



Port Everglades Master/Vision Plan Update

Public Meeting

June 24, 2013

Agenda

- Port Everglades Overview
- Project Background
- Infrastructure Needs Identified in 2009 Plan
- Review of Priority Projects
- Review of Key Projects
- Going Forward: Overview of Master/Vision Plan Update Process and Schedule
- Stakeholder Outreach



Port Everglades Overview



Port Everglades Mission

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



Port Everglades Results

#1 Seaport in Florida by Revenue

- \$143 million

#1 Container Port in Florida (#12 in U.S.) by Volume

- 926,000 TEUs in CY2012

#1 Seaport for Exports in Florida

- \$14 billion

#1 Foreign-Trade Zone (for exports) in the U.S.

- \$2 billion

#2 Petroleum Port in Florida

- 105 million barrels

#3 Cruise Port in the World

- 3.7 million multi-day passengers



It's All About Jobs

- Nearly \$26 billion total business activity
- 11,687 direct jobs
- \$729 million in state and local taxes
- Nearly 201,400 Florida jobs supported earning \$7.8 billion in wages



Project Background: Why do we do a Master/Vision Plan?

- The original Port Everglades Master/Vision Plan was approved by the Board of County Commissioners in December 2008
- Port Everglades Master/Vision Plan Update was approved by the Board of County Commissioners in March 2011
- BOCC has directed that Port Master Plan be updated every two to three years
- Next update now underway!



Facility/Infrastructure Needs Identified in the 2009 Master/Vision Plan Update

- More, longer and deeper cargo berths
- Ability to berth fully laden Post-Panamax vessels
- Rail to Southport/ICTF
- Longer cruise berths and modernized cruise terminals
- Reconfiguration of Northport slips
- Improvements to terminals to accommodate future growth
- Crushed rock/aggregate ship/facility
- Deeper and wider petroleum slips

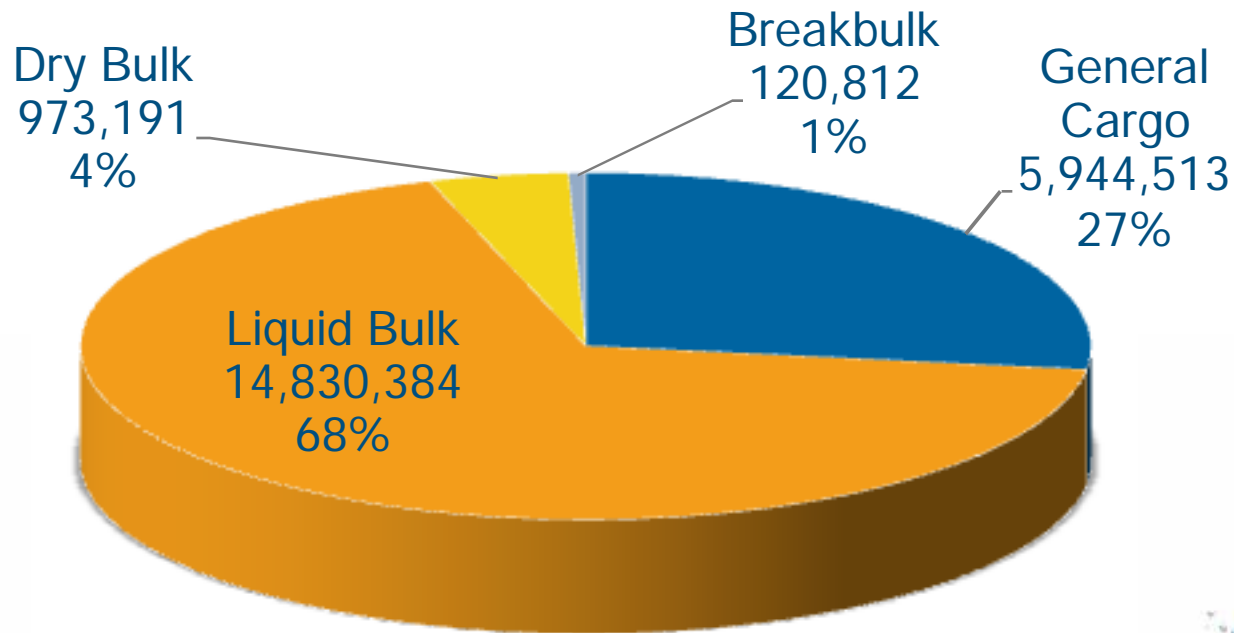


2009 Master/Vision Plan Update Forecast

Business Line	5-Year Plan (2015)	10-Year Plan (2019)	20-Year Plan (2029)
Containerized Cargo TEUs	1,541,258	1,786,740	2,401,230
Non-Containerized Cargo (Dry/Neo-Bulk) Tons	3,476,035	6,517,482	7,625,627
Liquid Bulk Cargo (Petroleum) Tons	15,199,717	16,026,912	16,699,008
Cruise Revenue Passengers	4,014,910	4,471,527	5,161,118



FY 2012 Performance



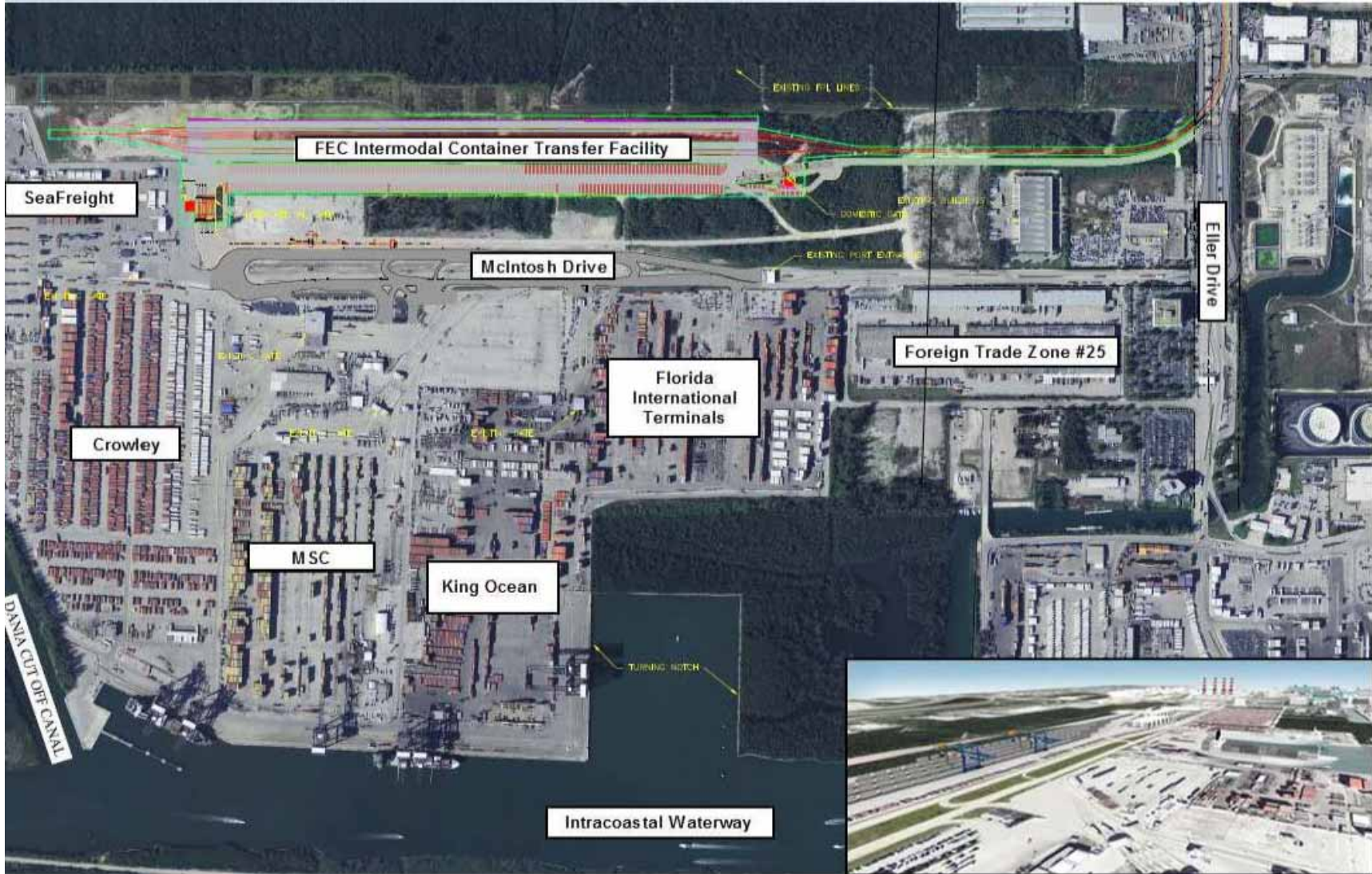
Cargo (Tons): 21,868,900
Containers (TEUs): 923,600
Cruise (Revenue Passengers): 3,757,320



PRIORITY PROJECTS



Intermodal Container Transfer Facility



Channel Deepening and Widening



Southport Turning Notch Project

Today



Turning Notch Extension



Conservation Easement - Upland Enhancement



- 8.68 acres is replaced with approximately 16.5 acres
- Conservation Easement becomes approximately 60 acres of Fee Simple Area



Priority Projects for Port Everglades

Intermodal Container Transfer Facility (ICTF)

- Now under construction
- Operational Summer 2014

Port Everglades Channel Deepening and Widening

- Draft ACOE Feasibility Study projected to be released for public comment June/July 2013

Southport Turning Notch Extension

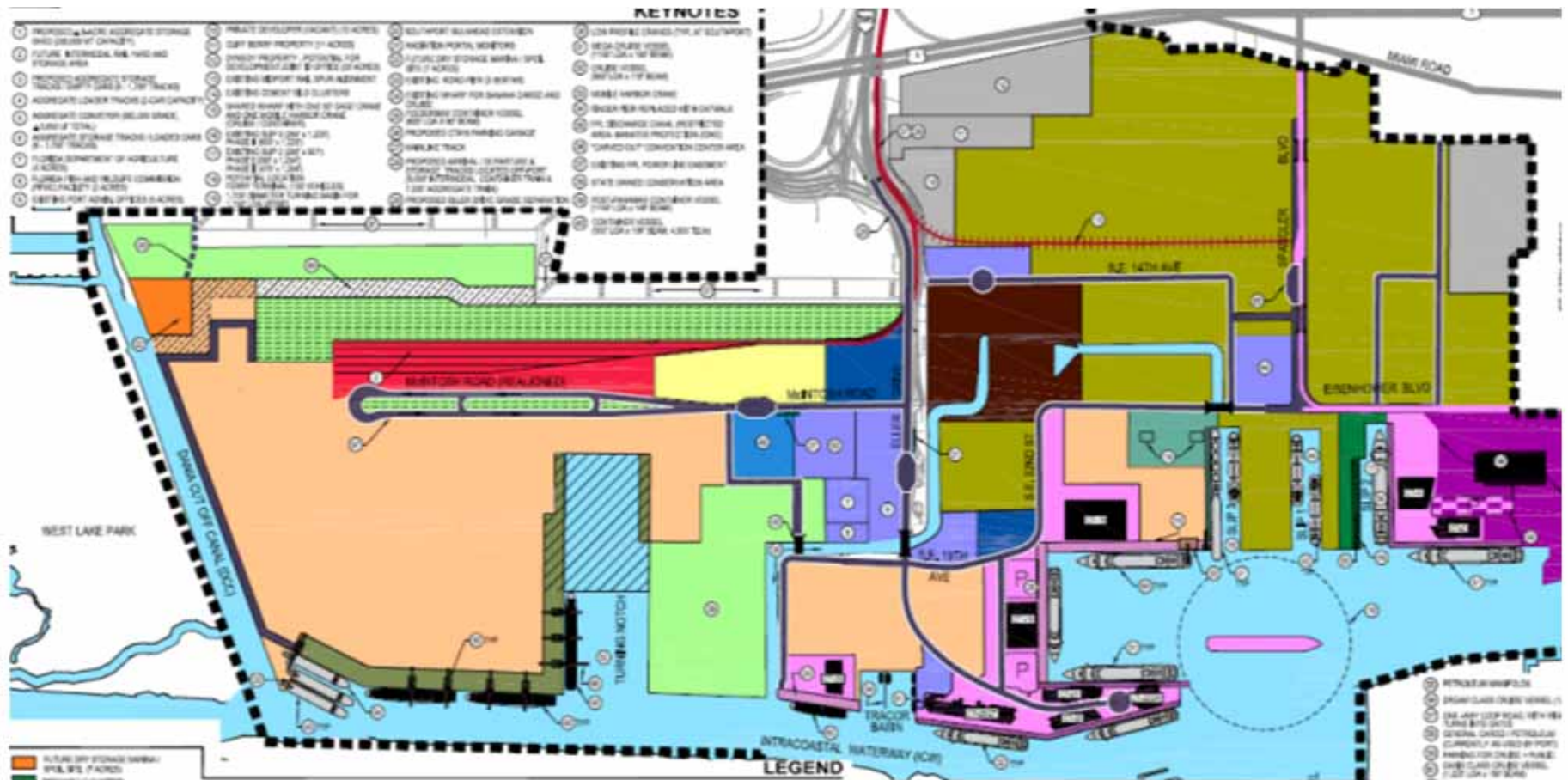
- Upland Mangrove Enhancement
- Timeline for mangrove creation permits - Summer 2013
- Site work - early 2014
- Mangrove planting - June 2014
- Trending Towards Success - Fall 2015

Turning Notch Construction

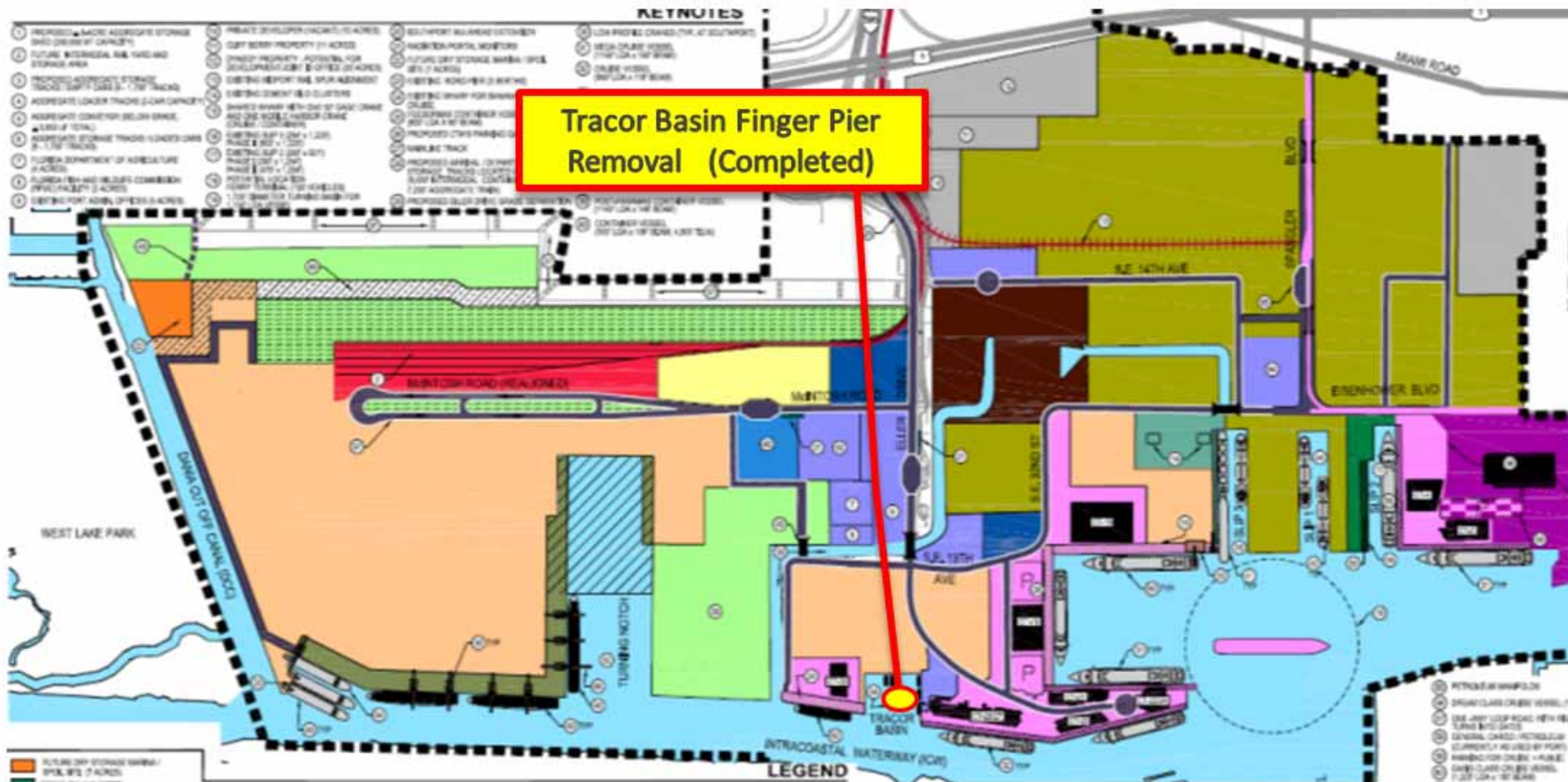
- Construction Begins Spring 2016
- Construction Completed Fall 2017



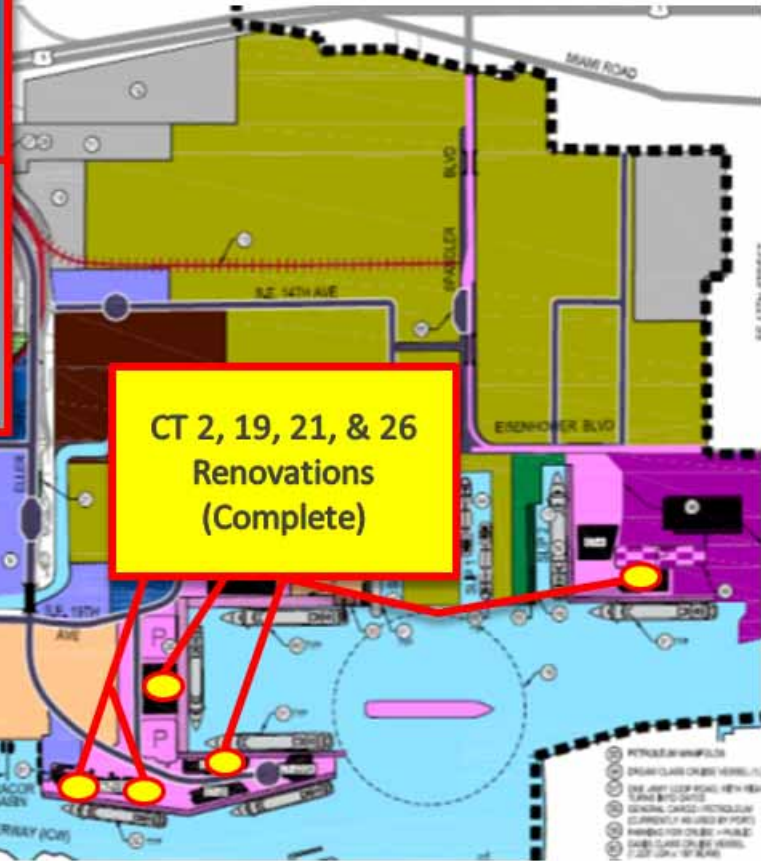
5-Year Master Plan (2011-2015)



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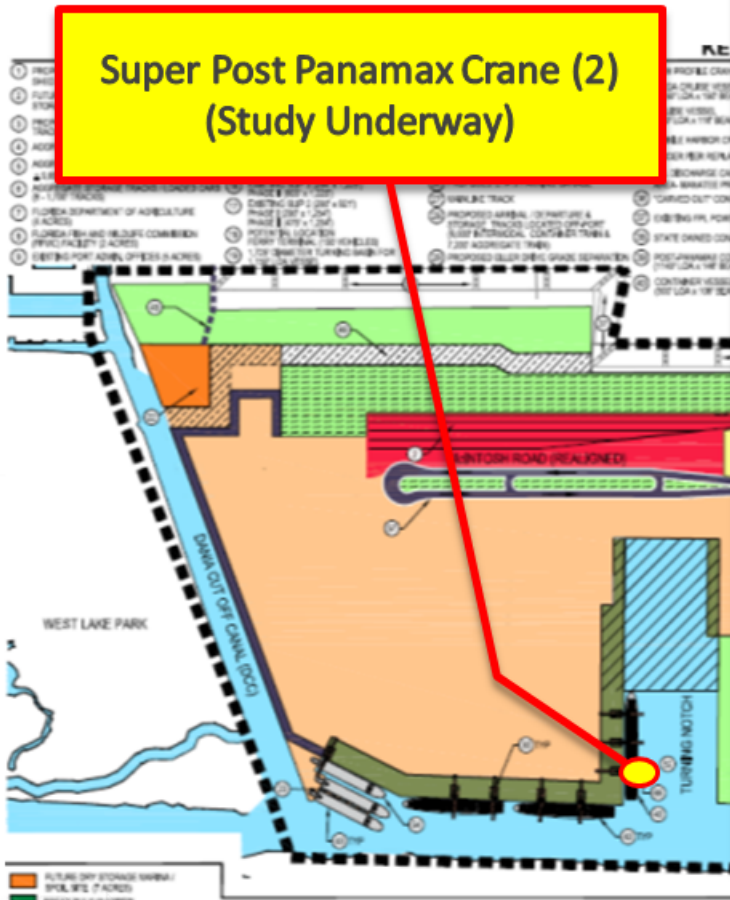
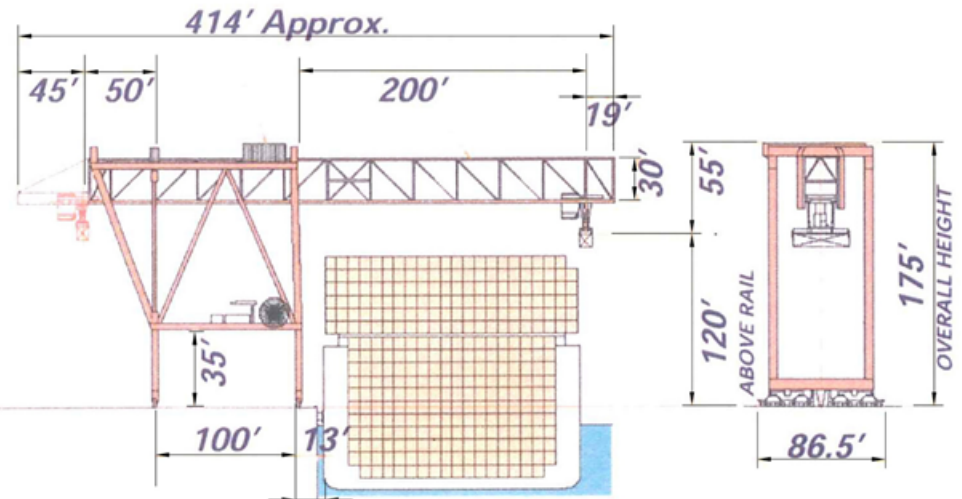


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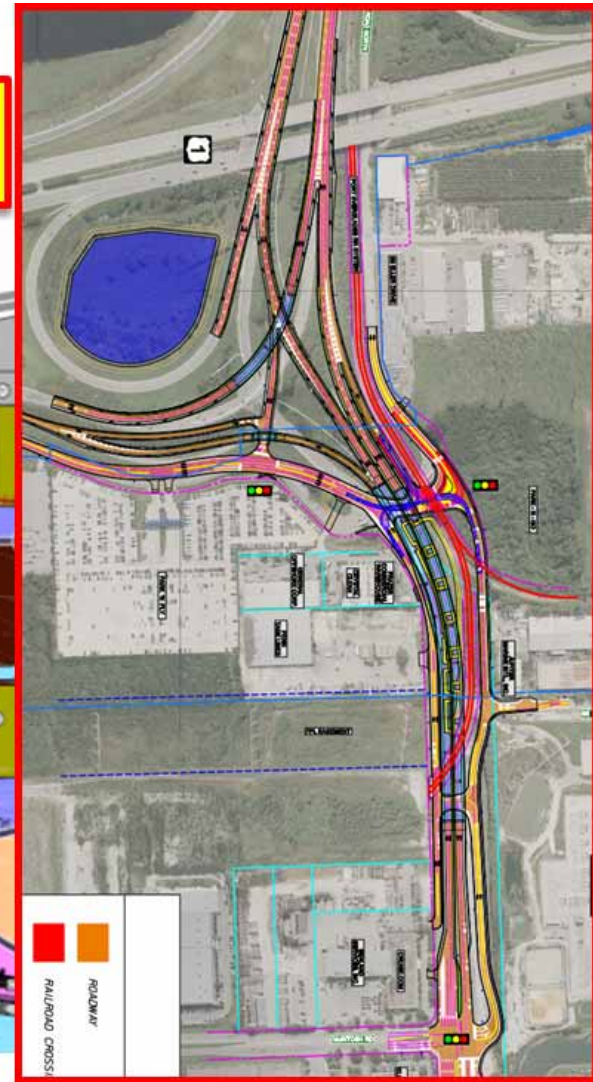


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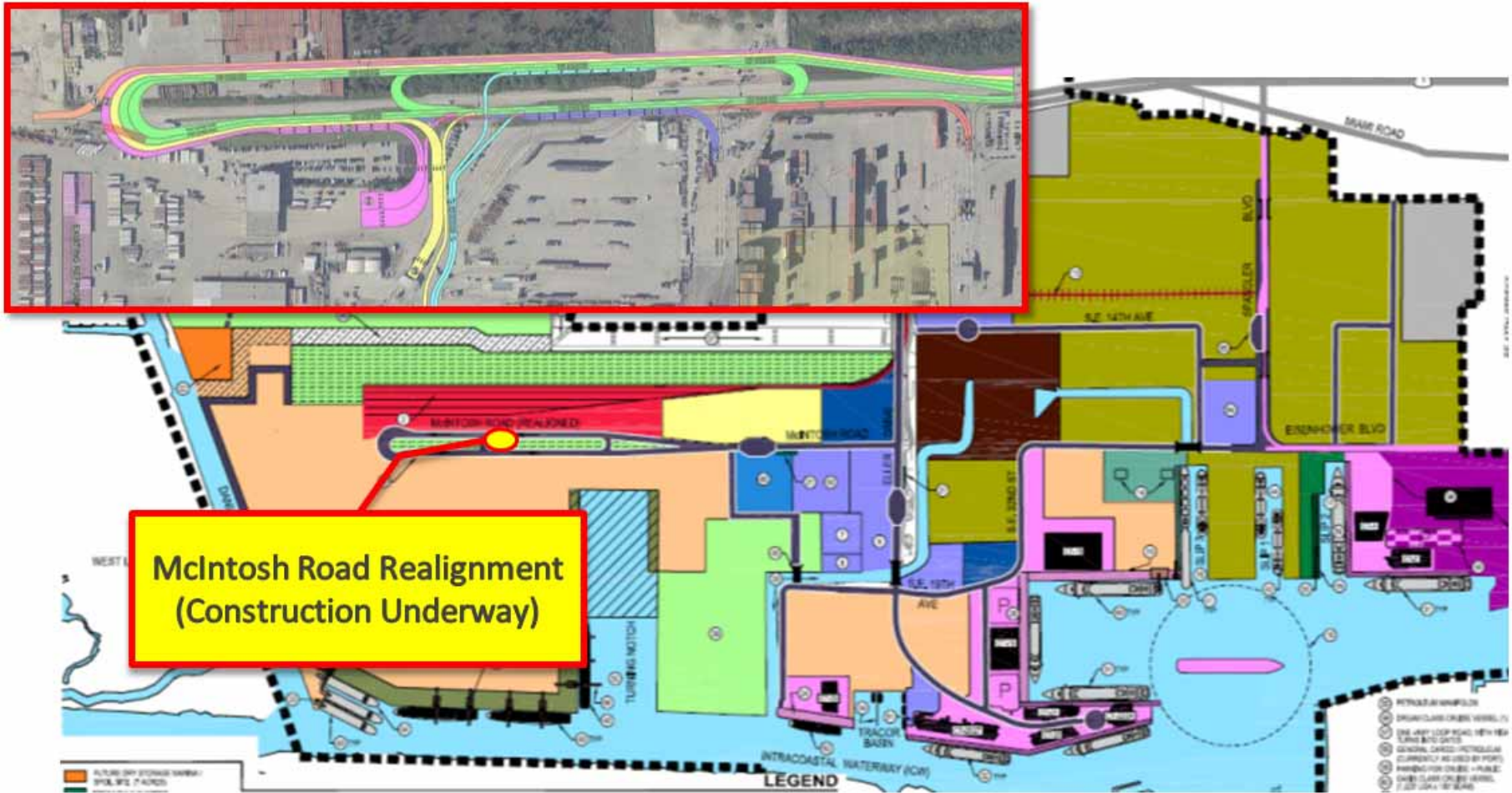
Super Post Panamax Crane (2)
(Study Underway)



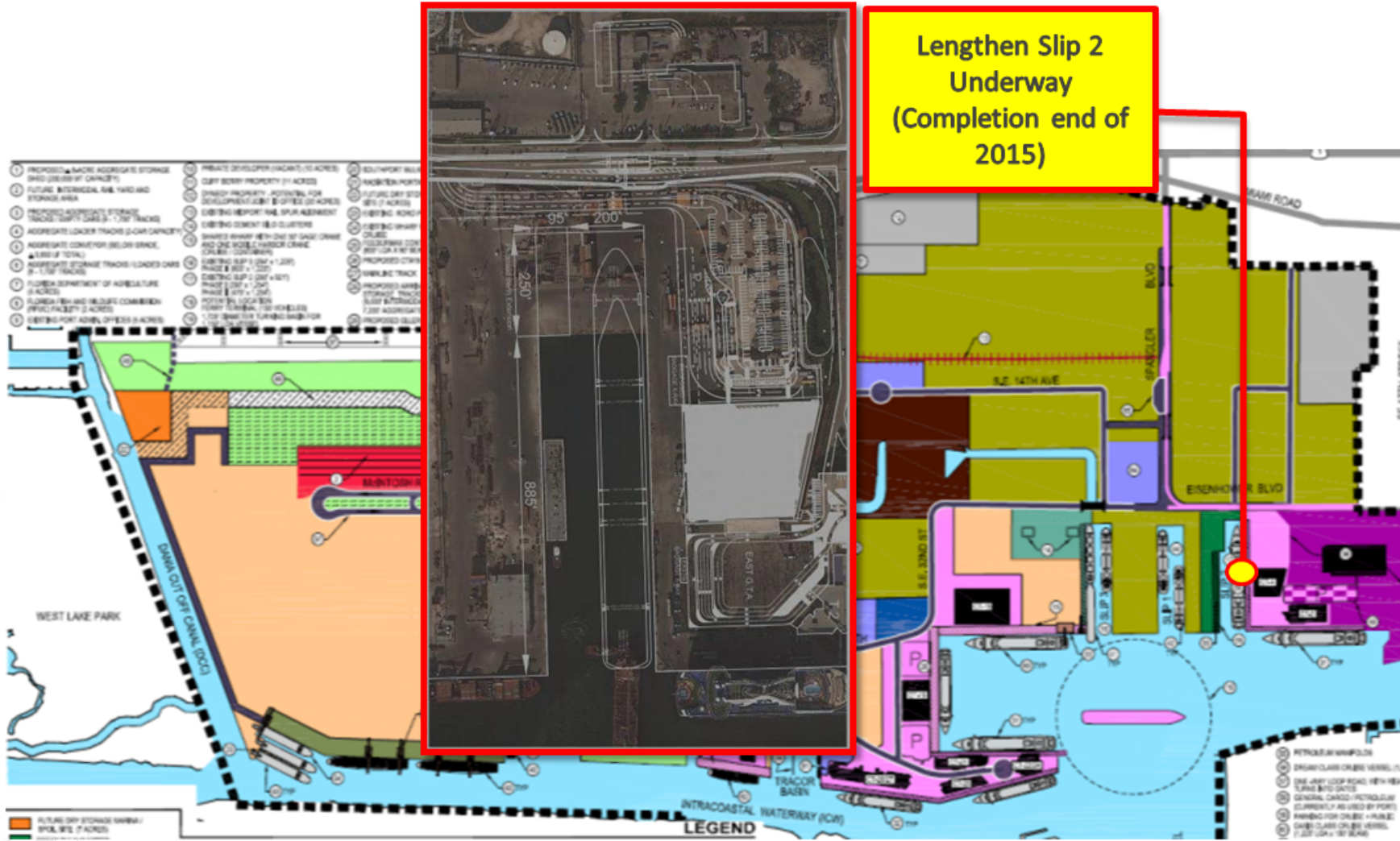
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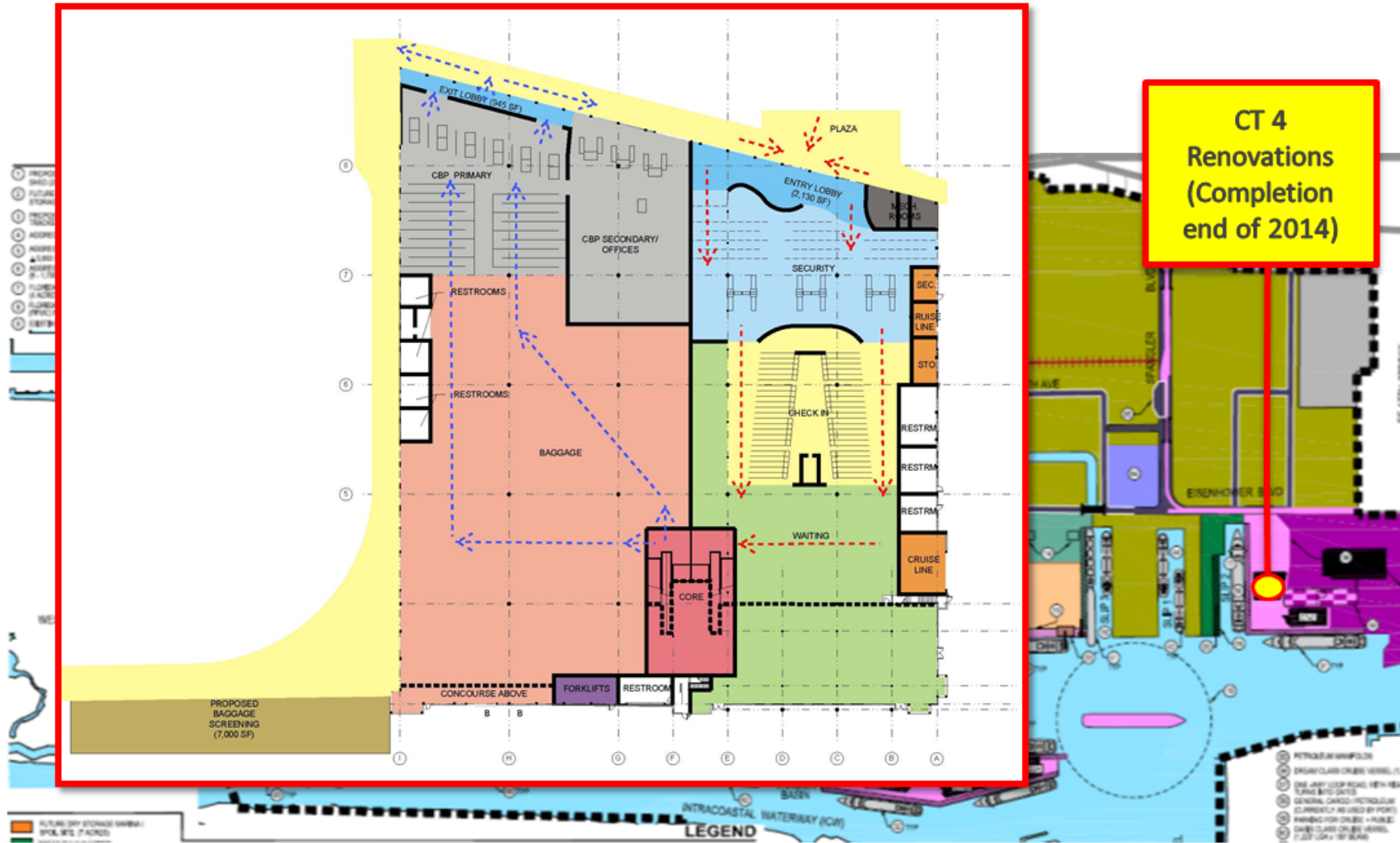
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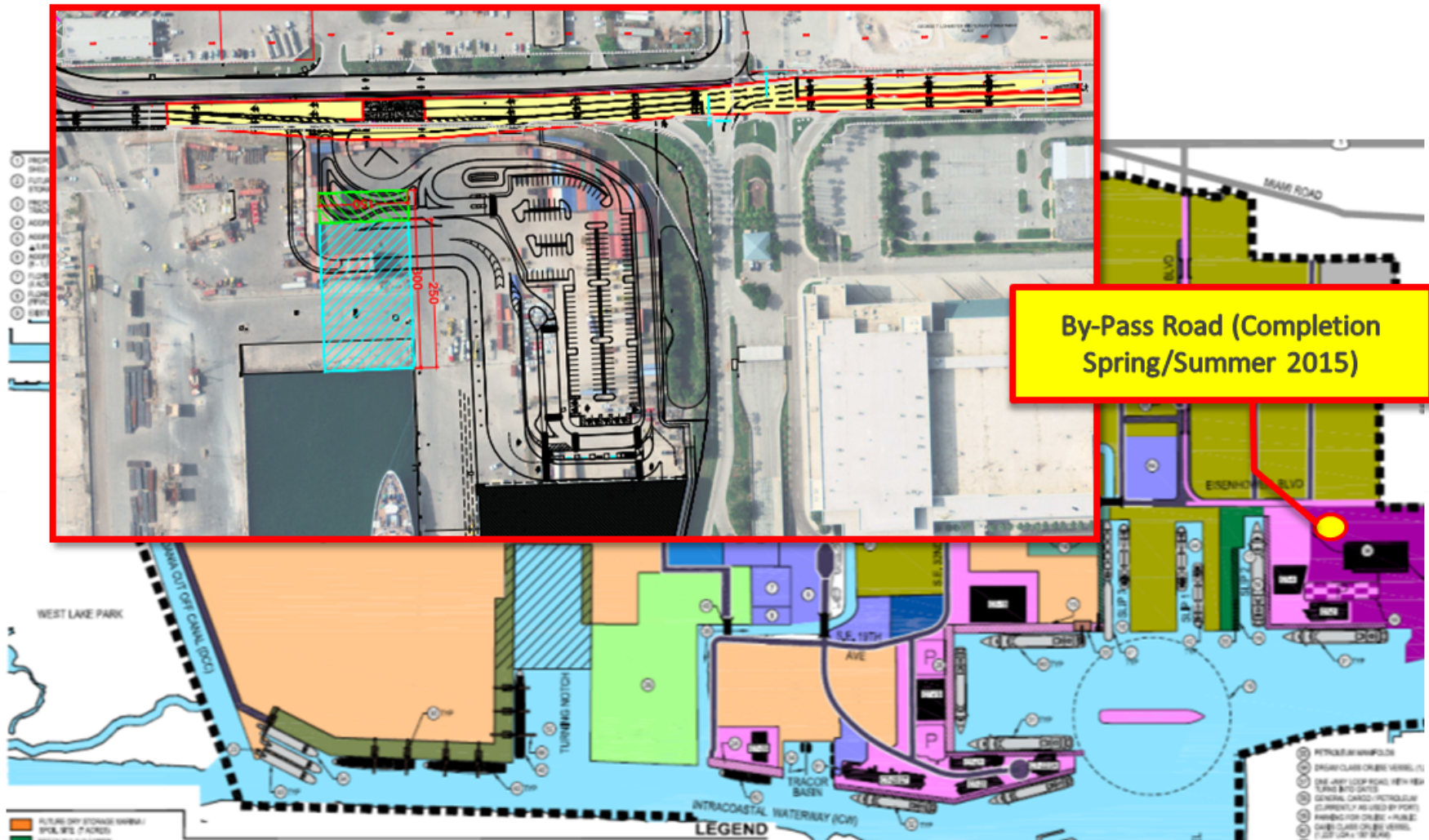
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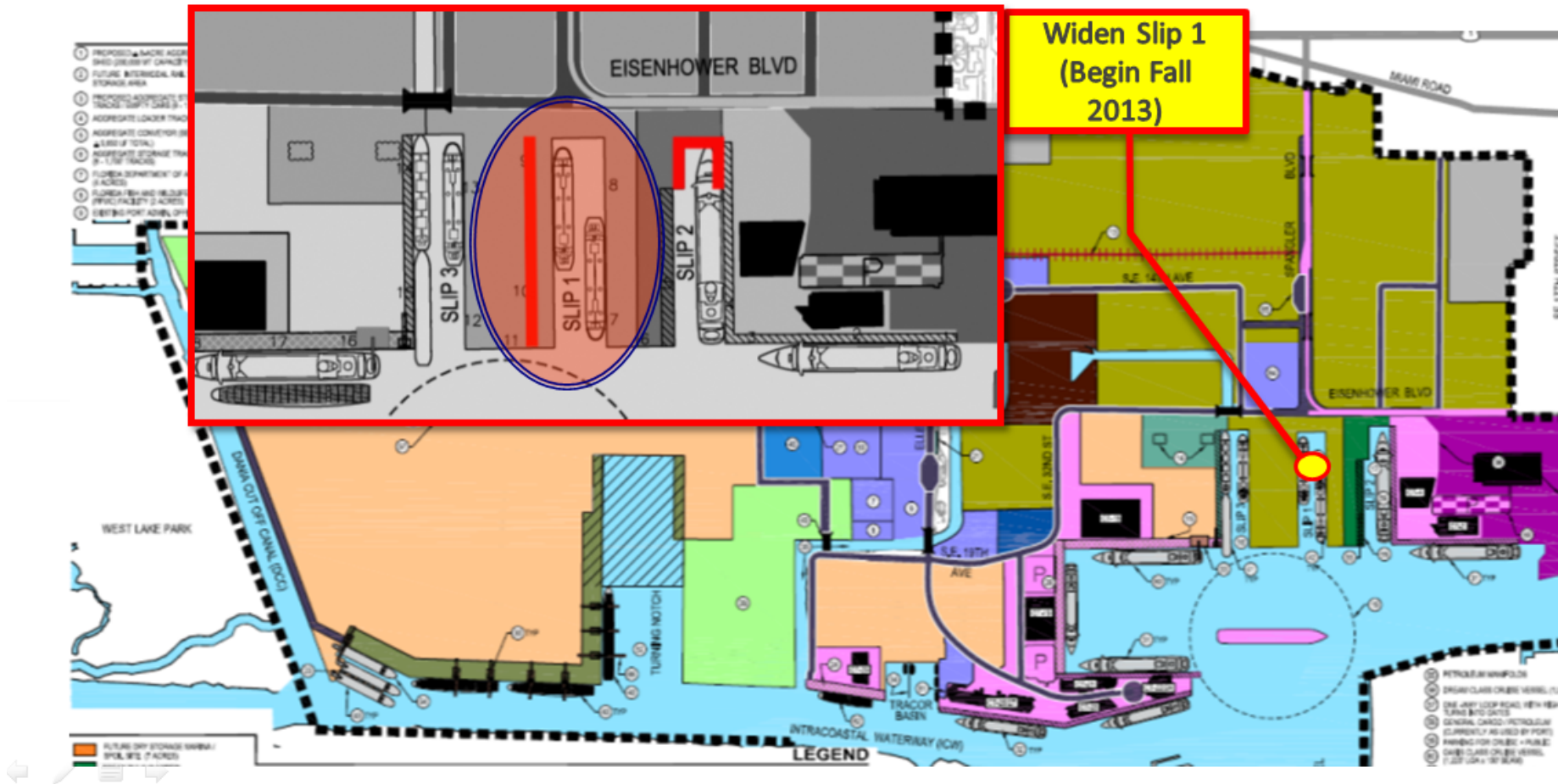
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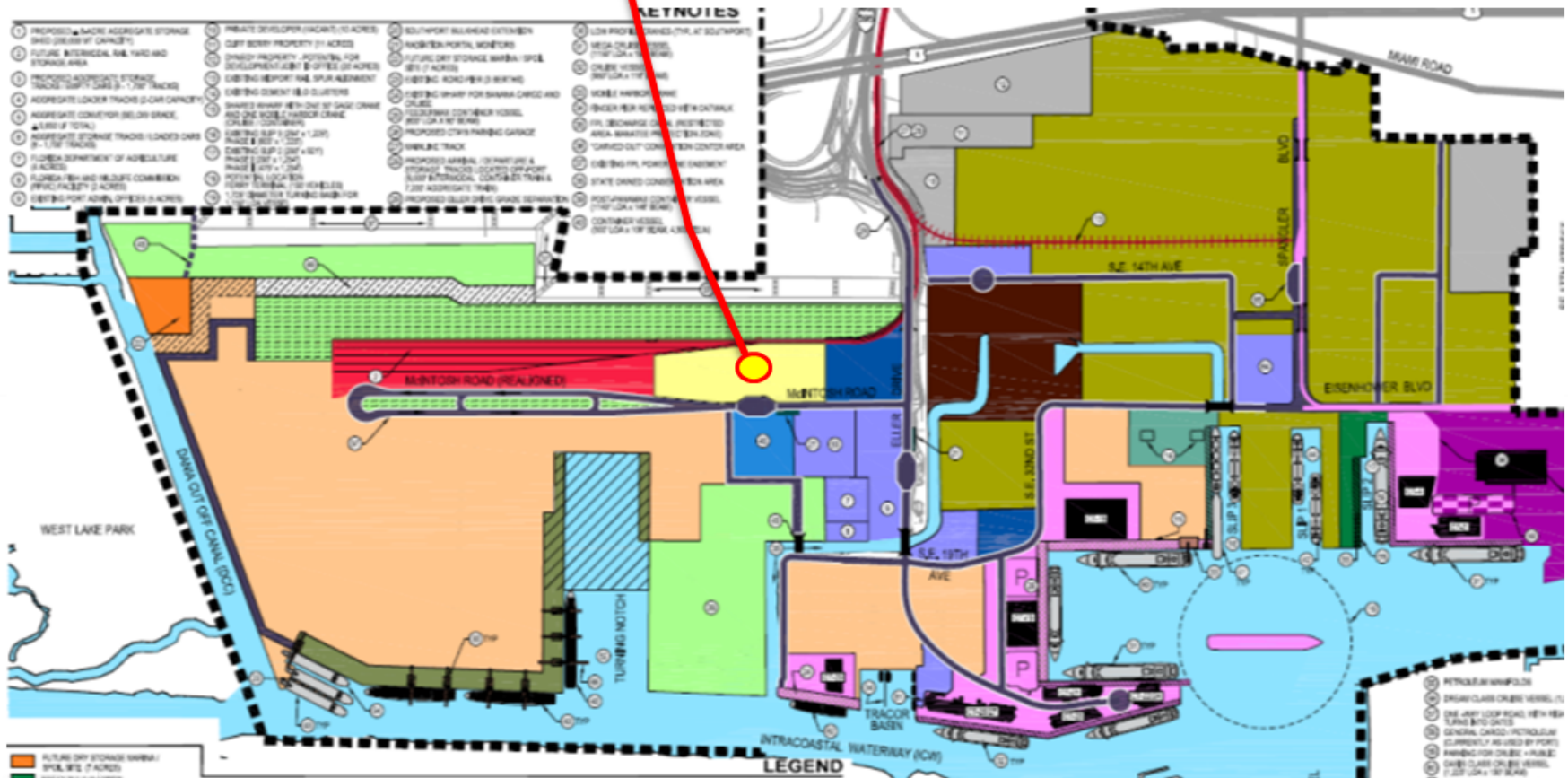


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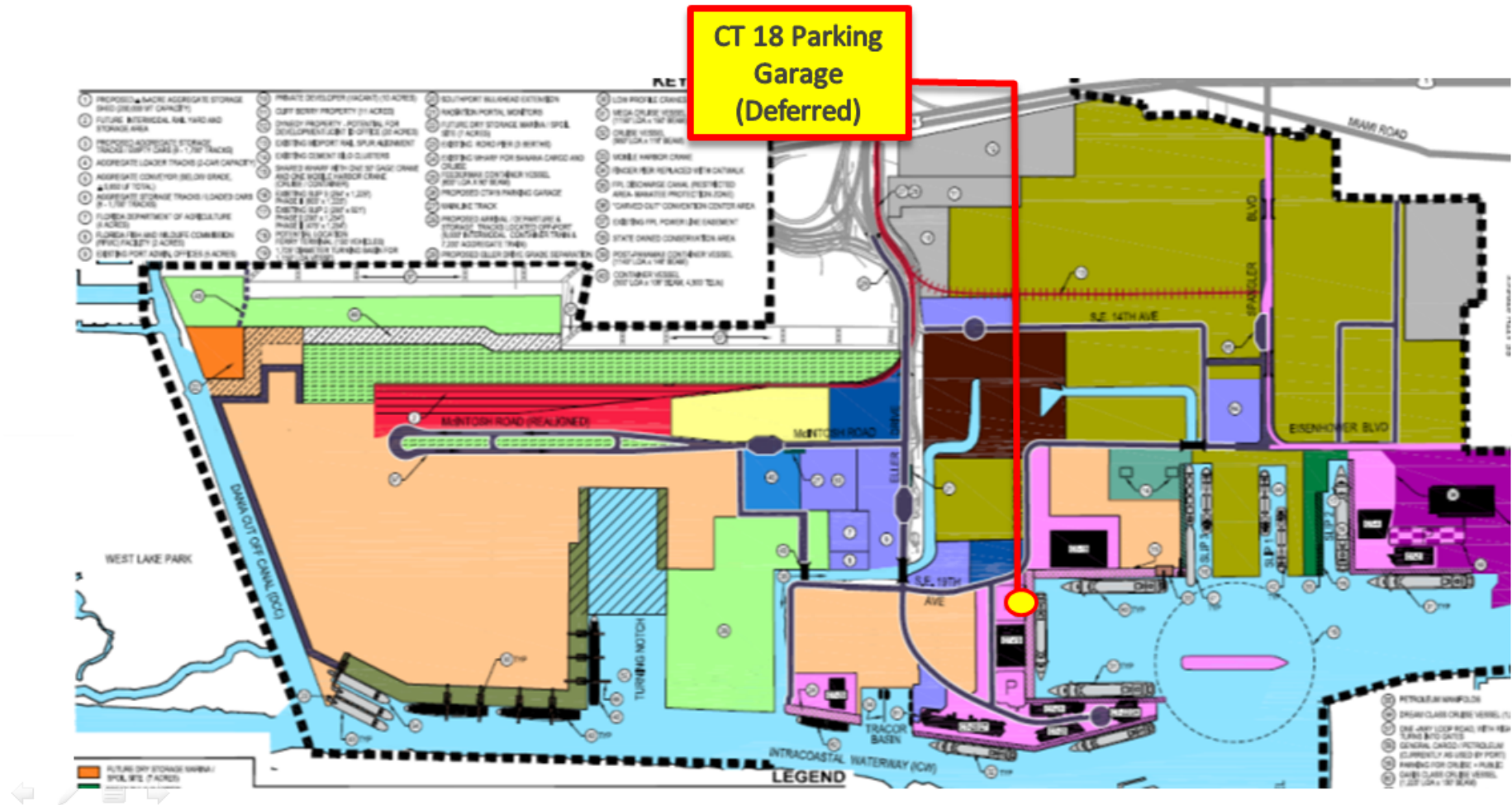


5-Year Master Plan (2011-2015)

**FTZ + CBP Relocation
(Study Underway)**

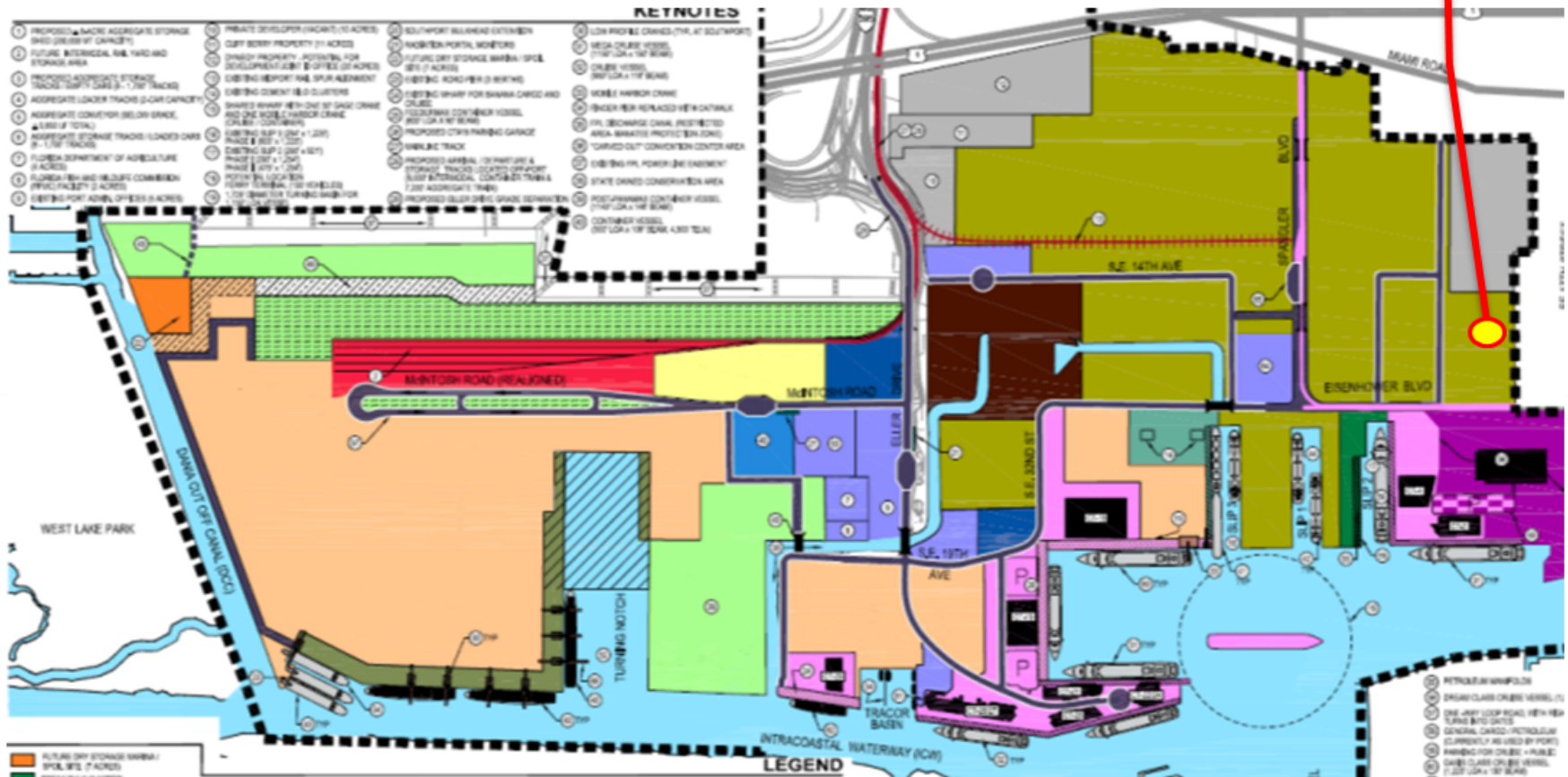


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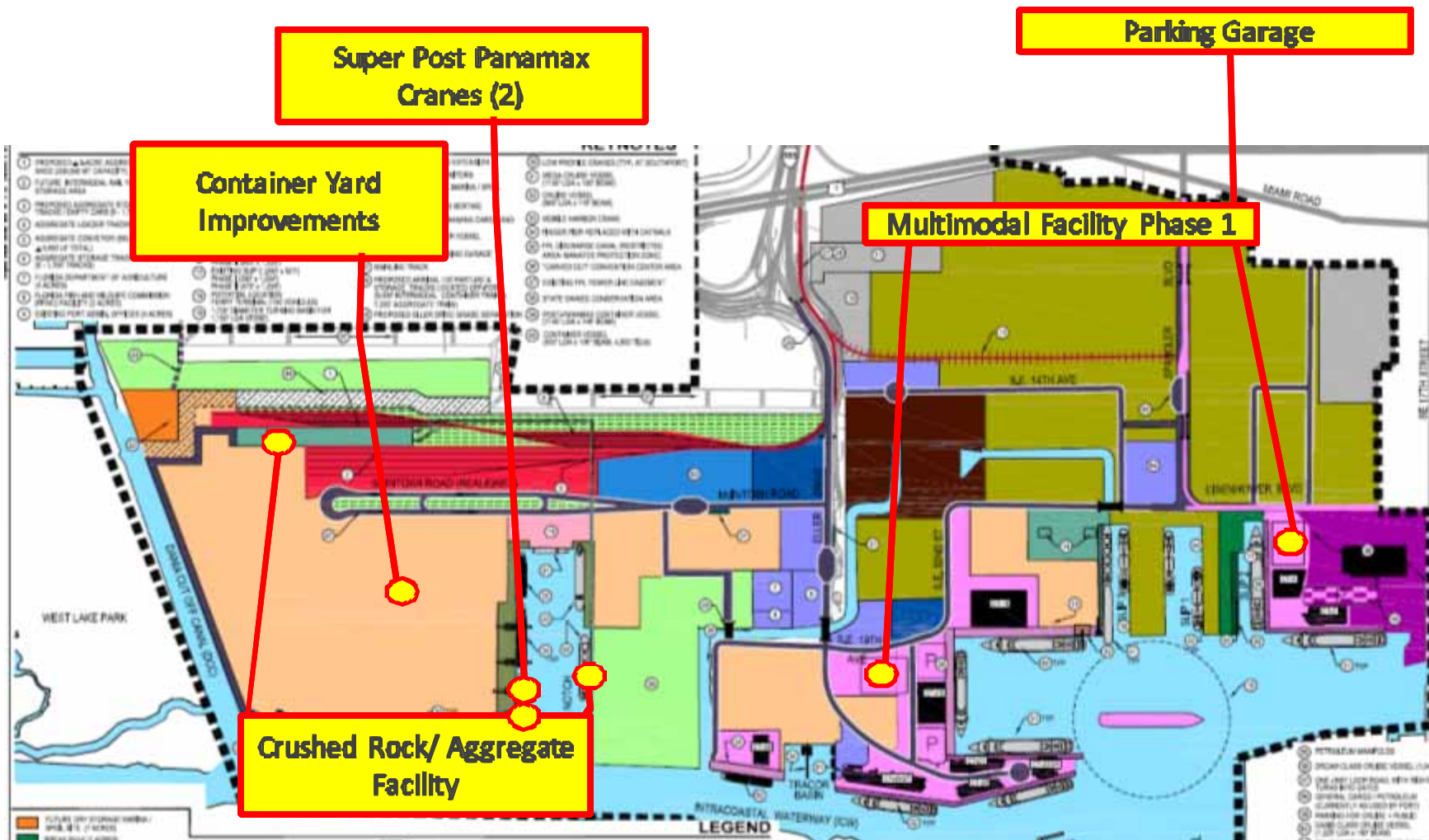


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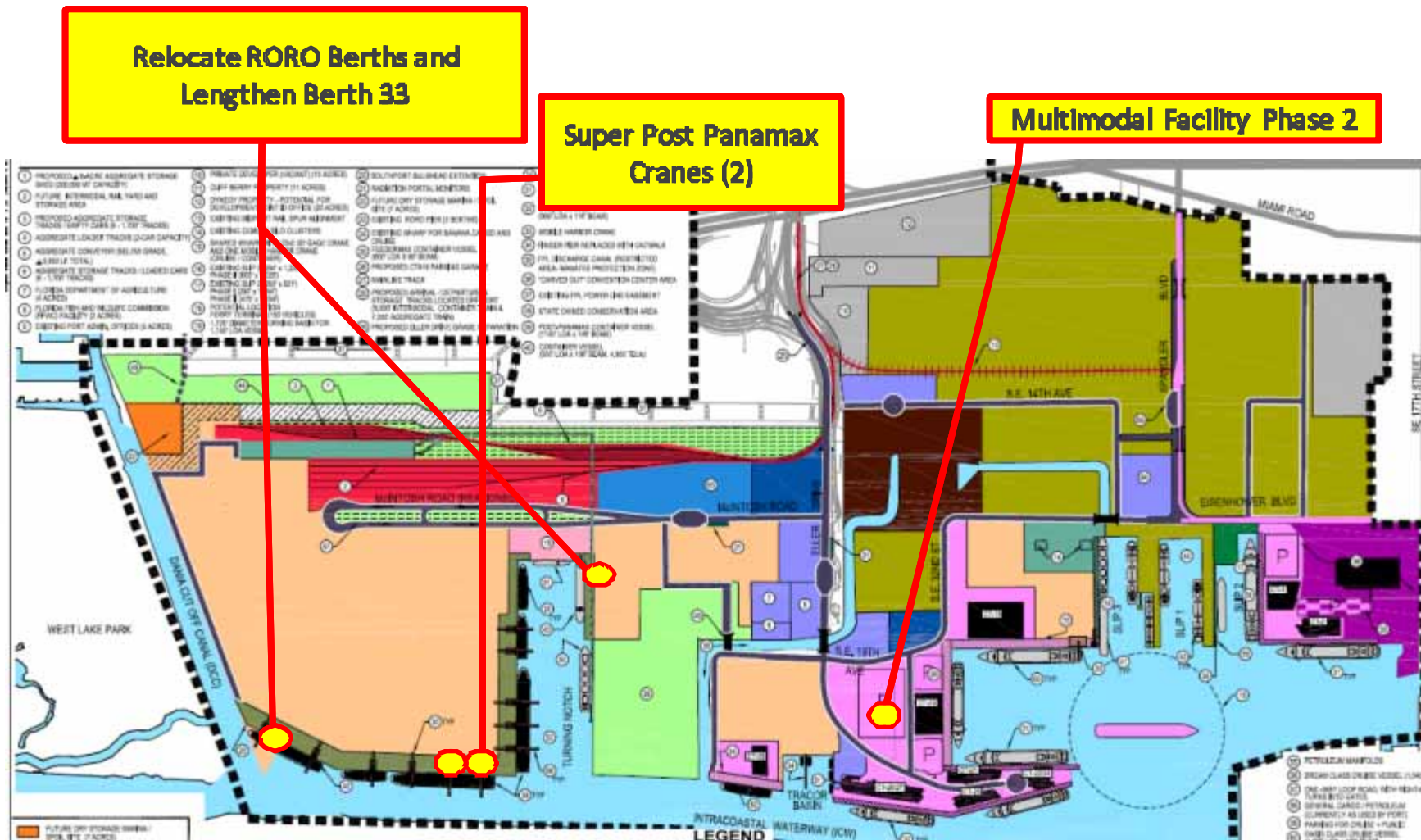
Petroleum Tankfarm
Redevelopment
(Deferred)



10-Year Vision Plan (2016-2019)



20-Year Vision Plan (2019-2029)



Master/Vision Plan Update Process

Phase I - End of September 2013

- Existing Conditions Assessment
- Market Assessment
- Business Line Forecasts (with and without 50 feet of water)
- Community and Stakeholder Meetings

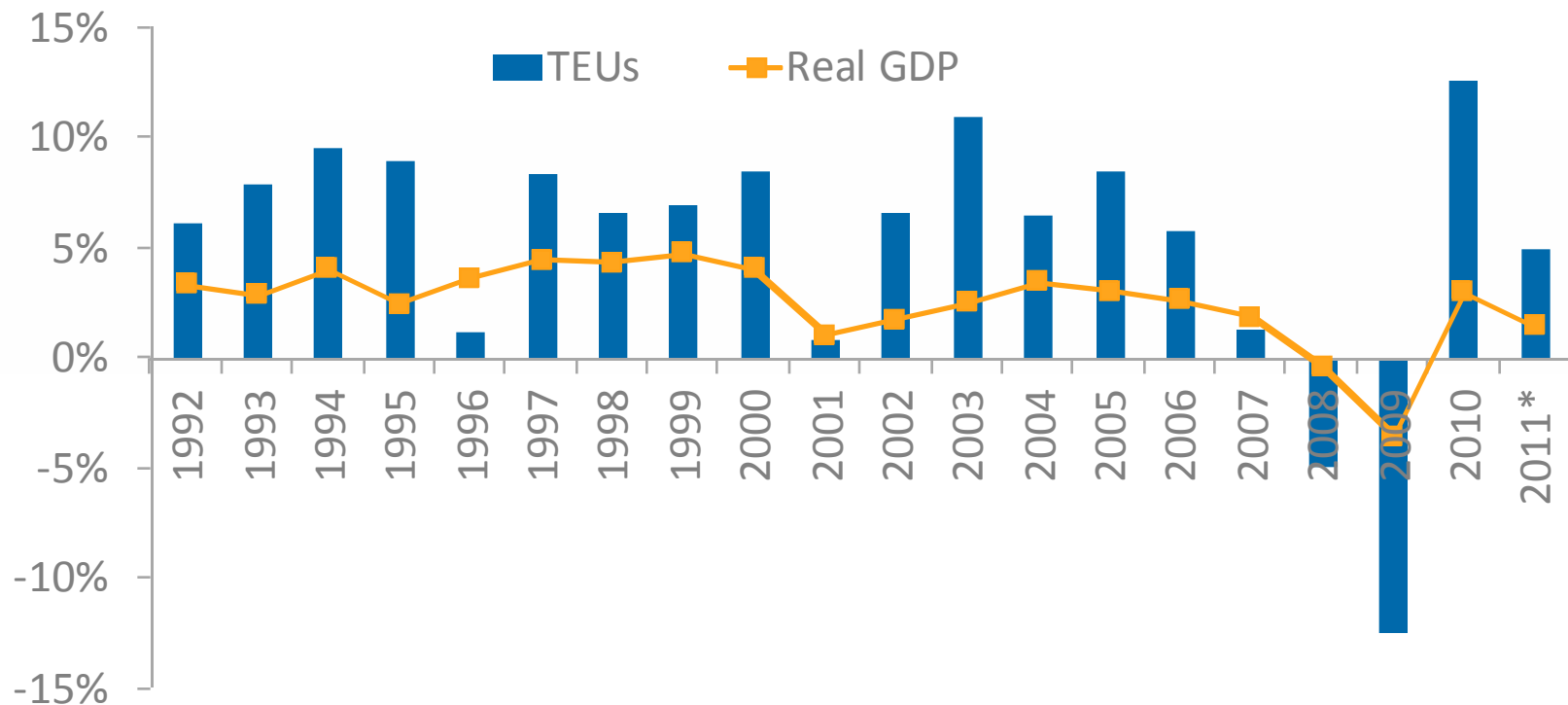
Phase II - January 2014

- Plan Development (Terminal Design Trends, Cargo Operational Enhancement Opportunities, Facility Needs Assessment, Conceptual Planning Studies, 20-Year Vision Plan, Parking and Rail and Truck Traffic)
- Strategy Development (Master Plan Development & Financial Strategy)
- Final Plan
- Plan Implementation
- Executive Summary
- Community and Stakeholder Meetings
- Phase III - February 2014
 - 3-D Computer Animated Video



Industry and Economic Changes Drive Need for Regular Forecast Updates

- U.S. container growth two times GDP growth from 1992 to 2007
- Great Recession requires a significant rework of this supposition



Evolving Markets Alter Forecasts Too

- The Caribbean remains the dominant cruise market, continues to grow, but is slowly losing market share as other markets expand
- Future growth in the Caribbean will be impacted by the infrastructure capabilities at key ports of call as vessels continue to increase in size

Market (2006-2011)	Bed Days	Share Shift
Caribbean	13.5%	-5.5
Mediterranean	109.4%	7.5
Europe/Scandinavia	24.6%	-0.5
Alaska	4.7%	-1.62
Bahamas	7.2%	-1.4
Mexico (West)	-32.6%	-3.1
Transatlantic	111.2%	1.08
Australia/New Zealand/ S. Pacific	101.2%	0.93
Trans Canal	-3.9%	-0.94
South America	81.7%	0.67
Hawaii	-23.9%	-1.5

Market (2011)	Bed Days	Market Share
Caribbean	36.2	33.7%
Mediterranean	21.99	20.4%
Europe/Scandinavia	8.47	7.9%
Alaska	6.65	6.2%
Bahamas	6.5	6.1%
Mexico (West)	3.51	3.3%
Transatlantic	3.1	2.9%
Australia/New Zealand/S. Pacific	2.9	2.7%
Trans Canal	2.69	2.5%
South America	2.6	2.4%
Hawaii	2.19	2.1%
Other	10.59	9.9%

Key Dates

June 10	Notice to Proceed
June 17	Port Staff & Consulting Team Kick-Off Meeting
June 20	Tenant/Stakeholder Kick-Off Meeting
June 24	Public Kick-Off Meeting
July 18	Port Everglades Advocacy Team Briefing
August 9	Port Everglades Association Briefing
Late Summer	Focus Group Meetings
Fall	Phase 2 Meetings

Additional Meetings to be Announced

We'd love to hear your input!



Port Everglades Master/Vision Plan Update Contact Person and Email

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To submit comments by email:

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