

2018 Port Everglades Master/Vision Plan Update

Tenants / Stakeholders Meeting

April 25, 2018

- The original Port Everglades Master/Vision Plan was approved by the Board of County Commissioners (BOCC) in December 2008
- Port Everglades Master/Vision Plan first Update was approved by the BOCC in March 2011
- In June 2014, BOCC adopted the second update to the Plan
 - BOCC has directed that Port Master/Vision Plan be updated every two to three years
- Third update is now underway
 - B&A Team awarded the 2018 Master / Vision Plan in March 2018
- 2018 update will be completed in spring 2019

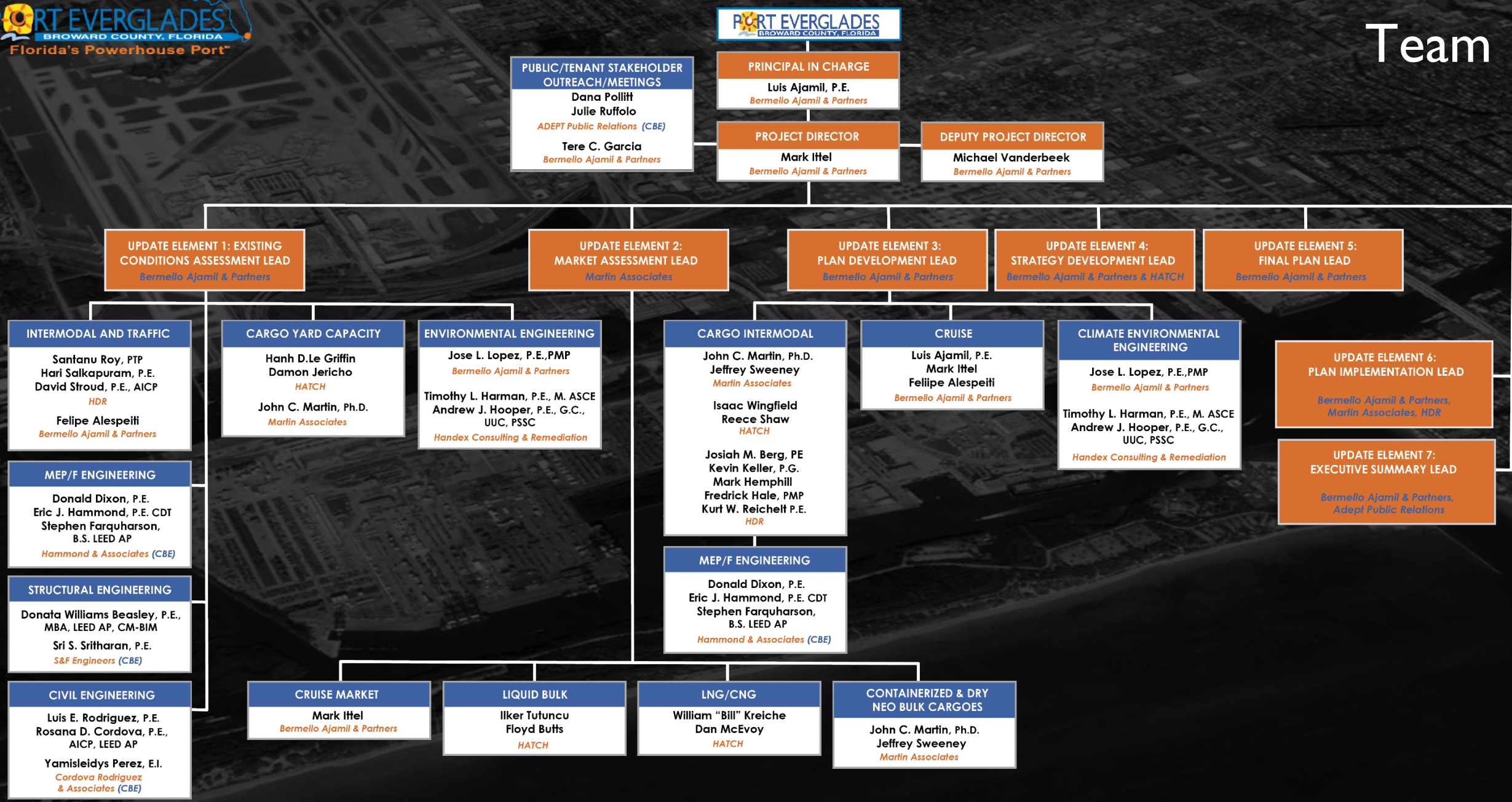
- **Master / Vision Plan Background**
 - Port's Mission statement
 - Direction, strategy and way forward
 - Team and approach
- **Priority Port Projects**
 - 5, 10 and 20 year Master / Vision Plan Project Update
- **Cargo, Cruise, Port Overview & Discussion**
- **Schedule and Process**
- **Outreach**
- **Next steps**

Port Everglades is Florida's powerhouse global gateway. A respected leader in trade, travel and financial stability, we create economic and social value by working in partnership with world-class clients.

We achieve advancements focusing on efficient facilities, trade and cruise expansion, jobs growth, safety, security and environmental stewardship for our customers, stakeholders and community.

As part of a regional transportation system, the purpose of Port Everglades is to create and promote commerce and industry by developing, marketing, maintaining, operating, improving, regulating, and managing the Port and harbor facilities.

- Bermello, Ajamil & Partners (B&A)
- ADEPT Public Relations
- Cordova Rodriguez & Associates, Inc.
- Hammond & Associates, Inc.
- S&F Engineers, Inc.
- Martin Associates
- Handex Consulting & Remediation
- Hatch
- HDR



- Major policies for the Master Vision Plan, which will provide the framework for the direction of the study.
- Amongst the major policy directions for discussion will be:
 - Port's mission statement and organization
 - The role of the Port in the community
 - Growth strategies
 - Priorities
 - Environmental footprint
 - Financial goals
 - Port's last Master Plan, including Plan successes and limitations
 - Other topics to be identified

Practical



Visionary

Sustainability



Educate US on the Port

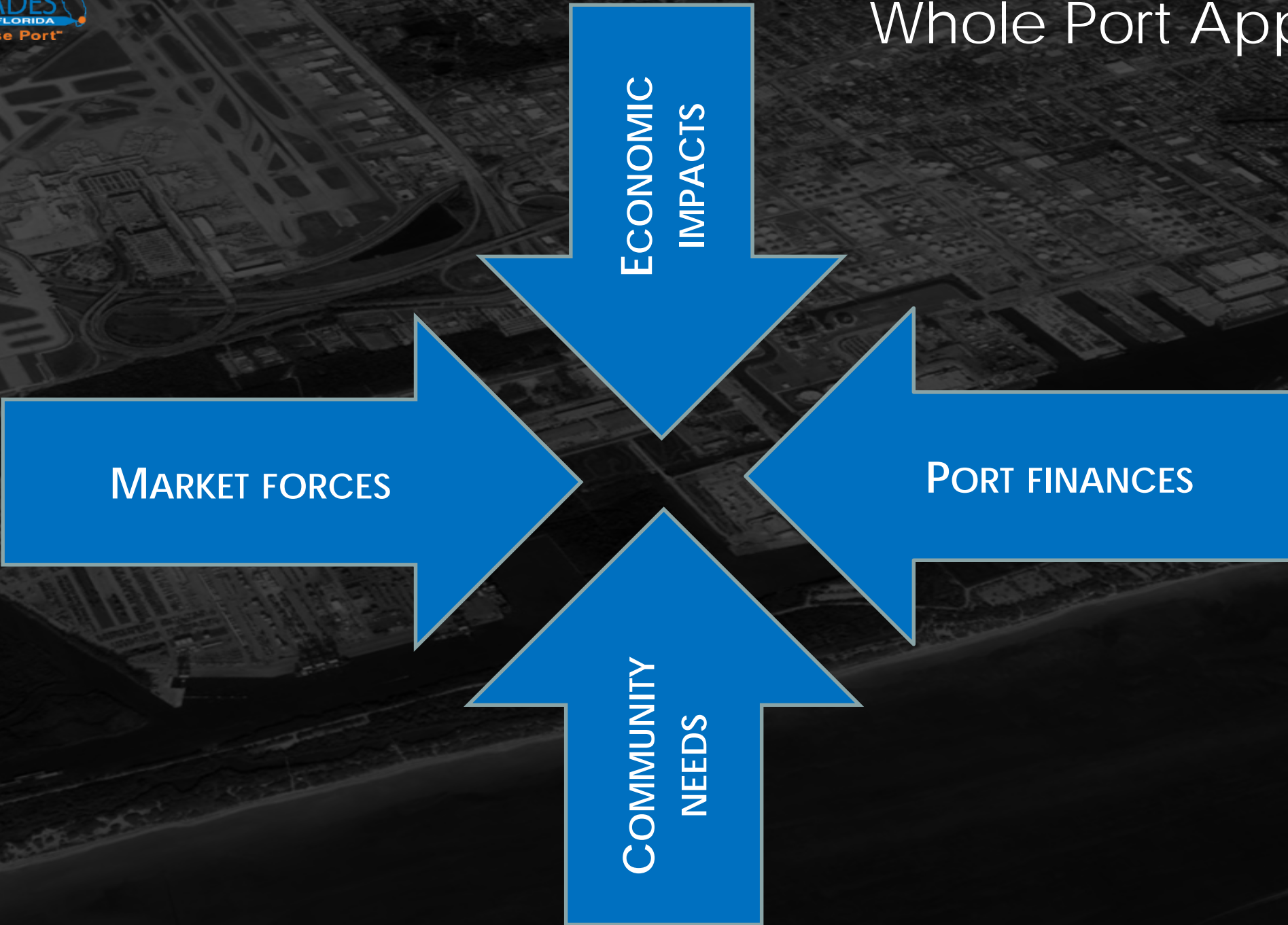
- You know the port – challenges and opportunities
- Contribute and tell us what works and what does not

Value to the community

- Identify opportunities to grow volumes & revenues in a diversified portfolio
- Balance local and regional needs
- Provide for economic, environmental and community needs

Our approach will...

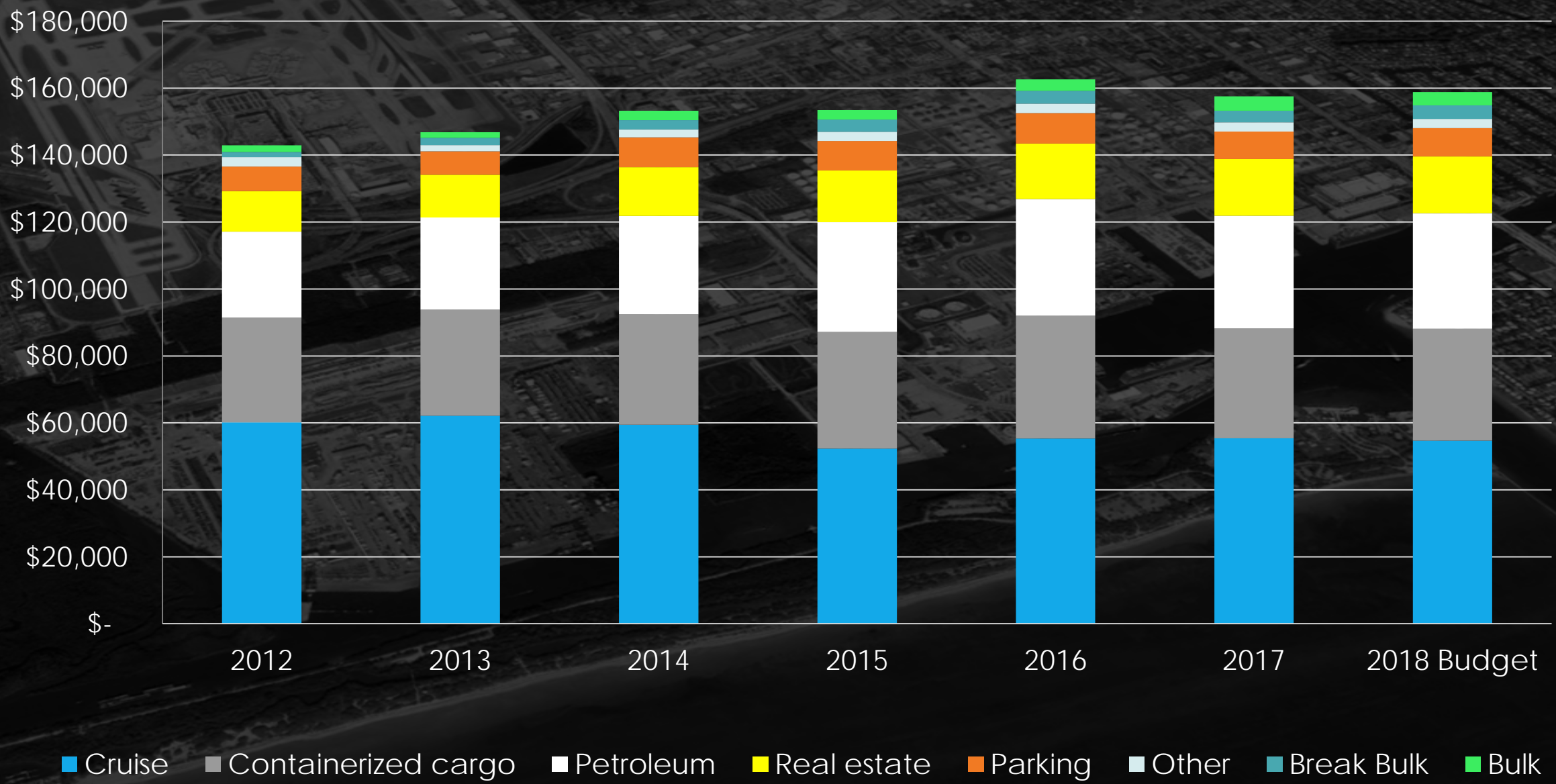
- Build on existing strengths and current port investments
- Preserve flexibility to adapt to new opportunities
- Explore opportunities to introduce technology and innovative practices
- Use dynamic financial modeling for project evaluation
- Emphasize sustainability and optimization
- Balance the needs of cargo and cruise operations
- Engage a broad range of tenants & stakeholders... beginning today!



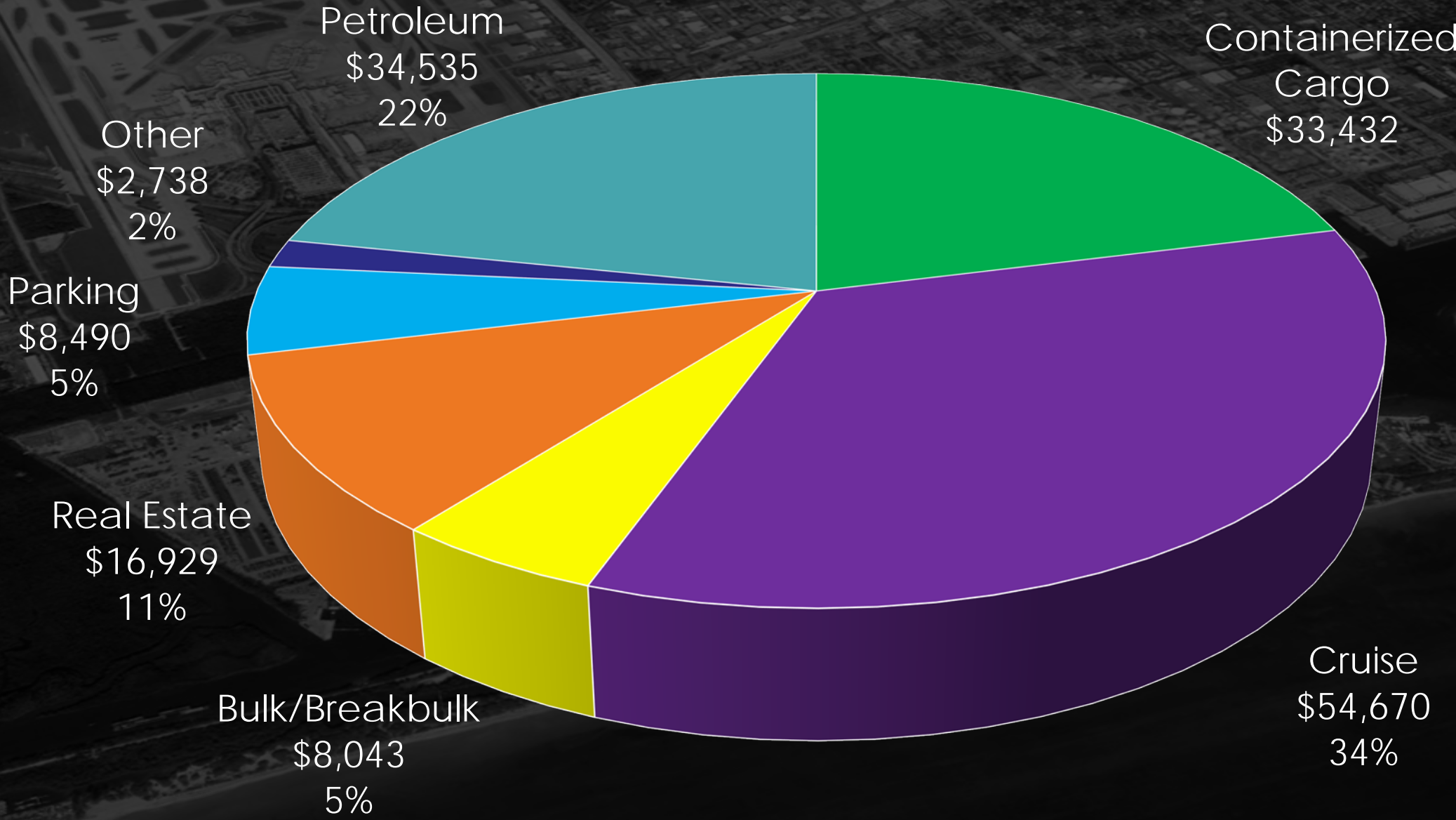
MASTER / VISION PLAN UPDATE: 5, 10, 20 YEAR PROJECT STATUS

PORT DISCUSSION

Gross income by business unit

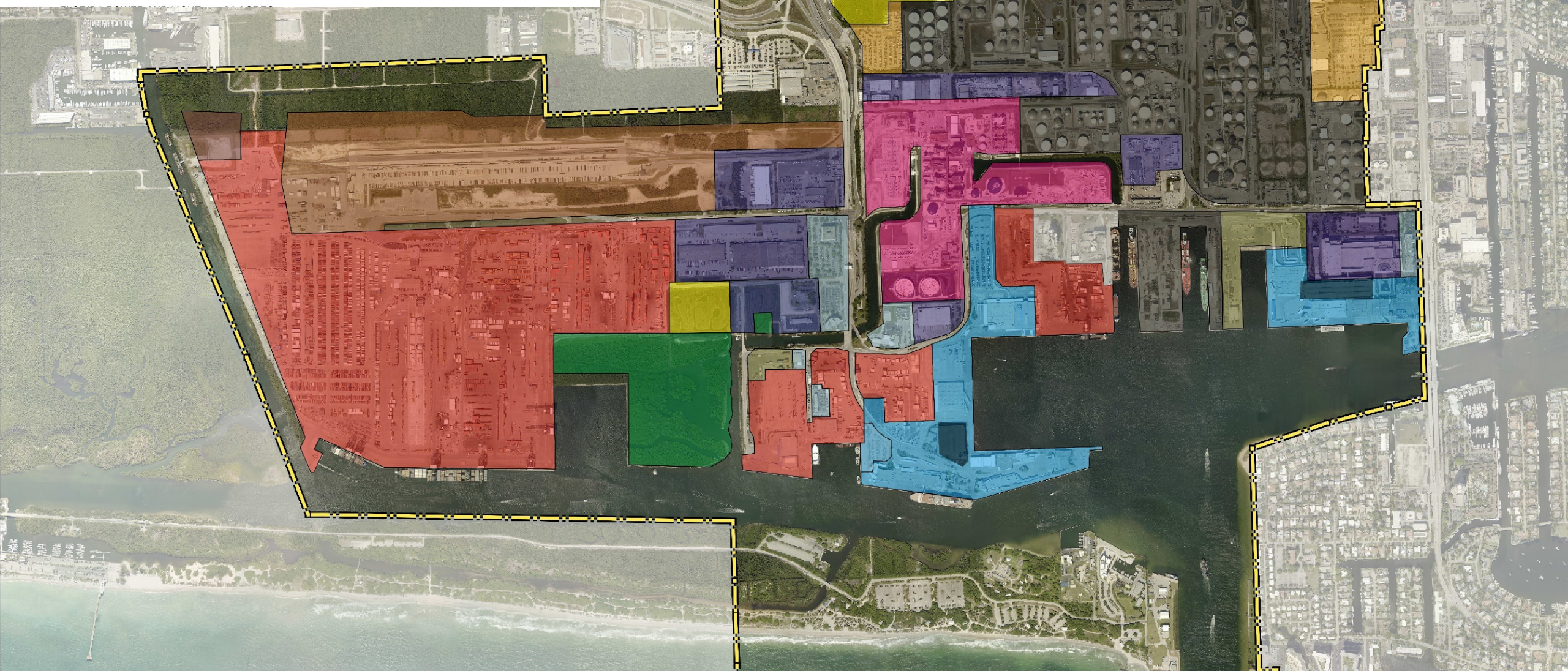


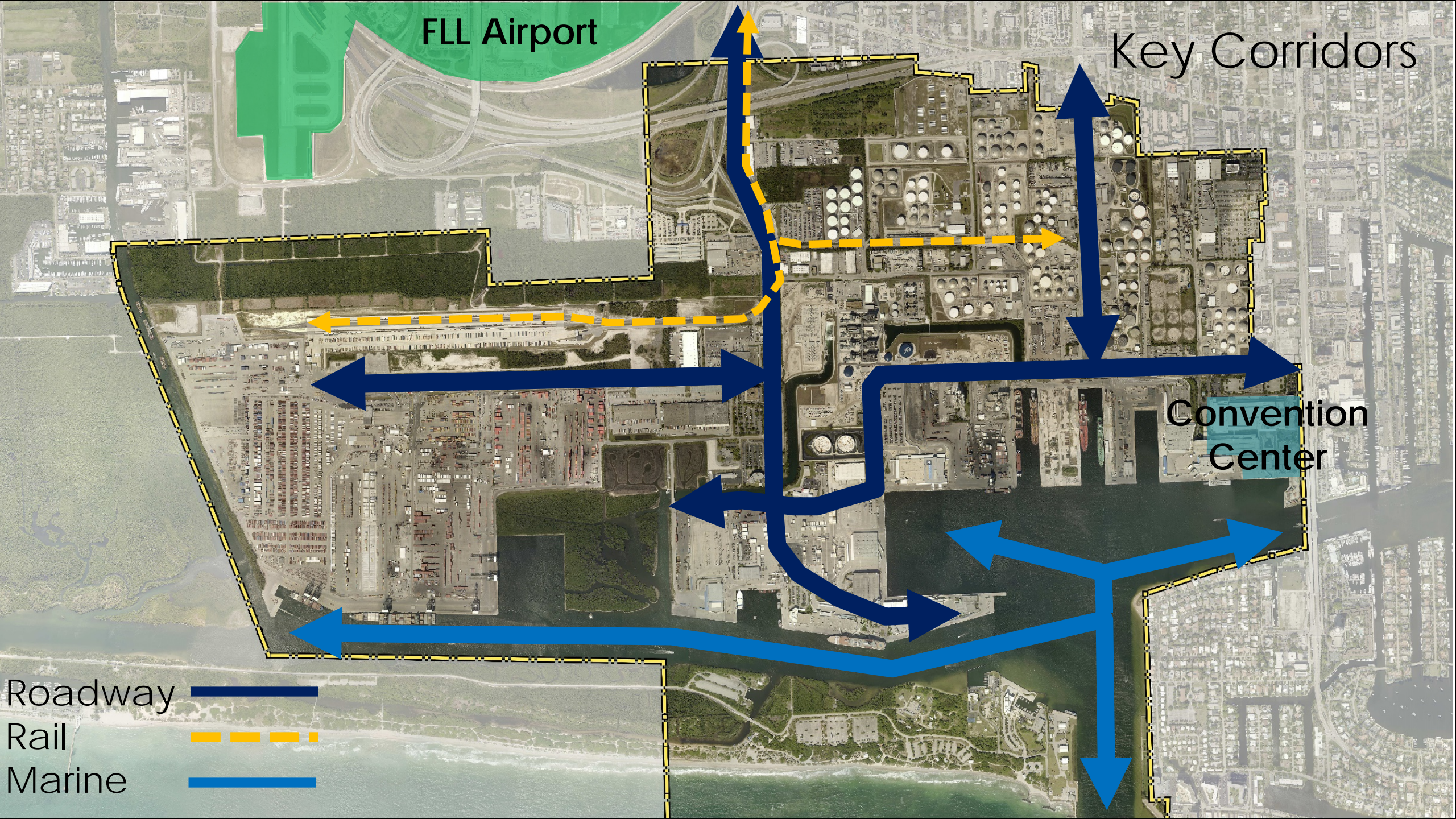
Recommended Operating Revenues, 2018



CRUISE AREA	92.5 ACRES	FLORIDA POWER AND LIGHT	81 ACRES
CONVENTION CENTER	19 ACRES	CONSERVATION AREA	51.5 ACRES
CONTAINER YARD	333.6 ACRES	VACANT LAND	181 ACRES
LIQUID BULK / PETROLEUM	290.4 ACRES	WAREHOUSING	93 ACRES
CEMENT / DRY BULK	13.6 ACRES	OFFICES	27.2 ACRES
GENERAL CARGO AREA	17.2 ACRES	PARKING GARAGES	76.7 ACRES
COMMERCIAL OR OTHER	66.8 ACRES	GOVERNMENTAL AGENCIES	13.4 ACRES
SPOIL AREA	7.5 ACRES	MULTI MODAL YARD	145.3 ACRES

Land Use





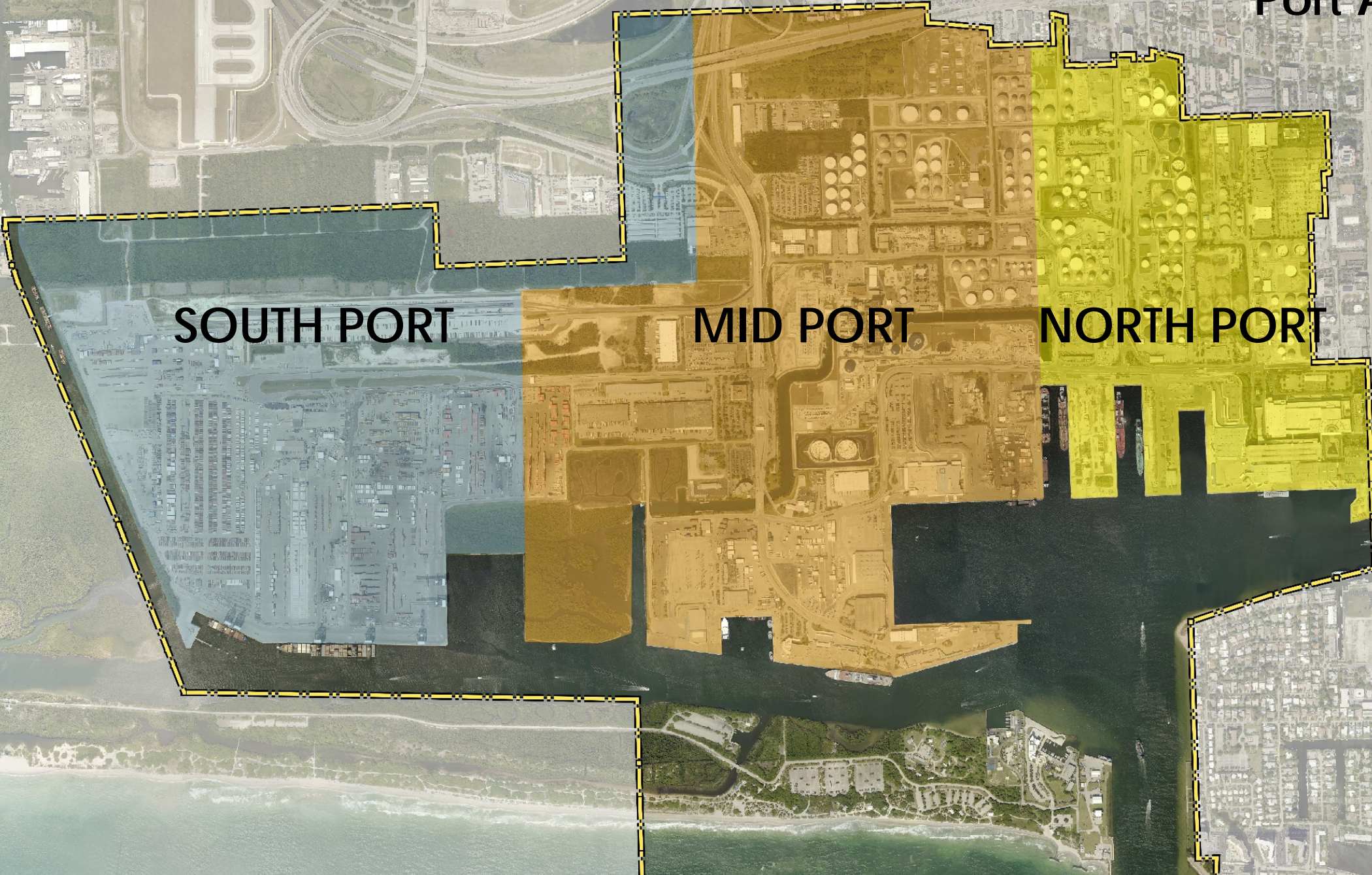
FLL Airport

Key Corridors

Convention Center

- Roadway 
- Rail 
- Marine 

Port Areas



SOUTH PORT

MID PORT

NORTH PORT

NEAR-DOCK RAIL = OPPORTUNITY TO EXPAND HINTERLAND AND REDUCE LOCAL TRUCK TRAFFIC

FTZ, COLD/FROZEN STORAGE TO SUPPORT REEFER TRADE, CRUISE PROVISIONING

PHASE 9B CONTAINER YARD = OPTIONS FOR FLEXIBLE FUTURE USE (CHASSIS STORAGE, EMPTY STORAGE, M&R / INSPECTIONS, TRANS LOADING, OTHER?)

LONG-TERM NEED TO RECONFIGURE/DENSIFY CONTAINER YARDS OVER TIME TO INCREASE THROUGHPUT ON SAME FOOTPRINT



Single access point for trucks = potential future congestion on peak pick-up/drop-off days

Logistics

Operations

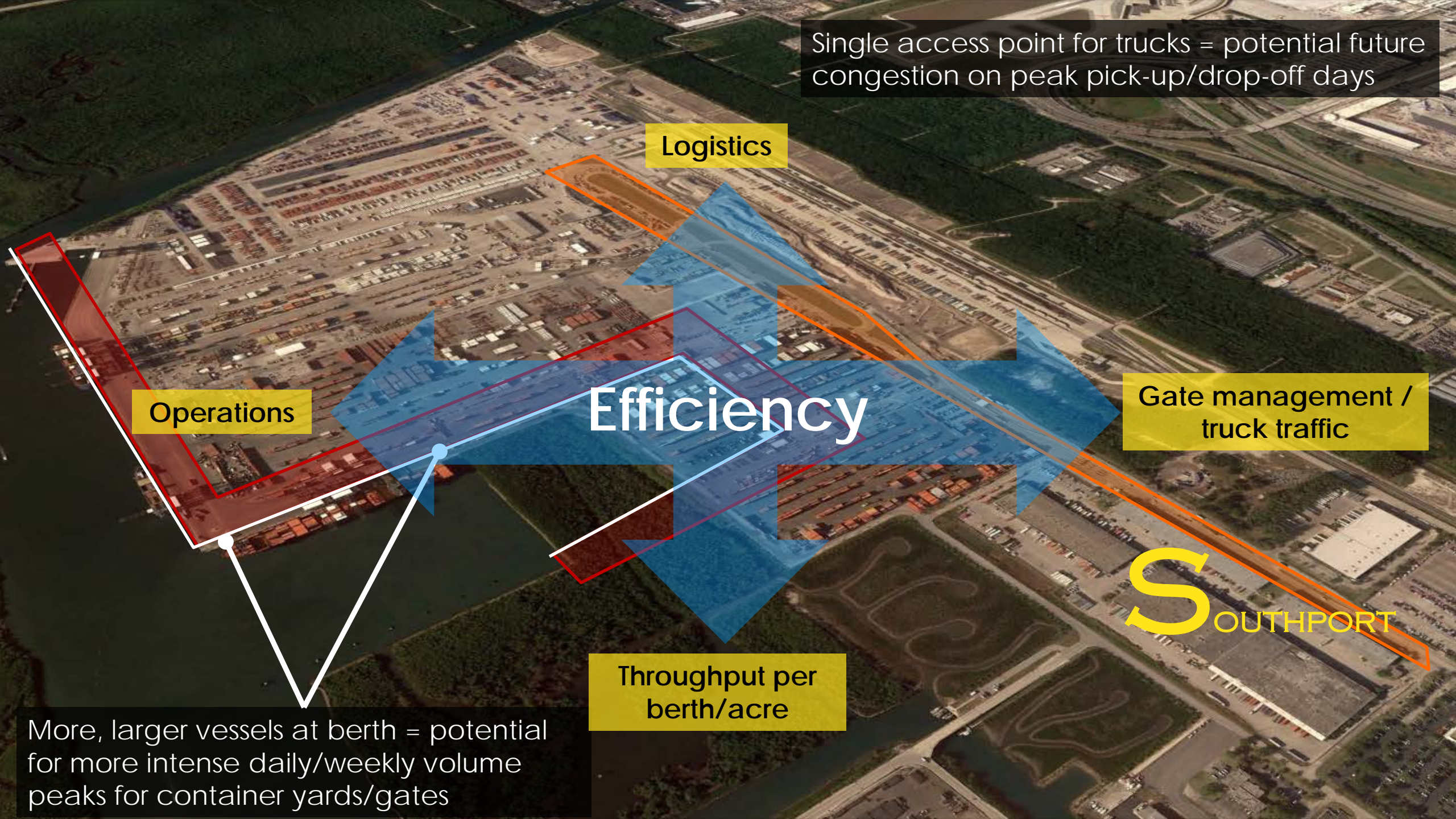
Gate management / truck traffic

Efficiency

Throughput per berth/acre

SOUTHPORT

More, larger vessels at berth = potential for more intense daily/weekly volume peaks for container yards/gates



HOW TO ACCOMMODATE LNG BUNKERING = MAJOR CONSIDERATION FOR COMING 20 PLUS YEARS

OTHER PROPERTIES WITHIN AND BEYOND PEV SHOULD BE IDENTIFIED FOR POTENTIAL FUTURE DEVELOPMENT AND USE/REUSE (INCLUDING OFFICE/COMMERCIAL)

IMPROVE T29 (CRUISE) IN BALANCE WITH INCREASED UTILIZATION OF ADJACENT BACKLANDS (CARGO); T19, T21, T25 AND SURROUNDING GTAs/PARKING

MIXED USE AREAS INCREASE LAND UTILIZATION AND CREATE COMPLIMENTARY REVENUE OPPORTUNITIES – HAS WORKED WELL HISTORICALLY BUT MAY COME UNDER PRESSURE AS CRUISE AND NON-CONTAINERIZED CARGO NEEDS GROW AND CHANGE OVER TIME

Vehicular access to the Midport garage and pick-up/drop-off congestion at T19, T21, T25 and T26 on multi-ship days

Circulation/
Parking

Containers
Operations

Flexibility

Cruise
Operations

Bulk/Ro-Ro
Operations

Berths 19-21, Terminal 29 and the "knuckle" = constraints to growth in cruise vessel size, PAX volume



PETROLEUM OPERATIONS ARE CRITICAL TO THE SOUTH FLORIDA ECONOMY AND DEMAND IS LIKELY TO GROW AS THE REGION GROWS: HOW AND WHERE TO ACCOMMODATE?

HOW TO ACCOMMODATE LNG BUNKERING = MAJOR CONSIDERATION FOR THE COMING 20 PLUS YEARS

N
ORTHPORT



Neo-bulk = good utilization of available land but likely to be cyclical/short-term/spot market opportunities

New Opportunities

LNG Bunkering

Integration

Cruise/
Convention

Petroleum /
Liquid Bulk

Other properties within and beyond PEV should be identified for potential future development and use/reuse (including office/commercial)



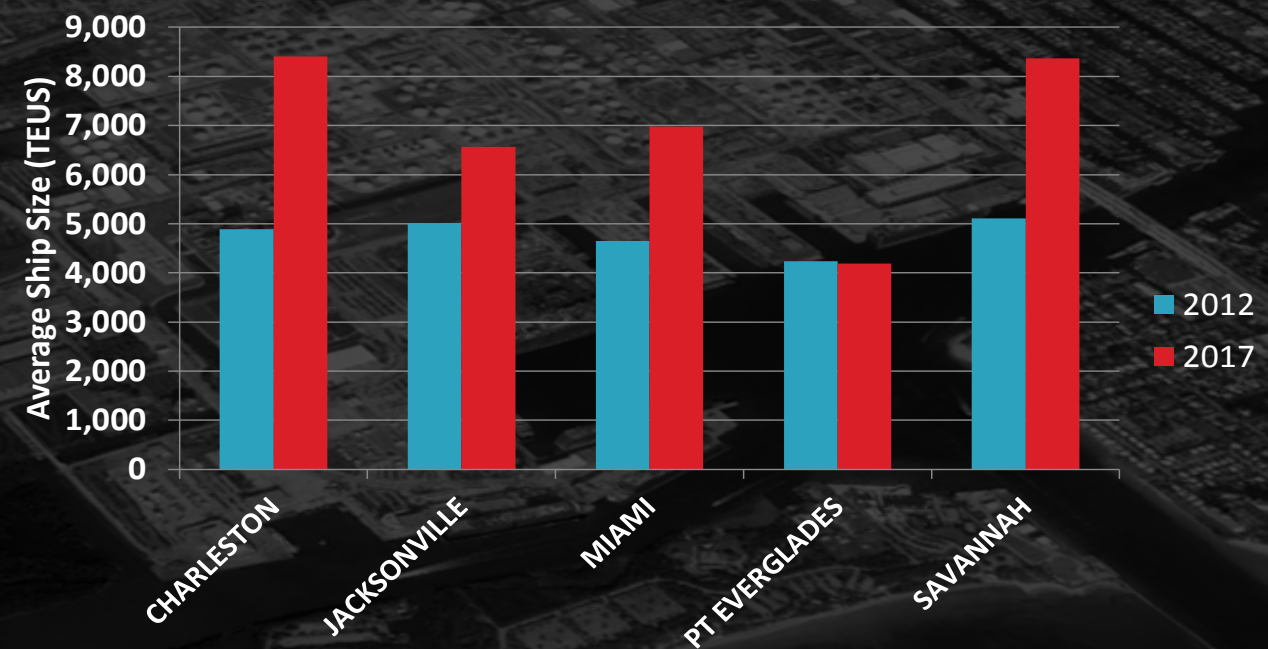


CARGO

Container

- Trade lanes
 - North/South key
 - Emerging – Africa, Mexico
 - Asian, Europe/Med
- Markets – Perishables
- Infrastructure
 - Channel depth
 - Cranes
 - Surface transportation access
- Operations
 - ILA/Teamsters/Non-union
 - Integrated operating systems
 - Gate management / truck traffic
 - Yard layout efficiency / berth productivity / minimize dwell times

The Growth In Size Of Container Vessels Deployed On The Asian Trade At South Atlantic And Florida Ports Underscores The Need To Complete Channel Deepening



Petroleum

- Future demand/markets
 - Gasoline
 - Jet Fuel
 - Alternative Fuels
 - Electric vehicles
- Competition from other ports
- Changes in vessels drive berths / operations

General Cargo

- Utilization of empty / reused space:
 - Steel
 - Autos
 - Project cargo/yachts
- Revenue maximization



LNG: a future necessity

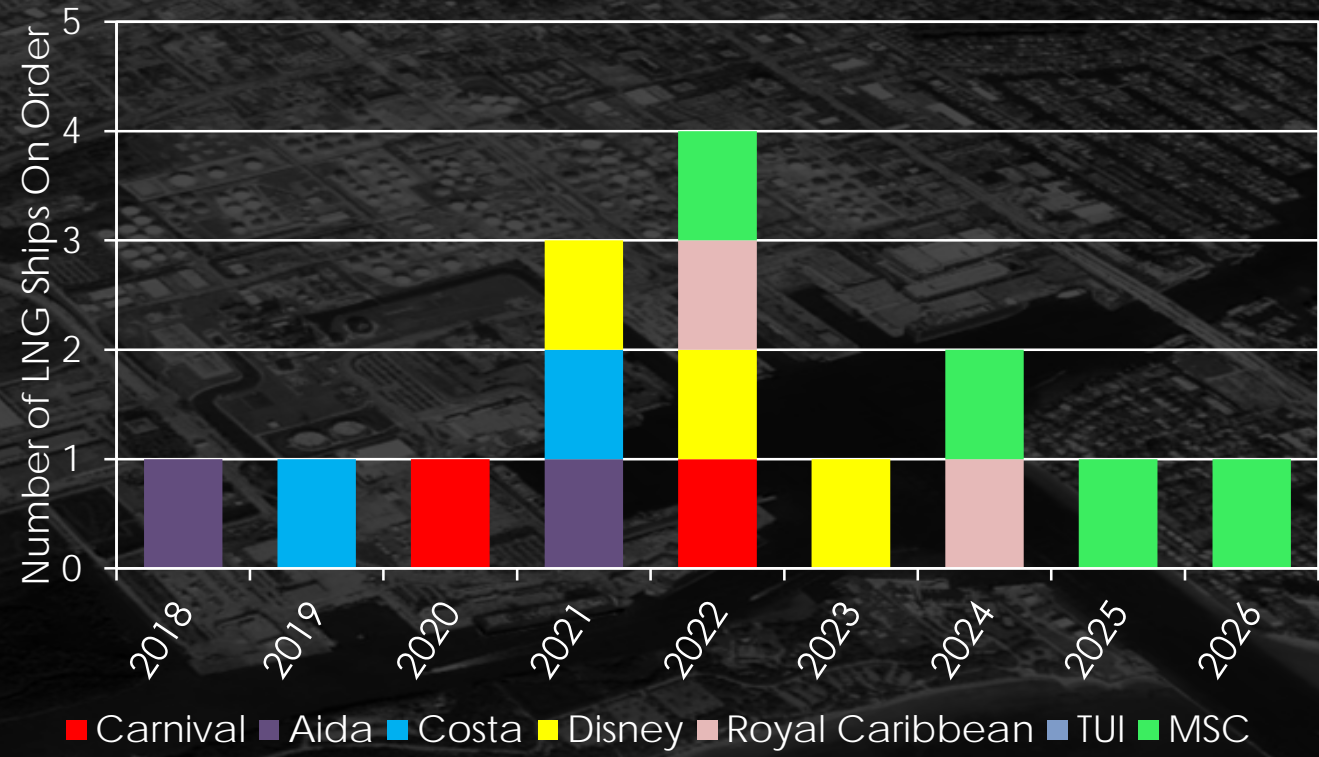
- Cruise ships
- Cargo -- Crowley, Tote/SeaStar
- ECA regulations
- How to develop LNG

Dry bulk

- Land leases
- Optimization of net income

Autonomous vehicles / vessels

- Is this a future reality?
- Impacts on traffic, operations



Existing situation analysis

- Key markets
- Terminal operations (existing and planned)
- Opportunities and constraints
- Planned investments
- Lease structures
 - Revenue per ton / unit
 - Throughput per acre
- Competitive situation

Market assessment and projections

- Growth in current operations
- Potential new markets

Cargo Analysis Key Steps

- Identification of future terminal needs
 - Cargo projections compared to existing and planned capacity
 - Non-structural vs. structural
 - Investments
- Capital development program
- Financial analysis
 - Lease structures
 - Public private partnerships
 - State and federal grants and loans
 - Conduit financing
- Economic impact assessment

CRUISE

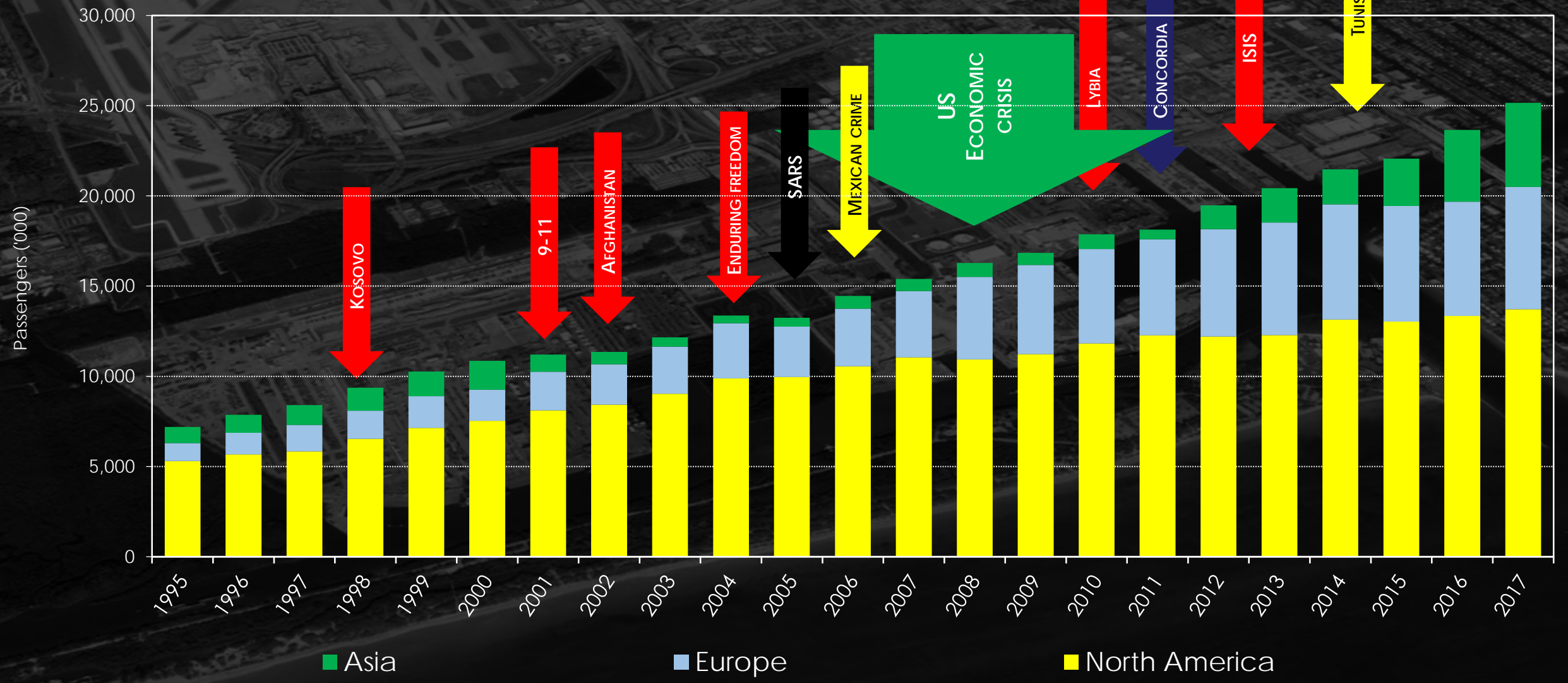


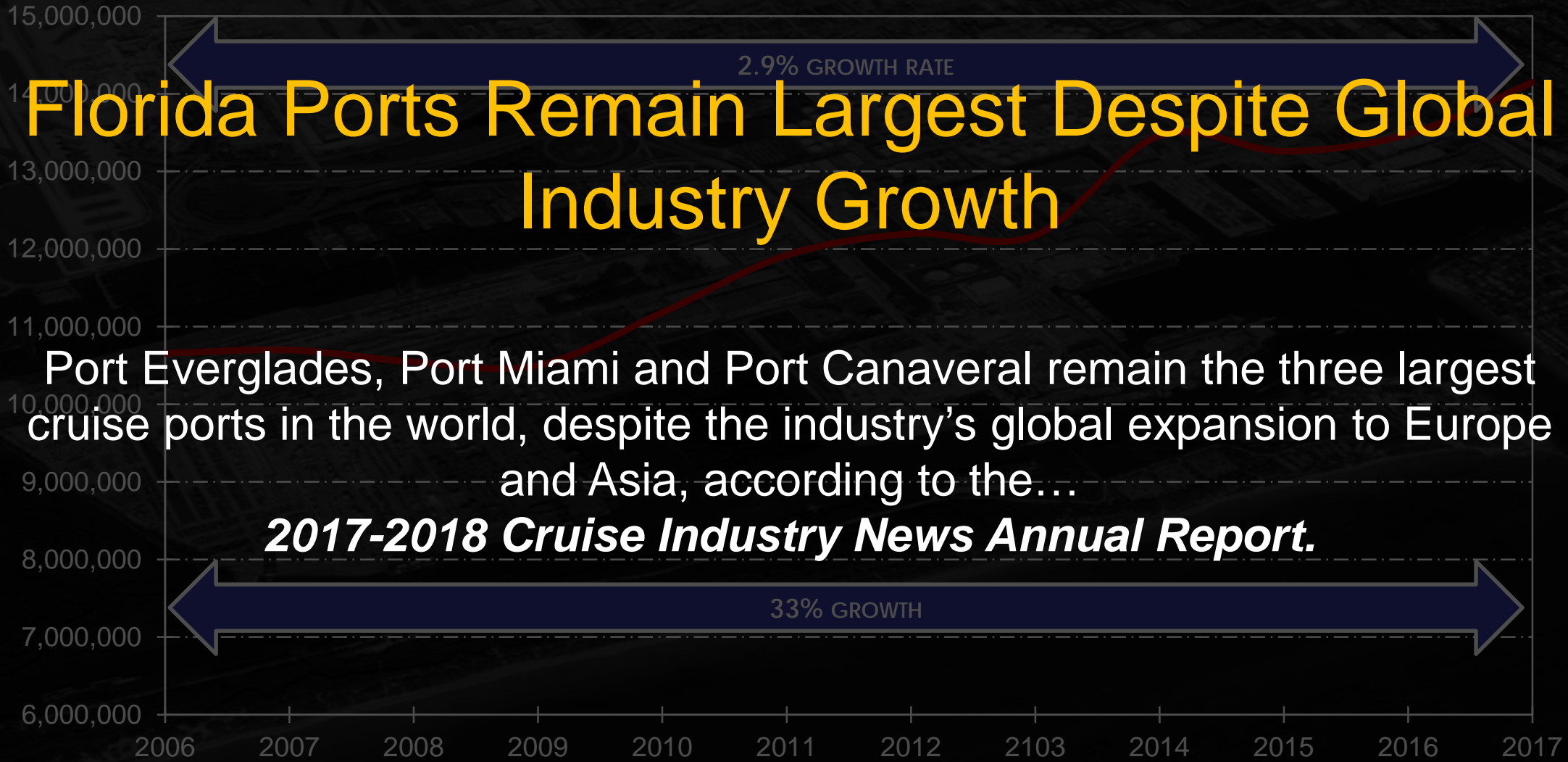
Cruise

- The largest source of revenue - no longer growing reliably year-over-year
- Port Miami and Port Canaveral both putting pressure on PEV by adding new terminal capacity for vessels including Oasis-class
- LNG bunkering at competing ports being developed (early stages)
- Is PEV cruise infrastructure keeping pace? *Berths, terminals, transportation*

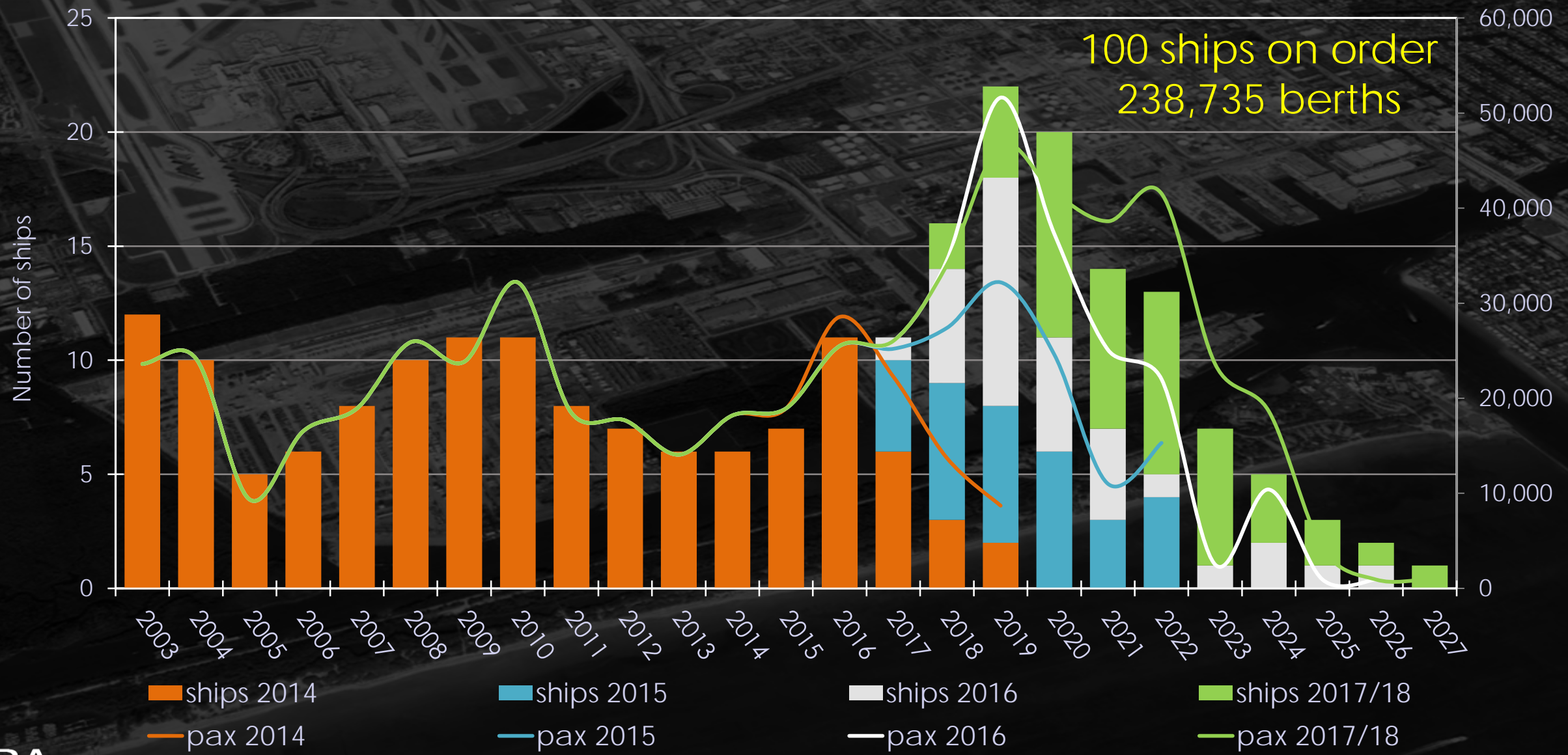


Worldwide cruise passengers

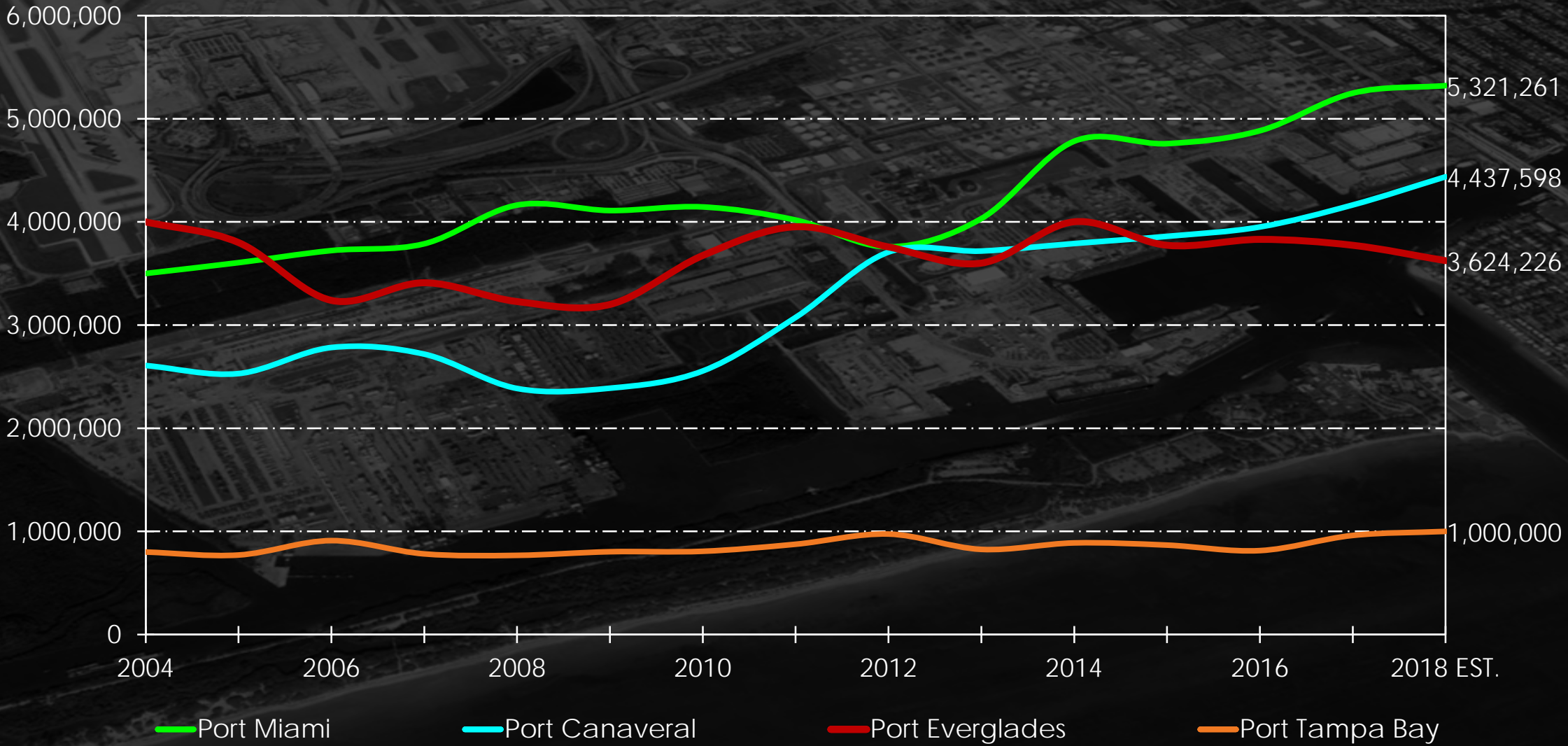




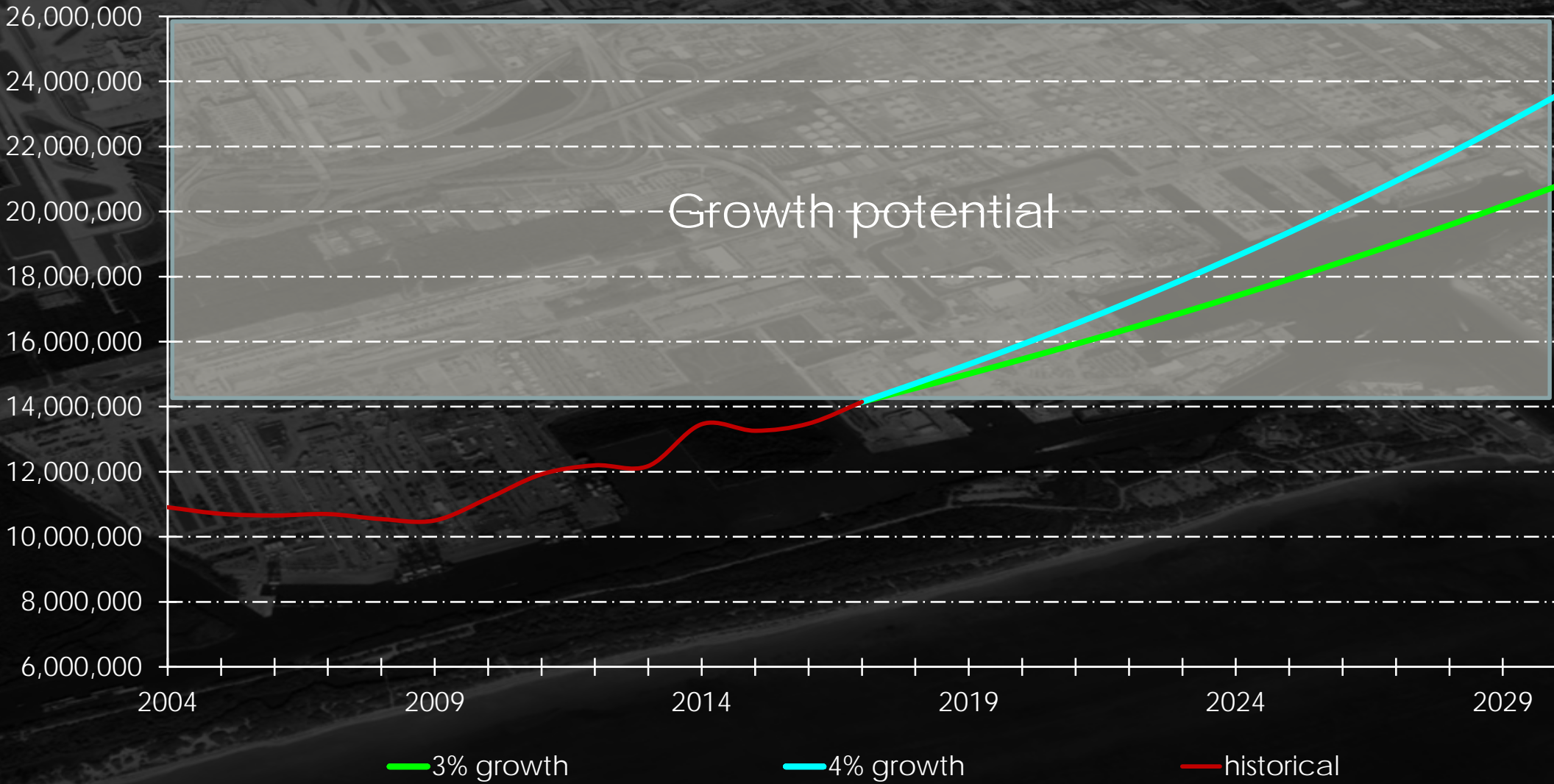
Ship order progression



Florida key homeports



Florida homeport passengers

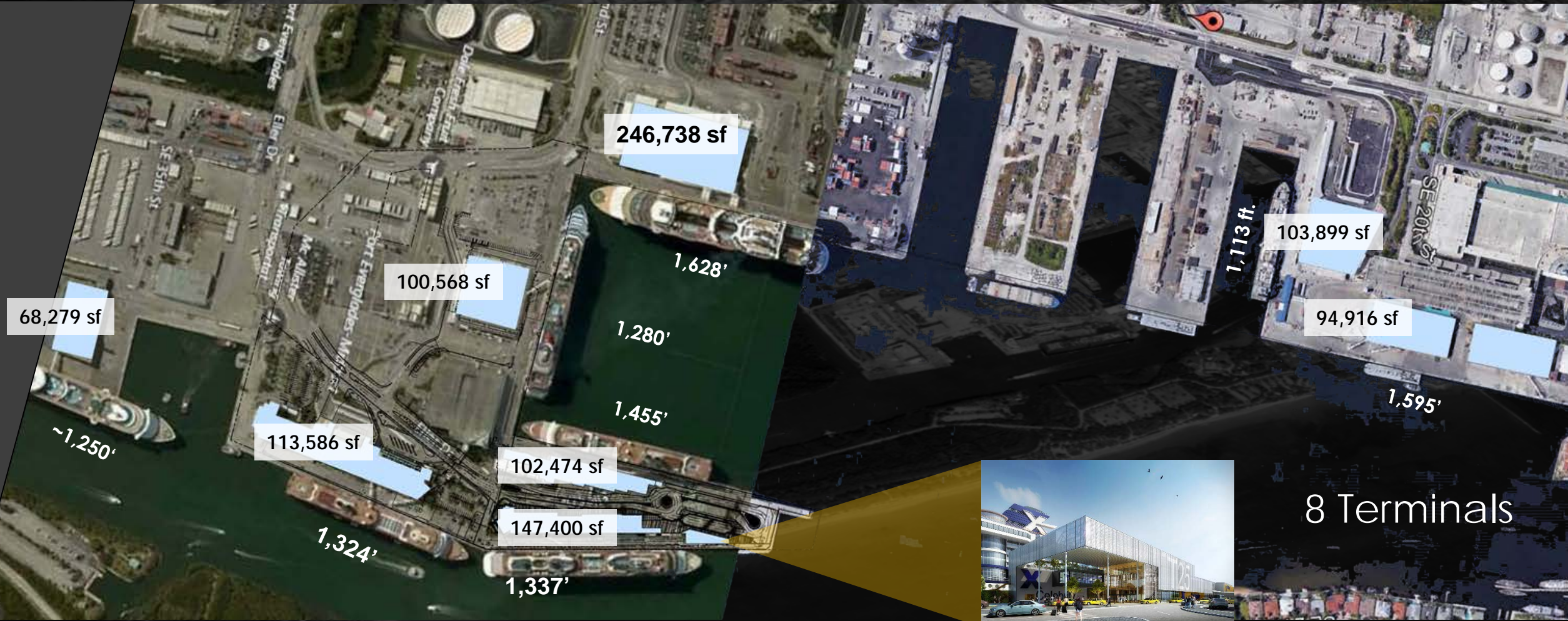


At 1 Million Passengers Per Berth
Over the Next 20 Years...

THERE COULD BE
DEMAND FOR AN ADDITIONAL 10 BERTHS IN FLORIDA

- **Port Everglades**
 - Current – 8 berths
 - Future ???
- **Port Miami**
 - Current - 7 berths
 - Future 9-10
- **Port Canaveral**
 - Current – 5 berths
 - Future 9
- **Port Tampa Bay**
 - Current – 3 berths
 - Future 2





8 Terminals

- **Phase I – End of July**
 - Existing Conditions Assessment
 - Market Assessments
 - Cargo, Cruise, Liquid bulk
 - Community and Stakeholder Outreach
- **Phase II – End January 2019**
 - Plan Development
 - Strategy Development
 - Financial Planning Tool Development
 - Final Plan / Plan Implementation
 - Executive Summary
 - Community and Stakeholder Meetings

- **Phase III – End February 2019**
 - 3-D Computer Animated Video
 - BOCC Adoption / MPO Meetings
- **Phase IV – End March 2019**
 - Broward County Comprehensive Plan Update

- **Broad outreach and input effort including:**
 - Port Everglades Management
 - Finance, Business Admin., Operations, Seaport Engineering, Environmental, Business Development
 - Tenants & stakeholders
 - Cargo, cruise, commercial arenas
 - Adjacent key entities with port interaction
 - Fort Lauderdale / Hollywood International Airport
 - Broward County Convention Center
 - Public outreach
 - Environmental, community & other groups
 - Port Everglades Association
 - County Oversight
 - Broward County Commission members
 - County Administrator's office

- These “Reach-outs” and key meetings provide for:
 - An introduction to the Master Planning Process
 - The ability to participate in the Planning Process
 - Define opportunities and challenges associated with the Port
 - Allow for “ownership” and “buy-in” of the overall process and final plan outcomes
- ***What are the potential opportunities for Port Everglades that should be explored as part of the M / VP planning process?***

- **Data collection** – already provided with a list and receiving materials
- **Stakeholder outreach**
 - Key Port personnel – kick-off meeting held on April 4th
 - Tenants and Stakeholder Meeting – TODAY (April 25)
 - Port Everglades staff meetings – week of April 23
- **Market assessment** – week of April 30
 - Cruise, cargo, liquid bulk tenant and stakeholder meetings / interviews
- **Infrastructure assessment** – underway
 - Berths, buildings, roadways, etc.
 - Updates on structural, electrical & mechanical, civil, etc.

- ***WE LOOK FORWARD TO YOUR INPUT AS PART OF THE PLANNING PROCESS***
- Mark Ittel – B&A Project Manager
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