervasive industry trends. 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

The TPA 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 TPA 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 existing jobs.

“Andino Cements is pleased to be the first company to develop operations at the Port Redwing terminal, here in southern Hillsborough. We are proud to be the pioneer in what we know will be tremendous development and expansion in the years ahead.”
– Augustin Restrepo, Andino Cements

ACCOMPLISHMENTS

General Cargo and Container Advancements

Ongoing container terminal expansion is providing greater capacity and enhanced efficiency for general cargo movements, such as those initiated in 2012 by Atlantic RoRo Carriers and American Honda Motor Co., Inc., as well as market opportunities for regional 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 is part of the I-4/Selmon Expressway Connector project, a \$568-million priority initiative of the Florida Department of Transportation, scheduled for completion in December 2013.



The Gateway Rail Project, completed in 2012, is a \$10.9-million joint TPA/CSX Corporation/Kinder Morgan Energy Partners initiative. It 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. In 2012 the project delivered 243 construction jobs and about 80 permanent jobs.

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 is building an \$80-million, 24-million-gallon used-oil recycling facility. To prepare, the port is rebuilding an access road, creating a new rail spur adjacent to the site, and installing six miles of piping for processing water.

“The NexLube project is a very important and beneficial project that will provide huge benefits to the environment and local economy. With everyone working together so well with us, this effort is a showcase of what can be done to properly promote and develop good projects.” – Enzio D’Angelo, NexLube Tampa, LLC

Financial

After several years of economic uncertainty 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.

HINTERLAND

Bulk/Breakbulk: Central Florida for energy, building, citrus and fertilizer products.

Container: Florida, and through CSX, the U.S. Midwest and entire eastern seaboard.

TRADE PARTNERS

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



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