

Florida Seaports' Statewide and Regional Strategic Visioning Process

July – September 2006



***A collaborative initiative
by the state's 14 public
deepwater seaports, their
tenants, users, and
partners.***

The Statewide and Regional Strategic Visioning Process

- 4 regional workshops with seaports, tenants, users, and partners (held at the Ports of Miami, Jacksonville, Tampa and Everglades).
- Online survey on 10 key shared issues.
- Workshops with the Florida Ports Financing Commission, the Florida Seaport Transportation and Economic Development Council, and the Florida Maritime Council.
- Florida Maritime Leadership Conference.



Components of the Strategic Visioning Program

- **Florida seaports' 2016 Vision of Success.**
- **Challenges to achieving that success.**
- **Value of seaports to Florida's future.**
- **Florida seaports' business model and key elements.**
- **Working together with partners.**



Florida Seaports'

2016 Vision of Success

In 2016, the following themes characterize the tremendous success of Florida's statewide seaport system in achieving a competitive edge:

- A.** Public and private partnerships have increased investments in seaport growth.
- B.** New freight and passenger transportation corridors have created seamless intermodal connectivity, improving landside and waterside access.
- C.** Port capacity has expanded to allow for new business opportunities.
- D.** The values of and synergies among ports, communities and industries for economic development have been recognized and supported.
- E.** Regional and statewide cooperation is enabling the optimization of port assets.



Florida Seaports'

2016 Vision of Success

The challenges the seaports will face in achieving their 2016 strategic vision (1):

- To be competitive in attracting new and existing markets and business opportunities, such as discretionary vs. competitive cargo.
- Providing facilities and services that address the needs of port users.
- Expanding ports' role as economic engines.
- Operating globally within a local governance structure.
- Creating efficient freight and passenger mobility and connectivity in transportation corridors.



Florida Seaports' **2016 Vision of Success**

The challenges the seaports will face in achieving their strategic vision (2):

- Maintaining and improving waterside navigation in a manner compatible with environmental stewardship.
- Developing adequate port/industrial land and facilities.
- Improving cargo and passenger capacity.
- Balancing the elements of a secure, sustainable and cost-effective logistics chain.



Florida Seaports' **2016 Vision of Success**

The challenges the seaports will face in achieving their strategic vision (3):

- Developing intermodal transportation partnerships to provide innovative market service strategies.
- Increasing public awareness and support for the maritime industry.
- Increasing regional cooperation.
- Funding, funding and more funding.



Value of the Seaports to Florida's Future

- **Florida's 14 deepwater seaports are critical to the state's transportation mobility and economy.**
- **Consumer goods flow through Florida's seaports.**
- **Florida's seaports are true economic engines, providing hundreds of thousands of well-paying jobs and generating billions of dollars of economic impact to their local, regional and statewide economies.**
- **Florida's seaports are vital to maintaining the state's competitive edge.**



The 2005 record: \$62.9 billion in goods 127.4 million tons of cargo 2.9 million TEUs:

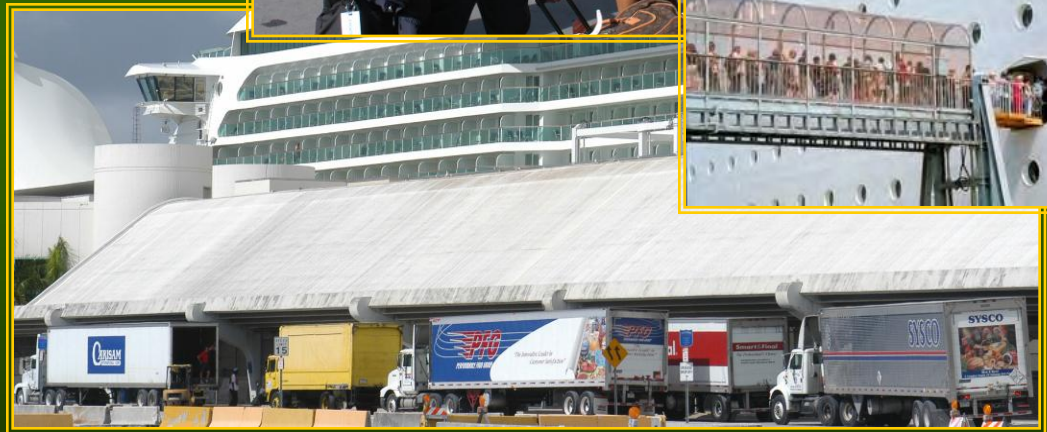
***Vehicles, Aggregate, Cement, Pipe, Lumber, Paper, Petroleum,
Bagged / Palletized Goods, Containerized Goods, and the
FTZ/Space Connection***



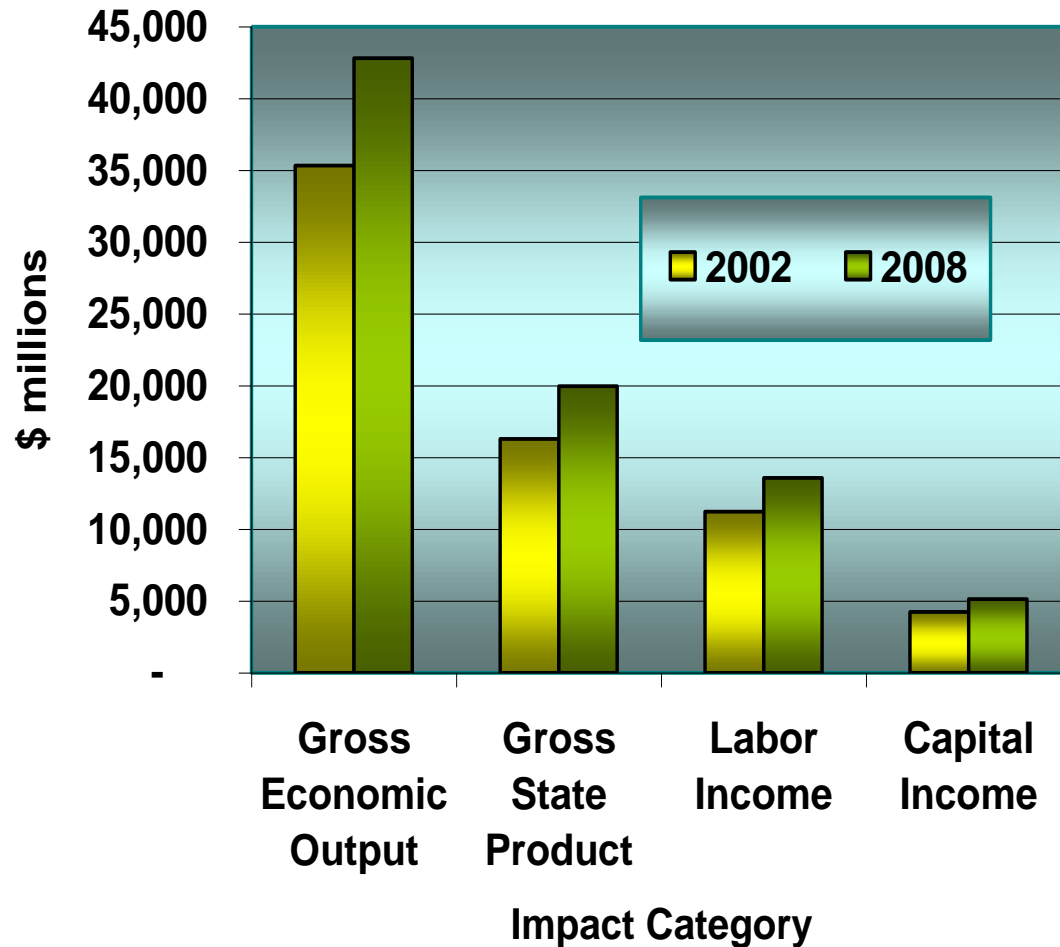
14.5 Million Revenue Cruise Passengers

(Florida's six cruise ports dominate the global industry)

- Miami
- Everglades
- Canaveral
- Tampa
- Palm Beach and
- Florida's Newest Cruise Port:
Jacksonville



Economic Impact of Florida's Seaports 2002-2008



Source: The Washington Economics Group, *A Forecast of Florida's International Trade Flows and the Economic Impact of Florida Seaports*, November 2003.

By 2008

- Annual gross economic output: \$42.8 billion
- Annual gross state product: \$19.9 billion
- Jobs: 348,290

Value of the Seaports to Florida's Future

- For 2006 in Florida, the mean average annual wage for individuals employed in transportation and material moving occupations is \$44,760 --
- Double the average pay for all other non-advanced degree occupations (\$23,254) and
- \$10,000 more than the average annual wage for all occupations (\$34,420).

Florida Seaports' 2016 Vision of Success

“Global trade is being driven by a combination of political, economic, technological and environmental trends and forces, and Florida must choose how to respond.”

--Global Trade Trends: Challenges and Opportunities for Florida's Ports,
(FDOT/Cambridge Systematics Inc., July 2006)



Florida Seaports'

2016 Vision of Success

Business Model and Key Elements

- The Florida seaports share strategic elements that frame their business models and drive their ability to succeed.
- These key elements provide the framework of each seaport's business model as well as a collective statewide business model.
- From a statewide perspective, this model describes how the seaports create value in the market place with the unique combination of assets, services, image, and distribution they carry forward.
- It also includes the operational infrastructure and the underlying partnerships the ports use to accomplish their work.



Florida Seaports'

2016 Vision of Success

Key Elements

1.Strategic Port Planning – Locally, Regionally and Statewide

- **Port master plans incorporated into local comprehensive plans.**
- **Opportunity for public input to plans.**
- **Plans guide the future of the seaports: locally, regionally and statewide, providing a balance of environmental stewardship and economic benefits.**



Florida Seaports' **2016 Vision of Success**

Key Elements

2. Deepwater Access

- **Developing and maintaining adequate deepwater berths, navigation channels, and turning basins.**
- **Providing navigational access to meet expanding market and vessel requirements.**



Florida Seaports'

2016 Vision of Success

Key Elements

3. Efficient Landside Access

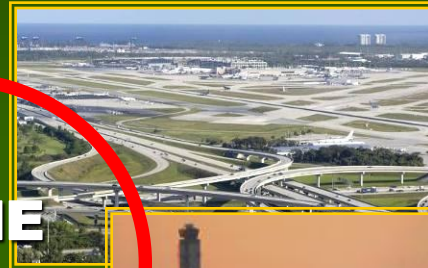
- **Road and rail systems must be able to move cargo and passengers efficiently on and off the ports.**
- **Good market access through a seamless connection from the water, through the port and onto the highway, air and rail systems.**



One seamless intermodal system moving goods and people between the channel and the marketplace



SHIP



PLANE



TRUCK



RAIL



SEAPORT

Florida Seaports' **2016 Vision of Success** **Key Elements**

4. Capacity for Port Growth – Locally and Regionally

- **Expansion of capacity through more efficient and effective use of limited land.**
- **Implementation of appropriate new development and redevelopment strategies.**
- **Use of new technologies.**



Florida Seaports'

2016 Vision of Success

Key Elements

5. Balance between User Needs and the Cost of Maritime Operations

- **Seaports must be efficient, cost-effective, and secure to be competitive.**
- **The industry requires that seaports remain flexible and offer services and facilities to their users at a cost that is sensitive to market demand.**



Florida Seaports'

2016 Vision of Success

Key Elements

6. Ability to Build and Sustain Key Partnerships

- **Florida seaports and users provide critical services to Florida's population in terms of accessing global freight and cruise markets.**
- **Transportation system providers and users are partners in creating efficient statewide transportation services.**



Florida Seaports'

2016 Vision of Success

Key Elements

7. Value of Investing in Florida Seaports and Serving Florida's Population

- Florida's seaports are huge economic engines that return high value to their communities, the state and the nation.
- For every \$1.00 the state invests in the seaports, it sees a \$6.90 return.
- The Florida seaports, with their local, state, federal and private sector partners, require infrastructure funding strategies that effectively meet the market demands of their capital improvement programs.
- Continued local, state, and federal government support is critical to the on-going success of the seaports and the state's economy.



Florida Seaports'

2016 Vision of Success

Key Elements

8. Enhanced Public Understanding and Support for Florida's Seaports

- **The Florida seaports should individually and collectively promote public understanding of their value and importance to the State's economic vitality and prosperity.**



Florida Seaports' **2016 Vision of Success**

Working Together with Partners

The seaports, their users and partners should engage in a collaborative planning process to build consensus on the shared vision of success and on the needs, policies and strategies that can achieve that vision.



