The Statewide Seaport System Plan

prepared for

Florida Transportation Commission

presented by

Meredith Dahlrose, State Seaport Manager

November 5, 2010
Florida’s Seaport System

Major Cargo Gateway Port
- Gateway for non-Florida commodities
- Gateway for strategic Florida commodities: containers, petroleum, coal, aggregates, etc.
- Very strong truck, rail, barge connectivity

Regional Cargo Gateway Port
- Gateway for regional commodities
- Special services, niche commodities
- Effective truck, rail, barge connectivity

Major Cruise Port
- Strong auto/transit/air connectivity
- Strong truck connectivity for provisioning
Florida’s Waterborne Trade in Tons

<table>
<thead>
<tr>
<th>Port</th>
<th>Tons (2009)</th>
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</thead>
<tbody>
<tr>
<td>Tampa</td>
<td>37,809,715</td>
</tr>
<tr>
<td>Jacksonville</td>
<td>23,380,812</td>
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<tr>
<td>Everglades</td>
<td>21,186,291</td>
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<tr>
<td>Manatee</td>
<td>8,275,387</td>
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<tr>
<td>Miami</td>
<td>6,831,496</td>
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<tr>
<td>Canaveral</td>
<td>2,592,897</td>
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<tr>
<td>Palm Beach</td>
<td>2,295,298</td>
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<tr>
<td>Panama City</td>
<td>1,302,000</td>
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<tr>
<td>Fernandina</td>
<td>506,876</td>
</tr>
<tr>
<td>Fort Pierce</td>
<td>358,000</td>
</tr>
<tr>
<td>Pensacola</td>
<td>247,772</td>
</tr>
<tr>
<td>Total</td>
<td>104,786,544</td>
</tr>
</tbody>
</table>

Percent of Total Tonnage

- 36%
- 22%
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Florida’s Waterborne Trade in Containers

<table>
<thead>
<tr>
<th>Port</th>
<th>TEUs (2009)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miami</td>
<td>807,069</td>
</tr>
<tr>
<td>Everglades</td>
<td>796,159</td>
</tr>
<tr>
<td>Jacksonville</td>
<td>754,352</td>
</tr>
<tr>
<td>Palm Beach</td>
<td>209,928</td>
</tr>
<tr>
<td>Tampa</td>
<td>48,788</td>
</tr>
<tr>
<td>Panama City</td>
<td>41,820</td>
</tr>
<tr>
<td>Fernandina</td>
<td>24,582</td>
</tr>
<tr>
<td>Fort Pierce</td>
<td>14,800</td>
</tr>
<tr>
<td>Manatee</td>
<td>14,507</td>
</tr>
<tr>
<td>Canaveral</td>
<td>799</td>
</tr>
<tr>
<td>Total</td>
<td>2,712,804</td>
</tr>
</tbody>
</table>

Source: Florida Ports Council, 2008-2009
### Florida’s Cruise Passengers

- **Miami**: 4,110,100 (26%)
- **Canaveral**: 3,250,775 (25%)
- **Everglades**: 3,139,820 (6%)
- **Key West**: 863,767 (3%)
- **Tampa**: 802,937 (7%)
- **Palm Beach**: 349,800
- **Jacksonville**: 185,434

**Total**: 12,702,633

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**Source**: Florida Ports Council, 2008-2009
Background

- Initial studies on seaport conditions, economic value - 2005
- Framework evaluation process - 2006
- DOT Statewide Seaport System Plan - 2008
  - Working Group met 2008-09
  - Drafted Recommendations Report to support Plan development – 2009
- Trade Flow and Logistics Study - 2009
Purpose:

• Develop a comprehensive Florida Seaport System Plan consistent with other FDOT modal plans
• Provide Department leadership with a “system-wide” view of the 14 ports and the state’s role in supporting them
• Provide improved ability to evaluate and prioritize state investments in seaports

Contents:

• Background
• 2060 Draft FTP goals
• Seaport Plan vision and objectives
• Current and future conditions
• Needs/resources
• Implementation
Key Issues

- Growth

Opportunities and challenges:
  - Panama Canal expansion
  - Opening of trade with Cuba
  - Increased use of Suez Canal
  - Shifts in global manufacturing centers
  - Growth in North/South Trade

- Needs/Resources
Trade Flow Study Findings

- Two components:
  - Maximizing Existing System - Growing Florida Market
  - Emergence as Global Hub - Growing non-Florida Market

- Three primary opportunities:
  - Maximize ability to serve Florida imports/exports through Florida gateways
  - Grow Florida origin exports
  - Expand ability to serve non-Florida markets
    - Other states imports through Florida gateways
    - Other states exports through Florida gateways
    - Transshipments through Florida gateways
Key Strategies

- Four types of strategies
  - Competition – economic development
  - Growth – trade flow findings
  - Mobility – capacity/operational issues
  - Partnerships – collaborative process
Next Steps

- Revised Draft for public review and comment – early November
- Executive Board - November
- Secretary adopt - December
Questions/Comments?

- For more info, see www.dot.state.fl.us/seaport

- Contact info:
  - Meredith Dahlrose, Manager, Seaport Office
  - (850) 414-4551
  - meredith.dahlrose@dot.state.fl.us