

Interim Report: October 2003

A Five-Year Plan to Achieve the Mission of Florida's Seaports

Selected components reflecting Chapter 311, Florida Statutes



FLORIDA SEAPORT TRANSPORTATION
AND ECONOMIC DEVELOPMENT COUNCIL

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FLORIDA SEAPORT TRANSPORTATION AND ECONOMIC DEVELOPMENT COUNCIL

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Preface

This document, prepared in accordance with the requirements of Chapter 311, Florida Statutes, complements the Executive Summary: A Five-Year Plan to Achieve the Mission of Florida's Seaports, 2002/2003 – 2006/2007. It includes the goals and objectives that guide the seaports in achieving their collective and individual missions, a summary of the seaports' collective five-year capital improvement program for 2002/2003 – 2006/2007, and updated port profiles of each of Florida's fourteen public deepwater seaports. This information will be updated in February 2004 to include the five-year period 2003/2004-2007/2008.

The Mission of Florida's Seaports

The collective mission of Florida's seaports is to enhance the economic vitality and quality of life in the state of Florida by fostering the growth of domestic and foreign waterborne commerce. Each of the seaports furthers this statewide mission at the regional level by providing facilities and services that both expand the economic opportunities available to the local community for trade and tourism and enable the seaport to compete effectively in global markets.

Section 1

The Collective Goals and Objectives of Florida's Seaports

The individual goals and objectives developed by each seaport are incorporated into the collective program of goals and objectives defined below.

Florida's deepwater seaports, as mandated by Florida law in the mid-1980s, prepared port master plans consistent with the comprehensive plans of their respective local governments. These regularly updated plans all establish goals and objectives for port development and expansion, and identify five-year capital improvement programs to implement them.

GOAL 1: Provide efficient and cost-effective facilities for cargo and passengers.

Objectives:

- Improve cargo facilities as required.
- Improve cruise facilities as required.
- Improve infrastructure as required at all ports.
- Implement maintenance and new dredging programs and identify appropriate dredged material management sites.
- Acquire land for port expansion and development of complementary activities.
- Implement environmental protection/mitigation and man-made/natural hazard mitigation programs as required.
- Encourage timely permitting programs through state and local agencies.

GOAL 2: Build the intermodal facilities needed by Florida's seaports to move their goods and passengers more efficiently than competing out-of-state and off-shore seaports.

Objectives:

- Provide/improve direct access to roadway networks.
- Work with governmental agencies to plan and fund intermodal transportation system improvements.
- Implement the statewide rail and intermodal policies.
- Partner with other modal interests to achieve common goals.

GOAL 3: Maintain and expand existing trade markets and patterns, increasing cargo flow.

Objectives:

- Continue individual as well as regional promotional efforts in establishing markets.
- Provide leadership through the Florida Seaport Transportation and Economic Development Council, the Florida Ports Council, and other agencies to develop trade policies, including educational efforts at state and national levels.
- Ensure that Florida's seaports are positioned to capture a sizable share of trade generated by an open Cuban market.
- Capitalize on opportunities presented by the North American Free Trade Agreement and by other such agreements with Florida's major trading partners.

GOAL 4: Develop funding alternatives that will enable Florida's seaports to implement required improvements in a timely manner and meet revenue projections.

Objectives:

- Increase seaport revenue streams by expanding port potentials and diversifying into profitable complementary activities where appropriate.
- Develop and maintain an adequate source of state and federal matching funds for port projects.
- Develop and maintain adequate sources of local government financing for port projects.

GOAL 5: Implement security measures that balance compliance with federal and state minimum security standards and the need for an efficient flow of commerce through our seaports.

Objectives:

- Seek federal and state funds to comply with federal and state seaport security measures.
- Work with federal and state agencies to develop cost-effective security measures to comply with federal and state mandates.
- Work with private sector seaport tenants to enable them to comply with federal and state minimum security standards.
- Provide leadership through the Florida Seaport Transportation and Economic Development Council, the Florida Ports Council, and other agencies to implement cost-effective seaport security measures that enable the orderly and smooth flow of commerce through our seaports.

GOAL 6: Develop a state policy on economic development recognizing that international trade is dependent on Florida's transportation system.

Objectives:

- Educate state leaders regarding the infrastructure investments in port transportation systems needed to attract and maintain market share.
- Educate state leaders regarding the need to keep landside transportation costs competitive.
- Continue to develop state policies that help ports lower the costs of land-based transportation services.

Section 2

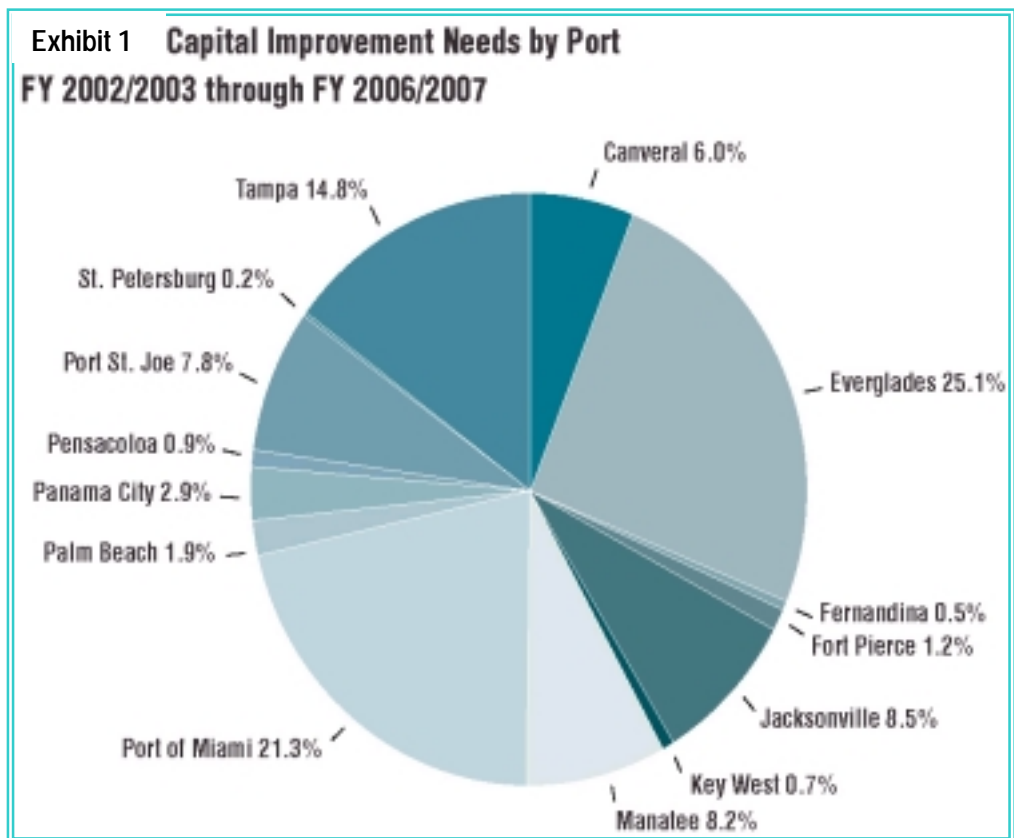
Collective Five-Year Capital Improvement Program: 2002/2003 – 2006/2007

Florida's Seaports Have Programmed \$1.6 Billion in Capital Improvements over the Next Five Years

To carry out their mission of "enhancing the economic vitality and quality of life in Florida by fostering the growth of domestic and international waterborne commerce," Florida's seaports implement master plans that have been adopted by the seaports' respective local governments. Industry parameters continue to dictate longer berths, larger terminals, deeper channels and more sophisticated equipment. Intermodal access requirements also dictate seaport investments in road and rail improvements while state-mandated security requirements introduce a new and costly dimension to the ports' capital improvement programs.

Master plan implementation has been facilitated by the state-seaport funding partnership. Originally created by Chapter 311, Florida Statutes (F.S.), that partnership was expanded in Chapter 320, F.S., which allowed the seaports to bond funds allocated for on-port capital development and expansion projects as well as priority, multi-jurisdictional, off-port projects.¹

For this five-year planning period, through FY 2006/2007, the 14 seaports have identified capital improvement programs, including intermodal access projects, totaling more than \$1.6 billion (see Table A-1 in the Appendix). The programs of the larger ports – Everglades, Jacksonville, Miami, and Tampa – total 70 percent of this amount and the programs of the next tier of ports – Canaveral, Manatee, and Palm Beach -- total 16 percent. The programs of the other seven ports -- Fernandina, Fort Pierce, Key West, Panama City, Pensacola, Port St. Joe, and St. Petersburg -- total the remaining 14 percent (see Exhibit 1).



¹Section 311.09(3), F.S., specifies that the *Seaport Mission Plan* "include specific recommendations for the construction of transportation facilities connecting any port to another transportation mode." Such priority projects as identified in *the Strategic Investment Plan to Implement the Intermodal Access Needs of Florida's Seaports (Landside Access Study)*, prepared for the Florida Department of Transportation and the FSTED Council by PBS&J and J.D. Sanchez Consulting, Inc., March 1998, as amended, are incorporated by reference into this document.

Seaport capital improvement needs encompass many different types of projects. These include general site improvements, construction projects, equipment, dredging and environmental programs, repairs and maintenance, land acquisition, security, projects that may not fall under any of the previous categories, and the off-port intermodal projects needed to maintain efficient port access for cargo and cruise customers.

Traditionally, and this five-year program is no exception, the greatest expenditures are for construction projects, including bulkheads, cargo and cruise terminals, warehouses, and other structures, that are essential for the efficient movement of goods and passengers through each seaport (see Exhibit 2). Over the next five years, the seaports expect to spend \$728 million, or 46 percent of the total, on such projects. The second largest project category of expenditures is for basic site improvements such as roads, lighting and other utilities, storage yards and similar projects. The third largest category of expenditures is for dredging and environmental programs. Indeed, eight of the fourteen ports are pursuing dredging projects whose implementation is key to their continuing competitiveness. These percentages shift from year to year as new demand-dictated capital investments become necessary. Currently the ports have diverted many capital expenditures to meet state-mandated security requirements, only a part of which are represented in the collective totals shown in Exhibit 2.

Many ports include only funded projects in their capital improvement budgets. Others include projects based on estimated revenues or other sources of funding. Consequently, the ports have identified a shortfall of approximately \$1 billion in their collective five-year capital improvement programs.

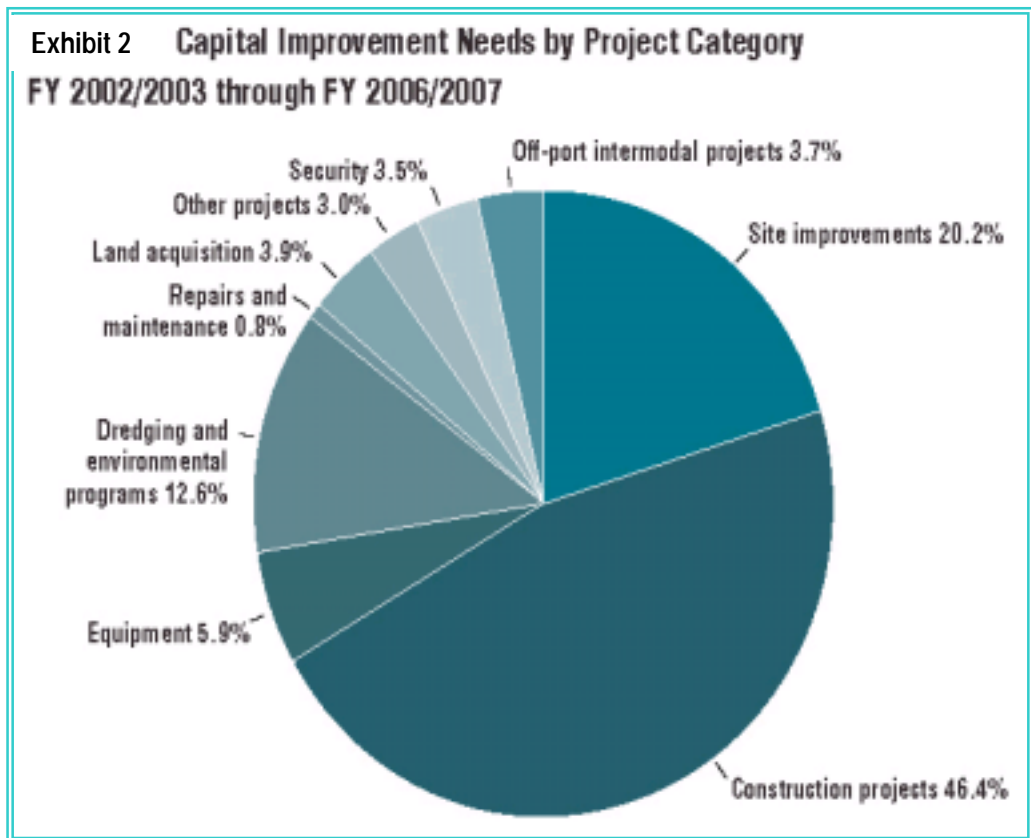


Table A-2 in the Appendix lists the priority projects for which the seaports have submitted matching grant applications for FY 2004/2005 under the Chapter 311 FSTED program. These seaport commerce projects have been prioritized because of their importance to the economic development and well being of the respective seaport communities and the entire state. Over their construction life, the identified projects cost a total of \$765.5 million. For FY 2004/2005, the matching funds requested for these projects totals \$122.9 million.

Several seaports have other costly intermodal infrastructure needs, including the following four major intermodal access projects important to the state's commerce:

The \$600 million, long-planned Port of Miami access tunnel is part of a comprehensive plan to improve not just the Port's immediate access by means of the tunnel, but also the state and interstate links to that tunnel and the Greater Miami downtown. This project, which has received federal location approval and is in Miami-Dade County's *Long-Range Transportation Plan*, is being reviewed by Florida's Turnpike Enterprise, which now has responsibility for its implementation; the review is expected to take at least a year and construction is still several years away.

Similarly, Port Everglades has a long-term plan for an approximately \$300 million airport-seaport connector to support cruise passenger transfers between the two facilities. This project, is a joint endeavor with Fort Lauderdale-Hollywood International Airport; the above approximate dollar amount reflects only the seaport portion of the project, as indicated in the *Port Everglades 2020 Master Plan Vision*.

For the Port of Tampa, the I-4 Crosstown Connector is a priority intermodal access project. This project, whose Phase I costs are estimated at \$152.7 million, has the support not only of the Tampa Port Authority but also FDOT, the Tampa-Hillsborough County Expressway Authority, the City of Tampa, and Hillsborough County. To date, only right-of-way costs (\$57.2 million) have received initial funding.

A priority intermodal access project for the Port of Jacksonville is the Martin Luther King Jr./21st Street Interchange. This project has received \$9.5 million in funding so far, which covers only environmental investigations, design, and programming for much of the right-of-way acquisition, which is estimated to take 18 months. FDOT estimates the funding required to complete the project at \$25 million, with construction timing contingent on funding.

Section 3

Port Profiles

PORT PROFILE: PORT CANAVERAL

www.portcanaveral.org

GOVERNING BODY: Canaveral Port Authority (Canaveral Port District)

Located on mid-Florida's Atlantic coast, adjacent to the Kennedy Space Center and to the Orlando theme parks and attractions, Port Canaveral serves both cargo and cruise markets. In FY 02, Port Canaveral handled 3.8 million revenue cruise passengers on 1-, 3-, 4-, and 7-day cruises to the Bahamas and the Caribbean. To date, the Port has invested \$150 million in its six major cruise terminals, designed and custom-built to accommodate the world's fleet of super megacruise ships. The Port has room for three more terminals, including a facility to homeport the America World City, if it is built.

Port Canaveral and its Foreign Trade Zone 136 serve as a unique quadramodal transportation hub, linking sea, land, air, and space transportation modes. Primary cargoes -- served by ten berths and a feeder-sized container yard -- include fresh fruit, steel, lumber, vehicles, petroleum products, newsprint, salt, cement, and aggregates. These cargoes totaled 4.2 million tons in FY 02. Use of the Port as a distribution center for import cargoes being sent throughout the Southeast U.S. is increasing; this trend will continue to grow.

In addition to its maritime operations, Port Canaveral has created a state-of-the-art maritime fire training facility for ships' crews and has developed award-winning environmental programs. Port property is also utilized for public/private, commercial, and recreational facilities for access by the local community and tourists to the ocean, beaches and Port parks.

MISSION STATEMENT

"Serve the economic and social needs of the District and the region by providing low-cost transportation benefits; creating a stable, meaningful, and permanent employment base; promoting and accommodating major marine-associated industries, facilities, and services for the military and space organizations; promoting the District's and region's economic growth; and enhancing local and regional recreational facilities and opportunities."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - 4.2 million. Projected – 6.7 million.

Cargo (TEUs): Current - 320. Projected – 17,500.

Cruise (revenue passengers): Current - 3.8 million. Projected – 8.2 million.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Construct and expand Port facilities and infrastructure in an orderly manner to meet the growth needs of the District and Central Florida region, the cruise/tourist industry, the cargo transport industry, and the Foreign Trade Zone; to support marine commercial/industrial groups, the military establishment, and the space industry as well as to meet the recreational demands of the nearby community.
- # Enhance intermodal connections to Central Florida.
- # Achieve cooperative utilization or recapture of Federal land now occupied by the Department of Defense.

Capital Improvements Needed to Achieve Port's Mission:

- | | |
|---|-----------------------------------|
| # Cruise terminal construction. | |
| # Cargo berth expansion and deepening. | # Road improvements. |
| # Land restoration. | # Container yard expansion. |
| # Widening of entrance channel to 500 feet. | # Rail access to Central Florida. |
| # Warehouse and cold storage expansion. | |

PORT CANAVERAL (Continued)
SPHERES OF INFLUENCE**Primary Hinterland Served:**

Cargo: Central Florida counties of Brevard, Polk, Indian River, Lake, Okeechobee, Orange, Osceola, Seminole, Volusia, and beyond to the Southeast U.S.

Cruise: The United States, Europe, the Bahamas, the Caribbean, Mexico, and Central and South America.

Trading Partners:

Imports: Europe (lumber, newsprint, cement, petroleum); Mediterranean (cement, petroleum, pumice); South America (cement, petroleum, juice concentrates, wood pulp); Caribbean Basin (petroleum, salt); Canada (newsprint, petroleum, aggregate/granite); Central America (melons); Africa (juice concentrates, vehicles)

Exports: Europe (citrus concentrates, juices); Far East (fresh citrus); Caribbean (vehicles, heavy equipment); Central America (vehicles, heavy equipment); Caribbean (vehicles, heavy equipment).

ENVIRONMENTAL INITIATIVES

- # Sand bypass and beach restoration.
- # Water quality monitoring.
- # Water reuse.
- # Stormwater treatment.
- # Off-shore artificial reefs.
- # Educational programs about threatened/endangered species.
- # Right whale protection.
- # ISO 14001 Certification.

- # Manatee and least tern protection.
- # Cruise Memorandum of Understanding with Florida Department of Environmental Protection.
- # Public park access.
- # Remediation.
- # Best management practices brochure for marine facilities and commercial fishing industry.
- # Five national/state awards, including Governor's Council for Sustainable Florida.

RECENT ACCOMPLISHMENTS

- # Diversification of cargo mix and increase of types of cargoes handled through the Port.
- # Increase in the number of terminal operators available at the Port.
- # Increase in cargo ship services available from the Port.
- # Addition of two of the world's largest megaships for year-round sailings from the Port
- # Record number of cruise ship calls and revenue cruise passengers.
- # Reintroduction into the short-term cruise market with year-round 1-, 2-, and 3-day cruises.
- # Initiation of a year-round port-of-call service from New York City.
- # Reconstruction of main entrance to south side of port (George King Boulevard).
- # New entrance and upgrades to Jetty Park.
- # New computerized weighing system and gate into south cargo area.
- # Recognition by the Florida Department of Law Enforcement for the third year in a row as the most substantially compliant seaport in Florida.
- # Receipt of American Association of Port Authorities' annual Award of Excellence for the Port's advertising campaign.

PORT PROFILE: PORT EVERGLADES

www.broward.org/port

GOVERNING BODY: Broward County Board of County Commissioners

Port Everglades ranks as one of the nation's leading container and cruise ports. It is also one of Broward County's most successful Enterprise Funds, having experienced a banner year in FY 02. Its diversified cargo includes:

- # Bulk (gasoline and aviation fuel, cement and clinkers, petroleum/crude and fuel oils, gypsum).
- # Break-bulk (building materials, steel, lumber).
- # Container (tile, leather goods, coffee, paper products, auto parts, furniture, apparel, beverages, dairy products, agricultural products, frozen meats, citrus concentrate).
- # Rolling stock such as yachts and other boats, vehicles and equipment.

The Port's cruise operations encompass nearly 50 ships, whose itineraries range from one-day cruises to the Bahamas through 103-night world cruises.

Other activities include: A petroleum storage tank farm, serving 12 counties; Foreign Trade Zone 25, used by over 60 businesses; and an annual May "Fleet Week" honoring the U.S. seagoing services.

MISSION STATEMENT

"Through ongoing seaport activity, to create and promote commerce and industry within Broward County, the state and the nation; to contribute to the development of an integrated and balanced regional transportation system."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current – 22.7 million. Projected – 26.30 million.

Cargo (TEUs): Current – 554,041. Projected - 896,000.

Cruise (revenue passengers): Current – 3.1 million. Projected - 4.3 million.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

Consistently maintain, develop, expand, and modify the Port to meet service area needs, strengthen Broward County's economy, and enhance the region's multi-modal transportation network.

- # Provide new container, bulk and break-bulk cargo facilities, including an intermodal container transfer facility.
- # Improve intermodal connections (road and rail) to facilitate the transportation of cargo and provide competitive service.
- # Expand cruise operations and construct new facilities.
- # Expand Foreign Trade Zone operations.
- # Expand role as a transshipment center for the Southeastern U.S., Caribbean, and Latin American markets.
- # Improve petroleum distribution facilities.
- # Pursue new trading opportunities and strengthen existing ties.
- # Maximize the advantage of the Coffee Exchange Designation.

PORT EVERGLADES (Continued)

Capital Improvements Needed to Achieve Port's Mission:

- # Expansion of Southport terminal.
- # Additional cruise terminals, cargo facilities, and cranes.
- # Better intermodal connections.
- # Harbor/maintenance dredging for deeper-draft cargo ships.
- # Permanent off-shore dredged material management site.
- # Additional upland dredged material management sites.

SPHERES OF INFLUENCE

Hinterland Served:

Cargo: Primarily Broward, Dade and Palm Beach counties as part of a 24-county area extending northward to Pasco, Polk, Osceola, and Brevard; southward to Monroe; and westward to the Gulf of Mexico; however, in trade with Latin America, the hinterland is the entire United States.

Trading Partners:

Countries and territories in the Caribbean Basin, North, Central, and South America; Europe; Mediterranean; the Middle East; Southwest Asia; Africa, and the Pacific Rim.

Cruise: All of North and South America and Europe.

ENVIRONMENTAL INITIATIVES

- # Manatee protection.
- # Wetland and mangrove protection.
- # Provision of dredged material for Broward County's beach nourishment program.
- # Environmental initiative awards from the American Association of Port Authorities.

RECENT ACCOMPLISHMENTS

- # Increase in automobile, break-bulk and dry bulk cargoes.
- # Record number of cruise ship calls and cruise passenger trips.
- # Completion of new 45-acre container terminal in Southport.
- # Completion of the first phase of security improvements with the security operation center.
- # New container cargo terminal lease with third party operators.
- # Dedication of new Terminal 29.

PORT PROFILE: PORT OF FERNANDINA

www.amelia island.com

GOVERNING BODY: Ocean Highway and Port Authority, Nassau County

The Port of Fernandina provides terminal service to over fifteen pulp and paper mills located throughout Florida and the southeast. Fernandina also supports a number of independent container lines serving Venezuela, Colombia, Ecuador, the Dominican Republic, Haiti, Jamaica, and Bermuda. The Port's principal cargoes include:

Exports: Forest products including Kraft linerboard, wood pulp and treated lumber.

Imports: Lumber, wood pulp, hardboard, and steel.

The containerized commodities moving through the Port include wood pulp, automobile parts, beer, frozen foods, machinery, and, consumer goods.

MISSION STATEMENT

"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. (Ch. 21418, S12, Sp. Acts 1941)."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - .6 million. Projected - .9 million.

Cargo (TEUs): Current - 28,000. Projected - 50,000.

Cruise (revenue passengers): Current - 454. Projected – 15,000.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Promote economic development.
- # Create employment opportunities in Nassau County.
- # Revitalize and maintain deepwater seaport activities.
- # Support local industries by providing port facilities.

Capital Improvements Needed to Achieve Port's Mission:

- # Expand warehouse space.
- # Expand rail siding to service intermodal traffic.
- # Add new berth.
- # Improve the pier and terminal.

PORT OF FERNANDINA (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Southeastern United States and Gulf States; major metropolitan areas such as Tampa, Orlando, Jacksonville, Atlanta, New Orleans, and Houston.

Trading Partners:

Northern Europe, the Mediterranean, Bermuda, Venezuela, Ecuador, Brazil, Chile, Columbia, Haiti, Dominican Republic, Jamaica, the Bahamas, and Puerto Rico.

ENVIRONMENTAL INITIATIVES

- # Two-year manatee monitoring study.
- # Participating with the New England Aquarium in a right whale monitoring program.
- # Near-shore disposal for beach renourishment (previous channel-deepening project).
- # Creation of five acres of saltwater marsh.
- # Reduction in truck dwell time.

RECENT ACCOMPLISHMENTS

- # New monthly service of imported lumber from Europe.
- # New monthly service of imported pulp and hardboard from Brazil.
- # New monthly service of exported Kraft liner board to Ecuador.
- # Warehouse capacity increased by approximately 12 percent.
- # Completion of Dade Street access improvements and new gate configuration.

PORT PROFILE: PORT OF FORT PIERCE

www.co.st-lucie.fl.us/port

GOVERNING BODY: St. Lucie County

St. Lucie County is exploring its strategic options for the Port. The current owner of 77 percent of the property, 67 acres, is entertaining offers to sell 52 of the 67 acres to private developers to construct a mega-yacht complex. No specific plans have been provided on the remaining 15 acres. Once a final plan has been submitted, it must be compliant with the Port Master Plan. The County will offer assistance to the developer of the 52 acres for the mega-yacht facility. The Port Master Plan has been completed and approved by State agencies and the County. Private users of the Port -- Indian River Terminal Company, Bahama Start Limited, Inc. and other miscellaneous shippers -- continue to move bulk products at their facilities, although Indian River Terminal facilities were not actively shipping or receiving cargo from early February until late August because of major renovations involving demolition of buildings and dock improvements.

PRINCIPAL ACTIVITIES AND PRODUCTS (PRIVATE TERMINALS):

Imports: Aragonite, cement.

Exports: Grapefruit.

MISSION STATEMENT

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

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - .030 million (including private terminals). Projected - .118 million.

Cargo (TEUs): Current - 115. Projected - None.

Cruise (revenue passengers): Current - None. Projected - .100 million.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Develop land for mega-yacht use.
- # Provide infrastructure for land to be developed for mixed marine recreation, marine commercial, and marine industrial uses.
- # Restore Taylor Creek to its original depth.

Capital Improvements Needed to Achieve Port's Mission

- # Land acquisition.
- # Road improvements.
- # Infrastructure construction.

PORT OF FORT PIERCE (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

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

Trading Partners:

Caribbean Basin, Bahamas, Far East, Europe.

RECENT ACCOMPLISHMENTS

- # Completion of Port Master Plan.
- # Design of Taylor Creek restoration project, with implementation scheduled for early 2004.
- # Adoption of Port Element into the County's Comprehensive Plan.

PORT PROFILE: PORT OF JACKSONVILLE

www.jaxport.com

GOVERNING BODY: Jacksonville Port Authority

The Port of Jacksonville includes many private terminals along the St. Johns River, plus three public cargo terminals and one passenger cruise terminal controlled by the Jacksonville Port Authority, also known as JAXPORT. The non-JAXPORT facilities include multiple dry and liquid bulk terminals, shipyards and U.S. Navy and Marine Corps installations.

JAXPORT facilities serve as a southeastern hub for the intermodal movement of commodities on the world market. Well-known as a leading importer of automobiles and other vehicles, the Port also ranks among the top twelve container ports in the nation and dominates trade with Puerto Rico.

Jacksonville continues to be an important military outload port for the rapid deployment of supplies for U.S. military operations throughout the world.

VISION STATEMENT

"The vision of the Jacksonville Port Authority is to be a major economic engine in Northeast Florida by becoming the premier diversified port in the Southeastern United States, with connections to all major trade lanes throughout the world."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons)¹: Current - 19.9 million. Projected - 27.0 million.

Cargo (TEUs): Current – 683,836. Projected – 900,000.

Cruise (revenue passengers): Current - None. Projected – 150,000.

¹ This tonnage includes the cargo crossing privately owned facilities in Jacksonville Harbor. JAXPORT total tonnage for CY 2002 was 7.1 million tons.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

Continue to expand Port facilities and improve existing infrastructure through major capital initiatives by:

- # Further developing JAXPORT's newest terminal for intermodal, bulk and break-bulk business.
- # Intensifying international marketing efforts and diversifying trade lanes and cargoes.
- # Working with FDOT to improve modern transportation connector system linking Jacksonville to interstate road network.
- # Coordinating new major cruise service now homeporting in Jacksonville.

Capital Improvements Needed to Achieve Port's Mission:

- # Intermodal highway connections.
- # Channel dredging to 40 plus 1 feet.
- # Funding assistance for capital projects.

PORT OF JACKSONVILLE (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Central and northern Florida, southeastern United States, major portions of the Midwest.

Trading Partners:

Far East, Canada, Central and South America, Caribbean Basin (including Puerto Rico), Northern and Western Europe, the Middle East, and Africa.

ENVIRONMENTAL INITIATIVES

- # Participation on the Northern Right Whale Monitoring Team (Coastal America 1997 Partnership Award).
- # Continuing role in public acquisition and enhancement of an environmentally sensitive natural island in the Intracoastal Waterway (part of wetland mitigation effort).

RECENT ACCOMPLISHMENTS

- # Fifty-four percent increase in marine cargo volume since 1990.
- # Moving a Port record of 615,030 vehicles in 2002, keeping JAXPORT as the second busiest vehicle-handling port in the country, behind New York/New Jersey.
- # Historic restructuring decision to separate JAXPORT into two agencies -- the Jacksonville Aviation Authority and the Jacksonville Port Authority -- effective October 1, 2001.
- # Completion of \$200+ million Port development and expansion plan.
- # Completion of first phase of 14.7-mile deepening of St. Johns River's main shipping channel from 38 to 41 feet.
- # Attracting two major cruise lines -- Carnival Cruise Lines and Celebrity Cruises -- to homeport in Jacksonville.

PORT PROFILE: PORT OF KEY WEST

www.keywestcity.com

GOVERNING BODY: City of Key West

The Port of Key West is the nation's largest passenger port-of-call, supporting approximately 20 percent of Florida's homeporting passengers and close to 10 percent of the overall North American cruise market. With recent shifts to close-to-home cruising due to the events of September 11, 2001, Key West has become more important than ever before, serving homeports along the nation's Eastern Seaboard and Gulf Coast. Almost one million cruise passengers are expected to visit Key West in 2003. In addition, Key West supports one of the strongest domestic ferry services in the state, offering water-based intermodal options for trips to and from the mainland.

Key West's strategic navigation location relative to the Florida Straits, Gulf of Mexico and Caribbean Sea has been recognized by the military for hundreds of years. In the last two years, the United States Navy has increased their presence at the Port, and is funding a \$40 million capital program to perform maintenance dredging of the federal channel and to improve berthing facilities in the Truman Harbor.

MISSION STATEMENT

"Provide the coordination of all Port activities so as to promote a safe and efficient port-of-call. Continuously plan for the future, meet the needs of our Port customers, and insure a secure revenue source while all along protecting the quality of life of our citizens and fragile ecosystem."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - None. Projected - None.

Cargo (TEUs): Current - None. Projected - None.

Cruise (revenue passengers): Current - .927 million. Projected - 1 million.

STRATEGIC DEVELOPMENT PROGRAM**Major Goals and Objectives:**

- # Develop and maintain port-of-call facilities to accommodate the needs of the cruise ship industry and its passengers.
- # Link the physical, social and environmental aspects of the working waterfront to the community fabric.
- # Maximize the generation of benefits and revenues emanating from the cruise industry for the City and its tourist-related businesses.
- # Manage cruise-related volumes to sustain the island's quality of life, including its environmentally sensitive resources, public amenities, and public waterfront.
- # Increase domestic ferry operations in the City of Key West as an alternative to land-based transportation.
- # Maintain and improve Port security.

Capital Improvements Needed to Achieve Port's Mission:

- # Incorporate the Truman Waterfront, a former United States Navy property, into the historic fabric of the City by means of improved access roads, berthing facilities, security improvement, and a harbor walk.
- # Maintain and improve the City's Mallory Dock cruise facility and Key West Bight ferry facility, including security improvements, infrastructure upgrades, and berthing improvements.

PORT OF KEY WEST (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

United States cruise homeports; West Coast of Florida
ferry ports; City of Key West.

Trading Partners:

Not applicable.

ENVIRONMENTAL INITIATIVES

The Port of Key West's strength as a cruise port-of-call lies in its high desirability as a destination, its strategic location relative to North American cruise itineraries, and its excellent berthing positions. But Key West's resources are fragile. The City's unique character derives from its highly individual community and environmental fabric; high passenger volumes can stress that fabric and potentially damage the desirability of the City as a destination and as a place to live.

To address these concerns, the City of Key West is embarking on a comprehensive study of the social, economic and environmental impacts of the cruise industry on the quality of life of the island. The goal of the study is to achieve a long-term, sustainable balance between cruise-related tourism and the unique character of the City. The study is expected to be complete in November 2004.

In addition, potential shipping impacts on the fragile ecosystem surrounding Key West are a concern. The Florida Keys and their offshore waters have been designated a National Marine Sanctuary and the possibility of providing extra protection against damaging discharges within these waters is being considered by the City.

RECENT ACCOMPLISHMENTS

- # Federal conveyance of the Truman Waterfront property to the City of Key West.
- # Long-term lease between the City of Key West and the United States Navy for the Outer Mole berthing facility.
- # Continued increases in passenger volumes and reports of high passenger and cruise line satisfaction.
- # Federal government assessing expansion of federal harbor project to include the turning basin formerly maintained by United States Navy.

PORT PROFILE: PORT MANATEE

www.portmanatee.com

GOVERNING BODY: Manatee County Port Authority

Located at the entrance to Tampa Bay, Port Manatee is the closest U.S., full-service deepwater seaport to the Panama Canal. The Port services a variety of break-bulk cargo commodities, led by imports of perishables, forest products, steel, and non-ferrous metals. Bulk commodities include finished phosphate products, refined petroleum, cement, cement clinkers, and a growing array of construction-grade aggregates. Port Manatee hosts more container movements than any other Gulf Coast seaport in Florida. More than \$65 million in new berthing and warehouse space, along with a comprehensive maintenance and expansion-dredging program, are under way at the Port.

MISSION STATEMENT:

At 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.@

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current – 6.7 million. Projected – 8.4 million.

Cargo (TEUs): Current – 7,186. Projected – 66,000.

Cruise (revenue passengers): Current -.063 million. Projected – N/A.

STRATEGIC DEVELOPMENT PROGRAM

Major 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.

Capital Improvements Needed to Achieve Port's Mission:

- | | |
|----------------------------|--|
| # Vessel berths. | # Paved open storage. |
| # Dredging. | # Shoreside cranes. |
| # Cruise terminal. | # Additional intermodal facilities and related infrastructure. |
| # Cold storage facilities. | |

PORT MANATEE (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Florida counties within a 100-mile radius including Lee, Charlotte, DeSoto, Sarasota, Hardee, Polk, Hillsborough, Pasco, Hernando, Pinellas as well as Manatee.

Trading Partners:

Pacific Rim, Central and South America, Caribbean Basin, Europe, Australia, and Africa.

ENVIRONMENTAL INITIATIVES

- Dedicated two-thirds of recently acquired Port property for environmental preservation and mitigation.
- Received a construction permit from the Florida Department of Environmental Protection, marking an important milestone in the Port's seagrass transplant program.
- Completed a 60-acre spoil island restoration project, transforming the land into a migratory and endangered bird sanctuary.

RECENT ACCOMPLISHMENTS

- Completion of the first 1,000 feet of the 1,584-foot Berth 12 construction project.
- Start of construction for the Berth 5 renovation and expansion program.
- Receipt of dredging permit from the U.S. Army Corps of Engineers for the Port's Phase II maintenance and expansion dredging program.
- Construction of dry-storage warehouse to accommodate rapidly growing imports of South American soft wood products.

PORT PROFILE: PORT OF MIAMI

www.metro-dade.com/portofmiami

GOVERNING BODY: Miami-Dade Board of County Commissioners

The Port of Miami -- formally known as the Dante B. Fascell Port of Miami-Dade -- is Florida's largest container port. In addition to providing frequent liner service to Caribbean, Central American, and South American markets, it serves markets in Europe and the Far East and is targeting new opportunities in Africa. This diversity accounts for the wide range of commodities the Port exports and imports:

Exports: Electronics, clothing, aviation and automotive parts, machinery, paper.

Imports: Textiles and apparel, seafood, coffee, flowers, electronics, ceramics.

Known as the Cruise Capital of the World, the Port also serves 17 homeporting ships, including six of the world's largest megaships. To advance both its cruise and cargo operations, the Port's capital improvement program is moving forward on several fronts: the construction of new cargo-handling facilities to serve growing container operations; the construction of two new cruise terminals and renovation of others to serve the next generation of cruise ships; direct interstate access; security enhancements; and significant operational efficiency improvements, including a revised traffic circulation plan.

MISSION STATEMENT

"To be an economic generator for both Miami-Dade County and South Florida, projecting a positive world-class image for our local community. To ensure that the Port has the capabilities to provide both the cruise and cargo industries with the necessary infrastructure for continued growth well into the 21st century."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current –8.7 million. Projected - 10.5 million.

Cargo (TEUs): Current – 980,743. Projected - 1.2 million.

Cruise (revenue passengers): Current - 3.4 million. Projected - 4.5 million.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Expand cruise market share by restoring existing facilities and constructing new terminals and berths required for new generation ships.
- # Expand container market share by providing cargo-handling and railroad facilities required for efficient intermodal container operations.
- # Enhance position as transshipment hub of the Caribbean and Central and South America.
- # Pursue new trade opportunities and strengthen existing ties.

Capital Improvements Needed to Achieve Port's Mission:

- # Security facilities.
- # Direct Port-Interstate access via tunnel or bridge.
- # Deeper and wider channel and turning basin.
- # Development of an on- or near-dock intermodal logistics transfer facility.
- # Cruise terminal and cargo berthing expansion.

PORT OF MIAMI (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

From the South Florida counties of Miami-Dade, Broward, Monroe and Palm Beach throughout the state into the Southeast and Midwest.

Trading Partners:

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

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

ENVIRONMENTAL INITIATIVES

- # Maintaining sensitive wetlands by removing exotic vegetation and restoring designated areas through Miami-Dade County's Department of Environmental Resources Management.
- # Monitoring artificial reefs and marine habitats originally created as part of a multi-million dollar mitigation program for the Port's harbor dredging project.
- # Designing and permitting improvements in an environmentally sensitive manner.
- # Interfacing with the environmental community on enhancements and initiatives for Biscayne Bay.
- # Developing public/private enhancement initiatives.

RECENT ACCOMPLISHMENTS

- # Continued cargo and cruise activity growth.
- # Construction of two new cruise terminals and completion of two multi-level parking garages.
- # Construction of additional 1,200-foot container berth (Berths 6 and 7) and construction of two new super post-Panamax container gantry cranes to be erected in 2004.
- # Support from local and state agencies for moving the long-planned Port tunnel forward as part of a comprehensive transportation improvement program.
- # Initiation of first cruise vessel calling at the Port of Miami as a port-of-call.
- # Significant operational efficiency improvements, including revised traffic circulation plan.
- # First port to implement the STARS security system.
- # Identification of \$60 million in security infrastructure improvements for which received approximately \$16 million in funding from the Federal Transportation Security Administration.

PORT PROFILE: PORT OF PALM BEACH

www.portofpalmbeach.com

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

The Port of Palm Beach is a full-service, diversified landlord port that provides services through its private sector partners in South Florida and is responsible for facilitating economic development within Palm Beach County and the region. With its associated activities, this “niche” Port is estimated to bring between 4,000 and 5,000 jobs to the community. Cargo services include containerized, dry bulk, liquid bulk, break-bulk, and roll-on/roll-off cargo; and the provision of facilities and handling services to accommodate these cargoes. The Port is an important distribution center for commodities being shipped primarily throughout the Caribbean Basin. Additionally, the Port provides Foreign Trade Zone and intermodal opportunities to its customers and users. The Port offers day-cruising, passenger-ferry cruising, and multi-day cruising that complement its other operations.

MISSION STATEMENT:

"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."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current – 5.5 million. Projected – 7.6 million.

Cargo (TEUs): Current – 221,153. Projected - 400,000.

Cruise (revenue passengers): Current - 0.592 million. Projected - 1 million.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Increase cargo throughput, with increased imports/exports into the Caribbean and Latin America regions.
- # Increase cruise operations, passenger counts, and support-related tourism.
- # Retain Port customers and assist in joint marketing efforts.
- # Increase and enhance the Port’s image in the community, state, region, and nation.
- # Develop and implement a new Port Master Plan.

Capital Improvements Needed to Achieve Port’s Mission

- | | |
|-----------------------------------|--|
| # Existing dock facilities. | # Cargo areas and warehouses. |
| # New, modern main gate entrance. | # Intermodal facilities. |
| # Railroad switching facilities. | # Roads and interchanges for regional Port access. |

PORT OF PALM BEACH (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Palm Beach, Martin, St. Lucie, Okeechobee, Highlands, Glades, Hendry, Brevard, Indian River, Monroe, Dade and Broward counties.

Trading Partners:

Central and South America, Mexico, Caribbean Basin, Canada and Northern Europe.

ENVIRONMENTAL INITIATIVES

- # Stormwater Management Plan (design and construction) to protect Lake Worth Lagoon.
- # Assistance to sister municipalities in obtaining U.S. Army Corps of Engineers upgrade of an existing sand transfer plant.
- # Placement of "manatee-friendly" fendering system along all berths and marginal wharves.
- # Joint initiatives with Palm Beach County and the Florida Inland Navigational District to keep Peanut Island maintained as a recreational park, to include eco-tourism.

RECENT ACCOMPLISHMENTS

- # Completion of Skypass/ elevation of U.S. 1.
- # Completion of new cruise terminal.
- # Completion of Maritime Office Complex.
- # Completion of Slip 3.
- # Completion of 11th Street Port entrance.
- # Completion of trench grate project.
- # Extensive tenant improvements.
- # Completion of temporary main gate/ preparation of final main gate relocation.
- # Preparation of an Intermodal Plan.

PORT PROFILE: PORT PANAMA CITY

www.portpanamacityusa.com

GOVERNING BODY: Panama City Port Authority

Port Panama City provides modern seaport facilities for a variety of break-bulk and bulk cargoes including forest products, steel, non-ferrous metals, bagged products, aggregates, and molasses. The Port's location is attractive to shippers serving North Florida, Georgia, and Alabama. Facilities include six berths, 350,000 square feet of warehouse space, six acres of paved cargo-handling area, and a new 36-foot deep channel.

Port Panama City is also home to two important manufacturing plants – Berg Steel Pipe and the Wellstream Corporation.

Exports: Pulp, paper, steel pipe, bulk clay, and project cargoes.

Imports: Copper, steel plate, steel coils, molasses, aggregates, feeds, and fertilizers.

MISSION STATEMENT

"Expand economic opportunities in the City of Panama City, Bay County, Northwest Florida, and the state by providing modern port facilities, promoting trade, and supporting industrial development."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - 0.9 million Projected -1.5 million.

Cargo (TEUs): Current - None. Projected – 30,000.

Cruise (revenue passengers): Current - None. Projected – 72,000.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Facilitate local and regional economic growth through phased expansion of seaport facilities.
- # Ensure essential intermodal transportation infrastructure and connectivity.
- # Conserve and protect environmental resources.
- # Reduce exposure to natural and manmade disasters through hazard mitigation, safety and security programs.

Capital Improvements Needed to Achieve Port's Mission:

- | | |
|--|--|
| # Construct multi-bulk terminal to include 75,000-square-foot covered bulk storage building, and tank terminal for liquid-bulk products. | # Purchase property for improved rail layout, spoil site, and proposed cruise terminal. |
| # Replace four small buildings with a modern 80,000-square-foot warehouse. | # Develop Phase II of Bay Industrial Park, to be known as the Port Panama City Intermodal Distribution Center. |
| # Add general cargo handling equipment, including mobile harbor cranes. | # Renovate cargo building to serve as cruise terminal and construct parking area for cruise operations. |

PORT OF PANAMA CITY (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Florida, Alabama, Georgia, Mississippi, Tennessee, Kentucky, North Carolina, and South Carolina.

Trading Partners:

Central America, South America, Europe, and the Caribbean.

ENVIRONMENTAL INITIATIVES

- # Continued maintenance of Audubon Island as a brown pelican nesting site.
- # Cooperation with the Naval Coastal Systems Station to provide upland sites for spoils disposal.
- # Implementation of Portwide Stormwater Management Plan.

RECENT ACCOMPLISHMENTS

- # Completion of new 36-foot-deep channel.
- # Expansion of cargo-handling facilities, with completion of south dock and west dock expansion and equipment purchase.
- # Renovation and upgrading of warehouses.

PORT PROFILE: PORT OF PENSACOLA

www.portofpensacola.com

GOVERNING BODY: City of Pensacola

This Northwest Florida port, capitalizing on its Gulf of Mexico access and rail proximity, has been successfully diversifying its cargo mix to provide new business opportunities. Additionally, the Port has begun a diversification of revenue streams by leasing available warehouse space to industrial use customers that fit within the Port's business profile as a landlord port. The Port's cargo includes:

Exports: Frozen food, bagged food products, forest products, sulphur, pipe, both electric and wind power generation equipment, off-shore exploration supplies and materials, and military equipment.

Imports: Forest products, aggregate, asphalt, steel, paper, cotton, both electric and wind power generation equipment, and vehicles.

The Port of Pensacola's primary operating objectives are to maximize revenues and maintain financial stability, while serving as a catalyst for the creation and retention of jobs. The Port achieves these objectives by facilitating international trade, improving facilities and services, attracting both cargo and non-cargo activities, and planning for improvements in facilities and infrastructure. In carrying out its activities, the Port balances these ideals with the sensitivities it faces as an industrial/commercial complex located in the midst of thriving downtown retail, residential and historic areas.

MISSION STATEMENT

"Manage and operate cost-effective facilities for marine commerce to foster regional and international trade; to stimulate private investment; and to promote economic development and employment."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - .7 million. Projected - 1.1 million.

Cargo (TEUs): Current - None. Projected - 5,000.

Cruise (revenue passengers): Current - None. Projected - 30,000.

STRATEGIC DEVELOPMENT PROGRAM**Major Goals and Objectives:**

- # Maintain aggressive marketing initiatives, targeting specific cargoes, including additional project cargo.
- # Rehabilitate Port facilities.
- # Attract and retain waterborne commerce and new industry.
- # Solidify and enhance Port-tenant relationships.

Capital Improvements Needed to Achieve Port's Mission:

- # Additional land and facilities, including improved intermodal transportation system.
- # Long-term maintenance dredging.
- # Adequate funding for expansion.
- # Remote cargo terminal sites.

PORT OF PENSACOLA (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Northwest Florida, Georgia, Alabama, Mississippi, Tennessee, Arkansas, Illinois, Nebraska, Iowa, Indiana, Colorado, Missouri, Wisconsin.

Trading Partners:

Central and South America, Caribbean Basin, Mediterranean, Africa, India, Philippines, Russia, South Korea.

ENVIRONMENTAL INITIATIVES

- # Construction and maintenance of a wetlands mitigation area on off-Port waterfront property.
- # Maintenance of a spoil disposal site.
- # Maintenance of a stormwater system.

RECENT ACCOMPLISHMENTS

- # Significant cargo diversification.
- # Full Port financing of outstanding debt payments, resulting in the elimination of an annual fund transfer from the City's general fund for this purpose.
- # Generation of \$11.8 million in annual wages and \$2.1 million in state and local taxes as well as 588 total jobs.
- # Bulkheading and filling of Commendencia slip to provide additional cargo capacity as well as new public access opportunities.
- # Collaboration with Community Redevelopment Agency to create a venue for military vessels, small to medium-sized cruise ships, commercial fishing vessels, and public excursion boats.
- # Activation of Port site within Foreign Trade Zone (FTZ 249). Including the Port property, FTZ 249 encompasses five sites in Escambia and Santa Rosa counties.
- # Focused expansion efforts to continue creating new jobs and stimulating local and regional economic impact.
- # Improvement and expansion of service offered to local industries, including GE, Martin Marietta, ReadyMix USA, Trigent, Gulf Sulphur Services, and others.

PORT PROFILE: PORT OF PORT ST. JOE

www.portofportstjoe.com

GOVERNING BODY: Port St. Joe Port Authority

The Port of Port St. Joe, a once-thriving Gulf port that has been inactive for many years, has recently adopted its new Port Master Plan; positive, determined steps are now being made to implement that plan. The first and most vital step is the initiating of Port operations on the site of the former, now closed, paper mill, thus utilizing existing infrastructure on the shipping channel and generating a revenue stream that will fund future expansion and growth. This effort to restore the mill site to its former status as an employment center and a hub of economic activity through Port development is of great importance to the citizens of the community. The Port's location allows the intermodal interchange of cargo from ocean vessels to rail, highway or continued water movement, via barge by the Intracoastal Waterway.

MISSION STATEMENT

"The mission of the Port of Port St. Joe is to enhance the economic vitality and quality of life in the Port St. Joe area by fostering the growth of domestic and foreign commerce."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - None. Projected -.4 million.

Cargo (TEUs): Current - None. Projected - To be determined.

Cruise (revenue passengers): Current - None. Projected - None.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Acquire land to revitalize Port.
- # Develop strategic plan to support development of new deepwater port facilities.
- # Pursue efforts to attract shipping by working with area railroad and truck lines as well as with economic development entities at the local and state levels.

Capital Improvements Needed to Achieve Port's Mission:

- # Additional land and facilities, including improved intermodal transportation system.
- # Long-term maintenance dredging.
- # Adequate funding for expansion.

SPHERES OF INFLUENCE

Hinterland Served:

To be determined.

Trading Partners:

To be determined.

RECENT ACCOMPLISHMENTS

- # Adoption of new Port Master Plan.
- # Completion of short-term Port Development Plan for the mill site.

PORT PROFILE: PORT OF ST. PETERSBURG

www.stpete.org/port.htm

GOVERNING BODY: City of St. Petersburg

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 small cruise ships and other vessels as well as partnering with its neighbor, the University of South Florida's Marine Science Department, to develop a cutting-edge research and educational center. The Port's Updated Master Plan, completed in 1999, provides the strategic guidelines for Port development.

MISSION STATEMENT

"To provide safe, clean, attractive commercial port facilities for use by the shipping industry and general public, 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."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current - None. Projected - None.

Cargo (TEUs): Current - None. Projected - None.

Cruise (revenue passengers): Current - None. Projected - 0.13 million.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Improve Port facilities, including terminal, berths, landscaping, parking, and public access to attract revenue-generating users to the Port.
- # 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 cruise passengers, local residents, and visitors to the Port area.
- # Continue to take advantage of the Port's proximity to the adjacent Albert Whitted Airport, University of South Florida campus, and museums through joint use and programming, and complement the City's downtown redevelopment plans.
- # Implement a cost-effective, phased development approach.

Capital Improvements Needed to Achieve Port's Mission:

- # Improve existing shoreside facilities: cruise embarkation/disembarkation terminal upgrades, paving, parking, and a second 900-foot berth.
- # Construction of new Port-related facilities to enhance the waterfront area.
- # Funding assistance for capital improvements.

PORT OF ST. PETERSBURG (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Cruise passengers come primarily from the Tampa Bay region, but also from out of state.

Trading Partners:

Not applicable at present.

ENVIRONMENTAL INITIATIVES

- # Collaboration with other Tampa Bay entities to establish a Vessel Traffic Information System, a prototype program to improve vessel safety in Tampa Bay.
- # In collaboration with the University of South Florida Marine Science Department, the Florida Institute of Oceanography, the United States Geological Survey, and the Florida Department of Environmental Protection, anticipated pursuit of opportunities to expand real-time data collection for the benefit of the entire state and its Gulf of Mexico and Caribbean trading partners.

RECENT ACCOMPLISHMENTS

- # Wharf improvements to the eastern third of the Port's dock area.
- # Refurbishment of existing cruise terminal.
- # Approval by Mayor and City Council of efforts, through the U.S. Army Corps of Engineers, to initiate studies to widen and deepen the Port basin and approach channel.
- # Plans to implement balance of wharf improvements as well as enhancements to shoreside facilities and intermodal infrastructure, in accordance with the Port Master Plan.
- # Continued implementation of security upgrades.

PORT PROFILE: PORT OF TAMPA

www.tampaport.com

GOVERNING BODY: Tampa Port Authority

The Port of Tampa is the largest of the Florida ports, as measured by tonnage, and the major economic engine in West Central Florida. A major port of entry for the fuel and building materials used in the region and a force in the shipbuilding and repair industry, the Port is also a popular cruise port, serving the expanding Western Caribbean market. Reflecting the Port's traditional ties with the nearby phosphate industry, the Port's predominant bulk cargoes include phosphate rock and fertilizer products as well as petroleum and coal. The Port is diversifying its cargo mix to take advantage of Florida's growing ties with Mexico and other countries in Central America and is developing a container-handling infrastructure. In addition to the traditional liquid and dry bulk cargoes, the Port handles many other commodities, exporting automobiles, citrus, frozen poultry, and scrap steel; and importing produce, gypsum, ammonia, sulphur, cement, steel, rock, fruit, construction materials, and refrigerated products.

Having collaborated with the City of Tampa to create a new tourist destination at the Garrison Center, the Port has attracted several additional cruise lines in recent years, and is building the cruise infrastructure needed to accommodate the anticipated further cruise growth.

MISSION STATEMENT

"The Tampa Port Authority is committed to growth through business and organizational diversity, which will enable it to be the largest full-service port authority in Florida, providing the highest quality services and infrastructure to five industry sectors: 1. Bulk, including the liquid and dry mineral and agricultural sectors; 2. General cargo, including break-bulk, containers, steel scrap, and refrigerated cargo; 3. Cruise activity; 4. Waterfront recreational activity; and 5. industrial development, including shipbuilding and repair. The Tampa Port Authority will also be the leader in promoting positive public-private partnerships, regional economic impact, environmental quality, and navigational safety in the Port's area of influence, while utilizing prudent fiscal management that maximizes economic benefits and meets operating and capital obligations."

CURRENT (FY 01/02) AND PROJECTED (FY 06/07) THROUGHPUTS

Cargo (tons): Current – 45.7 million. Projected – 48.4 million.
Cargo (TEUs): Current - 7,000. Projected - 50,000.
Cruise (revenue passengers): Current – 583,000 Projected – 1 million.

STRATEGIC DEVELOPMENT PROGRAM

Major Goals and Objectives:

- # Develop Port Ybor, south end of Hookers Point, Port Redwing, and Channelside area.
- # Develop the container cargo business.
- # Implement new Port security program.

Capital Improvements Needed to Achieve Port's Mission

- | | |
|--------------------------------------|--|
| # Roadways and other infrastructure. | # Transit sheds. |
| # General cargo terminals. | # Cruise terminals. |
| # Container cranes. | # Shipyard infrastructure investments. |

PORT OF TAMPA (Continued)

SPHERES OF INFLUENCE

Hinterland Served:

Hillsborough, Hernando, Pasco, Pinellas, Polk counties.

Trading Partners:

Mexico, Trinidad, China, Australia, Brazil, Canada, Columbia, Japan, Ukraine, Argentina.

ENVIRONMENTAL INITIATIVES

- # In cooperation with the U.S. Coast Guard as well as other Tampa Bay entities, maintaining of a Vessel Traffic Information System, which is a national prototype.
- # Wetland and estuary impact mitigation for Port activities.
- # Environmentally sound management of Port's spoil islands for wildlife resources.
- # Maintenance and restoration of stormwater runoff treatment systems.
- # Management and maintenance of Port's award-winning mitigation site at Pendola Point.
- # Management of sovereign submerged lands in Hillsborough County.
- # Environmentally sound upland property management.

RECENT ACCOMPLISHMENTS

- # New global container shipping service established by Zim, with an anticipated start up in October 2003.
- # New U.S.-flagged container-barge shipping operator initiated a service specializing in the transportation of Title II PL 480 cargo from Tampa.
- # Significant increase in cruise business in FY 02 and the prospect of 800,000 passengers in FY 03, a 36 percent increase over FY 02.
- # A 20 percent increase in the cruise "drive-to-market" over the preceding year, which translates into significant parking revenue increases.
- # Tampa offering an impressive schedule of 4-, 5-, 7-, 10-, 11-, and 14-day itineraries for the upcoming season.
- # Continuing momentum in FY 04, with several port-of-call visits scheduled by the luxury cruise line, Radisson Seven Seas Cruises.
- # Cooperative marketing initiatives between the cruise lines and local community partners well under way, bringing more exposure to the Tampa destination's hotels and attractions. Cruise activity and the visitors seen on pre- and post-cruise stays help fuel an economic impact to the community.
- # Reported economic impact (output) of \$13 billion, with 108,000 jobs, \$3.74 billion in wages, and \$380 million in local and state taxes.

Appendix

Table A-1 Florida Seaports' Capital Improvement Program, 2002/2003-2006/2007

Table A-2 Seaport Priority Projects for Funding