

FOCUSED ON THE FUTURE



CELEBRATING 30 YEARS

2020

2024

FIVE-YEAR FLORIDA
SEAPORT MISSION PLAN

Florida Seaport Transportation and
Economic Development Council

flaports.org

FLORIDA
PORTS
COUNCIL

FOCUSED ON THE FUTURE



"Florida's amazing seaports are working every day to adapt and overcome new challenges during these unprecedented times."

— JIMMY PATRONIS, CHIEF FINANCIAL OFFICER OF FLORIDA
July 10, 2020



2540 W. Executive Center Circle, Suite 200
Tallahassee, FL 32301

VISITFLORIDA.org

June 23, 2020

As a sixth generation Floridian and the President and CEO of VISIT FLORIDA, I have a great appreciation for the natural paradise we call home. From iconic beaches and theme parks, to diverse geography and cultures, Florida offers a wide array of treasures and experiences that truly make it the world's premier travel destination. I often tell people I have the best job in the world because I get to sell the best product imaginable – an unforgettable vacation to the Sunshine State.

My experience in the Florida Legislature and leading VISIT FLORIDA has given me a deep appreciation and understanding of the important role that Florida's seaports have in our state. Florida's port system is a major reason why we are the gateway to Latin America. As our state works to recover from the COVID-19 pandemic, our ports will be essential for delivering visitors into our communities and fueling our economic recovery.

VISIT FLORIDA looks forward to working with the Florida Ports Council and our tourism industry partners throughout the state as we welcome travelers back to Florida, and continue our mission of establishing the Sunshine State as the world's number one travel destination. Thank you to all of the hardworking Floridians who make our seaports so valuable to the residents of our state.

Sincerely,

Dana Young



President and CEO, VISIT FLORIDA

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REGARDING THE COVID-19 PANDEMIC

Since 1990, the Florida Seaport Transportation and Economic Development Council (FSTED) has produced this report annually by law. The record it demonstrates serves the people and businesses of Florida through a historical accounting of the overall health, capabilities and trends in the important work our ports perform for our society. As such, the information gathered for these reports is retrospective in nature, capturing the recent past with an eye to what it may tell us to expect in the future. Commencing with a world-wide pandemic and economic upheaval, the startling events of 2020 — the year in which this 2019 report is being produced — make

clear that precedent-based forecasting is untenable, challenging us to follow the same reporting format as in the past. We have therefore made some changes to our presentation to succinctly convey all the necessary facts and critical information for 2019, which will allow it to serve as a benchmark year with little speculation as to what the coming years will bring. In so doing we hope that this document will serve as an effective tool to measure the impacts of the present extraordinary time and help identify opportunities and successes in recovery as future years and events unfold.



FLORIDA SEAPORTS' GUIDING PRINCIPLES

OUR MISSION

Seaports work to enhance economic vitality and quality of life in Florida by fostering the growth of domestic and international waterborne commerce.

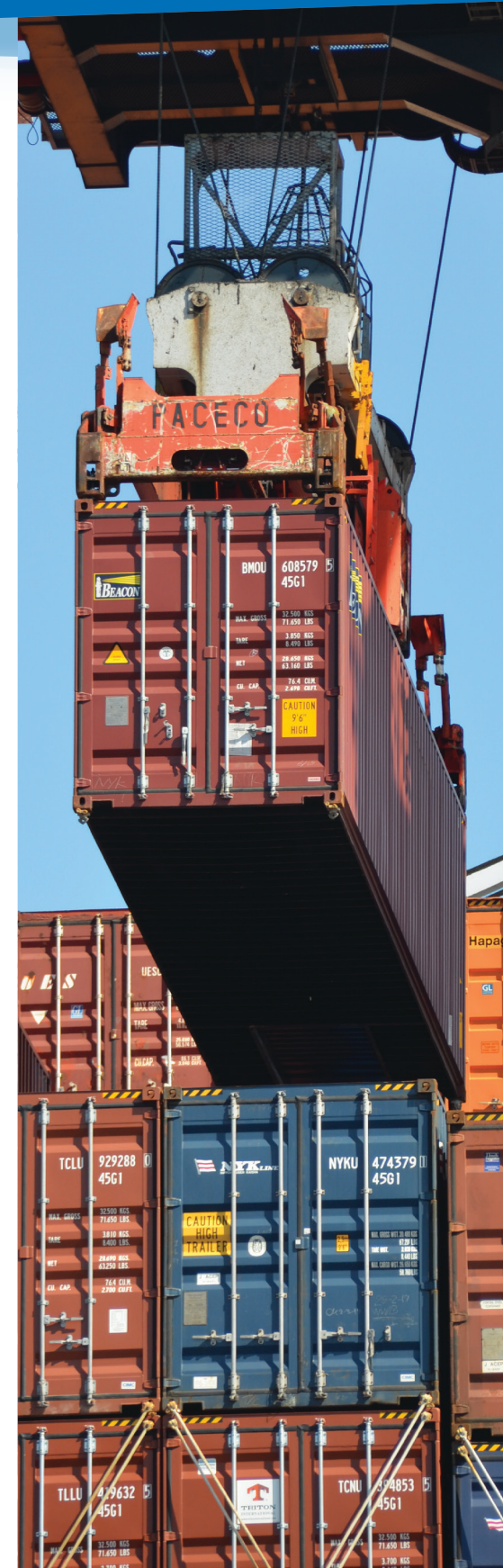
Charged with facilitating the implementation of seaport capital improvement projects, the Florida Seaport Transportation and Economic Development Council (FSTED) consists of the port directors of the 15 publicly owned seaports and a representative from both the Department of Transportation and the Department of Economic Opportunity. The Florida Ports Council administers the FSTED program and staffs the Council.

OUR MANDATE

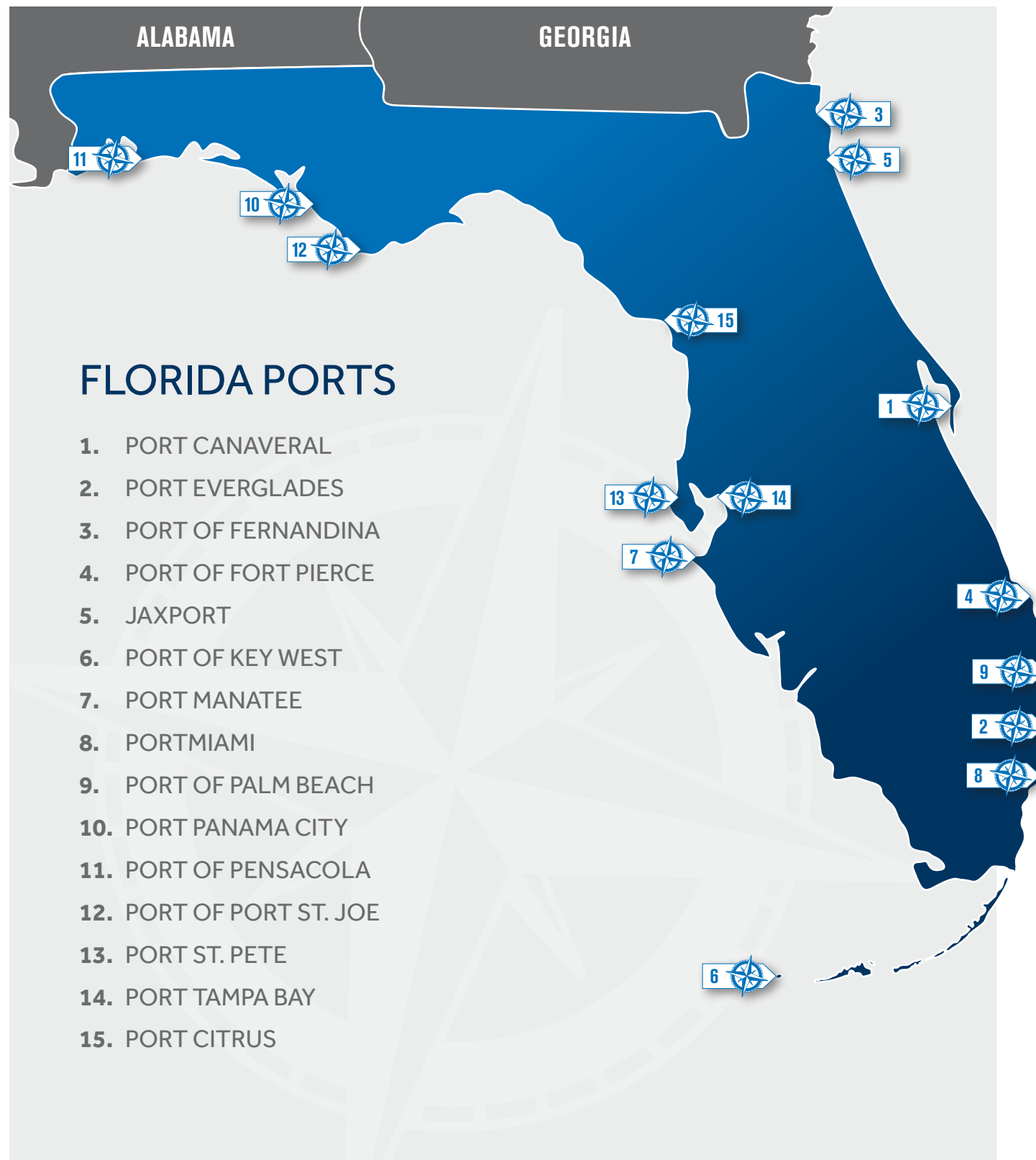
Florida's deepwater seaports, as mandated by Chapter 163, Florida Statutes, prepare master plans to guide their development and expansion. Regularly updated plans, consistent with the comprehensive plans of the seaports' respective local governments, establish goals and objectives, address forecasted needs, and identify five-year capital seaport improvement programs to implement.

OUR GOALS

- Develop world-class cargo and cruise facilities to enhance Florida's global competitiveness.
- Build system-wide, seamless intermodal facilities to move port goods and passengers efficiently and cost-effectively.
- Capitalize on increased north-south trade and the Panama Canal expansion to capture more direct all-water service and feeder calls.
- Strengthen and diversify strategic seaport funding to ensure vital and timely improvements.
- Advocate continued statewide economic development that includes investment in major economic engines – Florida seaports.
- Support security measures that balance compliance with an efficient flow of seaport commerce.



FLORIDA SEAPORTS AT A GLANCE



FLORIDA PORTS

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



HISTORY: NOW & THEN

- While the Florida Seaport Transportation and Economic Development (FSTED) Program had an \$8 million budget in its inaugural year, it now administers a robust, \$25 million state financing program.
- The state's seaports continue growing their cargo portfolios, consistently increasing movements across the three most important metrics: tonnage, value and TEUs.
- Florida ports have made significant upgrades to their infrastructure in response to the 2016 expansion of the Panama Canal.
- The largest cruise ship calling Florida its homeport carries 5,518 passengers and exceeds 225,000 tons – up from an average cruise ship weight of 77,000 tons 30 years ago.^{1,2,3}



¹ <https://www.orlandoweekly.com/Blogs/archives/2019/10/15/florida-will-lose-its-claim-to-hosting-worlds-largest-cruise-ship-but-thats-ok-because-giant-ships-are-the-worst>

² <https://www.tampabay.com/ap/2019/11/18/one-of-the-worlds-largest-cruise-ships-makes-its-florida-debut/>

³ <https://www.marineinsight.com/shipping-news/worlds-largest-cruise-ship-symphony-of-the-seas-launched/>

FINANCE

- The combined five-year Capital Improvement Plan for Florida’s 15 seaports totals \$3.1 billion.
- The largest planned investments are for cargo terminals (about 25 percent), berth rehabilitation and repairs (about 20 percent), and channel and harbor deepening (about 17 percent).
- Florida has 21 Foreign-Trade Zones — the second largest share in the country.



TOP THREE TRADING REGIONS: South and Central America and the Caribbean, Asia, and Europe account for **92.6%** of all Florida trade

CARGO & TRADE

- The state’s waterborne trade by value was relatively stable between 2018 and 2019, decreasing less than 1 percent.
- Despite a slight dip from 2018 to 2019, Central and South America remains the top trading region, worth over \$25 billion in exports (down 1.3 percent over 2018) and nearly \$18 billion in imports (down 2.1 percent over 2018).
- Latin and South America drive Florida’s export market, accounting for 69 percent of all state exports. Brazil is the state’s top export partner, followed by the Dominican Republic, Colombia, and Honduras.
- Japan was Florida’s top importer in 2019 (\$6.7 billion), while China ranked second (\$5.9 billion). Likely due to the national trade dispute with China, Florida ports saw a 17 percent decline in Chinese imports from 2018 to 2019.
- The state’s vehicle imports have doubled in value since 2014, though vehicle exports are trending downward. In 2019, Vehicles, Except Railway or Tramway, and Parts was ranked the state’s top import commodity based on value.



CRUISE & YACHTS

- Cruising has been integral to Florida’s economic competitiveness: the industry’s direct expenditures generate 154,646 jobs and \$7.69 billion in income across the state.⁴
- Florida cruise ports accounted for 60 percent of total U.S. port embarkations. The state’s embarkations have increased 30 percent since 2010.^{5, 6}
- Homeporting 92 passenger ships, cruise ports deliver vital state tourism revenue. Collectively, tourism-related businesses generated approximately \$3.8 billion as a result of the cruise industry’s activity in state.⁷
- Port St. Pete, the Port of Palm Beach, and the Port of Fort Pierce gear a variety of services and amenities to attract the megayacht market.⁸

⁴ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf>, Pg. 48
⁵ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf>, Pg. 46
⁶ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf>, Pg. 12
⁷ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf>, Pg. 47
⁸ <https://www.berthonepalmbeach.com/>



THE FLORIDA SEAPORTS

HISTORY: NOW & THEN

KEY TAKEAWAYS

- In recognition of seaports' role in Florida's economic growth, the State Legislature created the Florida Seaport Transportation and Economic Development (FSTED) Program in 1990 to finance port projects.
- Florida is a top maritime trade state and home to the world's leading cruise ports.
- The global cruise industry continues to thrive in Florida, home of the world's top three cruise ports: PortMiami, Port Canaveral and Port Everglades.
- The state's seaports continue growing their cargo portfolios, consistently increasing movements across the three most important metrics: tonnage, value and TEUs.

WHERE WE STARTED: FLORIDA'S SEAPORT HISTORY

Florida's long and rich maritime history is a driver of the Sunshine State's flourishing economy. For years, the state has invested significantly in its 15 seaports, yielding a strong and unique partnership. These investments have paid off: Florida is a top maritime trade state and is home to the world's leading cruise ports.⁹



⁹ <http://scdn.flaports.org/wp-content/uploads/GlobalOppsAnalysis2015web.pdf>

FSTED HISTORY OVERVIEW

The Florida State Legislature created the Florida Seaport Transportation and Economic Development (FSTED) Program under Chapter 311, Florida Statutes (F.S.) 30 years ago to finance port transportation projects on a 50-50 matching basis. The program was established in recognition of the importance of international trade to the state's economic progress and job creation. Similarly, the Legislature realized the value in enhancing port infrastructure and capacity to align with the consumer demands of Florida's growing population.

The directors from each of Florida's 15 publicly owned seaports participate in the FSTED Council, as well as a representative from the Department of Transportation and the Department of Economic Opportunity. The Florida Ports Council staffs the FSTED Council and provides support in the administration of the FSTED program. What began as a modest venture with an initial investment of \$8 million¹⁰ has expanded to a significant \$25 million state financing program.¹¹

Florida's seaports facilitate trade in the global marketplace, but each is firmly rooted in a unique Florida community. As such, project development begins at the local level and is critical to ensuring community support. Annually, the FSTED Council solicits applications from the state's 15 seaports and reviews all eligible applications to determine "consistency with appropriate plans, economic benefit, readiness for construction, and capacity within the seaport system" (s. 311.09(4), F.S.).

ENVIRONMENTAL STEWARDSHIP

The Port of Palm Beach enjoys incredibly clean water quality. With respect to this valuable resource, the Port maintains a seat on the Southeast Florida Coral Reef Initiative Task Force, helping to protect ocean health.

¹⁰ <http://www.myfloridalegal.com/ago.nsf/Opinions/E65AFBF96117CD7F852568EA006D7E52>

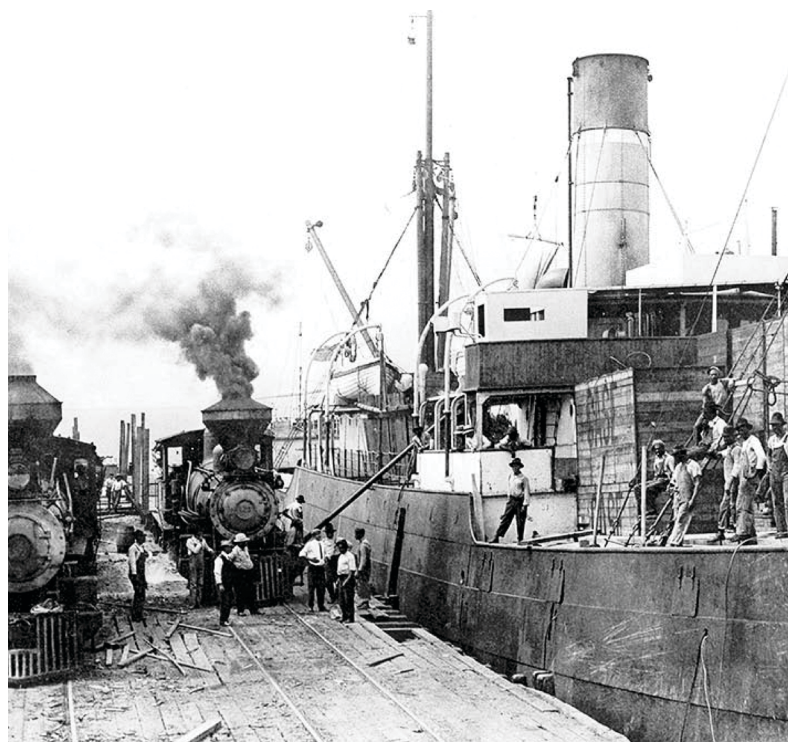
¹¹ History- FSTED Summary



GROWTH OF SHIPS & CARGO

Expansion of the Panama Canal, completed in 2016, presented an opportunity for Florida ports to serve larger vessels. To accommodate larger ships, several of the state's seaports invested in waterside improvements, such as harbor deepening projects, and land side improvements, such as equipment purchases and improved intermodal connections. While the Panama Canal previously accommodated 4,500 twenty-foot equivalent unit (TEU) container ships, the expansion now allows 12,500 TEU container ships to pass through its locks. Not only did this shift the landscape for ports positioned to accommodate new Panamax ships, but it also resulted in a cascading effect across the board as fleets began retiring smaller ships.^{12, 13}

Recognized as a global gateway with strong waterside infrastructure and landside connections, Florida's waterborne cargo volumes are on a growth trajectory. Cargo movement is commonly measured in three ways – value, tonnage and TEUs.



In FY 2018/2019, Florida ports moved approximately 111.8 million tons of cargo, a 1.4 percent increase over the prior year. By comparison, in FY 2010/2011, Florida ports moved 106.4 million tons of cargo. During that period, domestic cargo grew the most, increasing from 47.8 million tons in FY 2010/2011 to 53.5 million tons in FY 2018/2019.

Despite a slight year-over-year dip (-1.7 percent) reported between FY 2017/2018 and FY 2018/2019, Florida ports steadily increased TEU movements over the last decade. While Florida seaports moved about 2.8 million TEUs in FY 2009/2010, by 2018/2019, TEUs totaled over 4 million.

Dry bulk (fertilizers, cement and aggregates, among other commodities) accounted for 23.2 percent of total cargo tonnage in FY 2018/2019. Leading tonnage growth for the fiscal year, dry bulk increased 7 percent over FY 2017/2018. Liquid bulk, totaling 47.9 percent of cargo, decreased 0.6 percent in comparison to FY 2017/2018 tonnage. Break-bulk cargo, representing 6.4 percent of cargo, saw a slight 0.8 percent increase above FY 2017/2018.

Domestic cargo remains the primary tonnage moved by Florida seaports, representing 47.8 percent of FY 2018/2019 tonnage. Imports (39.6 million tons) remained virtually unchanged at 35.4 percent of the total cargo tonnage handled by Florida seaports in FY 2018/2019. Exports (18.8 million tons) represented 16.8 percent of total tonnage, accounting for a slightly larger share of the annual seaport tonnage over the previous year.



¹² https://transportgeography.org/?page_id=2232

¹³ [https://fdotwww.blob.core.windows.net/sitefinity/docs/default-source/seaport/seaport/pdfs/fdot-\(05-2018\)-panama-canal-expansion-and-florida-seaports--a-preliminary-study.pdf?sfvrsn=4f716e49_0](https://fdotwww.blob.core.windows.net/sitefinity/docs/default-source/seaport/seaport/pdfs/fdot-(05-2018)-panama-canal-expansion-and-florida-seaports--a-preliminary-study.pdf?sfvrsn=4f716e49_0)



AMERICA'S FIRST PORT

Jacksonville has one of the oldest seaport histories in the United States, begun in 1562 when the French Huguenot Jean Ribault sailed across the Atlantic Ocean into what is modern day Jacksonville. Three years later, an English merchant, John Hawkins, sailed into the mouth of the St. Johns to replenish his water supply and traded some guns and ammunition from the French at Fort Caroline for food and a vessel. This transaction was the first recorded act of international waterborne commerce in the New World, prompting Jacksonville to be called "America's First Port" – a moniker of great pride among mariners in Northeast Florida. Today, JAXPORT handles more than 1.3 million TEUs annually, is the 10th largest container port in the United States by TEU count, and is the second busiest vehicle handling port in the United States, handling more than 696,000 vehicles annually.

GROWTH OF CRUISE SHIPS & PASSENGER COUNTS

The passenger cruise industry has enjoyed unprecedented growth in recent years. Cruise ship size continued growing, too. Between 1990 and 2000, passenger ships grew from 77,000 tons to 150,000 tons.¹⁴ At the present time, PortMiami serves as the homeport to the four largest cruise ships in the world, Royal Caribbean's Oasis Class ships, which exceed 225,000 tons.^{15, 16} The largest of the four in the Oasis Class series, *Symphony of the Seas*, can accommodate 5,518 passengers.¹⁷

Florida ports also offer dockage to the world's most luxurious fleet of large private yachts.¹⁸ Demand for luxury yachts that stretch between 75 and 120 feet remain the primary market segment within the fast-growing industry, though other ship sizes range from 121 to 250 feet or greater than 250 feet.¹⁹ This super, or mega, yacht market represents an impactful revenue stream for the ports and the region.

Port St. Pete, the only superyacht marina on Florida's Gulf Coast, moored one of the world's largest yachts at 302 feet with a crew size of 30 — the *Tatoosh*.²⁰ On the Atlantic Coast, the Port of Palm Beach can dock yachts up to 450 feet long at its Berth One Palm Beach.²¹ The Port of Fort Pierce has established itself as a hub for the maintenance, refit and overhaul (MRO) of megayachts by procuring Derecktor Shipyards to repurpose a dated cargo facility into a megayacht shipyard, complete with the largest-capacity mobile boat hoist in the world.²²

Florida has capitalized on its close proximity to tropical destinations by making strategic investments in fixed cruise infrastructure. The global cruise industry continues to thrive in Florida, home of the world's top three cruise ports: PortMiami, Port Canaveral and Port Everglades. Florida seaports handled 18.3 million passengers in FY 2018/2019, surpassing the previous year's record of 16.8 million passengers.

¹⁴ <https://thepointsguy.com/news/why-cruise-ships-keep-getting-bigger/>

¹⁵ <https://www.orlandoweekly.com/Blogs/archives/2019/10/15/florida-will-lose-its-claim-to-hosting-worlds-largest-cruise-ship-but-thats-ok-because-giant-ships-are-the-worst>

¹⁶ <https://www.tampabay.com/ap/2019/11/18/one-of-the-worlds-largest-cruise-ships-makes-its-florida-debut/>

In 2019, the number of multi-day cruise passengers surpassed all previous records, representing a 9.2 percent increase above FY 2017/2018. Florida's top three cruise ports (PortMiami, Port Canaveral and Port Everglades) all realized double-digit increases.

Ports Canaveral, Everglades and Miami also offered one-day cruises in 2019. After gaining a small volume uptick in FY 2017/2018 for the first time in three years, one-day cruise passengers decreased 8.6 percent in FY 2018/2019.

BLUE ECONOMY

The need for deep-water access is now blending traditional port functions with 21st-century "blue economy" activities. For example, the Port of Pensacola is home to a former 630-foot cargo vessel now owned by Jeff Bezos' space exploration company Blue Origin. The ship will complete a major conversion that will equip it to serve as a landing platform vessel beginning in late 2021. Pensacola's new strategy maintains the port's core assets for cargo and trade activity while allowing space for blue economy sectors, such as aquaculture, marine technology and biology, and ocean industry career training.

¹⁷ <https://www.marineinsight.com/shipping-news/worlds-largest-cruise-ship-symphony-of-the-seas-launched/>

¹⁸ SMP 2019-2023, Pg. 12

¹⁹ <https://www.alliedmarketresearch.com/luxury-yacht-market>

²⁰ Port St. Pete Port Profile

²¹ <https://www.berthonepalmbeach.com/>

²² Port Ft. Pierce Port Profile

KEY TAKEAWAYS

- **Florida ports act as an economic multiplier, contributing billions to the state’s economy and creating jobs and a higher standard of living for residents.**
- **Through their Capital Improvement Plans (CIPs), Florida’s 15 seaports identified a combined \$3.1 billion in port infrastructure investment over the next five years.**
- **Demonstrating a commitment to growth in trade, Florida seaports plan to invest 25 percent – \$775 million – of their collective CIP into cargo terminals.**
- **In addition to revenue generated by port activity, seaports may access a variety of private, state and federal funding and financing tools for infrastructure development.**
- **A significant value-add to international shippers and manufacturers, there are 21 Foreign-Trade Zones in the state of Florida, second only to Texas.**

THE BUSINESS OF PORTS

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

Ports are facilitators. They provide the infrastructure necessary to accept and move trade as well as passenger vessels. As such, port infrastructure must meet the demands of private industry. Growing vessel size, for example, introduces a number of infrastructure stressors. Are the channel and harbor deep enough to accommodate a larger ship? Upon arrival, is the berth sufficient? Are the cargo staging areas large enough? Will the landside passenger needs be met? Are the intermodal connections sufficient? Port officials monitor the pulse of both the shipping industry and the port community to maintain competitiveness and cohesion.



CAPITAL IMPROVEMENT PLAN

Florida is the only contiguous state bordered by water on three sides, and as such, its seaports are woven tightly into the state’s infrastructure fabric. Annually, each seaport produces a five-year Capital Improvement Plan (CIP) that includes infrastructure improvements to meet the needs of tomorrow. CIPs lay out a wide range of projects, including: channel and harbor deepening, land acquisition, intermodal connections, and terminal development and improvements.

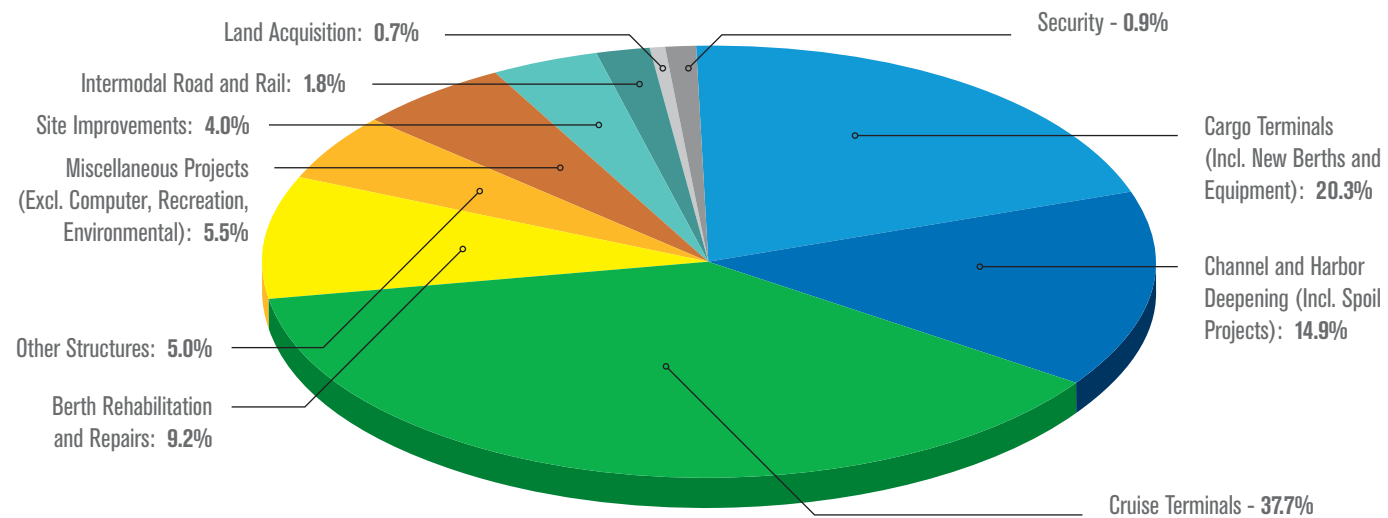
Combined, Florida’s 15 seaports identified \$3.1 billion of investments through their CIPs for the period beginning in FY 2019/2020 running through FY 2023/2024. PortMiami’s CIP has the highest price tag, projecting an investment totaling nearly \$790 million over the five-year period. Respectively, JAXPORT, Port Everglades, Port Tampa Bay and Port Canaveral follow, rounding out the top five for a total planned investment exceeding \$2.7 billion.

Demonstrating a commitment to growth in trade, Florida seaports plan to invest 25 percent – or \$775 million – of the collective CIP into their cargo terminals. The next highest collective CIP line item is repair costs, followed by channel and harbor deepening and then cruise terminal investments.

EXHIBIT #1

COLLECTIVE FLORIDA SEAPORT FIVE-YEAR CAPITAL IMPROVEMENT PLAN (BY YEAR) FY 2019/2020 TO FY 2023/2024						
PORT	FY 2019/2020	FY 2020/2021	FY 2021/2022	FY 2022/2023	FY 2023/2024	Total Five-Year CIP
Canaveral	\$154,777,000	\$68,128,000	\$49,662,000	\$37,824,000	\$39,625,000	\$350,016,000
Citrus	\$0	\$0	\$0	\$0	\$0	\$0
Everglades	\$185,245,500	\$144,750,500	\$73,037,500	\$41,892,500	\$55,829,000	\$500,755,000
Fernandina	\$3,150,000	\$9,100,000	\$6,650,000	\$5,150,000	\$6,000,000	\$30,050,000
Fort Pierce	\$1,900,000	\$8,450,000	\$6,000,000	\$1,500,000	\$0	\$17,850,000
Jacksonville	\$123,466,000	\$96,084,000	\$185,238,000	\$142,171,000	\$108,644,000	\$655,603,000
Key West	\$51,000	\$1,975,000	\$1,700,000	\$0	\$0	\$3,726,000
Manatee	\$18,154,000	\$65,700,000	\$4,950,000	\$20,500,000	\$18,000,000	\$127,304,000
Miami	\$242,736,000	\$166,709,000	\$169,438,000	\$129,157,000	\$81,700,000	\$789,740,000
Palm Beach	\$8,600,000	\$9,200,000	\$7,800,000	\$9,900,000	\$13,000,000	\$48,500,000
Panama City	\$21,200,000	\$20,750,000	\$24,600,000	\$20,000,000	\$4,000,000	\$90,550,000
Pensacola	\$2,225,000	\$500,000	\$6,287,000	\$250,000	\$0	\$9,262,000
Port St. Joe	\$1,000,000	\$49,000,000	\$0	\$0	\$0	\$50,000,000
St. Petersburg	\$3,255,000	\$1,490,000	\$0	\$0	\$0	\$4,745,000
Tampa	\$94,900,000	\$123,125,000	\$120,825,000	\$77,200,000	\$55,500,000	\$471,550,000
TOTAL	\$860,659,500	\$764,961,500	\$656,187,500	\$485,544,500	\$382,298,000	\$3,149,651,000
Data Source: Individual seaport CIPs (as of November 16, 2019)						
Notes: Funds for some projects are yet to be appropriated. Figures used may reflect low, mid or high range forecasts. Ports may choose to move projects from year to year, and/or to add or eliminate projects.						

COLLECTIVE FLORIDA SEAPORT FIVE-YEAR CAPITAL IMPROVEMENT PLAN (BY PROJECT TYPE) FY 2019/2020 TO FY 2023/2024



Data Source: Individual seaports five-year CIP total is \$3.1 billion.

Exhibit 2 Note: Project categories used in this document are sorted by major investment type, but sometimes a project will cross over into two or more categories.

ALIGNING INVESTMENTS WITH OPPORTUNITIES

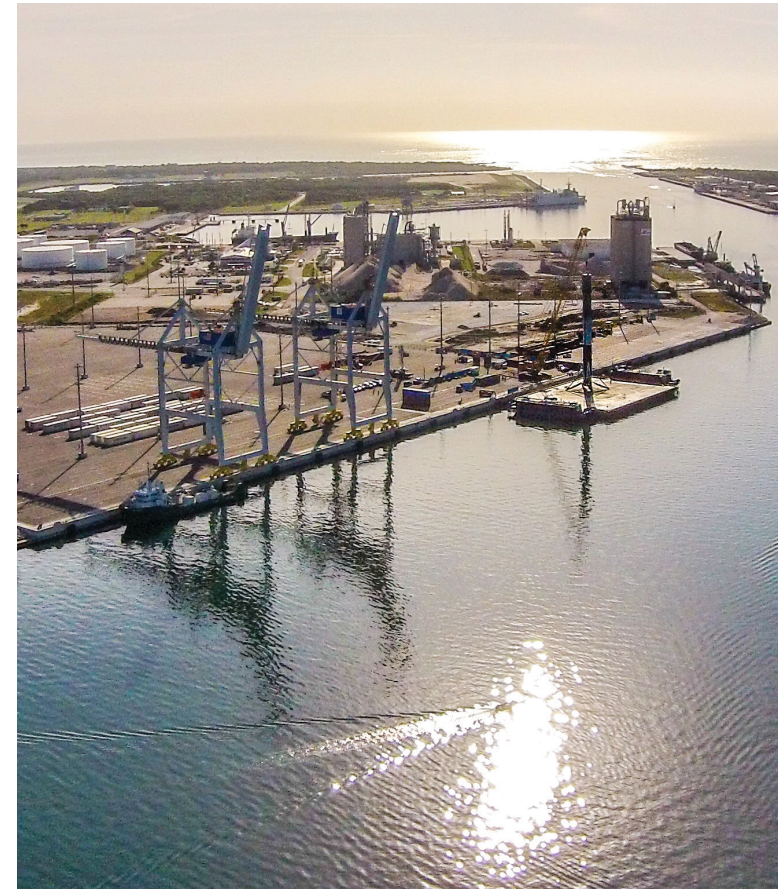
Seaports develop CIPs on a five-year planning horizon in order to capitalize on growth trends and opportunities. As the state's seaports continue to facilitate the growth of both trade and tourism, seaport executives identify investments that will grow or sustain the demands of their customer base – and even attract new customers.

PRIORITIZING INVESTMENTS

Building on its success as the “Cruise Capital of the World,” cruise terminal investments top PortMiami's CIP. Last year 6.8 million vacationers sailed through PortMiami – a world record – and over the next five years, the Port anticipates becoming the homeport to five additional ships, bringing the total from 36 to 41, and welcoming an additional 1.6 million passengers annually by FY 2023/2024.

In 2019, vehicles topped Florida's imports by value and ranked second as the state's export by value. This is no surprise as JAXPORT is the nation's second-busiest vehicle-handling port. Leading vehicle processors AMPORTS, Wallenius Wilhelmsen Solutions and Southeast Toyota Distributors combine for more than 300 acres of auto processing on port terminals. The Port has included in its CIP the construction of a new auto processing terminal at Dames Point to accommodate continued growth.

Having exceeded one million TEUs for six consecutive years, Port Everglades is a leader in the state's containerized cargo trade. In its CIP, Port Everglades identified the largest investment ever undertaken by the Port: Southpoint Turning Notch Expansion. The project will allow for new cargo berths by lengthening the existing notch from 900 feet to 2,400 feet. The project also includes installation of crane rail infrastructure to handle three new Super Post-Panamax gantry cranes.



FUELING THE FUTURE FROM SEA TO SPACE

Port Canaveral is less than a year away from becoming North America's first LNG cruise port. Powered by cleaner-burning LNG, the Port's new \$163 million Cruise Terminal 3 will be the largest in the Port's 66-year history. Representing Florida's Space Coast and the Central Florida region, the Port and its FTZ #136 serve as a unique transportation hub, linking sea, land, air and space with the benefits of a first-class seaport that includes easy highway access; unrestricted air-draft; -43 deep-water sea access; and, uncongested multipurpose berthing.

Port Tampa Bay's CIP identifies an investment of over \$200 million in its cargo facilities. The opportunity is clear: the Tampa Bay/ I-4 Corridor region is home to the state's largest concentration of distribution centers and a huge consumer base. For scale, Central Florida's population of nine million residents is about the same as the combined population of 10 states: Wyoming, Vermont, Alaska, North and South Dakota, Delaware, Rhode Island, Montana, Maine and New Hampshire.²³ Port Tampa Bay's strategic investments are paying off: in 2019, the Port welcomed three direct, weekly trans-Pacific container shipping services.

Named “World's Best Cruise Port” by *Global Traveler Magazine* in 2019, Port Canaveral continues growing its cruise business and has included cruise terminal investment as the largest line item on its CIP. The Cruise Terminal 3 Complex and Roadway Expansion Project will allow Port Canaveral to become the homeport to Carnival Cruise Line's largest and newest class of ship, which will be the first LNG powered cruise ship in North America.

Port Manatee, Port St. Pete, and the Port of Fernandina identified cargo terminal investments through their five-year CIPs, Port Manatee's being the largest planned investment at \$42 million. The Port of Port St. Joe, meanwhile, has identified dredging as its largest CIP need. The Port of Pensacola's CIP names berth rehab as its largest line item. Florida's southernmost port, the Port of Key West, is planning upgrades to its docking facilities to better accommodate the 900,000 visitors it anticipates receiving in FY 2019/2020. Projects identified by Port of Ft. Pierce include converting a cargo terminal into a purpose-built facility specifically for the maintenance, refit and overhaul of megayachts.

²³ https://www.census.gov/data/tables/time-series/demo/popest/2010s-state-total.html#par_textimage_1574439295

HOW PORTS ARE FUNDED

A characteristic that separates ports from other types of infrastructure is just how unique they are in governance and operations from one another. Some states – such as Maryland, Virginia, the Carolinas and Georgia – manage their seaports through the state government. Elsewhere, such as in Los Angeles and Long Beach, California, ports are part of a city government. Others still are managed by counties and public authorities. Florida ports offer a window into the wide array of seaport governance structures. While JAXPORT is an independent authority of the City of Jacksonville, Port Everglades is a self-supporting enterprise fund of the Broward County government. Canaveral Port Authority is an independent governmental agency, complete with an elected board of commissioners. Governance structures play a role in how ports are funded and how they generate revenue.

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

In addition to using revenue generated through seaport operations, ports may choose to seek financing and funding tools available from federal, state or local governments. Funding and financing options for capital projects include a combination of working capital, state grants, federal grants, construction bonds, bank loans, commercial mortgages and private capital.

In order to execute on-port and near-port projects, Florida seaports work with their state, federal, private and association partners to underwrite funding and financial incentives. The following is a list of grant and loan programs available to Florida seaports, administered at the state and federal level.

TRIUMPH GULF COAST GRANT

The Panama City Port Authority was the first recipient of grant funds from Triumph Gulf Coast. The organization charged with distributing funds in Northwest Florida from the B.P. oil spill settlement – the Environmental Protection Agency (EPA) – awarded the Port Authority a \$10 million grant to assist with the development and expansion of the bulk cargo facilities at the new East Terminal, based on the economic importance of the project.



STATE OF FLORIDA PROGRAMS

Florida Seaport Transportation and Economic Development (FSTED): 15-member council comprised of Florida seaports representatives, Florida Department of Economic Opportunity (FDEO) and Florida Department of Transportation (FDOT). The FSTED grant allocates a minimum of \$25 million a year for seaport improvements, requiring a 50-50 match.²⁴

Strategic Port Investment Initiative (SPII): FDOT-managed fund which allocates a minimum of \$35 million to seaports each year.²⁵ State funding is matched by the local port, requiring a 50-50 match.

Strategic Intermodal System (SIS): Funding pool administered by FDOT to focus the state’s limited transportation resources on the facilities most significant for interregional, interstate, and international travel.²⁶

Florida’s State Infrastructure Bank (SIB): Loan and credit enhancement program administered by FDOT and consisting of two separate accounts – the federally-funded account, which is capitalized by federal money matched with state money and the state-funded account which is capitalized by state money and bond proceeds.²⁷

Volkswagen Settlement (VW): State managed fund resulting from a lawsuit settlement between VW and the U.S. Environmental Protection Agency (EPA) to partially resolve allegations of violations of the Clean Air Act. Florida’s share is more than \$166 million, or 5.68 percent of the overall Mitigation Trust Fund.²⁸

Triumph Grant: Following the 2010 Gulf Oil Spill, the State of Florida sued British Petroleum (“B.P.”) for the economic damages it sustained. B.P. and the state entered into a settlement agreement whereby the State will receive a total of \$2 billion dollars until 2033. These funds are available to generate increased economic activity in the disproportionately affected counties, which are all in the Florida Panhandle.²⁹



²⁴ <https://flaports.org/about/florida-seaport-transportation-and-economic-development-program/>
²⁵ http://www.leg.state.fl.us/Statutes/index.cfm?App_mode=Display_Statute&Search_String=&URL=0300-0399/0311/Sections/0311.10.html
²⁶ <https://www.fdot.gov/planning/sis/default.shtm>
²⁷ <https://www.fdot.gov/comptroller/pfo/sibintro.shtm>
²⁸ <https://floridadep.gov/air/air/content/volkswagen-settlement-mitigation-trust>
²⁹ <https://www.myfloridatriumph.com/about/frequently-asked-questions/>

FEDERAL PROGRAMS *(available to all states)*

Port Infrastructure Development Grant: Federally managed grant program funded through an appropriations omnibus bill that included a \$225 million port infrastructure development grant program in Fiscal Year 2020.³⁰

Fixing America’s Surface Transportation (FAST) Act: Federal surface transportation authorization law that includes \$6.3 billion for the new National Highway Freight Program, which pioneers dedicated formula funding to states for freight projects such as port-inland connectivity. It provides \$4.5 billion for the Nationally Significant Freight and Highway Projects program (also known as INFRA), which includes \$500 million for multi-modal freight projects and a \$450-million ‘carve-out’ for smaller projects of up to \$100 million.³¹ Only a percentage of FAST Act freight funding (\$1.13 billion of \$11 billion) is multimodal, a crucial need for many Florida ports.

Infrastructure for Rebuilding America (INFRA): Federally managed grant program, borne out of the FAST Act of 2015, with approximately \$906 million available in Fiscal Year 2020 for projects that help rebuild America’s ‘crumbling infrastructure.’³² In addition to providing direct federal funding, the INFRA program aims to increase the total investment by state, local, and private partners. The program funds projects mainly outside the port gates, including set asides for rural versus urban projects. This program was formerly known as the Fostering Advancement in Shipping and Transportation for the Long-term Achievement of National Efficiencies, or FASTLANE, program.

Better Utilizing Investments to Leverage Development (BUILD): Federally managed multimodal grant program, available to a wide variety of mobility needs, funded at \$1 billion in Fiscal Year 2020.³³ This program was formerly known as the Transportation Investment Generating Economic Recovery, or TIGER, program.

U.S. Army Corps of Engineers (USACE) Work Plan: Plan that provides federal funding for harbor deepening and maintenance. These funds need to be matched at the local or state level.³⁴

Railroad Rehabilitation & Improvement Financing (RRIF): Federal Railroad Administration financing tool available for port rail projects. Some ports find program requirements burdensome, while some would prefer that it had a capital grants component, making continued advocacy important.³⁵

Consolidated Rail Infrastructure and Safety Improvement Grants Program (CRISI): Program through the Federal Railroad Administration that can provide important multimodal funding for port rail access projects.³⁶ In Fiscal Year 2020, \$325 million was appropriated for the program.

Port Security Grant Program (PSGP): Federally managed grant with \$100 million available in Fiscal Year 2020 for funded patrol vessels, video surveillance, access control systems, sonar equipment, cybersecurity assessments, Transportation Worker Identification Credential (TWIC) readers, and infrastructure.³⁷

Diesel Emissions Reduction Act (DERA): Federally managed grant to improve air quality at the nation’s ports. In Fiscal Year 2020, the U.S. EPA anticipates awarding \$44 million for emissions and idle control devices, aerodynamic equipment, engine and vehicle replacements, and alternative fuel options.³⁸

³⁰ [https://www.maritime.dot.gov/PIDP%20Grants/FAQs#:~:text=Q:What is the basis,Port Infrastructure Development Program \(Program\).](https://www.maritime.dot.gov/PIDP%20Grants/FAQs#:~:text=Q:What is the basis,Port Infrastructure Development Program (Program).)

³¹ <https://www.fhwa.dot.gov/fastact/summary.cfm>

³² <https://www.federalregister.gov/documents/2018/12/21/2018-27695/notice-of-funding-opportunity-for-the-department-of-transportations-nationally-significant-freight>

³³ <https://cms7.dot.gov/sites/dot.gov/files/docs/subdoc/391/fy-2019-build-nofo-fr.pdf>

³⁴ <https://www.usace.army.mil/Media/News-Releases/News-Release-Article-View/Article/2080242/us-army-corps-of-engineers-releases-work-plan-for-fiscal-2020-civil-works-appro/#:~:text=The U.S. Army Corps of,program on February 10, 2020.>

³⁵ <https://www.transportation.gov/buildamerica/financing/rrif/railroad-rehabilitation-improvement-financing-rrif>

³⁶ <https://railroads.dot.gov/grants-loans/competitive-discretionary-grant-programs/consolidated-rail-infrastructure-and-safety-2>

³⁷ <https://www.fema.gov/port-security-grant-program> “Fiscal Year 2019 Port Security Grant Program”

³⁸ <https://www.epa.gov/sites/production/files/2020-02/documents/420b20018.pdf>

FOREIGN-TRADE ZONES

Created in 1934 to encourage international trade, a Foreign-Trade Zone (FTZ) is a land area located in or near a U.S. port of entry that is legally considered outside the national customs territory. There are 21 FTZs located in the state of Florida, second only to Texas.³⁹ FTZs provide economic incentives to companies importing or exporting international goods.⁴⁰ Duty-free treatment is applied to items that are re-exported and duty payment is deferred on items sold in the U.S. market. These savings are advantageous to shippers: one of JAXPORT’s largest FTZ users, Mazda North America Operations, saves approximately \$100,000 annually on merchandise processing fees.⁴¹



³⁹ <https://enforcement.trade.gov/ftzpage/letters/ftzlist-map.html>

⁴⁰ <https://www.globaltrademag.com/foreign-trade-zones-ports-and-economic-development-forces-create-american-success-stories/>

⁴¹ <https://www.jaxport.com/hidden-savings-opportunity-the-merchandise-processing-fee/>

CARGO & TRADE

KEY TAKEAWAYS

- At \$86.6 billion, Florida's waterborne trade value held steady in 2019, falling less than 1 percent from 2018.
- The state's waterborne trade presents a robust import market, valued over \$20 billion higher than exports in 2019.⁶⁷
- Central and South America remain Florida's top trading region.
- While China remains a top importer in the state, 2019 imports declined 17 percent from 2018; this reduction is consistent with the overall national trend.⁶⁸
- Despite strong cargo numbers in 2019, 2020 is filled with uncertainty due to the global economic downturn caused by COVID-19.

FLORIDA'S INTERNATIONAL TRADE MARKET

The state's waterborne trade was relatively stable between 2018 and 2019, decreasing less than 1 percent by value. During this period, imports notched a 0.3 percent uptick, while exports decreased 1.2 percent. The state's waterborne trade presents a more robust import market, valued at \$55 billion in 2019, while exports in the same year totaled \$32.8 billion.



TRADE TRENDS

In 2019, Florida maintained its role as the gateway to Central and South American markets. Florida seaports exported \$25.8 billion worth of goods to the region in 2019 (down slightly from \$26.1 billion in 2018) and imported \$17.8 billion worth of goods (down from \$18.2 billion in 2018).⁷² Overall, Central and South America remain Florida's top trading region but imports from Asia and the Middle East outpaced those from Central and South America in 2019, totaling nearly \$22 billion, showing no change from 2018.⁷³ Indicating a stark trade imbalance – not unlike that experienced by other seaports in the U.S. – exports to Asia and the Middle East totaled just \$3.9 billion in value, representing a 3.7 percent increase over the \$3.7 billion in goods exported to Asia and the Middle East in 2018.

EXHIBIT #3

FLORIDA WATERBORNE AND AIRBORNE IMPORTS AND EXPORTS BY GLOBAL REGION IN 2019 (WITH 2018 COMPARISON)

REGION	IMPORTS			EXPORTS		
	2018	2019	PERCENT CHANGE 2019 OVER 2018	2018	2019	PERCENT CHANGE 2019 OVER 2018
South and Central America, Caribbean	\$18,205,621,674	\$17,826,392,154	-2.1%	\$26,123,573,389	\$25,784,300,459	-1.3%
Asia and the Middle East	\$21,754,864,351	\$21,748,397,794	0.0%	\$3,742,617,964	\$3,880,999,114	3.7%
Europe	\$10,036,990,030	\$10,206,802,456	1.7%	\$1,641,371,448	\$1,611,001,136	-1.9%
North America	\$4,392,085,358	\$4,713,373,290	7.3%	\$954,008,189	\$809,985,892	-15.1%
African Continent	\$257,474,426	\$289,838,766	12.6%	\$412,165,851	\$408,226,580	-1.0%
Australia and Oceania	\$202,882,096	\$234,201,794	15.4%	\$307,238,788	\$291,426,647	-5.1%
TOTAL	\$54,849,917,935	\$55,019,006,254	0.3%	\$33,180,975,629	\$32,785,939,828	-1.2%

Data Source: U.S. Census Bureau

ECONOMIC OUTLOOK FOR 2020

On the heels of a very strong 2019, all indicators pointed to another boom year in 2020. Economists could not have predicted the economic plunge caused by COVID-19 in the first half of 2020. Around the world, most of the workforce was asked to stay home in an effort to slow the spread. Nearly every sector of the global economy was negatively impacted and the recovery trajectory remains uncertain. By the second quarter of 2020, tens of millions of Americans had lost their jobs, reversing a decade of growth.⁴²

In June of 2020, the Congressional Research Service delivered a report to the U.S. Congress that stated global trade could fall by 13 to 32 percent, "depending on the depth and extent of the global economic downturn, exacting an especially heavy economic toll on trade-dependent developing and emerging economies."⁴³ These figures were developed by the World Trade Organization (WTO). Further, WTO officials speculated that the impact on global trade volumes may be more severe than those experienced at the height of the 2008–2009 financial crisis.

The uncertainty of a timeline for vaccination development and distribution looms heavy over economic models for 2020 and beyond.

⁷⁵ <https://www.federalreserve.gov/newsevents/testimony/powell20200519a.htm>

⁷⁶ <https://fas.org/sgp/crs/row/R46270.pdf>

WHAT WE MOVE & WHERE

The trade category Vehicles, Except Railway or Tramway, and Parts Etc. (vehicles) topped Florida’s imports by value in 2019 at almost \$13 billion, double the value of the state’s vehicle imports in 2014.⁴⁴ Given the high value of vehicles relative to other waterborne trade, it is no surprise that the second largest import category by value – Apparel Articles and Accessories, Knit or Crochet – totals just \$5 billion. The state’s top export commodity in 2019 was Industrial Machinery, including Computers, at \$6.1 billion. Interestingly, vehicles ranked second in the state’s waterborne export commodities by value, at roughly \$4.7 billion. While vehicle imports have risen steadily in recent years, vehicle exports have dropped. At its ten-year peak in 2010, the state exported about \$10.5 billion in vehicles.⁴⁵



Florida seaports exported goods to 201 countries in 2019.⁴⁶ The top export partner was Brazil, which received \$3.6 billion in commodities, followed by the Dominican Republic (\$2.7 billion), Colombia (\$1.6 billion) and Honduras (\$1.6 billion).⁴⁷ In fact, 18 of the top 20 export partners were Central and South American countries in 2019 and represented 69 percent of exports by value.⁴⁸



EXHIBIT #4

FLORIDA TOP TEN TRADING PARTNERS FOR WATERBORNE CARGO (BY VALUE) 2018 TO 2019					
	2018		2019		
COUNTRY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2019 OVER 2018
TOTAL ALL COUNTRIES	\$87,337,099,424		\$86,566,433,043		-0.9%
China	\$7,024,071,631	1	\$7,563,524,186	1	7.7%
Japan	\$6,868,221,347	2	\$6,914,159,749	2	0.7%
Dominican Republic	\$5,163,824,207	3	\$5,707,154,314	3	10.5%
Brazil	\$4,388,607,350	4	\$5,233,083,683	4	19.2%
Mexico	\$4,165,370,381	5	\$4,655,623,181	5	11.8%
Honduras	\$4,035,120,863	6	\$4,249,014,882	6	5.3%
Chile	\$3,794,131,327	7	\$3,904,932,111	7	2.9%
Colombia	\$2,396,582,755	8	\$2,480,776,090	8	3.5%
Costa Rica	\$2,509,560,139	9	\$2,441,423,965	9	-2.7%
Guatemala	\$2,262,566,036	10	\$2,316,285,499	10	2.4%
TOP TEN TOTAL			\$45,465,977,660		
Data Source: U.S. Census Bureau					
TOP TEN SHARE OF TOTAL WATERBORNE CARGO \$86.6 BILLION: 52.5%					

⁴⁴ Exhibit 8: FL Ports Top Import Commodities
⁴⁵ Exhibit 9: FL Ports Top Export Commodities

EXHIBIT #5

FLORIDA TOP TEN WATERBORNE IMPORT TRADING PARTNERS 2018 TO 2019					
	2018		2019		
COUNTRY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2019 OVER 2018
TOTAL ALL COUNTRIES	\$54,197,490,321		\$53,797,665,660		-0.7%
Japan	\$6,627,426,969	2	\$6,681,536,672	1	0.8%
China	\$7,131,042,412	1	\$5,948,817,658	2	-16.6%
Mexico	\$3,791,075,729	3	\$4,261,300,644	3	12.4%
Dominican Republic	\$2,975,385,791	4	\$3,025,692,278	4	1.7%
Honduras	\$2,590,887,441	5	\$2,588,226,297	5	-0.1%
Germany	\$2,131,493,944	7	\$2,125,250,263	6	-0.3%
Chile	\$2,424,619,793	6	\$2,060,157,215	7	-15.0%
Italy	\$1,938,347,836	8	\$1,768,123,113	8	-8.8%
Brazil	\$1,708,786,413	9	\$1,689,108,208	9	-1.2%
Nicaragua	\$1,530,425,790	10	\$1,378,068,932	10	-10.0%
TOP TEN TOTAL			\$31,526,281,280		
Data Source: U.S. Census Bureau					
TOP TEN SHARE OF TOTAL FLORIDA WATERBORNE IMPORTS \$53.8 BILLION: 58.6%					

⁴⁶ Exhibit 6: FL Ports Top Export Partners by Country
⁴⁷ Exhibit 6: FL Ports Top Export Partners by Country
⁴⁸ Exhibit 6: FL Ports Top Export Partners by Country

EXHIBIT #6

FLORIDA TOP TEN WATERBORNE EXPORT TRADING PARTNERS
2018 TO 2019

	2018		2019		
COUNTRY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2019 OVER 2018
TOTAL ALL COUNTRIES	\$33,139,609,103		\$32,768,767,383		-1.1%
Brazil	\$3,551,364,264	1	\$3,657,748,322	1	3.0%
Dominican Republic	\$2,726,537,301	2	\$2,745,204,334	2	0.7%
Colombia	\$1,612,072,717	3	\$1,619,535,733	3	0.5%
Honduras	\$1,655,345,211	4	\$1,615,720,225	4	-2.4%
Bahamas	\$1,251,952,919	8	\$1,531,590,743	5	22.3%
Costa Rica	\$1,415,338,706	6	\$1,406,172,472	6	-0.6%
Chile	\$1,476,011,443	5	\$1,377,308,513	7	-6.7%
Peru	\$1,221,742,572	9	\$1,210,836,420	8	-0.9%
Panama	\$1,291,080,526	7	\$1,203,645,899	9	-6.8%
Guatemala	\$1,063,636,632	11	\$994,942,216	10	-6.5%
TOP TEN TOTAL			\$17,362,704,877		

Data Source: U.S. Census Bureau TOP TEN SHARE OF TOTAL WATERBORNE EXPORTS \$32.8 BILLION: 53%

While Florida received imports from 174 countries in 2019,⁴⁹ the top ten list makes up 59 percent of the import value.⁵⁰ China and Japan topped Florida’s 2019 list of import partners, delivering a total of \$12.6 billion in goods.⁵¹ The next three countries – Mexico, the Dominican Republic and Honduras – combine for a total of nearly \$10 billion in imported goods.⁵²

EXTENDING GLOBAL TRADE REACH

The International Trade Hub at Port Manatee is bolstering efforts to foster productive links for global commerce between markets in Florida and throughout the world. Launched in 2014, the trade hub, based at the Port Manatee Intermodal Center recently opened promotional offices in Latin America and Europe, broadening its reach. The hub has conducted expo-style showcases throughout Florida and received visits from high-level government and trade officials representing more than a dozen nations, including Argentina, Canada, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Germany, Guatemala, Honduras, Japan, Mexico, Peru, Poland and Spain.

⁴⁹ Exhibit 5: FL Ports Top Import Partners by Country
⁵⁰ Exhibit 5: FL Ports Top Import Partners by Country
⁵¹ Exhibit 5: FL Ports Top Import Partners by Country
⁵² Exhibit 5: FL Ports Top Import Partners by Country

EXHIBIT #7

FLORIDA TOP TEN WATERBORNE COMMODITIES
(IMPORT AND EXPORT) 2018 TO 2019

	2018		2019		
COMMODITY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2019 OVER 2018
TOTAL ALL COMMODITIES	\$87,337,099,424		\$86,566,433,043		-0.9%
Vehicles, except Railway or Tramway, and Parts	\$17,984,935,111	1	\$17,904,161,654	1	-0.4%
Nuclear Reactors, Boilers, Machinery, and Parts Thereof	\$7,899,766,814	2	\$8,577,107,768	2	8.6%
Electric Machinery, including Sound and TV Equipment	\$5,693,534,481	3	\$6,081,011,438	3	6.8%
Apparel Articles and Accessories, Knit or Crochet	\$4,873,625,815	4	\$5,215,943,043	4	7.0%
Mineral Fuel, Oil, Bituminous Substances, Mineral Wax	\$2,485,010,124	5	\$3,159,414,109	5	27.1%
Furniture, Bedding, Lamps Not Elsewhere Specified, Prefab Buildings	\$2,001,056,454	6	\$2,211,100,528	6	10.5%
Copper and Articles Thereof	\$2,131,429,731	7	\$2,206,679,878	7	3.5%
Plastics and Articles Thereof	\$1,939,339,585	8	\$2,078,733,339	8	7.2%
Optical, Photo, Medical or Surgical Instruments	\$2,061,342,435	9	\$2,007,134,986	9	-2.6%
Beverages, Spirits and Vinegar	\$1,849,896,677	10	\$1,952,496,578	10	5.5%
TOP TEN TOTAL			\$51,393,783,321		

Data Source: U.S. Census Bureau TOP TEN SHARE OF TOTAL WATERBORNE CARGO \$86.6 BILLION: 59.4%



While goods from China remain at the top of Florida’s imports, the value between 2018 and 2019 decreased by 17 percent.⁵³ Florida’s decrease is consistent with the broader national decline in Chinese imports, which saw a 16 percent decrease from 2018 to 2019.⁵⁴ This overall decline, in part, can be attributed to the U.S. government’s trade dispute with China which has yielded staggered tariff schedules, applied to thousands of products valued at hundreds of billions of U.S. dollars. According to the U.S. Trade Representative, the U.S. first imposed tariffs on Chinese imports due to findings from an investigation into China’s “acts, policies, and practices related to technology transfer, intellectual property, and innovation.”⁵⁵ The tariff regime began in 2018 and continued through 2019, narrowing the U.S. trade balance from a record high of \$-418.9 billion in 2018 to \$-345.2 billion in 2019.⁵⁶

⁵³ Exhibit 5: FL Ports Top Import Partners by Country NOTE: Raw data shows China as #2 import partner in 2019; SMP Workbooks 2020-2024 (This Year) Exhibit 5 shows China as #1.
⁵⁴ <https://www.census.gov/foreign-trade/balance/c5700.html>

⁵⁵ <https://ustr.gov/about-us/policy-offices/press-office/press-releases/2019/december/united-states-and-china-reach>
⁵⁶ <https://www.census.gov/foreign-trade/balance/c5700.html>

EXHIBIT #8

FLORIDA TOP TEN WATERBORNE IMPORT COMMODITIES
(IMPORT AND EXPORT) 2018 TO 2019

	2018		2019		
COMMODITY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2019 OVER 2018
TOTAL ALL COMMODITIES	\$54,197,490,321		\$53,797,665,660		-0.7%
Vehicles, Except Railway Or Tramway, And Parts Etc.	\$12,737,182,580	1	\$13,111,843,438	1	2.9%
Apparel Articles And Accessories, Knit Or Crochet	\$5,018,805,028	2	\$4,933,233,759	2	-1.7%
Electric Machinery Etc.; Sound Equip; Tv Equip; Pts.	\$3,242,460,122	3	\$3,444,864,977	3	6.2%
Mineral Fuel, Oil Etc.; Bitumin Subst; Mineral Wax	\$2,937,755,958	4	\$3,129,726,357	4	6.5%
Industrial Machinery, Including Computers	\$2,429,835,274	5	\$2,303,698,302	5	-5.2%
Furniture; Bedding Etc.; Lamps Nesoi Etc; Prefab Bd.	\$1,723,699,495	7	\$1,609,790,045	6	-6.6%
Fish, Crustaceans & Aquatic Invertebrates	\$1,565,349,489	10	\$1,575,953,862	7	0.7%
Copper And Articles Thereof	\$1,986,114,204	6	\$1,551,178,863	8	-21.9%
Apparel Articles And Accessories, Not Knit Etc.	\$1,606,725,017	9	\$1,525,527,255	9	-5.1%
Beverages, Spirits And Vinegar	\$1,610,182,518	8	\$1,508,058,388	10	-6.3%
TOP TEN TOTAL			\$34,693,875,246		
Data Source: U.S. Census Bureau					
TOP TEN SHARE OF TOTAL WATERBORNE IMPORTS \$53.8 BILLION: 64.5%					

EXHIBIT #9

FLORIDA TOP TEN WATERBORNE EXPORT COMMODITIES
(IMPORT AND EXPORT) 2018 TO 2019

	2018		2019		
COMMODITY	VALUE OF TRADE	RANK	VALUE OF TRADE	RANK	PERCENT CHANGE 2019 OVER 2018
TOTAL ALL COMMODITIES	\$33,139,609,103		\$32,768,767,383		-1.1%
Industrial Machinery, Including Computers	\$6,133,614,724	1	\$6,100,109,793	1	-0.5%
Vehicles, Except Railway Or Tramway, And Parts Etc.	\$5,164,902,239	2	\$4,692,617,917	2	-9.1%
Electric Machinery Etc.; Sound Equip; Tv Equip; Pts.	\$2,837,947,729	3	\$2,842,887,891	3	0.2%
Fertilizers	\$1,486,998,034	4	\$1,394,783,276	4	-6.2%
Plastics And Articles Thereof	\$1,167,951,339	5	\$1,170,579,395	5	0.2%
Essential Oils Etc.; Perfumery, Cosmetic Etc Preps	\$995,288,770	6	\$941,517,494	6	-5.4%
Optic, Photo Etc., Medic Or Surgical Instrments Etc.	\$823,942,191	8	\$916,819,377	7	11.3%
Cotton, Including Yarn And Woven Fabric Thereof	\$881,790,652	7	\$872,798,184	8	-1.0%
Ships, Boats And Floating Structures	\$646,388,208	10	\$845,181,459	9	30.8%
Meat And Edible Meat Offal	\$698,025,957	9	\$718,009,486	10	2.9%
TOP TEN TOTAL			\$20,495,304,272		
Data Source: U.S. Census Bureau					
TOP TEN SHARE OF TOTAL WATERBORNE EXPORTS \$32.8: 62.6%					



HOW DO WE PREDICT WATERBORNE CARGO TRADE TO CHANGE IN 2020?

It is likely that, for a variety of reasons, U.S. trade with China will continue to contract in 2020 due to both increased costs and risks. The impact of tariffs will continue making trade with China less attractive. COVID-19 exposed many manufacturing and supply chain vulnerabilities tied to the world's overreliance on China, causing manufacturers to reconsider their choices of production locations. In particular, the pharmaceutical industry is likely to diversify production facility locations outside China in an effort to minimize risk and improve supply chain resiliency.

EXHIBIT #10

FLORIDA CONTAINERIZED WATERBORNE TRADE BY SEAPORT
(BY VALUE) 2018 TO 2019

	2018		2019		
PORT	CONTAINERIZED CARGO VALUE	TOTAL WATERBORNE CARGO VALUE	CONTAINERIZED CARGO VALUE	TOTAL WATERBORNE CARGO VALUE	CHANGE IN TOTAL WATERBORNE CARGO VALUE 2019 OVER 2018
Canaveral	\$37,643,136	\$1,577,160,683	\$34,541,006	\$1,437,778,865	-8.8%
Everglades	\$20,093,788,745	\$24,403,731,018	\$18,378,432,116	\$22,684,928,147	-7.0%
Fernandina	\$109,060,100	\$158,573,138	\$84,154,965	\$125,130,277	-21.1%
Fort Pierce	\$1,066,833	\$4,784,211	\$678,761	\$5,404,423	13%
Jacksonville	\$9,723,379,688	\$25,677,929,340	\$9,985,242,005	\$26,547,422,956	3.4%
Manatee	\$287,650,670	\$973,196,487	\$445,448,195	\$1,060,220,013	8.9%
Miami	\$23,376,855,500	\$25,664,657,271	\$23,990,343,390	\$26,188,773,498	2.0%
Palm Beach	\$1,860,347,174	\$2,345,233,241	\$1,815,664,812	\$2,518,692,574	7.4%
Panama City	\$755,361,300	\$2,839,931,348	\$666,657,188	\$2,445,892,735	-13.9%
Pensacola	\$23,742,640	\$37,575,873	\$8,371,442	\$58,406,964	55.4%
Tampa	\$1,111,901,322	\$3,654,326,814	\$1,229,064,989	\$3,493,782,591	-4.4%
TOTAL	\$57,380,797,108	\$87,337,099,424	\$56,638,598,869	\$86,566,433,043	-0.9%

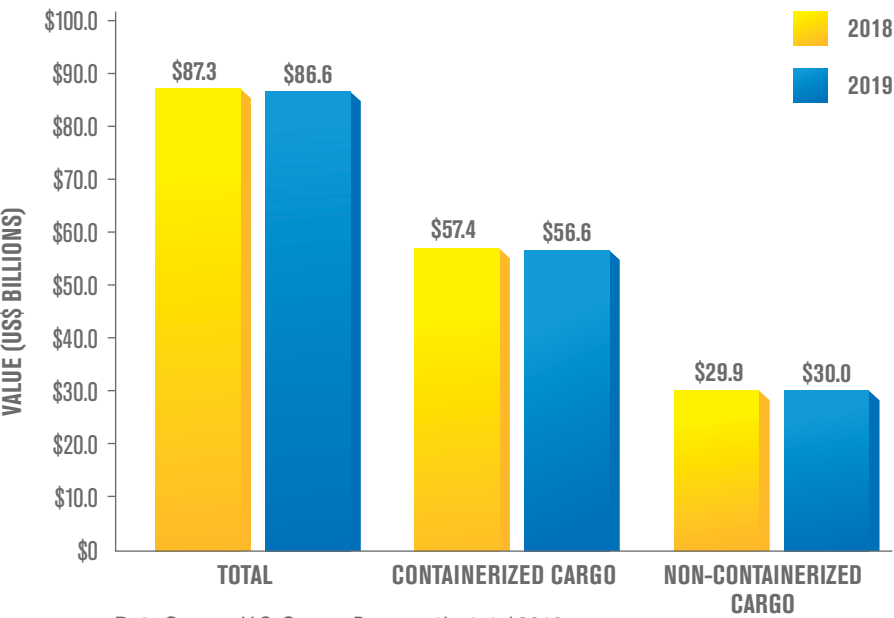
Data Source: U.S. Census Bureau - the total 2019 international trade value basis is \$86.6 billion. This figure does not include Puerto Rican or other domestic cargo. No cargo handled at the following ports: Citrus, Key West, St. Joe or St. Petersburg.



While the two aforementioned events flared in recent months and resulted in highly visible changes, a slow trend to move manufacturing out of China and into other parts of Asia has been simmering in recent years and will undoubtedly continue in 2020. Rising income has grown the size and wealth of China’s middle class, driving up the cost of labor and doing business. Many countries in Southeast Asia – such as Vietnam, Thailand and Malaysia – have benefited from China’s declining market share.⁵⁷

EXHIBIT #11

**COMPARISON OF FLORIDA
CONTAINERIZED AND NON-CONTAINERIZED CARGO
(BY VALUE)**



Data Source: U.S. Census Bureau - the total 2019 international trade value basis is \$86.6 billion

Declining Chinese imports present an opportunity for both East Coast and Gulf Coast seaports. Whereas West Coast ports have developed a robust trade lane with China, a competitive all-water route to East Coast markets from Southeast Asia through the Suez Canal is gaining popularity.⁵⁸

EXHIBIT #12

**FLORIDA WATERBORNE IMPORTS AND EXPORTS BY SEAPORT
(BY VALUE) 2018 TO 2019**

	2018			2019		
PORT	IMPORTS	EXPORTS	TOTAL	IMPORTS	EXPORTS	TOTAL
Canaveral	\$1,542,287,322	\$34,873,361	\$1,577,160,683	\$1,386,872,829	\$50,906,036	\$1,437,778,865
Everglades	\$11,769,212,802	\$12,634,518,216	\$24,403,731,018	\$10,480,180,016	\$12,204,748,131	\$22,684,928,147
Fernandina	\$4,356,749	\$154,216,389	\$158,573,138	\$19,668,775	\$105,461,502	\$125,130,277
Fort Pierce	\$625,360	\$4,158,851	\$4,784,211	\$432,368	\$4,972,055	\$5,404,423
Jacksonville	\$19,198,826,259	\$6,479,103,081	\$25,677,929,340	\$20,292,939,989	\$6,254,482,967	\$26,547,422,956
Manatee	\$870,458,850	\$102,737,637	\$973,196,487	\$907,818,255	\$152,401,758	\$1,060,220,013
Miami	\$15,852,168,363	\$9,812,488,908	\$25,664,657,271	\$16,209,698,474	\$9,979,075,024	\$26,188,773,498
Palm Beach	\$473,998,768	\$1,871,234,473	\$2,345,233,241	\$520,192,735	\$1,998,499,839	\$2,518,692,574
Panama City	\$2,367,942,756	\$471,988,592	\$2,839,931,348	\$1,989,272,753	\$456,619,982	\$2,445,892,735
Pensacola	\$7,751,498	\$29,824,375	\$37,575,873	\$51,732,415	\$6,674,549	\$58,406,964
Tampa	\$2,109,861,594	\$1,544,465,220	\$3,654,326,814	\$1,938,857,051	\$1,554,925,540	\$3,493,782,591
TOTAL	\$54,197,490,321	\$33,139,609,103	\$87,337,099,424	\$53,797,665,660	\$32,768,767,383	\$86,566,433,043

Data Source: U.S. Census Bureau - the total 2019 international trade value basis is \$86.6 billion. This figure does not include Puerto Rico or other domestic cargo. No cargo handled at the following ports: Citrus, Key West, St. Joe or St. Petersburg.

⁵⁷ Wilman, Mike, April 2020, ‘Major Suppliers Diversifying Manufacturing Operations Away From China’, case study, retrieved from IHS Markit

⁵⁸ https://www.joc.com/port-news/us-ports/east-gulf-coast-ports-gain-amid-china-trade-war_20191121.html

EXHIBIT #13

FLORIDA WATERBORNE IMPORT, EXPORT AND DOMESTIC BY SEAPORT (BY TONNAGE)
FY 2018/2019 (WITH PRIOR YEAR COMPARISONS)

PORT*	IMPORTS	EXPORTS	DOMESTIC	TOTAL
Canaveral	4,666,889	89,283	1,572,923	6,329,095
Everglades	7,388,785	3,501,634	14,735,240	25,625,659
Fernandina	275,000	425,000	0	700,000
Fort Pierce	0	3,485	589	4,074
Jacksonville	10,048,381	2,482,546	8,185,867	20,716,794
Manatee	3,393,666	262,726	5,923,730	9,580,122
Miami	5,745,631	4,375,938	0	10,121,569
Palm Beach	410,137	1,404,568	494,065	2,308,770
Panama City	539,413	1,013,959	200,628	1,754,000
Pensacola	81,983	11,803	117,504	211,290
Tampa	7,044,443	5,190,267	22,228,261	34,462,971
TOTAL FY 2018/2019	39,594,328	18,761,209	53,458,807	111,814,344
TOTAL FY 2017/2018	38,729,636	17,891,659	53,646,835	110,268,130
FY 23/24 PROJECTION	48,504,178	22,466,175	58,095,907	129,066,260

Data Source: Individual seaports

* No cargo reported for ports of Citrus, Key West, Port St. Joe or St. Petersburg at this time; all figures subject to rounding, and, each port's tonnage may be subject to reassignment between categories

EXHIBIT #14

FLORIDA WATERBORNE IMPORT, EXPORT AND DOMESTIC TONNAGE PERCENTAGES
FY 2016/2017 TO FY 2018/2019

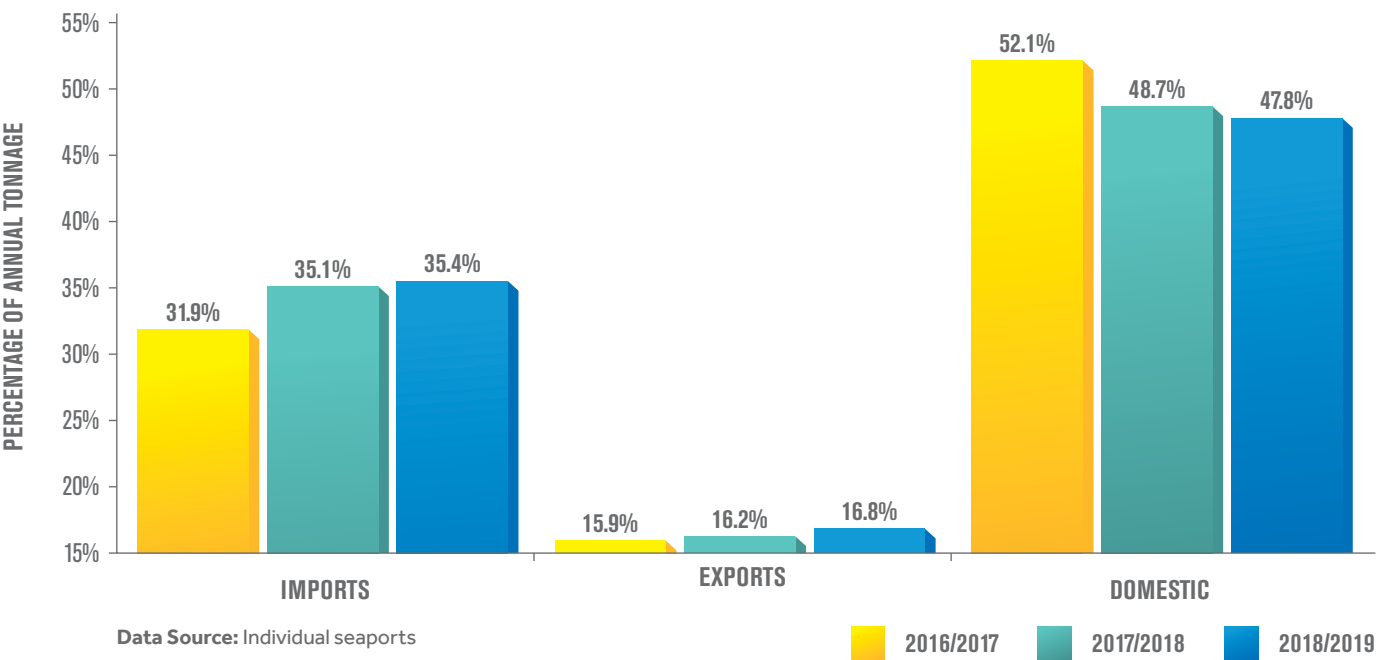


EXHIBIT #15

WATERBORNE CARGO TYPES HANDLED BY FLORIDA SEAPORTS (BY TONNAGE)
FY 2018/2019 (WITH PRIOR YEAR COMPARISONS)

PORT*	DRY BULK	LIQUID BULK	BREAK-BULK**	CONTAINER CARGO	TOTAL
Canaveral	2,087,202	3,850,344	384,465	7,084	6,329,095
Everglades	1,544,332	16,937,058	346,575	6,797,694	25,625,659
Fernandina	15,000	0	370,000	300,000	700,000
Fort Pierce	0	0	4,074	0	4,074
Jacksonville	6,426,244	5,142,084	4,010,028	5,138,437	20,716,793
Manatee	2,239,965	6,318,989	485,992	535,176	9,580,122
Miami	0	0	1,716	10,119,854	10,121,570
Palm Beach	552,150	320,581	91,621	1,344,157	2,308,770
Panama City	893,858	33,162	662,557	164,386	1,754,000
Pensacola	132,479	0	64,638	14,173	211,290
Tampa	12,088,807	20,948,729	764,784	660,651	34,462,971
TOTAL FY 2018/2019	25,980,037	53,550,947	7,186,450	25,081,612	111,814,344
TOTAL FY 2017/2018	24,272,345	53,874,255	7,128,571	24,992,959	110,268,130
TONNAGE CHANGE 2018/2019 OVER 2017/2018	1,707,692	-323,308	57,879	88,653	1,530,916
Percentage of Tonnage Change 2018/2019 over 2017/2018	7.0%	-0.6%	0.8%	0.4%	1.4%

Data Source: Individual seaports

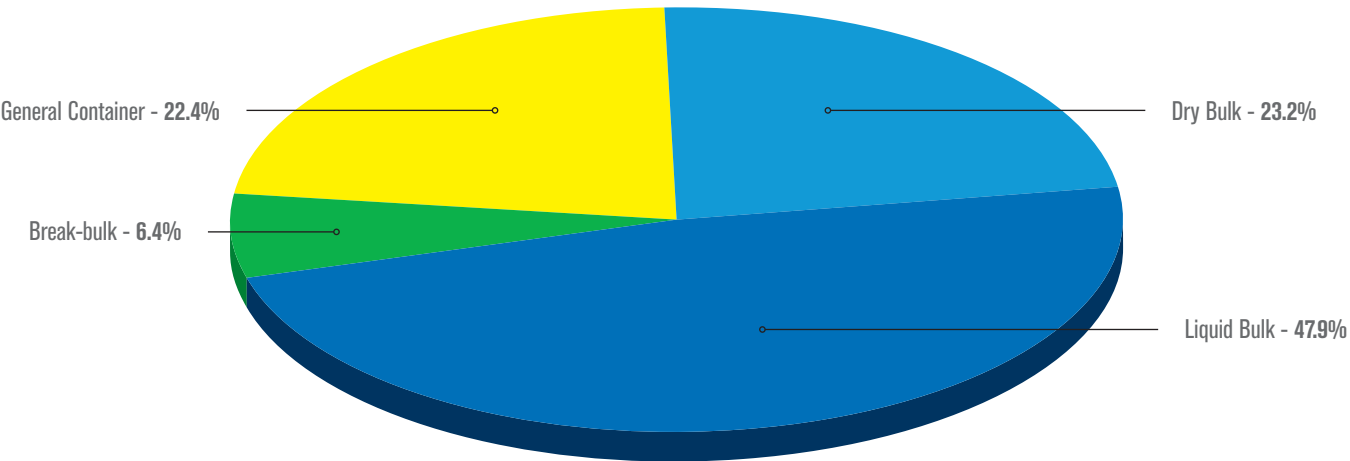
* No cargo reported for ports of Citrus, Key West, Port St. Joe or St. Petersburg at this time, all figures subject to rounding and each port's tonnage may be subject to reassignment between categories

** Break-bulk is defined to include all non-containerized general cargo



EXHIBIT #16

PERCENTAGE OF WATERBORNE CARGO TYPES HANDLED BY FLORIDA SEAPORTS
FY 2018/2019



Data Source: Individual seaports
Total FY 2018/2019 cargo volume is 111 million tons. Break-bulk is defined to include all non-containerized general cargo



EXHIBIT #17

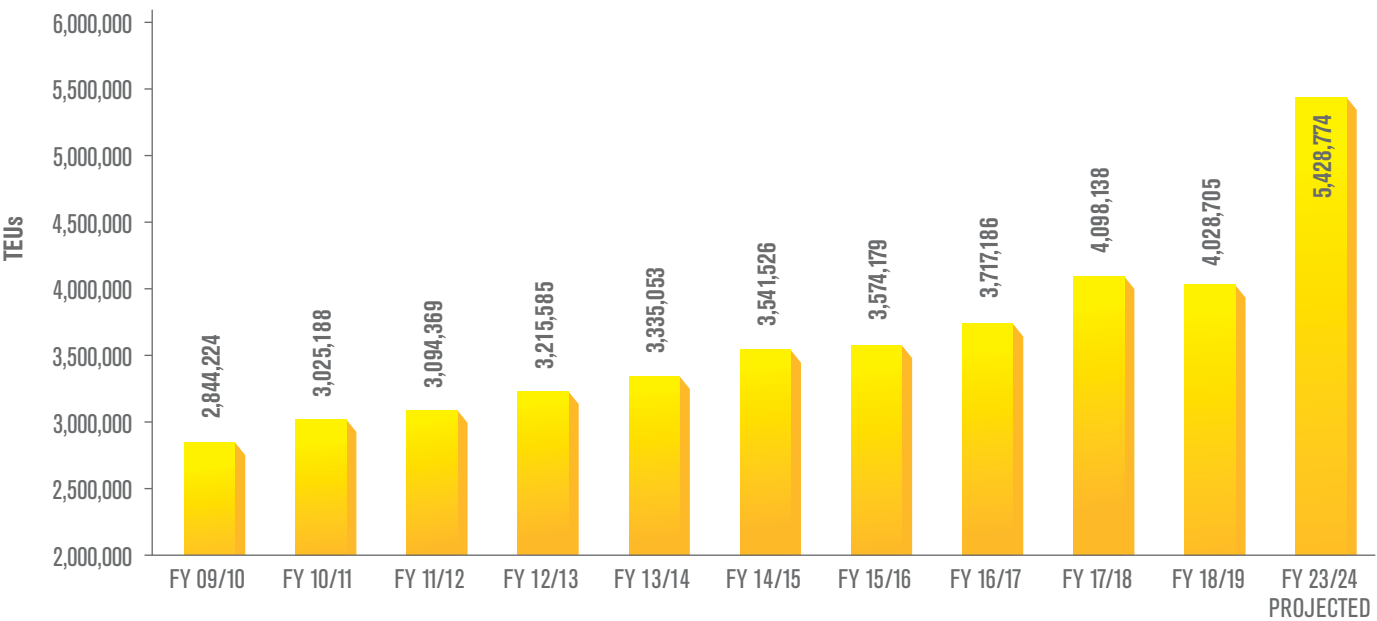
THREE-YEAR COMPARISON OF CONTAINER TEUs HANDLED BY FLORIDA SEAPORTS
FY 2016/2017 TO FY 2018/2019

PORT	FY 2016/2017	FY 2017/2018	FY 2018/2019	FY 2018/2019 RANKING	PROJECTED FY 2023/2024
Canaveral	11,394	7,126	1,490	9	143,689
Everglades	1,076,893	1,108,466	1,053,078	3	1,291,000
Fernandina	0	88	0	11	0
Fort Pierce	10,006	8,000	15,000	8	70,000
Jacksonville	1,189,531	1,431,391	1,358,756	1	1,775,650
Manatee	39,726	38,199	57,255	6	73,054
Miami	1,024,335	1,083,586	1,120,913	2	1,270,000
Palm Beach	279,290	292,304	279,900	4	324,481
Panama City	29,456	38,092	35,750	7	80,000
Pensacola	0	3,448	900	10	900
Tampa	56,555	87,526	105,663	5	400,000
TOTAL	3,717,186	4,098,226	4,028,705		5,428,774

Data Source: Individual seaports; all figures subject to rounding

EXHIBIT #18

CONTAINER TEUs HANDLED BY FLORIDA SEAPORTS
FY 2008/2009 TO FY 2017/2018



Data Source: Individual seaports

CRUISE & YACHTS

KEY TAKEAWAYS

- **Sunshine State** cruising increased 8.7 percent between FY 2017/2018 and FY 2018/2019 for a total passenger count of 18.3 million.
- The cruise industry’s direct expenditures generate a total economic impact of 154,646 jobs and \$7.69 billion in income across the state.
- Florida seaports accounted for nearly 60 percent of U.S. port embarkations – the largest net importer of cruise passengers in the country.
- Florida’s seaports work closely with the cruise line industry to welcome technological and environmental advances.
- For many years, Florida has been a global hub for megayachts, both for extended marina stays and, increasingly, for maintenance.
- Despite a banner year in 2019, the cruise line industry will contract significantly in 2020 due to stringent travel restrictions imposed in an effort to slow the spread of COVID-19.

LEADING THE WORLD IN CRUISING

Charting a course through industry trends and strategic investments has allowed Florida’s seven major cruise ports to remain true to the goals of exceptional service and optimum facilities for passengers. The cruise industry’s direct expenditures generate a total economic impact of 154,646 jobs and \$7.69 billion in income across the state.⁵⁹ Not only has Florida benefited from record cruise passenger growth, but also from the adoption of technological advances that will shape the industry in coming years.



⁵⁹ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf> Pg. 48

EXHIBIT #19

REVENUE CRUISE PASSENGERS AT FLORIDA SEAPORTS FY 2018/2019 (WITH PRIOR YEAR COMPARISON AND FY 2023/2024 PROJECTIONS)							
	FY 2017/2018			FY 2018/2019			PROJECTED FY 2023/2024
PORT	ONE-DAY	MULTI-DAY	TOTAL	ONE-DAY	MULTI-DAY	TOTAL	TOTAL
Canaveral	272,572	4,568,431	4,841,003	251,160	4,634,154	4,885,314	5,669,648
Everglades	128,934	3,741,408	3,870,342	119,153	3,773,062	3,892,215	4,597,074
Jacksonville	0	199,899	199,899	0	194,665	194,665	194,655
Key West	0	865,909	865,909	0	913,323	913,323	913,323
Miami	48,863	5,503,212	5,552,075	41,936	6,781,880	6,823,816	8,500,000
Palm Beach	0	462,674	462,674	0	449,457	449,457	536,385
St. Petersburg	755	0	755	0	0	0	5,000
Tampa	0	1,043,329	1,043,329	0	1,149,289	1,149,289	1,300,000
TOTAL	451,124	16,384,862	16,835,986	412,249	17,895,830	18,308,079	21,716,085

Data Source: Individual seaports

The One-Day columns includes passenger counts from casino cruises, day cruises, and passenger-only ferries, but excludes harbor tours and fishing excursions; the Multi-Day columns include passenger counts from home-ported vessels and port-of-call vessels

TECHNOLOGICAL ADVANCES

Florida’s three most active cruise ports maintain competitiveness by tailoring facility upgrades to keep pace with innovation. PortMiami is preparing to dock the next line of cruise ships at its modern facilities, recently unveiling options for new cruise berths, terminals, and parking facilities.⁶⁰ With the goal of expanding its cruise market, in 2019 Port Everglades completed construction on one of the industry’s most advanced cruise terminals.⁶¹ The new terminal, constructed using green building practices, features the latest check-in technology for enhanced passenger processing and redesigned roadways for improved ground accessibility.⁶² Port Canaveral will soon call itself the homeport of Carnival Cruise Line’s Mardi Gras, their largest and newest class of ship and the first Liquified Natural Gas (LNG) powered cruise ship in North America.⁶³



⁶⁰ PortMiami Port Profile
⁶¹ Port Everglades Port Profile
⁶² <https://www.porteverglades.net/articles/post/celebrity-edge-arrives-at-new-port-everglades-terminal/>
⁶³ Port Canaveral Port Profile



NUMBER OF CRUISE SHIPS BASED IN FLORIDA

Since 2010, Florida cruise ports have seen a 30 percent increase in passenger embarkations.⁶⁴ According to the Cruise Line International Association’s (CLIA) 2019 Economic Impact Study, Florida seaports accounted for nearly 60 percent of all U.S. port embarkations⁶⁵ — the largest net importer of cruise passengers in the country.⁶⁶ In 2019, Florida ports served as home to 92 cruise vessels.⁶⁷ The scope of economic activity generated at these ports represents significant value for the tourism industry in Florida. Tourism-related businesses such as hotels, airlines, travel agencies, restaurants, and ground transportation services received about \$3.8 billion, or 45 percent of the cruise industry’s direct expenditures in the state.⁶⁸

Carnival Corporations & plc., Royal Caribbean Cruises, Ltd., Norwegian Cruise Line Holdings, MSC Cruises (USA) Inc., and Disney Cruise Lines are all headquartered in Florida.⁶⁹ Following the successful terminal opening at PortMiami in 2018,⁷⁰ Royal Caribbean began work expanding corporate headquarters at the port.⁷¹ Port Canaveral partnered with Carnival Cruise Line to build a state-of-industry terminal by July 2020 to receive the line’s innovative Mardi Gras ship.⁷²

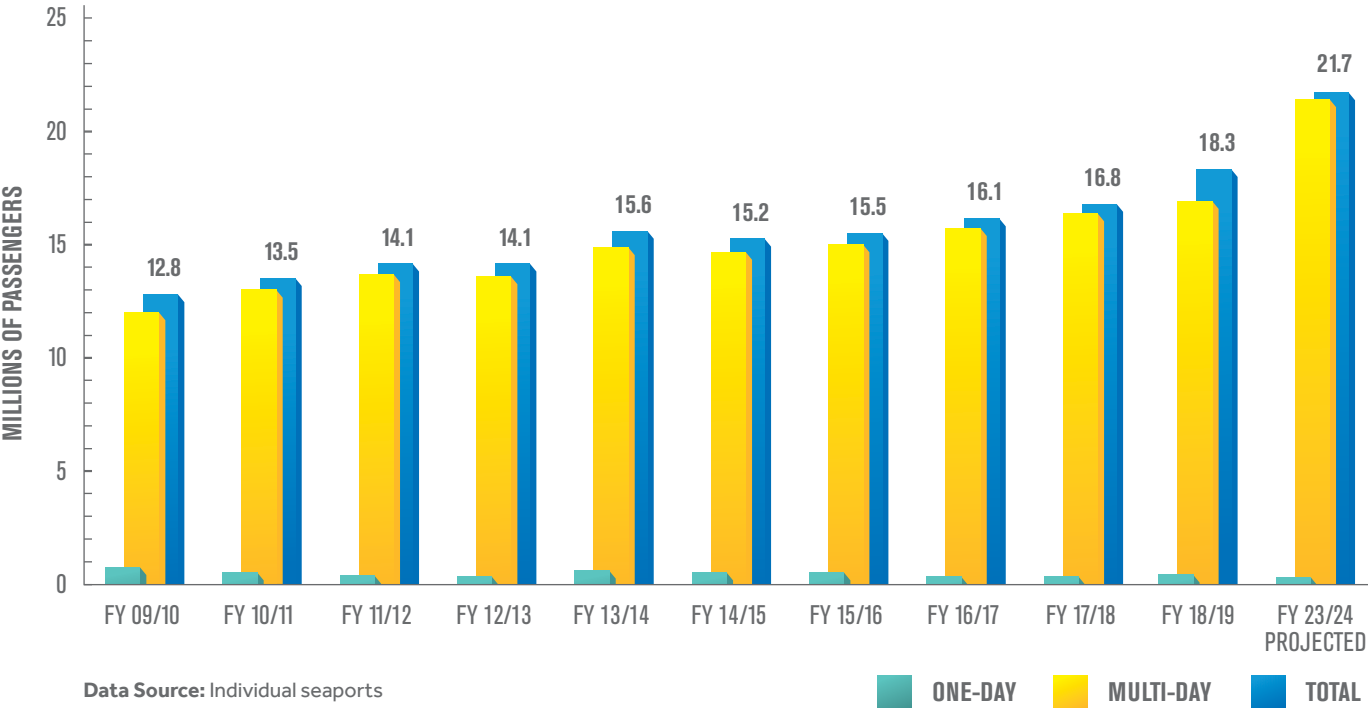
GREEN MARINE

Port Everglades is the first seaport in the United States to voluntarily enter a partnership agreement with the U.S. Environmental Protection Agency (EPA) – EPA Air Emissions Study – to study air emissions in a seaport scenario. The study includes emissions from ocean-going vessels, harbor vessels, cargo handling equipment, on-road vehicles, and rail operations.

⁶⁴ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf> Pg. 12
⁶⁵ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf> Pg. 46
⁶⁶ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf> Pg. 46
⁶⁷ <https://www.porttb.com/cruise>, PortMiami Port Profile, Port Canaveral Questionnaire & Data, Port Everglades Port Profile, JAXPORT Port Profile, Port Palm Beach Port Profile (*note : no homeport vessels at Key West or St. Pete)
⁶⁸ <https://cruising.org/-/media/research-updates/research/contribution-of-the-international-cruise-industry-to-the-us-economy-2018.pdf> Pg. 47
⁶⁹ Pg. 42 of SMP 2019-2023 word version
⁷⁰ <https://www.sun-sentinel.com/travel/florida-cruise-guide/fl-fea-royal-caribbean-new-terminal-port-miami-20181105-story.html>
⁷¹ <https://www.royalcaribbeanblog.com/2020/03/26/royal-caribbean-has-paused-construction-its-new-miami-headquarters-due-coronavirus>
⁷² Port Canaveral Port Profile

EXHIBIT #20

REVENUE CRUISE PASSENGERS AT FLORIDA SEAPORTS
FY 2009/2010 TO FY 2018/2019



CRUISE TRENDS

The cruise industry’s total global output is estimated at \$150 billion.⁷³ For scale, this is roughly the size of Hungary’s 2018 GDP, as reported by the World Bank.⁷⁴ The industry sustains economic growth by adapting to shifts in consumer trends, such as offering studio cabins and single-friendly activities to accommodate the increase in passengers traveling alone.⁷⁵ Additionally, many cruise lines debuted options for three-to-five day cruises, as mini vacations have become a popular travel choice.⁷⁶

Between FY 2017/2018 and FY 2018/2019, Florida passenger counts increased by 8.7 percent. Growth can be attributed to multiday cruises, as one-day cruise passenger counts dropped by 8.6 percent in this period. PortMiami’s passenger growth was the most significant, increasing by nearly 1.3 million.



⁷³ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 19
⁷⁴ https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?most_recent_value_desc=false
⁷⁵ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 10
⁷⁶ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 10



CLIA CRUISE INDUSTRY OUTLOOK

In December 2019, CLIA's Cruise Industry Outlook 2020 projected 32 million passengers would embark on cruises worldwide in 2020.⁷⁷ On January 30, 2020, the World Health Organization declared COVID-19 a public health emergency of international concern. As such, governments around the world placed strict limitations on both domestic and international travel, resulting in cruise travel being severely restricted in 2020. Long-term impacts are unknown at this time.

The travel and hospitality industry have been among the hardest hit in the early days of COVID-19. Despite the inevitability of poor numbers in 2020, the trendline shows great promise for recovery. According to CLIA's 2019 study, industry trends for 2020 show 66 percent of Generation X and 71 percent of Millennials have a more positive attitude about cruising compared to two years ago.⁷⁸ At the height of the Great Recession in 2009, 17.8 million passengers boarded cruises. That number steadily increased over a ten-year period and CLIA's 2019 passenger projections estimate 30 million guests, an increase of 68 percent.⁷⁹ U.S. market demand, which represents more than half of the globe's cruise passengers, buoys the industry.⁸⁰

The cruise industry has a deep commitment to environmental stewardship and sustainability, adopting energy-efficient technologies and cleaner fuels. CLIA projections indicate that 44 percent of new ships will be fueled by LNG.⁸¹ Within 10 years, the industry anticipates reducing its share of carbon emissions by 40 percent from 2008 levels.⁸² CLIA members have invested over \$22 billion to equip ships with new, environmentally-safe technology, such as exhaust gas cleaning systems and shore-side power.⁸³ Powered by a record of innovation and response, the cruise industry continues to enhance destination stewardship and promote responsible tourism through increased partnerships with local governments, excursion diversification, and staggered arrivals and departures.^{84, 85}

⁷⁷ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 12

⁷⁸ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 10

⁷⁹ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 12

⁸⁰ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 16 U.S figure and divide by 28.5 million on Pg. 19

⁸¹ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 8

⁸² <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 6

⁸³ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 6-7

⁸⁴ <https://cruising.org/-/media/research-updates/research/state-of-the-cruise-industry.pdf> Pg. 9

⁸⁵ <https://www.globenewswire.com/news-release/2019/12/12/1960111/0/en/Cruise-Lines-International-Association-CLIA-Releases-2020-State-of-the-Cruise-Industry-Outlook-Report.html>

YACHTS OF FLORIDA

Florida, in particular South Florida, for years has been a megayacht global hub. Megayachts arrive for extended marina stays after long voyages, and increasingly, for maintenance, refit and overhaul (MRO). Florida's public ports are active in the growing MRO market.

Port St. Pete markets itself as the only superyacht marina on Florida's Gulf Coast. Its location in the heart of downtown St. Petersburg presents the ideal itinerary, offering shopping, golfing, dining, parks, beaches, as well as scores of galleries and museums, including the world-renowned Dali Museum.

The Port of Palm Beach leases a berth and related facilities to Berth One Palm Beach, which accommodates megayachts as long as 450 feet for a range of services, including refit.

The Port of Fort Pierce recently took a pivotal step into the megayacht market. St. Lucie County purchased the former Indian River Terminal and selected Derecktor Shipyards to convert the outdated cargo facility into a 12.5-acre purpose-built shipyard. This will include the refit of 200 ft+ yachts and large

TAPPING INTO A MEGAYACHT NICHE

The St. Lucie Board of County Commissioners took a bold decision to purchase the former Indian River Terminal, which was converted into Derecktor Ft. Pierce, LLC. Beginning operations on November 1, 2019, the "purpose-built" megayacht facility for the maintenance, refit, and overhaul of very large yachts and large sailing vessels creates a niche unserved by any western hemisphere port, while growing the market worldwide.

sailing vessels that will generate a projected 891 jobs and an economic output of \$105 million. The world's largest mobile shiplift is slated to be operational at the Port of Fort Pierce in 2020.





FLORIDA PORT PROFILES

PORT CANAVERAL

PORT MIAMI

PORT EVERGLADES

PORT OF PALM BEACH

PORT OF FERNANDINA

PORT PANAMA CITY

PORT OF FORT PIERCE

PORT OF PENSACOLA

JAXPORT

PORT OF PORT ST. JOE

PORT OF KEY WEST

PORT ST. PETE

PORT MANATEE

PORT TAMPA BAY

PORT CANAVERAL

Canaveral Port Authority

FOREIGN-TRADE ZONE **#136**

YEAR PORT WAS ESTABLISHED: **1953**

Port Canaveral is a world-class gateway for cruises, cargo, recreation and logistics, as well as a portal to new frontiers in space. In its fiscal year ending Sept. 30, 2019, Port Canaveral hosted nearly 4.6 million revenue cruise passengers through its state-of-industry terminals and saw movement of 6 million of tons of cargo, including dry and liquid bulk, breakbulk, project and containerized goods.

Port Canaveral has a significant role and responsibility in building and sustaining a strong economy on Florida's Space Coast and the Central Florida region – now the 10th-largest consumer market in the United States, with economic growth well above the national average. The port and its Foreign-Trade Zone No.136 furnish a unique quadrimodal transportation hub, linking sea, land, air and space with the benefits of a first-class seaport that includes easy highway access, unrestricted air draft, 43-foot deepwater sea access and uncongested multipurpose berthing.

Port Canaveral has tailored its growth deliberately and strategically. Approximately 75 percent of the port's total revenue is derived from its cruise business, but, with an increasingly diversified cargo portfolio and growing needs of the region's commercial space operations, the port is investing in increasing capacity with harbor and landside infrastructure improvements, such as new and renovated cruise terminal facilities and building and refurbishing multipurpose deepwater berths to keep pace with demands and promote economic prosperity for the region.

State-of-industry terminal facilities and multipurpose deepwater berths are critical to meeting the needs of today's larger, more sophisticated vessels, adding value to the port's capabilities and helping maintain the port's competitive position for handling future business demands.

Port Canaveral's significant growth is boosting its economic impact across Florida. A newly released study shows the port's operations in 2018 contributed \$3.85 billion in economic impacts, while supporting 32,650 jobs, with \$1.3 billion in wages and an estimated \$107.2 million in Florida tax revenues.



Named "World's Best Cruise Port" by Global Traveler Magazine in 2019, Port Canaveral is soon to become North America's first liquefied natural gas cruise port. Port Canaveral is to be the homeport for Carnival Cruise Line's Carnival Mardi Gras – a 180,000-gross-registered-ton ship powered by cleaner-burning LNG, slated to arrive at the port's new Cruise Terminal 3. The \$163 million terminal project is the largest in the port's 66-year history.

As part of its nearly three-year preparation and planning for the arrival of the groundbreaking cruise ship, Port Canaveral expanded its maritime firefighting academy to offer advanced LNG firefighting certification training for firefighters, shipboard personnel and LNG fuel operators and transporters. The port also has on order a high-tech fireboat designed and purpose-built to provide enhanced marine firefighting and rescue capabilities. The \$4.8 million 65-foot-long marine firefighting rescue vessel is targeted for delivery in fall 2020. It is to be equipped with conventional and dry-chemical firefighting apparatus to ensure safety of the port's growing maritime operations and expanding space enterprises in the region.

GOALS & OBJECTIVES

- Expand the LNG footprint and service capabilities for the cruise lines
- Work with commercial space companies to accommodate the increasing requirements of their expanding enterprise
- Balance berth utilization with the highest demand for bulkhead space in the Port's history

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Cruise Terminal 3 Complex and Roadway Expansion
- North Cargo Berth 8 Uplands Improvement and Pier Extension
- Cruise Terminals 8 & 10 Renovations and Roadway Expansion

ACCOMPLISHMENTS

- \$110 million in total revenue for 2019 (highest in Port history)
- Historic long-term 25-year agreement signed with Carnival Cruise Line includes homeporting their largest and newest class of ship and the first LNG powered cruise ship in North America
- A new mobile harbor crane (largest in USA) acquired late 2018 and put into service early 2019 to handle a variety of cargo including heavy lift of rocket boosters for commercial space



TOP TRADE PARTNERS (by value)

IMPORTS

- Bahamas
- Canada
- Japan
- South Korea
- Netherlands

EXPORTS

- Bahamas
- Canada
- Ascension
- Costa Rica
- Germany

TOP COMMODITY TRADED (by value)

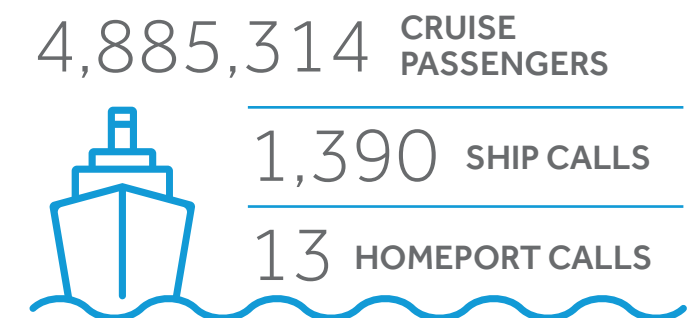
IMPORTS

- Petroleum
- Slag
- Limestone
- Granite
- Salt

EXPORTS

- Salt
- Petroleum
- Containers
- Vehicles
- Machinery

2019 CRUISE ACHIEVEMENTS



portcanaveral.com

PORT EVERGLADES

Broward County Board of County Commissioners, Port Everglades Department

FOREIGN-TRADE ZONE **#25**

YEAR PORT WAS ESTABLISHED: **1927**

Caribbean cruise vacations and international trade are what make Port Everglades an economic powerhouse for Broward County and one of the most diverse seaports in the United States.

Port Everglades is located in the heart of one of the world's largest consumer regions, with a combined 110 million residents and seasonal visitors within a 500-mile radius. With its proximity to the Caribbean, Port Everglades is the third-busiest cruise homeport in the world. And it is a leading container port in Florida and among the most active cargo ports in the United States.

Port Everglades is also South Florida's main seaport for receiving petroleum products, including gasoline and jet fuel. Approximately 38 percent of the petroleum consumed in the state of Florida, including jet fuel for four international airports, is stored and distributed by companies located within Port Everglades. A foreign-trade zone and available office space inside the port's controlled-access area make Port Everglades a highly desirable business center for world trade.

The port's diversified cargo mix includes containers, refrigerated cargo (fifth in the nation), new and used automobiles and trucks, dry bulk, breakbulk, project, roll-on/roll-off and liquid bulk. The Florida East Coast Railway's 43-acre international and domestic intermodal container transfer facility makes it possible for cargo shipped to Port Everglades to reach Atlanta and Charlotte within two days and 70 percent of the U.S. population within four days.

Port Everglades hosts nearly 4 million passengers annually, sailing on a variety of itineraries offered by nine different cruise lines and one daily ferry service. Guests enjoy the port's proximity to three international airports, including the rapidly growing Fort Lauderdale-Hollywood International Airport (FLL) less than 2 miles away. For pre- and post-cruise stays, Port Everglades is a short drive from sweeping beachfronts, a vibrant art scene, world-class restaurants, craft breweries, entertainment,



shopping, casinos and family-friendly activity destinations – including the namesake Florida Everglades.

Port Everglades follows an aggressive, comprehensive master/vision plan that, to strategize for upcoming capital improvements, is updated every two to four years to reanalyze and update market trends; changes in the cruise, cargo shipping and petroleum industries; local planning initiatives and evolving technologies. This in-depth analysis provides a projective and substantiated market-driven and environmentally sound, phased roadmap for guiding cost-feasible capital investments over the next 20 years.

During 2020, Port Everglades is to unveil its latest master/vision plan update, to include a five-year master plan through fiscal 2023; a 10-year vision plan for fiscal years 2024 to 2028; and a 20-year vision plan through fiscal years 2029 to 2038.

The Port Everglades Department is a self-supporting enterprise fund of Broward County government. It does not rely on local tax dollars for operations or capital improvements. The total annual value of economic activity at Port Everglades is nearly \$34 billion. And 231,579 Florida jobs are impacted by the port, including 13,127 people who work for companies that provide direct services to Port Everglades.

GOALS & OBJECTIVES

- Complete the Southport Turning Notch Extension and Crane Rail Infrastructure project
- Expand the cruise market
- Complete the U.S. Army Corps of Engineers Navigation Improvements Project

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Southport Turning Notch Expansion New and three new Super Post-Panamax gantry cranes largest infrastructure project in the Port's history; allows for new cargo berths by lengthening the existing notch from 900 feet to 2,400 feet and installing crane rail infrastructure to handle new Super Post-Panamax gantry cranes
- Harbor Improvement Project to include deepening of the Port's navigational channel from 42 to 48 feet and widening narrow sections of the Intracoastal Waterway
- New International Logistics Center will contain warehouse, refrigerated warehouse and office space, and cross-docking facilities; divided into two buildings the scheduled completion is September 2020

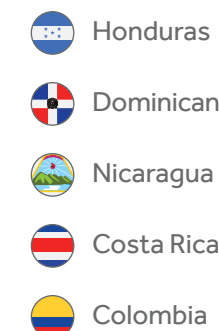
ACCOMPLISHMENTS

- Completed construction of Cruise Terminal 2, in time for the arrival of Celebrity Cruises' first new ship class in a decade, Celebrity Edge on November 19, 2019
- Exceeding 1 million TEUs for six consecutive years
- Obtaining a signed Chief of Engineer's Report and Congressional authorization for the U.S. Army Corps of Engineers Port Everglades Navigation Improvement Project

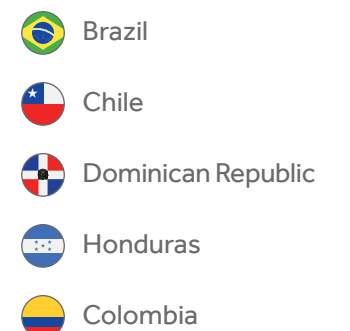


TOP TRADE PARTNERS (by value)

IMPORTS

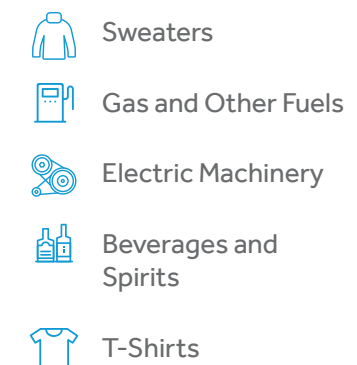


EXPORTS

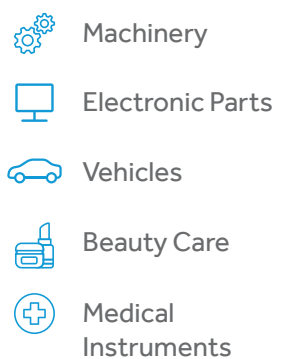


TOP COMMODITY TRADED (by value)

IMPORTS



EXPORTS



2019 CRUISE ACHIEVEMENTS

3,892,215 CRUISE PASSENGERS



902 SHIP CALLS

35 HOMEPORT CALLS

porteverglades.net

PORT OF FERNANDINA

Ocean Highway and Port Authority, Nassau County

YEAR PORT WAS ESTABLISHED: **1941**

The Port of Fernandina is located on Florida's Atlantic coast and provides terminal service to more than 14 pulp and paper producers located throughout Florida and the Southeastern United States, as well as steel export services to several steel companies with mills in the Southeast.

To better accommodate customers, capital investments of \$15 million are planned for the coming years to modernize the Port's on-dock paper warehouse, add cranes and cargo handling equipment, and complete a berth extension. The Port currently has 250,000 square-feet of on-port warehouse facilities, over 100,000 square-feet of off-port warehouse facilities, and daily on-dock rail service. It also has a fully certified Container Freight Station, and will soon be adding Foreign-Trade Zone designation.

GOALS & OBJECTIVES

- Formulating long-term master plan/capital improvement plan with emphasis on impacts to environment
- Increase containerized cargo
- Diversify breakbulk commodities
- Explore additional revenue streams to Port Authority

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Berth deepening
- 1000' Pier extension
- 500,000 square foot on-dock warehouse

ACCOMPLISHMENTS

- Worldwide Terminals completed its second full year of operations at the Port of Fernandina
- Closed on \$27.6 million in Port Infrastructure Bonds and \$8 million in matching funds
- Commenced long-term capital investment plan of \$15 million (Phase I)
- Deepened Berths to 40 feet



TOP TRADE PARTNERS (by value)

IMPORTS

- Brazil
- Europe
- Sweden
- Finland
- China

EXPORTS

- Ecuador
- Dominican Republic
- Bermuda
- Central America
- Caribbean

TOP COMMODITY TRADED (by value)

IMPORTS

- Wood Pulp
- Steel
- Lumber
- Oats
- Plywood

EXPORTS

- KLB
- Lumber
- Containerized Cargo
- Food Aid
- Containers KLB Lumber



PORT OF FORT PIERCE

St. Lucie County

FOREIGN-TRADE ZONE **#218**

YEAR PORT WAS ESTABLISHED: **1920**

In 1918, a special act of the Florida Legislature established a taxing district to fund the construction of the Fort Pierce Inlet. St. Lucie County became the port authority and has remained so through an act of legislature since that time.



Beginning in 1920, with the actual completion of the Fort Pierce Inlet, the port thrived, first as a hub for the coastwise shipping of Florida citrus and produce. The port was then converted into a U.S. Navy base in World War II before finally establishing itself as a shipping hub to the Bahamas.

The Port of Fort Pierce has been unique among Florida ports in that its working waterfront, the Indian River Terminal and much of the rest of the port were held in private ownership. That changed in January 2018, when St. Lucie County acquired the terminal with a goal of transforming it from a dated cargo facility to a purpose-built shipyard for the maintenance, refit and overhaul of megayachts.

Culminating a nearly yearlong procurement process, Derecktor Shipyards, one of the world's leading maintenance, refit and overhaul (MRO) companies, assumed control of the operations and development of the terminal on November 1, 2019.

GOALS & OBJECTIVES

- Job creation and economic growth through successful development and operation of the former Indian River Terminal by Derecktor Ft. Pierce, LLC
- Development of vast undeveloped port properties
- Development of robust job training/ apprenticeship programs

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

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

ACCOMPLISHMENTS

- Acquisition of the former Indian River (Cargo) Terminal
- Selection of Derecktor Shipyards, Inc. to operate the former Indian River Terminal for the operation and development of megayacht maintenance, refit, overhaul facility
- Demolition of the 50+ year-old citrus packing house to provide critical uplands space for megayacht MRO



ENVIRONMENTAL STEWARDSHIP

The St. Lucie County Artificial Reef Program, supported by port facilities, is among the most active and subsidized in the State, supporting counties throughout Florida.

SOURCE: SMP 2019-20 Questionnaire (Port of Ft. Pierce)



Port of Fort Pierce



Located in the heart of the Southeastern United States, at the crossroads of rail and highway networks, JAXPORT is a preferred global gateway to Florida, the nation's third-most-populous state. Jacksonville is Florida's largest container port by volume and the nation's second-busiest vehicle-handling port.

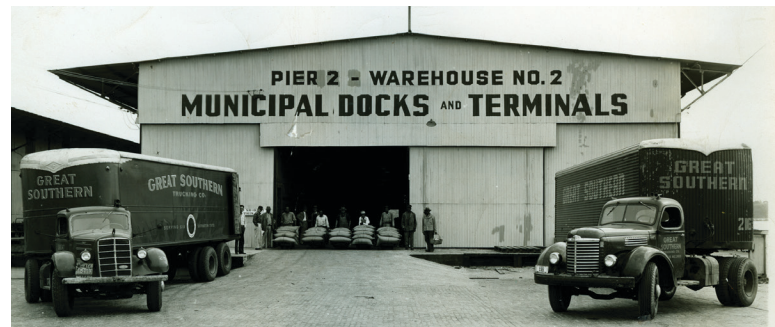
JAXPORT owns, maintains and markets three cargo terminals, two intermodal rail terminals and one passenger cruise terminal along the St. Johns River: Blount Island Marine Terminal, Dames Point Marine Terminal, Talleyrand Marine Terminal, Talleyrand Intermodal Container Transfer Facility (ICTF), Dames Point ICTF and JAXPORT Cruise Terminal.

Dozens of ocean carriers call JAXPORT, offering shippers competitive transit times to 140 ports in more than 70 countries. JAXPORT offers ocean carrier services to all major world regions, including regular container service connecting Jacksonville with Asia, South America, the Caribbean and Central America, as well as customized container freight shipments and transshipment options to and from Europe and Africa.

Port terminals are within minutes of three major Interstate highways – I-10, I-75 and I-95 – providing access to more than 70 million consumers within one day's drive. JAXPORT is served by 100 trucking firms and 40 daily trains via Class I railroads CSX and Norfolk Southern and regional Florida East Coast Railway. JAXPORT's intermodal connections offer seamless access to markets throughout the Southeast and Midwest, including Mississippi and Ohio river valleys.

Leading vehicle processors AMPORTS, Wallenius Wilhelmsen Solutions and Southeast Toyota Distributors combine for more than 300 acres of auto processing on port terminals, making Jacksonville one of the nation's largest vehicle-handling centers.

Port enhancements – including deepening the Jacksonville shipping channel to 47 feet, as well as construction of a state-of-the-art international container terminal and new auto terminal – are currently under way to accommodate continued growth.



Northeast Florida offers numerous advantages for manufacturers, including 138 million square feet of competitively priced warehousing and distribution space, a labor force of 845,000-plus workers and streamlined clearances via Foreign-Trade Zone No. 64. As one of the South Atlantic's most diversified ports, JAXPORT has experienced labor for a variety of specialty cargos, including breakbulk, fresh and frozen, forest products, high and heavy, project cargo and more.

Jacksonville is also a convenient, centrally located drive-to cruise market. The port is home to the 2,056-passenger Carnival Ecstasy, offering four- and five-day cruises to tropical Bahamian and Eastern Caribbean destinations.

The region is a global leader in the use of liquefied natural gas as a clean marine fuel. JAXPORT is the only U.S. East Coast port to offer on-dock and near-dock LNG fueling capabilities for ships, and four LNG-powered vessels are homeported in Jacksonville.

JAXPORT is Northeast Florida's economic engine, with cargo activity through Jacksonville's seaport supporting more than 26,000 jobs in Northeast Florida, with nearly \$31.1 billion in annual economic output for the region and state. This impact is expected to grow as JAXPORT and its partners continue to invest in building the port of the future.

GOALS & OBJECTIVES

- Expansion of LNG as a marine fuel at JAXPORT
- Additional electric cranes added for cargo handling
- Increased usage of JAXPORT's ICTF to reduce truck emissions on the road.

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Rehab of deep-water berths 33 and 34 to accommodate the world's largest ships
- Buildout of the SSA Jacksonville Container Terminal on Blount Island which will create capacity to efficiently handle cargo from the world's largest ships
- Buildout of new auto processing terminal at Dames Point to create capacity for JAXPORT to remain a national leader in the import/export of ro-ro vehicles.

ACCOMPLISHMENTS

- Completed funding for the first 8 miles of the 11-mile Harbor Deepening Project. This deepens the harbor to 47 feet to accommodate post-Panamax vessels. Construction began in 2018 and will be completed in 2023 – two years ahead of schedule.
- As part of the infrastructure improvements required to accommodate the largest vessels and support 100-gauge cranes, JAXPORT completed rehab of deep-water berths 34 and 35.



TOP TRADE PARTNERS (by value)

IMPORTS

- Northeast Asia
- East Coast South America
- Southeast Asia
- Central America
- Northern Europe

EXPORTS

- East Coast of South America
- Caribbean
- Northeast Asia
- Middle East
- Africa

TOP COMMODITY TRADED (by value)

IMPORTS

- All Others
- Motor Vehicles
- Medical
- Machinery
- Apparel

EXPORTS

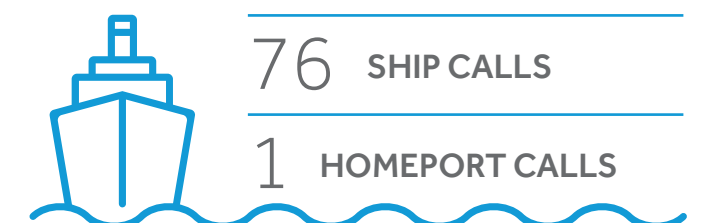
- All Others
- Motor Vehicles
- Machinery
- Medical
- Electronics/ Instruments

2019 CRUISE ACHIEVEMENTS

194,655 CRUISE PASSENGERS

76 SHIP CALLS

1 HOMEPORT CALLS



PORT OF KEY WEST

City of Key West

YEAR PORT WAS ESTABLISHED: **1823**

The Port of Key West, Florida's most southern port, consists of three docking facilities: Mallory Square, the Navy's Outer Mole Pier, and the privately-owned Pier B at the Margaritaville Key West Resort. These facilities constitute one of the busiest cruise ports of call in the nation and one of the state's strongest and most sustained ferry-port operations. During 2018-19 approximately 393 ships and 913,323 passengers visited Key West. In 2019-20 the City expects 416 ships and 890,000 passengers. The port hosts cruise ships from Miami, Port Everglades, Canaveral, Tampa and Jacksonville as well as ferries from Fort Myers and Marco Island.



Due to the recent closure of Cuba, the port is seeing increased port calls from Carnival, Royal, MSC and Celebrity cruise lines. The port was able to accommodate an additional 46 calls within a six-month period. The Port of Key West is a major economic engine for the city and local businesses, resulting in an economic impact annually of \$85 million. The port provides 1,250 direct and indirect jobs to the 25,000 citizens of Key West, while contributing 15 percent of the city's total tax revenue. Key West is one of the most popular ports in the Caribbean and is typically included in 7- and 10-day Western Caribbean or Bahamian itineraries. As a general rule, cruise ship passengers can expect to spend between 6 and 10 hours ashore in Key West; the average port calls to the city in 2018 lasted 7¾ hours, while in 2019 the average port calls to the city lasted 8¼ hours. These passengers are introduced to the unique charm of Key West without contributing vehicular traffic to the overburdened US-1 corridor.

GOALS & OBJECTIVES

- Mallory T-Pier Extension and Plaza improvements
- Improvements in passenger port of call experiences
- Improvements in passenger movement and disbursement

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Mallory T-Pier Berthing Improvement
- Security Check Point Enhancements
- Emergency repairs to breasting dolphin damaged by cruise ship

ACCOMPLISHMENTS

- Truman Waterfront Park Development Outer Mole Pier: the 33-acre former site of the Key West Naval base was redeveloped into an exceptional urban park to offer residents and visitors an opportunity to experience the historical origin of Key West
- Truman Waterfront Security Access Entry Points Outer Mole Pier
- Mallory T-Pier & Bollards refurbishing & repairs



2019 CRUISE ACHIEVEMENTS

913,323 CRUISE PASSENGERS

393 SHIP CALLS

CityOfKeyWest-FL.gov

PORT MANATEE

Manatee County Port Authority

FOREIGN-TRADE ZONE **#169**

YEAR PORT WAS ESTABLISHED: **1970**

Port Manatee is one of Florida's fastest-growing deepwater seaports, handling a diverse array of bulk, breakbulk, containerized and heavylift project cargos. Located at the entrance to Tampa Bay, Port Manatee is the closest U.S. deepwater seaport to the expanded Panama Canal, with 10 40-foot-draft berths offering seamless intermodal connectivity and competitive rates at its prime location.



Port Manatee plays a key role in literally fueling Southwest Florida's economy, serving as gateway for nearly 475 million gallons a year of gasoline and related fuels.

In recent years, Port Manatee has attracted additional ocean carrier services, including direct weekly services of World Direct Shipping between Mexico and Port Manatee, while continuing to be the preferred U.S. Southeast gateway for long-time tenant Del Monte Fresh Produce. At the same time, Port Manatee has established itself as a project cargo trendsetter, with the opening of Air Products. Port Manatee's \$60 million liquefied natural gas heat exchanger fabrication facility immediately across U.S. 41 from port property.

In 2020, Port Manatee celebrates its 50-year anniversary, as its remarkable record of growth continues with new initiatives and infrastructure enhancements. Repaving of the port's roadways is intended to better support burgeoning traffic volumes, while lengthening of Berth 4 to 1,000 feet from its present 600 feet aims to maximize operating capacity. An additional 15 acres of container yard is designed to help efficiently accommodate growing containerized cargo activity.

Businesses benefit from use of land surrounding the port, with the Florida International Gateway encompassing almost 5,000 acres of largely undeveloped sites adjacent to Port Manatee. Port Manatee's Foreign-Trade Zone No. 169 allows many businesses within a 60-mile radius or 90-minute drive to defer, reduce or even eliminate costly U.S. Customs duties. No other property within Florida offers more direct, extensive and beneficial incentives to attract development of logistically focused manufacturing, processing, warehousing and distribution facilities.

Meanwhile, the International Trade Hub at Port Manatee, based at the Port Manatee Intermodal Center, is bolstering efforts to foster productive links for global commerce between markets in Florida and throughout the world. Launched in 2014, the trade hub recently opened promotional offices in Latin America and Europe, broadening its reach. The hub has conducted expo-style showcases throughout Florida and received visits from high-level government and trade officials representing more than a dozen nations, including Argentina, Canada, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Germany, Guatemala, Honduras, Japan, Mexico, Peru, Poland and Spain.

Port Manatee is one of Manatee County's leading economic engines, continuously focused on development of commerce and creation of jobs. Big businesses are increasingly drawn to the port and surrounding land, offering hundreds of new jobs in maritime and related industrial sectors. The port generates more than \$2.3 billion in annual economic impacts, while supporting more than 24,000 jobs for the region, without levying ad-valorem taxes.



GOALS & OBJECTIVES

- Expanding berth capacity
- Increasing market diversity
- Increasing cargo staging capacity

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Rehab of Berth 6 and extension of Berth 4
- Intermodal Container Yard Phase II
- Construction of a drop trailer lot

ACCOMPLISHMENTS

- Continued increases in cargo tons and revenue
- Renewals or new lease agreements with leases expiring after 50 years
- Nearly 50% increase in TEUs
- AAPA Communications Award of Distinction for the Port Manatee 2019 Directory



TOP TRADE PARTNERS (by value)

IMPORTS

- Brazil
- Costa Rica
- Mexico
- Portugal
- Argentina

EXPORTS

- Colombia
- Australia
- Guatemala
- Peru
- Costa Rica

TOP COMMODITY TRADED (by value)

IMPORTS

- Petroleum Products
- Citrus Juices
- Fruits and Vegetables
- Fly Ash
- Aluminum

EXPORTS

- Paper Products
- Fertilizer
- Project Cargo
- Steel
- Medical

portmanatee.com

PORTMIAMI

Board of County Commissioners, Miami-Dade County

FOREIGN-TRADE ZONE **#281**

YEAR PORT WAS ESTABLISHED: **1905**

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

After completing more than \$1 billion of capital improvements on the cargo side, including a deep water channel with a depth of -50/52 feet, the acquisition of new super Post-Panamax gantry cranes, upgrades to on-dock intermodal rail providing connectivity to 70% of U.S. population in less than four days, and a fast access tunnel link to the U.S. interstate highway system, the world's largest container shipping alliances have made PortMiami their preferred port solidifying its position as a world class global gateway. To date, the Port has welcomed more than 300 Post-Panamax vessels requiring a -39 ft. draft or deeper that could not have called without the completion of these projects.



For the fifth consecutive year, PortMiami has surpassed the 1 million TEU mark and this past year exceeded 1.1 million TEUs. Last year the Cruise Capital of the World set another world record in cruise passenger traffic with nearly 6.8 million vacationers sailing through PortMiami. And recently, the Port launched a new modern cruise era making renovations and improvements including options for new cruise berths, terminals, and parking facilities in preparation for the next of cruise ships. The PortMiami team is continuously looking at ways to enhance its and is committed to continue offering optimum infrastructure combined with impeccable customer service.

GOALS & OBJECTIVES

- Maintain, improve and enhance cruise facilities necessary to accommodate the projected number of cruise passengers and ships
- Maintain, improve and enhance cargo facilities to accommodate the projected cargo volume demands
- Operate with top security measures and ensure compatibility of its facilities and operations with surrounding communities and the natural environment

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- New Cruise Terminals B, H, AA/AAA, F expansion and roadway improvements
- New and Rehabilitated Bulkheads/Berths
- Cargo Container Yard Infrastructure Improvements, including infrastructure for eRTGs, Post-Panamax gantry cranes, and state-of-the-art cargo gate facilities

ACCOMPLISHMENTS

- Consistent cargo growth reflecting over 1 million TEUs for five years in a row
- Cruise growth increase to a record 6.79 million passengers in FY2019 along with new contracts for continued growth.
- Continuous safe and secure operations in a sustainable environment.



TOP TRADE PARTNERS (by value)

IMPORTS

- China
- Honduras
- Dominican Republic
- Nicaragua
- Guatemala

EXPORTS

- Honduras
- Dominican Republic
- El Salvador
- Indonesia
- Jamaica



TOP COMMODITY TRADED (by value)

IMPORTS

- Apparel
- Machinery
- Aluminum
- Manufactured Plastic Products
- Furniture

EXPORTS

- Machinery
- Waste Products
- Apparel
- Motor Vehicles
- Medical

2019 CRUISE ACHIEVEMENTS

6,823,816 CRUISE PASSENGERS

1,288 SHIP CALLS

36 HOMEPORT CALLS



PORT OF PALM BEACH

Board of Port Commissioners, Port of Palm Beach District

FOREIGN-TRADE ZONE **#135**

YEAR PORT WAS ESTABLISHED: **1915**

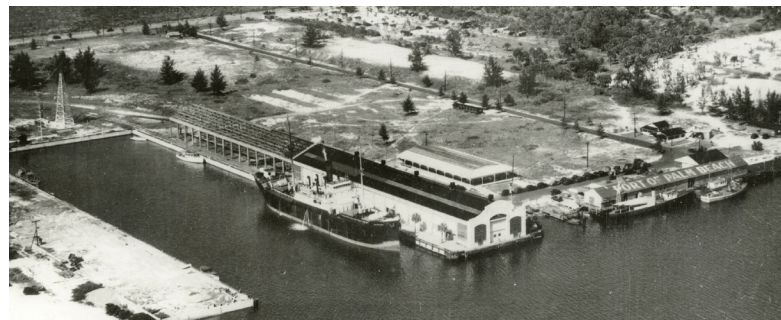
The Port of Palm Beach is a full-service diversified landlord port located in Riviera Beach. The port and its dozens of tenants continue to constitute a powerful engine for economic development and job creation, employing more than 3,800 people in the South Florida region and the state.

At only 162 acres, the port can handle any size cargo. Its efficiency is unparalleled, annually processing more than \$7 billion in commodities, with food being the port's primary export sector. Almost 80 percent of all goods passing through the port are exported, making the Port of Palm Beach one of only 16 "export ports" in the United States.

More than 2.5 million tons of cargo and 462,000 cruise passengers move through the Port of Palm Beach on an annual basis, generating at least \$254 million in business revenue. The Port of Palm Beach is an important distribution center for commodities shipped all over the world, especially into the Caribbean Basin. Operations include those handling containerized, dry bulk, liquid bulk, breakbulk, roll-on/roll-off and heavylift project cargos. Additionally, the port has, since 1987, provided Foreign-Trade Zone No. 135 to the region, encompassing both port and private-sector sites.

The Port of Palm Beach consistently ranks as the fourth-busiest container port among Florida's 15 deepwater ports. The port has three slips, 17 berths and seven roll-on/roll-off ramps. It offers 6,500 linear feet of berthing space to accommodate vessels as many as 700 feet long and 100 feet wide. With an operating draft of 33 feet at mean low water, the port's docks are a 20-minute transit from the first sea buoy.

The port is easily accessible from Interstate 95, Florida's Turnpike and Florida East Coast Railway, allowing for seamless, cost-effective cargo movement. Florida East Coast Railway provides twice-daily service to the port's rail interchange. Offering the convenience of on-dock rail, the port owns and operates a locomotive and 6.5 miles of track. The industrial switching operation is capable of handling box, hopper and double-stack rail cars, with 24/7



operations. Rail operations can accommodate 20-axle rail cars, with 450-ton capacity.

In addition to servicing the on-port cargo tenants, the Port of Palm Beach works with its exclusive cruise line, Bahamas Paradise Cruise Line. Its two ships – the Grand Celebration and Grand Classica – offer two-night cruises to Grand Bahama Island and Nassau. The cruise line also offers a unique cruise-and-stay program to its passengers.

The port is a special taxing district, a subdivision of the State of Florida, governed by five elected commissioners. The port has not levied any taxes for the past 43 years.

GOALS & OBJECTIVES

- Continuing to maximize energy efficiency
- Maintaining manatee protection initiatives
- Preserving coral reefs

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Rail Improvements
- Cargo Gate and Interchange Relocation
- Slip2 Bulkhead Replacement








ACCOMPLISHMENTS






- Berth 17 Construction
- MOB Teardown / Refrigerated Container Yard Expansion Project
- Berth 1 Bulkhead Reconstruction

TOP TRADE PARTNERS (by value)

IMPORTS

-  Canada
-  Virgin Islands
-  Bahamas
-  Leeward & Windward
-  Dominican Republic






EXPORTS

-  Bahamas
-  Leeward & Windward
-  Virgin Islands
-  Turks & Caicos Islands
-  Trinidad & Tobago








TOP COMMODITY TRADED (by value)

IMPORTS

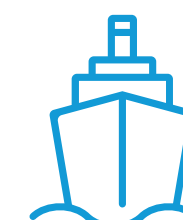
-  General Cargo
-  Boats & Parts
-  Vegetables
-  Synthetic Resins & Plastics
-  Womens Clothing

EXPORTS

-  Grocery Products
-  General Cargo
-  Scientific Measuring Equipment
-  Precious Metals
-  Boats and Parts

2019 CRUISE ACHIEVEMENTS

449,457 CRUISE PASSENGERS



283 SHIP CALLS

2 HOMEPORT CALLS

portofpalmbeach.com

PORT PANAMA CITY

Panama City Port Authority

FOREIGN-TRADE ZONE **#65**

YEAR PORT WAS ESTABLISHED: **1948**

Port Panama City is a growing regional port providing port facilities and handling services for a diverse mix of cargo. Port Panama City also supports a number of major manufacturers in the region with vital port services.

Over the last five years, the port has purchased a second deepwater facility and has completed construction of a new forest products export facility. Over time, the port looks to add a second berth and additional warehouses to this facility, increasing the total annual cargo throughput capacity for the port by 1.5 million tons.



The Panama City Port Authority is moving forward with the expansion of container terminal capacity at its West Terminal. In the next year, the port is slated to construct a 70,000-square-foot container freight station and purchase a third container-handling crane. Also at the West Terminal, the port has taken the first steps toward a \$15 million expansion of its bulk storage facility, designed to support handling of an additional 300,000 tons in annual biomass exports.

Port Panama City is an active participant in regional economic development efforts. It works closely with the Bay County Economic Development Agency and Florida's Great Northwest to support the expansion of existing industries and to attract new industries to the region. The port has developed its intermodal distribution center to promote warehousing and distribution services and to provide shovel-ready industrial sites for new industries.

Recently, the Panama City Port Authority has played a significant role in attracting cooling and heating systems manufacturer Airtemp of Mexico and custom kitchen cabinet importer Clark & Son Inc. to locate their U.S. operations to Panama City. Currently, the port supports 1,200 direct jobs and another 5,800 indirect jobs in Northwest Florida. The economic benefits of the Port of Panama City are estimated to be \$1.4 billion a year.

GOALS & OBJECTIVES

- East Terminal Development
- East Channel Deepening to 38 Feet
- Expansion of Containerized Cargo Facility

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Expansion of new East Terminal
- Expansion of the Container Terminal
- Expansion of Bulk Storage Facilities

ACCOMPLISHMENTS

- Development of the new East Terminal
- Warehouse and rail yard expansion at the Port's Intermodal Distribution Center
- Securing funding for the deepening of the East Channel



TOP TRADE PARTNERS (by value)

IMPORTS

- Chile
- Mexico
- Germany

EXPORTS

- United Kingdom
- Costa Rica
- Netherlands
- Mexico

TOP COMMODITY TRADED (by value)

IMPORTS

- Copper
- Vegetables
- Lumber

EXPORTS

- Wood Pellets
- Kraft Linerboard
- Wood Pulp
- Textiles



panamacityportauthority.com

PORT OF PENSACOLA

City of Pensacola

FOREIGN-TRADE ZONE **#249**

YEAR PORT WAS ESTABLISHED: **1784**

The Port of Pensacola has been part of the city's culture and community since the first commercial dock was built in 1784. But the need for deep-water access is now blending traditional port functions with 21st-century "blue economy" activities. For example, the port is home to a former 630-foot cargo vessel now owned by Jeff Bezos' space exploration company Blue Origin. The ship will complete a major conversion that will equip the ship to serve as a landing platform vessel beginning in late 2021.



Pensacola's new strategy maintains the port's core assets for cargo and trade activity while allowing space for blue economy sectors, such as aquaculture, marine technology and biology, and ocean industry career training. It also allocates a portion of the port's outside the gate holdings for civic uses — such as harbor cruises, water taxis, maritime history centers and entertainment venues. The port's commitment to blending traditional and new ideas received two boosts last year. Pensacola Bay Oyster Company opened an oyster nursery, becoming the port's first aquaculture customer. A short time later, the New York Yacht Club selected Pensacola as the winter training base for its American Magic sailing team, which will challenge for the 36th America's Cup in Auckland, New Zealand in 2021. On the cargo front, the port continues to play a critical role supporting the local General Electric Wind Energy manufacturing facility and wind farm projects across the United

States by handling a record number of wind energy components and fully assembled wind energy generation turbines.

Further development of new niches and the handling of long standing cargo types, combined with the strategic implementation of the new vision plan, should insure that the Port of Pensacola is as important to Northwest Florida's future as it was to its past.

GOALS & OBJECTIVES

- Expand Maritime Maintenance, Modification, Repair and Overhaul (M/MMRO) operations and facilities on Port
- Diversify Port tenant base to include marine research and subsurface technology activities
- Merge Port tenants and operations seamlessly into the adjacent areas while maintaining core maritime Port activities including cargo operations and vessel maintenance repair and overhaul

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Berth #6 rehab project Phase II
- Dredging
- Rail rehabilitation and modernization

ACCOMPLISHMENTS

- Berth #6 Rehab project Phase I
- Ferry Landing
- Economic turnaround of the Port



TOP TRADE PARTNERS (by value)

IMPORTS

- Bahamas
- Mexico
- Brazil

EXPORTS

- Mexico
- Israel
- Brazil

TOP COMMODITY TRADED (by value)

IMPORTS

- Aggregate
- Monoammonium Phosphate
- Scrap Metal
- Containerized Cargo

EXPORTS

- Wind Energy Generation Components
- Woodpulp
- Linerboard Paper
- Cement

2019 CRUISE ACHIEVEMENTS



16,365

FERRY PASSENGERS



portofpensacola.com

PORT OF PORT ST. JOE

Port St. Joe Authority

YEAR PORT WAS ESTABLISHED: **1914**

Located in Gulf County, the Port of Port St. Joe offers a deepwater seaport with nearly 1,900 linear feet of frontage. The Port of Port St. Joe is well-suited for bulk and cargo shipments, offering access to rail, the U.S. Gulf Intracoastal Waterway, and state and U.S. highways. Current cargo includes shipping oyster shells to Mississippi and rock to Tampa.

One of the port's greatest assets is the approximately 300 acres of combined ready-to-be-leased lands adjacent to the bulkheads, and the more than 5,000 acres of land in the port environs available for immediate development. Businesses wishing to establish facilities have plenty of room to build and expand. Additionally, much of the bulkhead area has water, sewer and electric in place. The emerging port anticipates ongoing development, building on established domestic shipments of oyster shells and rock. With much of the basic infrastructure in place, the Port Authority and private partner, The St. Joe Company, have marketing efforts underway to ensure additional investment projects align with defined demand and support identified markets.



GOALS & OBJECTIVES

- Dredging of the shipping channel
- Port expansion and modernization to keep up with increasing domestic and international trade activity in the Panhandle
- Ensuring recovery from the Deep-Water Horizon Oil Spill and Hurricane Michael as it is essential to maintain the economic dynamism of the region and state while increasing employment opportunities and generating critical public revenues



CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Dredging of the channel to a depth of 37 feet
- Repairs to the Rail Line Leading to the Port
- Construction of a building on Port property for a factory leased to Indie Dwell Florida Home Builders

ACCOMPLISHMENTS

- Company Bulkhead
- The county along with the St. Joe company have built and improved Port facilities to the shipping bulkhead for the loading of timber onto barges
- Barge shipping of logs out of the Port

PORT ST. PETE

City of St. Petersburg

FOREIGN-TRADE ZONE **#193**

YEAR PORT WAS ESTABLISHED: **1925**

Port St. Pete, located on Tampa Bay, is a multi-use facility that capitalizes on its unique assets within the city of St. Petersburg. The Port is located in the heart of downtown St. Petersburg, just a short walk from local shops, restaurants and bars, pristine parkland, and scores of galleries and museums, including the world-renowned Dali Museum.



Port St. Pete is the only superyacht marina on Florida's Gulf Coast. The Port features a four-acre facility with outdoor storage areas and easy access to interstates, major highways and two international airports. With its existing facilities as well as the presence of many governmental, institutional and academic agencies engaged in maritime research, Port of St. Petersburg has both the institutional capacity and the infrastructure to fill a unique niche as an International Research Port.

The St. Petersburg Ocean Team (SPOT) is the premier consortium for marine science, oceanographic, and environmental research agencies and governmental institutions in the Southeast and one of the top such industry clusters in the nation. The downtown waterfront area is a major strength for the City. The City/Port staff is actively engaged with yacht captains on an interpersonal level, developing personal relationships and contacts/connections with them at events, boat shows, visits, media events, interactions, etc. The goal is to not only promote the Port, but also the City.

A number of large yachts have benefited from the amenities and services available while moored at the Port over the past several years including M/Y *Tatoosh*, one of the world's largest yachts at 302 ft. with a crew of 30. This potential large yacht opportunity for the Port has evolved as a result of the proliferation of large yachts being constructed at a rapid pace throughout the world.

The Port's 23-ft. project depth and 1,200 ft. lineal wharf continue to provide the typical services required by large vessels such as fuel, water, sewage pump out, resupply, security, crane service, customs processing, etc. As part of a recently completed \$5 million wharf renovation, the Port has installed 6 power pedestals to meet the electrical needs of visiting large vessels. The power configurations now available at the Port include 480v, 3-phase, 600 amp service, as well as a variety of other electrical configurations including 220v and 208v service.

In partnership with the St. Pete Ocean Team the City is moving forward with implementation of the marine science/research educational "experience" within the existing Port Terminal Building. This new endeavor will be open to the public and will have a strong focus on enhancing the marine science/research knowledge of school children who could be bused to the facility during school hours. Through its membership in the Florida Ports Council, the Port has received Florida Seaport Transportation and Economic Development (FSTED) Grants and City capital matching funds. These funds are currently available to make modifications to the existing Port Terminal Building to help accommodate implementation of the marine science/research educational "experience". Public access to the Port waterfront would be instantly enhanced through implementation of the Terminal Building marine science/research educational endeavor.



GOALS & OBJECTIVES

- Build a new Port facility building to expand opportunity for marine research in St. Pete
- Secure tenant interest and funding for a new passenger processing facility
- Construct additional docking areas for large yachts and other vessels



ACCOMPLISHMENTS

- New lease of Port building to USF St. Petersburg

FUTURE

The future of the Port St. Pete is bright. The large yacht market compliments the research component and maximizes utilization of the Port by providing the many services and amenities needed by large yachts for maintenance and repair. The City is thriving and provides a unique, safe destination for in-state, and out-of-state travelers.

PORT TAMPA BAY

Tampa Port Authority

FOREIGN-TRADE ZONE #79

YEAR PORT WAS ESTABLISHED: 1945

Port Tampa Bay is the largest of the Florida ports by acreage and is a critical economic engine for all of Central Florida. From a wide-ranging cargo mix to its cruise passenger popularity to its ample capacity for shipbuilding and repair, the Port is among the nation's most diverse seaports.



Port Tampa Bay is located in one of the fastest growing regions of the state and contributes \$17.2 billion annually to the local economy while supporting more than 85,000 direct and indirect jobs. In 2019, PTB welcomed three new direct, weekly trans-Pacific container shipping services, representing three of the most significant commercial developments in the Port's history. Together, Port Tampa Bay and its terminal operating partner, Ports America, have a multi-phased buildout plan to quadruple the capacity of the Port's container business to support continued growth in Central Florida.

Port Tampa Bay, a top ten U.S. cruise port, handled more than one million cruise passengers in 2019. Port Tampa Bay remains the energy conduit for all of West Central Florida, with all the gasoline, diesel fuel, jet fuel and ethanol for the region moving through the Port. As it has for more than a century, Port Tampa Bay serves as an important gateway for shipments of Florida fertilizer to domestic and global markets.

GOALS & OBJECTIVES

- Expand and diversify Port Tampa Bay business base through executing a supply chain sales strategy
- Fulfill central Florida's long-term energy requirements
- Optimize Tampa Bay's vessel access

CURRENT OR PLANNED INVESTMENTS FOR THE NEXT FIVE YEARS

- Main channel deepening – one to two feet
- Container complex expansion – Berth 214 and uplands
- Transload facility, adjacent to container complex

ACCOMPLISHMENTS

- Port Tampa Bay has secured three new direct Asian global carrier services
- Through P5 investment, Port Tampa Bay completed the expansion and deepening of the Big Bend channel, which connects to the main channel in Tampa's harbor and will allow larger vessels to dock along the channel and facilitate the movement of goods through the Port to the Interstate 4 corridor
- In 2019, Port Tampa Bay welcomed more than one million cruise passengers for a second consecutive year

TOP TRADE PARTNERS (by value)

IMPORTS

- Denmark
- Canada
- China
- Australia
- Uruguay

EXPORTS

- Denmark
- Russia
- Bahamas
- China
- Mexico

TOP COMMODITY TRADED (by value)

IMPORTS

- Misc./Cement
- Steel Products
- Fertilizers
- Industrial Chemicals
- Other Manufacturers Plastics Products

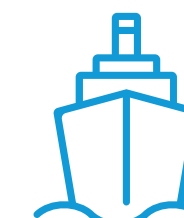
EXPORTS

- Misc.
- Fertilizers
- Industrial Chemicals
- Paper
- Beauty Care



2019 CRUISE ACHIEVEMENTS

1,149,289 CRUISE PASSENGERS



246 SHIP CALLS

1 HOMEPORT CALLS



FLORIDA SEAPORTS RESOURCE LIST

FLORIDA PORTS COUNCIL STAFF

DOUG WHEELER
President and CEO

MIKE RUBIN
*Vice President of
Governmental Affairs*

CHRISTY GANDY
Director of Administration

JESSIE WERNER
Vice President of Public Affairs

CASEY GRIGSBY
*Vice President of
Programs and Planning*

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Florida Seaport Transportation and Economic Development Council

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Port of Key West | Port Manatee | PortMiami | Port of Palm Beach | Port Panama City
Port of Pensacola | Port of Port St. Joe | Port St. Pete | Port Tampa Bay