

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 Ports 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*



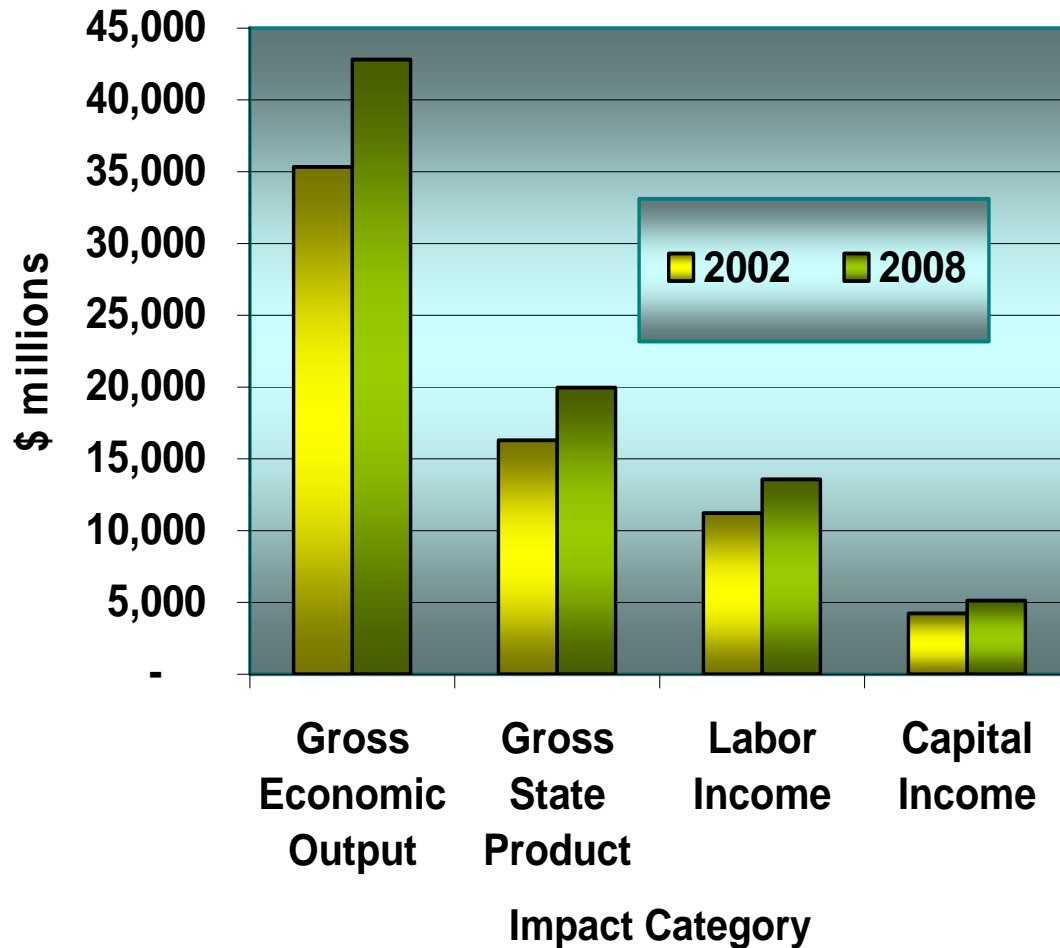
14.5 Million Revenue Cruise Passengers

(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

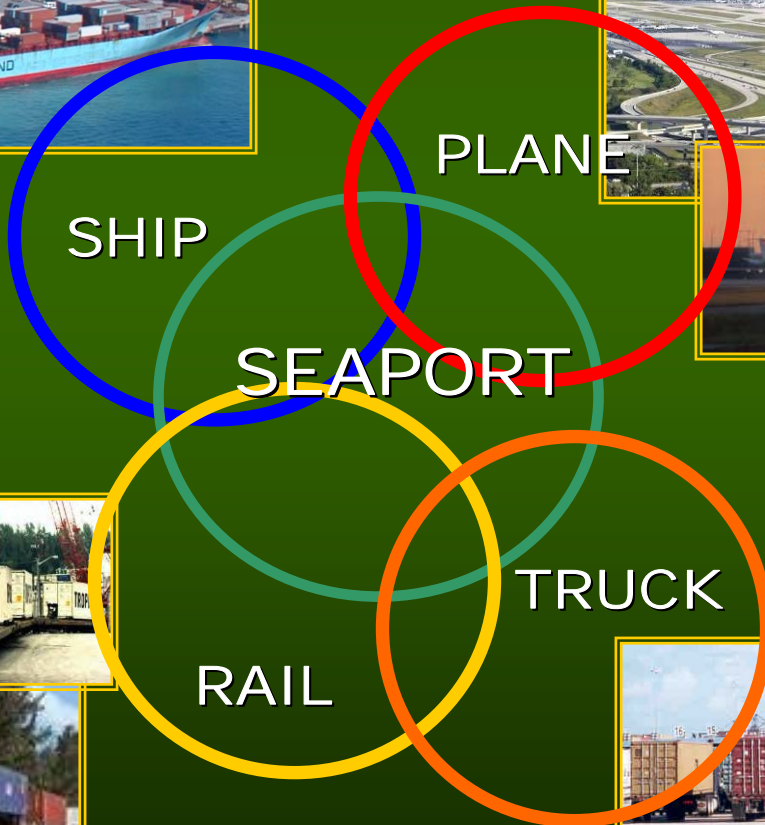
Key Elements

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*



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.





PENSACOLA

PANAMA CITY

FERNANDINA

JACKSONVILLE

PORT ST. JOE

CANAVERAL

TAMPA

FORT PIERCE

ST. PETERSBURG

MANATEE

PALM BEACH

EVERGLADES

MIAMI

KEY WEST