



S E A P O R T

EXECUTIVE SUMMARY

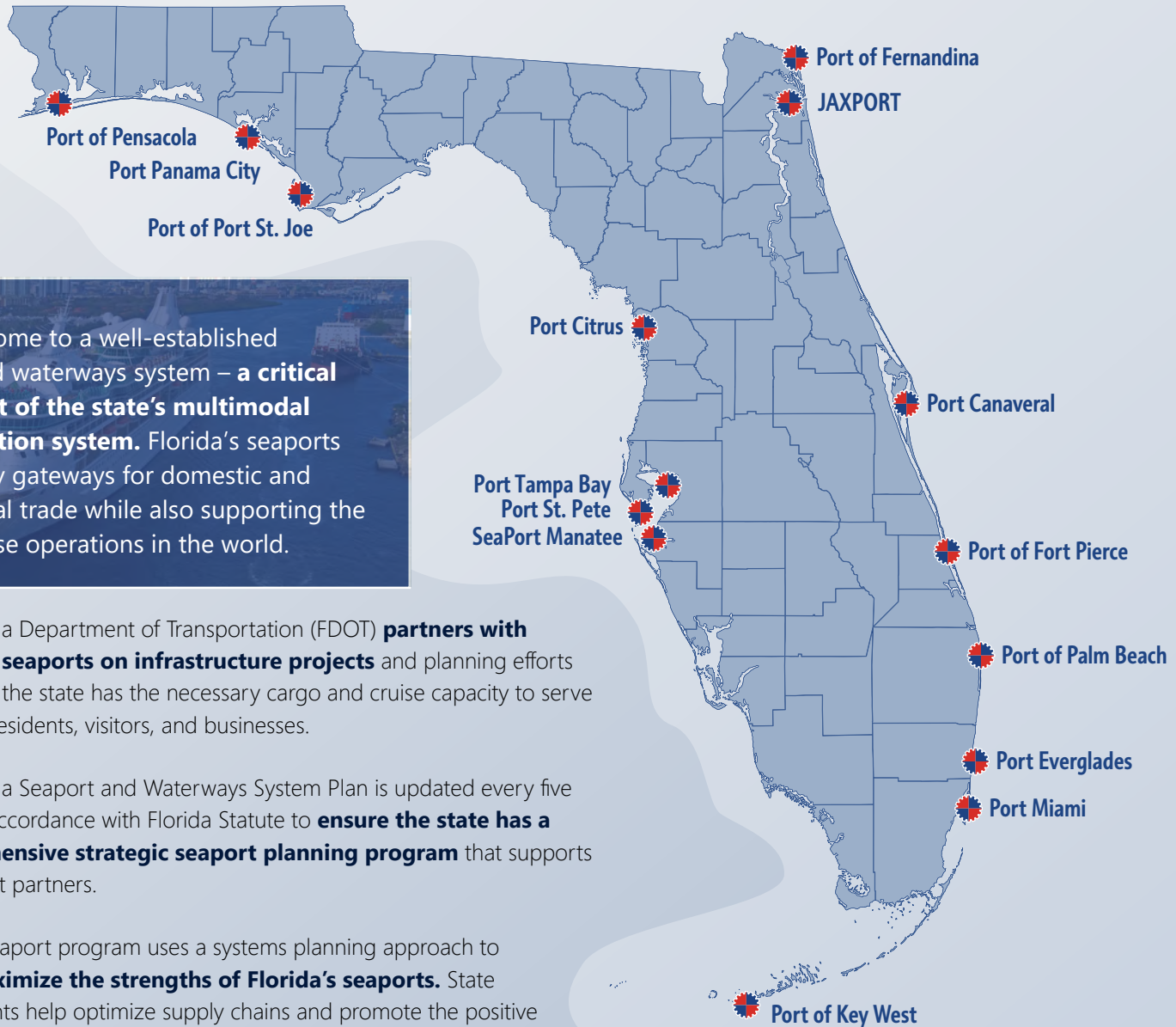
Florida Seaport and Waterways System Plan



August 2022



FLORIDA'S SEAPORT SYSTEM



Florida is home to a well-established seaport and waterways system – a **critical component of the state's multimodal transportation system**. Florida's seaports serve as key gateways for domestic and international trade while also supporting the largest cruise operations in the world.

The Florida Department of Transportation (FDOT) **partners with Florida's seaports on infrastructure projects** and planning efforts to ensure the state has the necessary cargo and cruise capacity to serve Florida's residents, visitors, and businesses.

The Florida Seaport and Waterways System Plan is updated every five years in accordance with Florida Statute to **ensure the state has a comprehensive strategic seaport planning program** that supports its seaport partners.

FDOT's seaport program uses a systems planning approach to **help maximize the strengths of Florida's seaports**. State investments help optimize supply chains and promote the positive economic impacts of our seaports across the state.

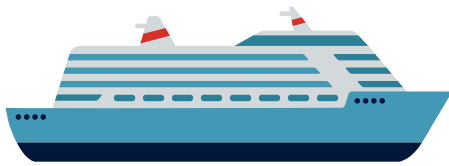
The Plan introduces the seaport and waterways system; discusses cargo and passenger trends and forecasts; summarizes seaport needs, priorities, and advantages; and presents key focus areas, themes, and strategies to **ensure the continued success of Florida's seaports**.





CURRENT AND FUTURE CARGO AND CRUISE VOLUMES AT FLORIDA SEAPORTS

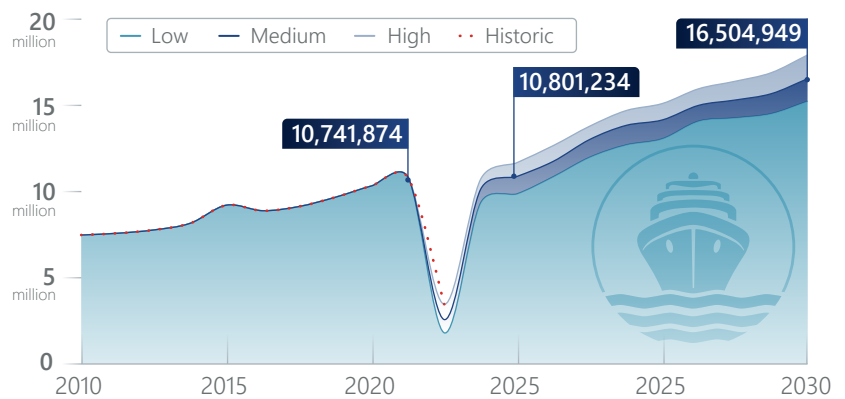
The strategic characteristics of Florida's seaport and waterways system contribute to the competitiveness and diversity of the state's maritime industries. With 14 active public seaports, **every region of the state has access to one or more deep water seaports serving as gateways to global markets.** These seaports offer a **mix of services that cover all types of cargo** as well as cruise passengers, providing multiple opportunities for market development and expansion.



Florida is home to the world's three busiest cruise ports and this **dominance in the cruise industry ensures Florida is always on the cutting edge of new cruise industry offerings**, including the newest, largest, and most advanced vessels

and cruise terminals. The variety of cruise options available makes Florida an attractive market for residents and visitors alike. This strong awareness of the industry and proximity of Florida to the Caribbean and the Bahamas supports homeport and port of call cruise operations at Florida seaports. After handling 18.3 million revenue cruise passengers in 2019, cruise traffic decreased to just under 9.6 million in 2020 due to COVID-19. The anticipated comeback of this industry, coupled with historic growth trends in the industry, indicate that Florida will continue to be home to the world's best cruise ports and handle more than 33 million revenue passengers on an annual basis by 2030.

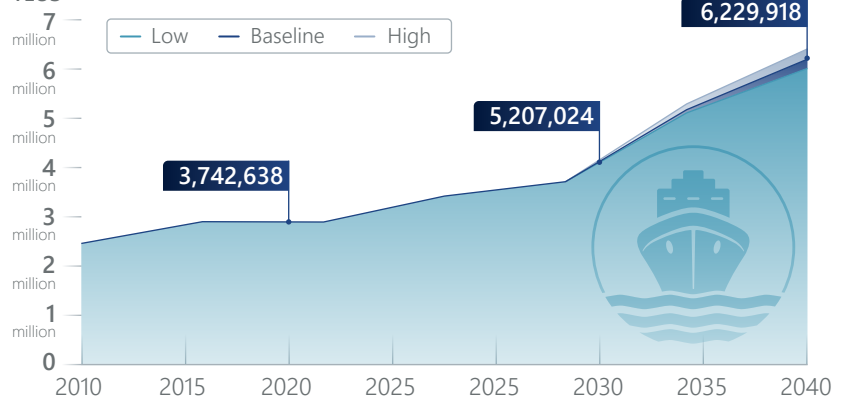
CRUISE PASSENGERS



Florida's seaports **serve as primary gateways for trade throughout the Caribbean, Central and South America. System redundancy for key strategic commodities makes the state more resilient** by providing long-term sustainability of the seaport system and creating a more robust economy in local communities and the state as a whole.

Increases in cargo capacity **ensure Florida's seaports are positioned to serve Florida markets.** For example, increases in container capacity have led to significant investments to deepen and widen port channels, which **positions the state for larger vessels for all cargo types.** Container volumes are anticipated to see tremendous growth in the coming years, increasing from over 4 million in 2019 up to 6.4 million TEUs by 2040 in a high scenario. This containerized cargo volume does not include the 26 million tons of dry bulk, 54 million tons of liquid bulk, and 7.2 million tons of break bulk also handled by Florida's seaports in 2019 which has grown by 21 percent since 2014.

TEUS





CONSTRAINTS, NEEDS, AND ADVANTAGES

Florida's seaports **represent one of the top economic engines in each of their host communities**. The **established seaport funding programs** implemented annually by FDOT in partnership with the seaports help set the seaports up to take advantage of strategic opportunities. FDOT's focus on passenger and freight operations and advancement of on and off port improvements supports freight and passenger mobility. FDOT plays a major role in improving the capacity and efficiency of waterborne commerce and maritime facilities.

Strategic investments at Florida's seaports have **focused on positioning the state for future growth**. Florida's seaports have a wide variety of constraints, needs, and advantages to address to **maintain and expand their businesses**.

The industry continues to build larger ships which must fit into existing channels and port infrastructure. In addition, shippers and shipping companies are looking for more reliable and resilient supply chains, which has led to diversification of vessel rotations, providing additional opportunities for Gulf and Atlantic seaports.

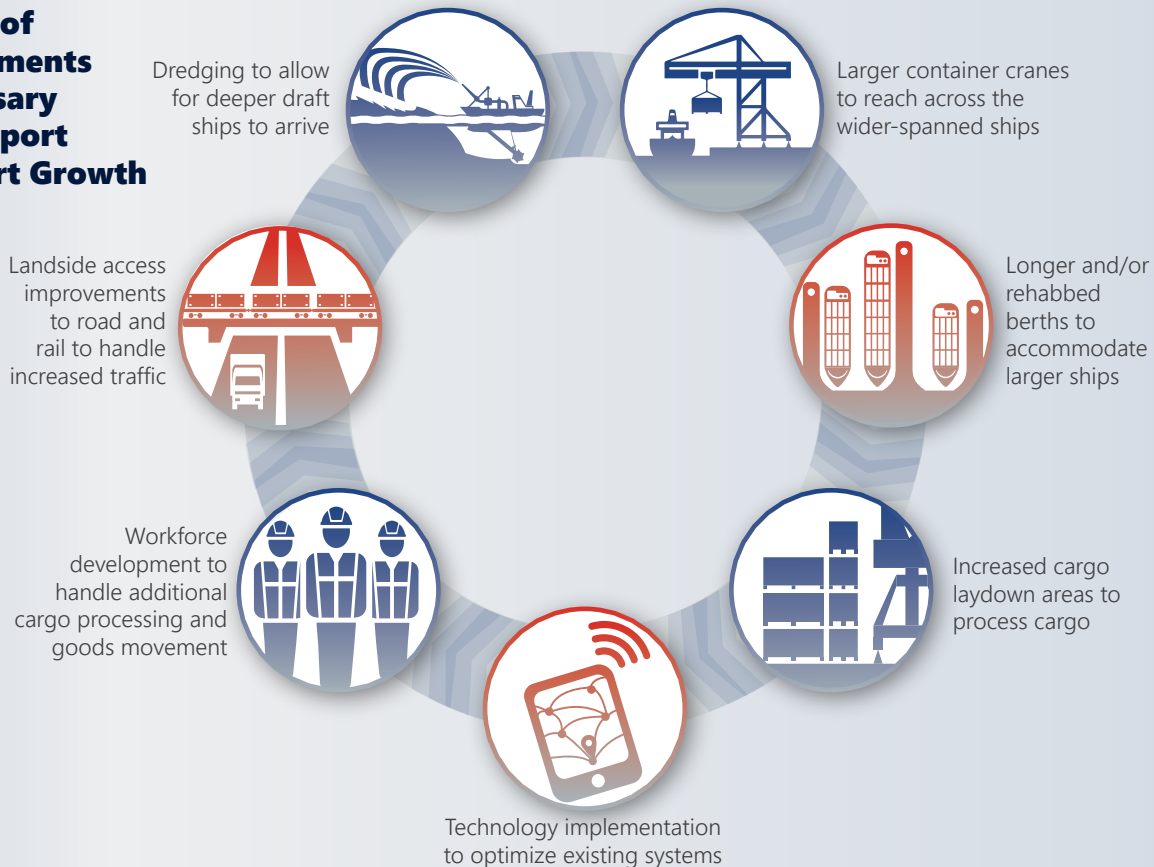
The ability of Florida's seaports to **adapt to this dynamic business environment** will be critical to preserve and strengthen the competitiveness of these gateways. **Channel and harbor dredging and deepening and**

intermodal access remain key focus areas for each of Florida's seaports. Many of these projects have been completed or are funded and underway.

Waterway capacity projects have a downstream effect on terminal and landside operations. Larger vessels lead to the need for larger cranes, longer berths, additional terminal laydown areas, and efficient road and rail access. Workforce availability is critical as is the ability to incorporate technology solutions that help with terminal efficiency.

A diverse investment strategy is necessary to ensure the success of Florida's seaports and to prevent any one of these items from becoming an inhibitor to growth.

Types of Investments Necessary to Support Seaport Growth





KEY THEMES TO GUIDE THE FUTURE OF FLORIDA SEAPORTS

The Plan identifies eight (8) key themes that guide the state's investment decisions. These themes capture the essence of the constraints, needs and advantages facing Florida's seaports.



ACCESS

Adequate access ensures the safe and efficient movement of freight, passengers, and workers accessing a seaport. Appropriate landside and waterside access must be maintained



DIVERSITY OF OPERATIONS

Maintaining diverse operations at Florida's seaports strengthens the ability to handle changes or disruptions to a singular industry and compete in a variety of markets



ENVIRONMENTAL SUSTAINABILITY AND RESILIENCE

Maintaining Florida's natural environment is critical to the welfare of the state. The ability to withstand extreme weather is also crucial for continued, uninterrupted operations



FUNDING

State financial assistance is maximized by leveraging local, federal, and private funding to create the most efficient seaport and waterway system



NAVIGATION

Safe passage of ships is becoming more challenging as they get larger. Channels, berths, and equipment must be improved to maintain safe navigation



LAND AVAILABILITY

Seaports are becoming land constrained which limits long-term growth. Seaport land should be conserved for cargo and passenger related uses



TECHNOLOGY

Innovation is allowing for densification and automation. Technology solutions are needed to handle increased volumes given other constraints



TRADE SHIFTS AND SUPPLY CHAIN DISRUPTIONS

Population migration, global events, and industry shifts require responsive systems that can readily accommodate changes in demand and operations



STRATEGIES AND OUTLOOK

Florida's seaport and waterways system has continued to grow and expand over the last five years. Investments, completed and underway, align with the focus areas and initiatives, and FDOT's Seaport Office has engaged in the advancement of projects through the defined list of strategies. All of Florida's ports have advanced their priorities. These strategic investments have already made great economic impacts to the ports, industry, businesses, and communities.

While the pandemic resulted in a temporary pause in growth in some markets, the ports remain bullish about future market opportunities and have not experienced the same supply chain disruptions—at least locally—that other competitor ports have in the Southeast U.S. and on the West Coast. The cruise industry has returned, with new terminals under development, new ships on order, and a surging demand of cruisers ready to return to sea.

FDOT's Seaport Office has actively partnered with the seaports as they continue to maneuver a dynamic market place with real-time changes to investment priorities as new opportunities develop.

FDOT SEAPORT OFFICE STRATEGIES



Use state resources to leverage investments in Florida's seaports.



Partner with seaports to pursue opportunities to enhance seaport efficiencies, capabilities, resilience, and capacities.



Collaborate with seaports and industry stakeholders to identify and fund projects.



Coordinate with seaports and intermodal industry to promote efficient multimodal connectivity.



Monitor industry events, issues, and trends to ensure Florida's seaports are positioned for success.



Facilitate public sector responsiveness to seaport needs and opportunities and support competitive grant applications.



Monitor seaport system performance to track the effectiveness of investments to guide future investments.

This Seaport and Waterways System Plan provides an updated roadmap for the state's seaport program, providing a concise and forward-looking perspective on the future of Florida's seaport and waterways system and the role FDOT plays in supporting future success. The outlook is strong. Florida's seaports have aggressive capital improvement plans under development and the state is committed to partner with them.

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