



Port Everglades Master/Vision Plan Update

Port Everglades Association Briefing

February 7, 2014



Master/Vision Plan Update Process

- Phase I - End of September 2013 **COMPLETED**
 - Existing Conditions Assessment
 - Market Assessment
 - Business Line Forecasts (with and without 50ft of water)
 - Community and Stakeholder Meetings
- **Phase II - April 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 - April 2014
 - 3-D Computer Animated Video



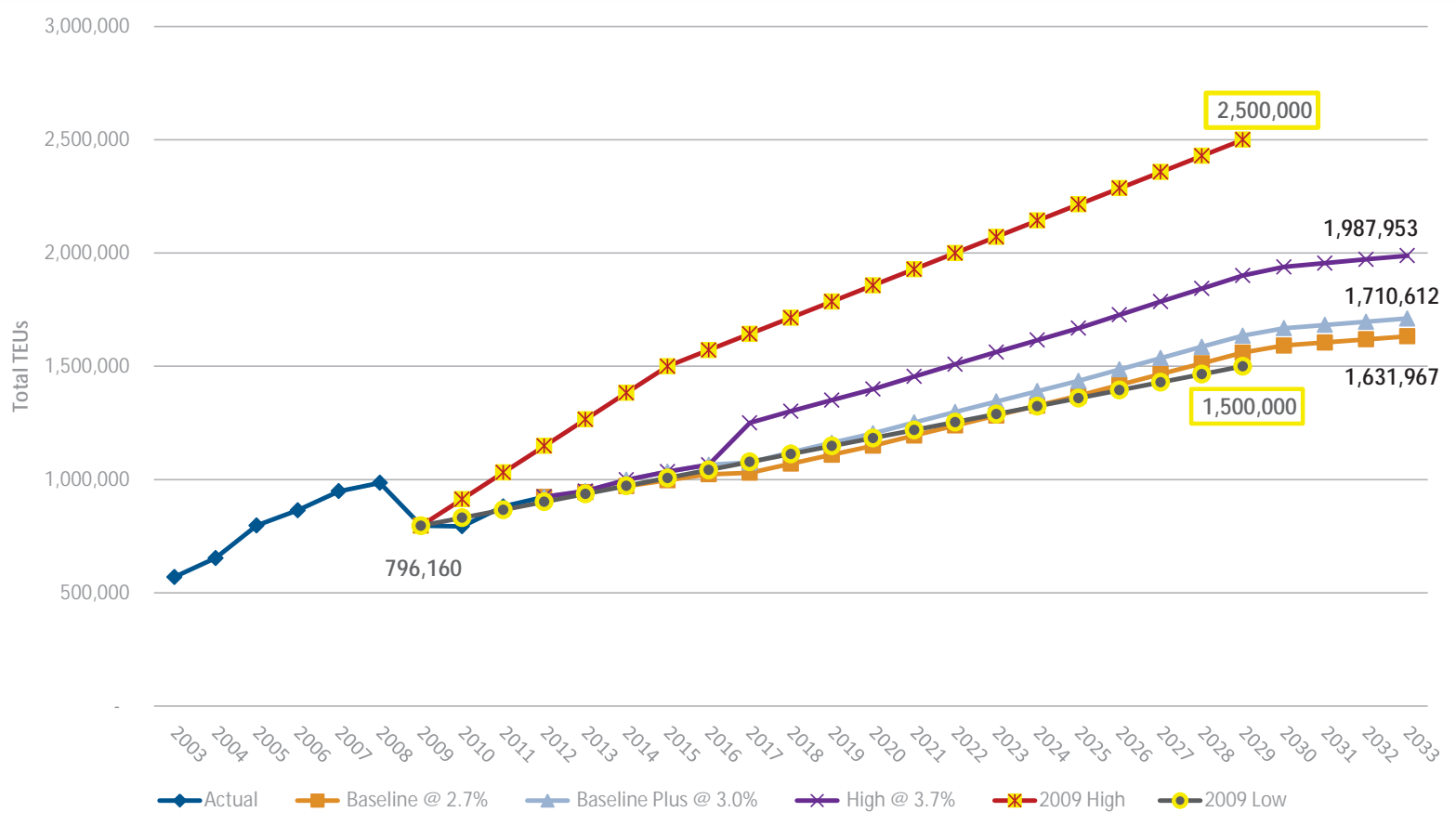
Master/Vision Plan

MARKET ASSESSMENTS SUMMARY

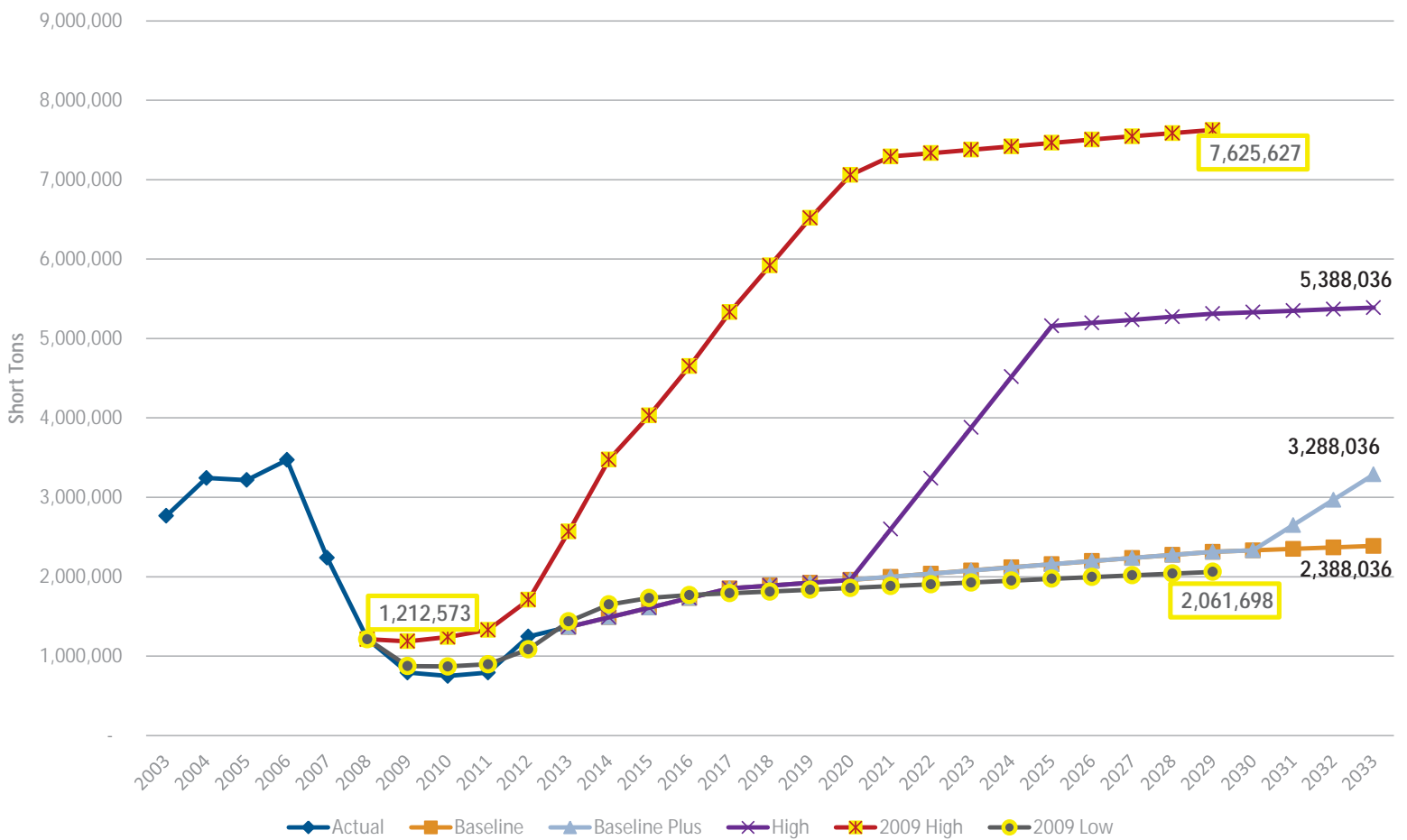


Containers - Comparison of 2009 and 2014 Forecasts

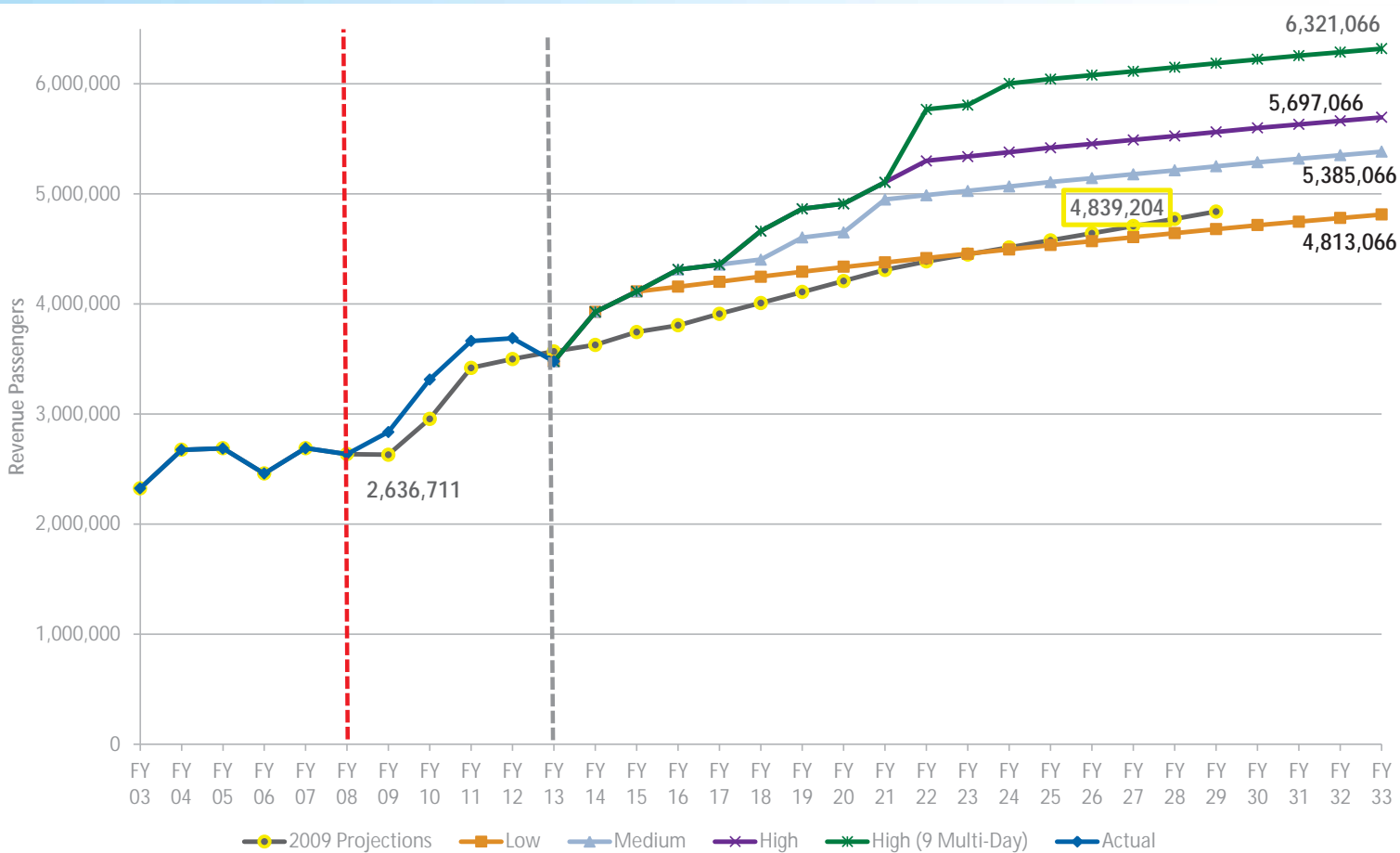
Total TEUs



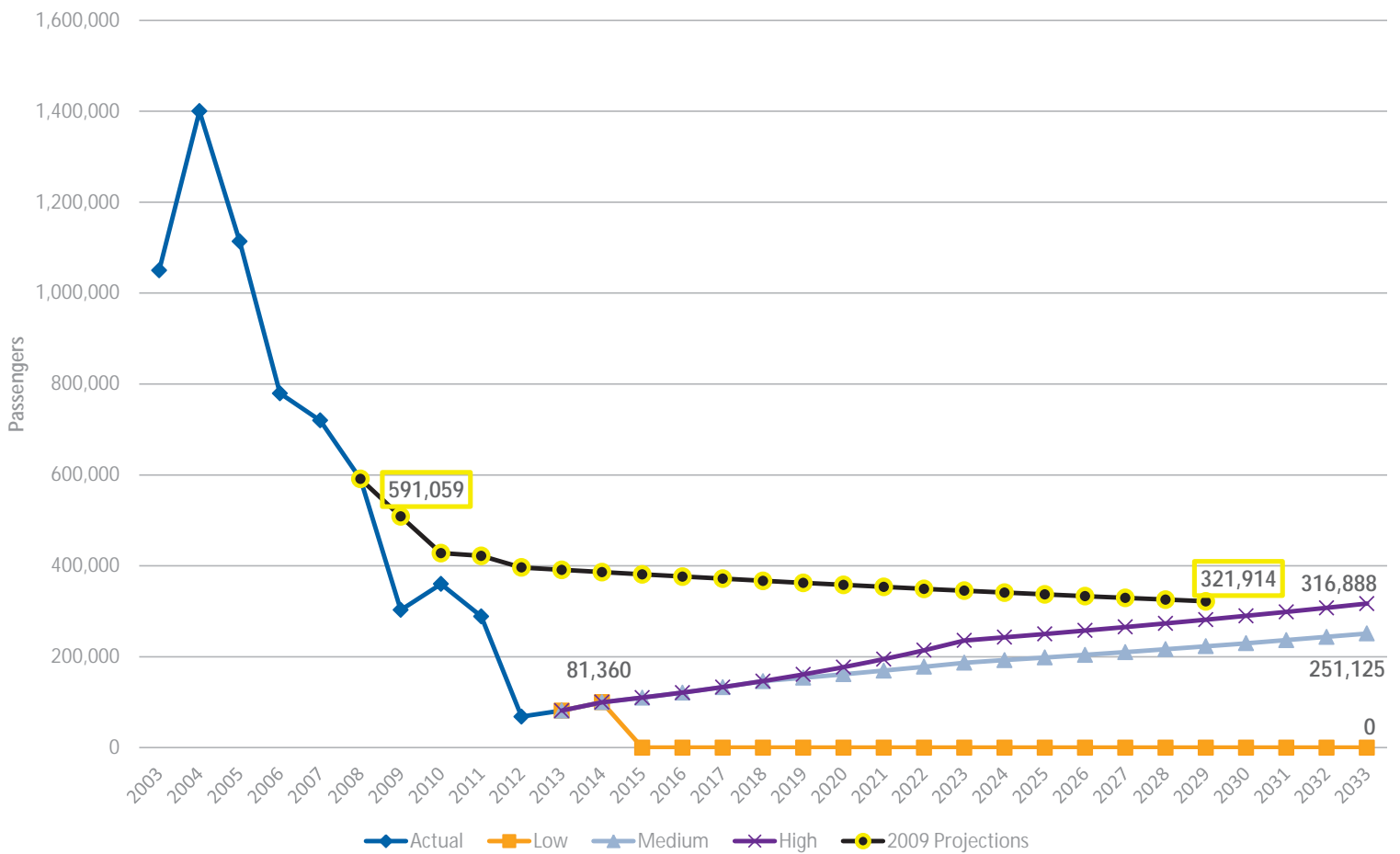
Dry Bulk, Break Bulk, Yachts and Vehicles Comparison of 2009 and 2014 Forecast Estimates



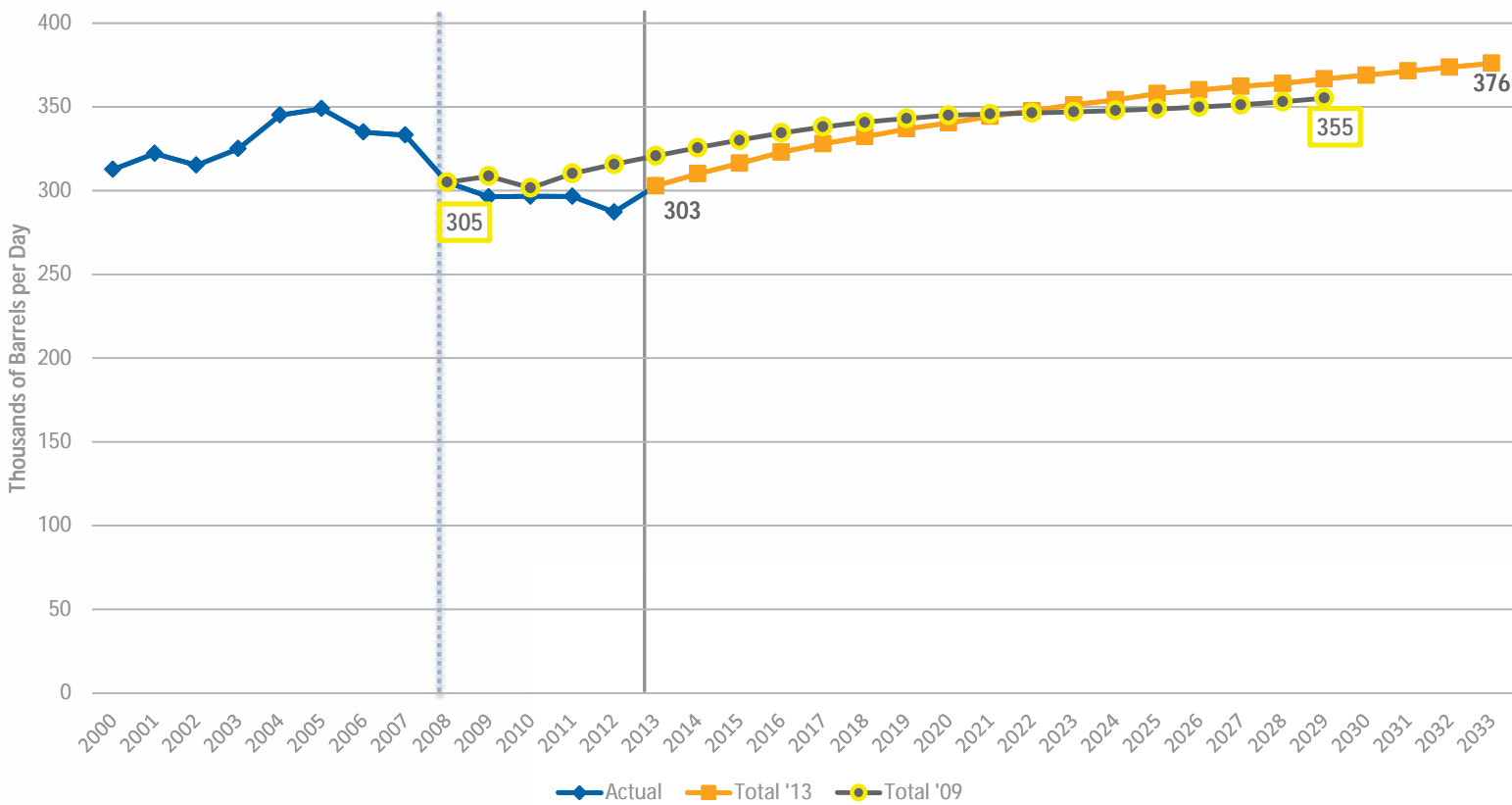
Multi-Day Cruise Passengers Comparison of 2009 and 2014 Forecast Estimates



20 Year Forecast for Port Everglades Single-Day Cruise Passengers



Petroleum Forecast: 2009 and 2014 Comparison

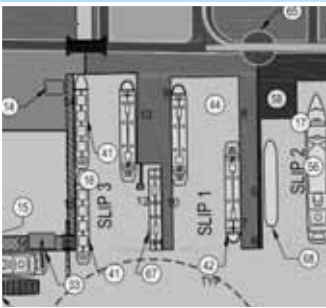


Master/Vision Plan

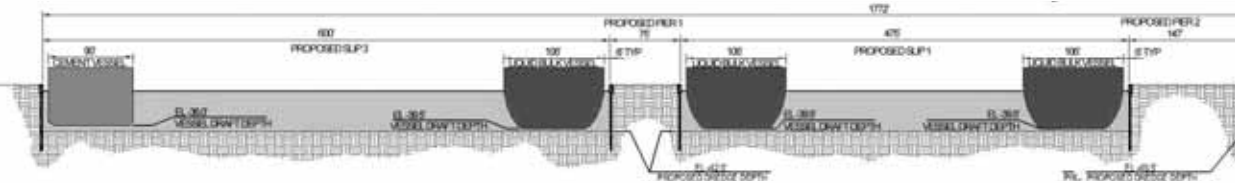
PROJECT DEVELOPMENT AND IMPLEMENTATION



Petroleum Receiving Berths Redevelopment – Slip 1 and Slip 3



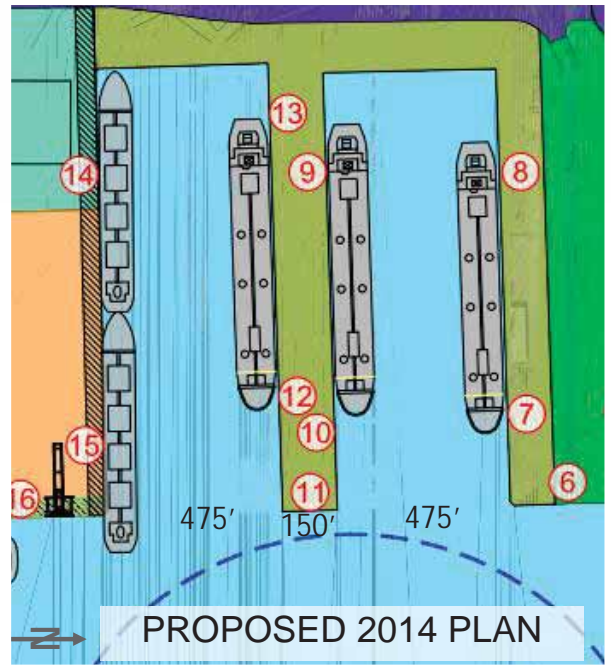
EXISTING 2009 PLAN



Development Program

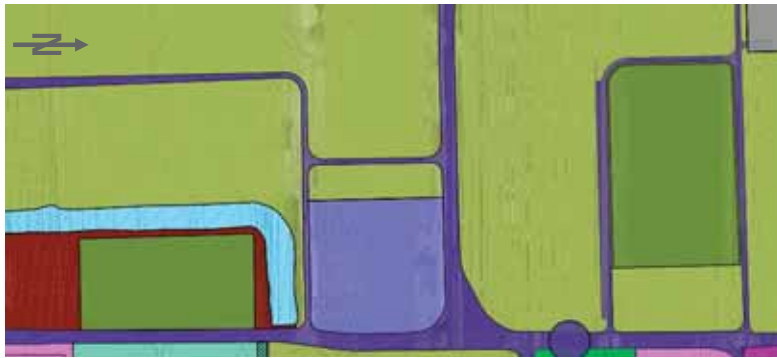
- 3 Redundant Berths
- Berth capacity for Post-Panamax vessels (beam of 130')
- Depth consistent with ACOE deepening project
- Ready for reinstallation of piping and loading arms
- Changes from 2009 Plan include:
 - Slip 1 expansion to the South by 175' (not 125')
 - Slip 1 North bulkhead replaced in current location
 - Slip 3 expansion to the North by 175' (not 300')

Berth Number	Slip	Gross Cost (\$M)
7-13A	1 & 3	208.0



Neo Bulk Storage Yard Development

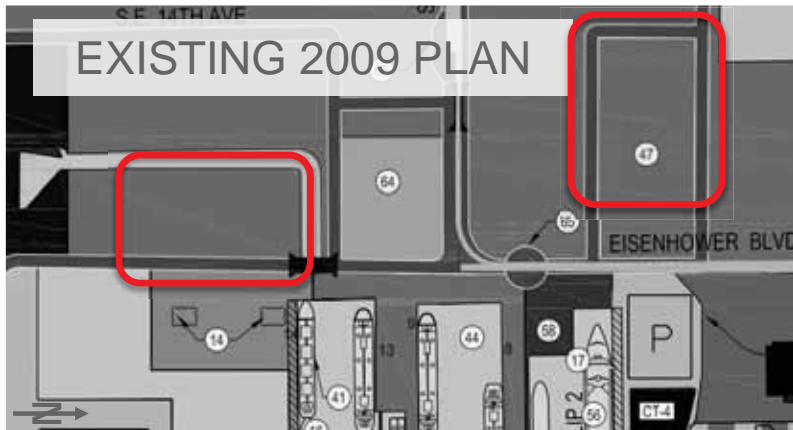
PROPOSED 2014 PLAN



Development Program

- Berth 5 / RO-RO Ramp / Molasses Tank Farm Parcel (13ac)
- Berth 14-15 / FPL Parcel (10ac)

EXISTING 2009 PLAN

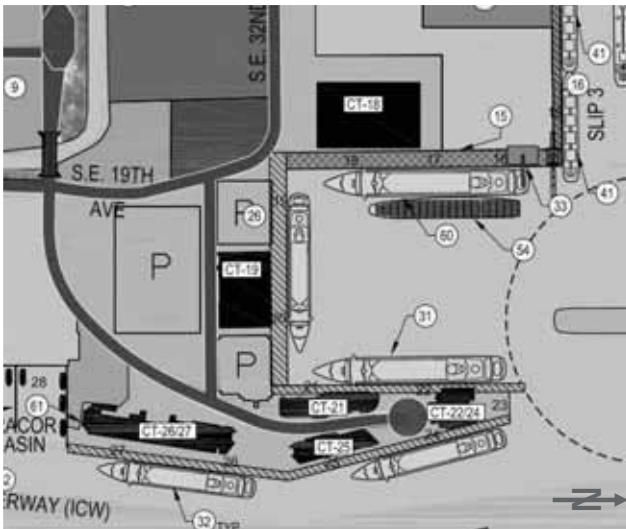


Land Parcel	Berth Number	Gross Cost (\$M)	Plan Year
Molasses Tank Farm	5	22.1	5
FPL Parcel*	14-15	20.2	5

* Subject to availability

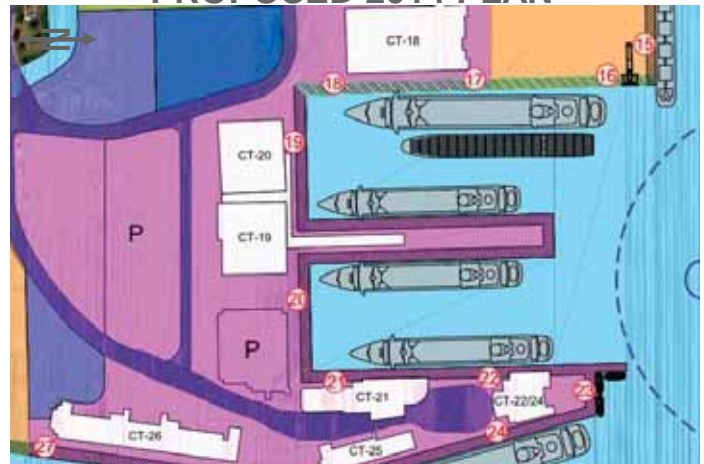
Cruise Pier and Terminals 19/20 Construction

EXISTING 2009 PLAN



Project Element	Berth Number	Gross Cost (\$M)	Plan Year
Pier 19/20	19/20	84.5	20
CT 19 & 20	19/20	83.9	20
TOTAL		168.4	

Under Evaluation for PROPOSED 2014 PLAN

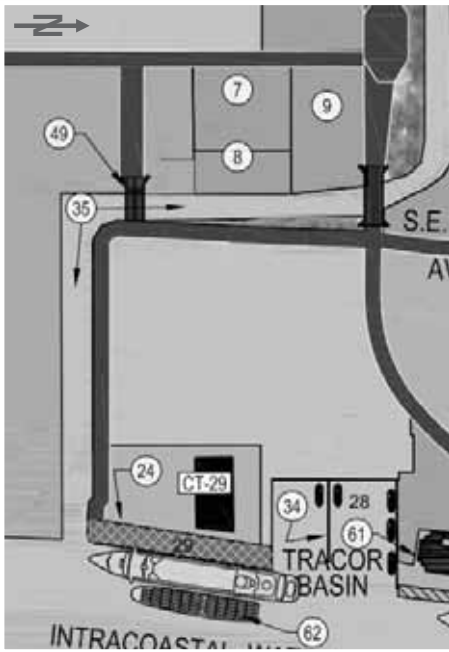


Development Program

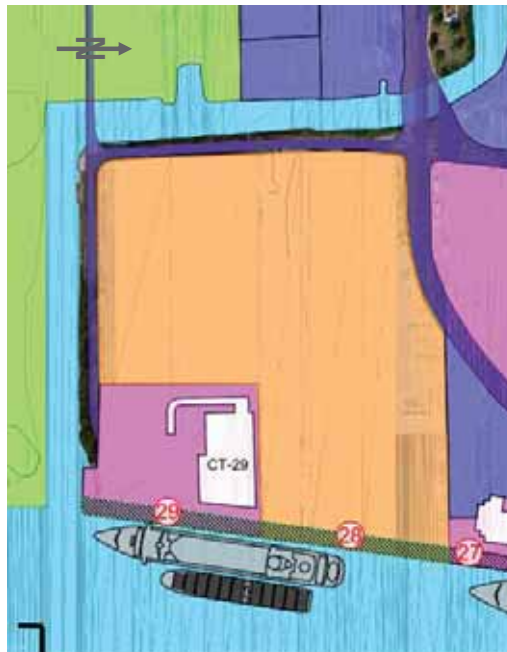
- Pier (1,150ft x 200ft)
 - Two 1,150ft berths
- Existing CT 19
- New CT 20
- Combined GTA and Parking

Tracor Basin Fill

EXISTING 2009 PLAN



PROPOSED 2014 PLAN



Development Program

- Create +/- 6ac of container yard
- Increased berth length
- Connectivity to Midport Cruise East

Revenue Considerations:

- Larger Vessel At CT 29
- More efficient ops at 29
- Connectivity to Southport Cargo operations

Project	Berth	Gross Cost (\$M)	Net Cost (\$M)	Plan Year
Total Fill	29 EXT	49.0	29.7	10

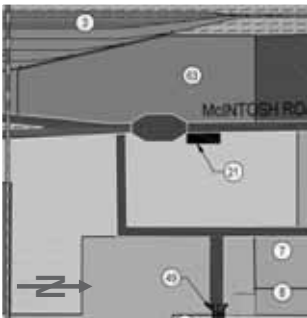
McIntosh Road Gate Lane Addition

Development Program

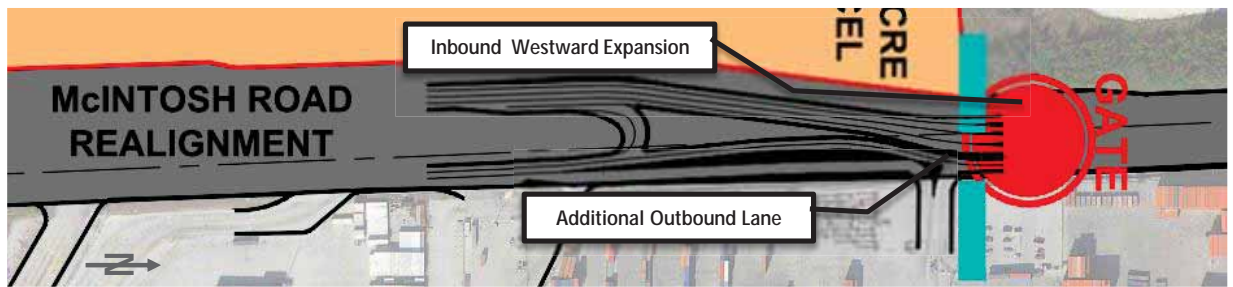
- Addition to the current McIntosh Road Improvements Project to increase capacity
- Better align McIntosh Gate with McIntosh Road Realignment
- Address FTZ relocation and Southport Yard Expansion due to turning notch expansion
- Continued CBP use of existing FTZ buildings B and E

Project	Gross Cost (\$M)	Plan Year
Westward Expansion (in alignment with current gates)	1.6	5
Split Entrance South of Existing Gate	1.6	5

EXISTING 2009 PLAN



PROPOSED 2014 PLAN



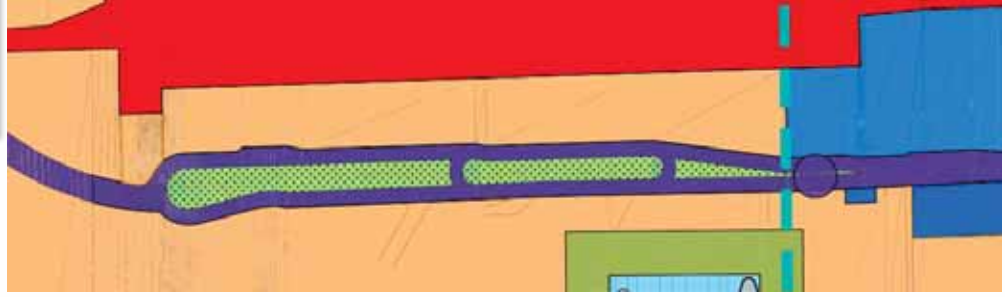
Container Upland Development (19.9ac)

Development Program

- Development of a 19.9ac area to support Southport container operations

Project	Net Cost (\$M)	Plan Year
19.9ac Development	33.9	5

PROPOSED 2014 PLAN



EXISTING 2009 PLAN

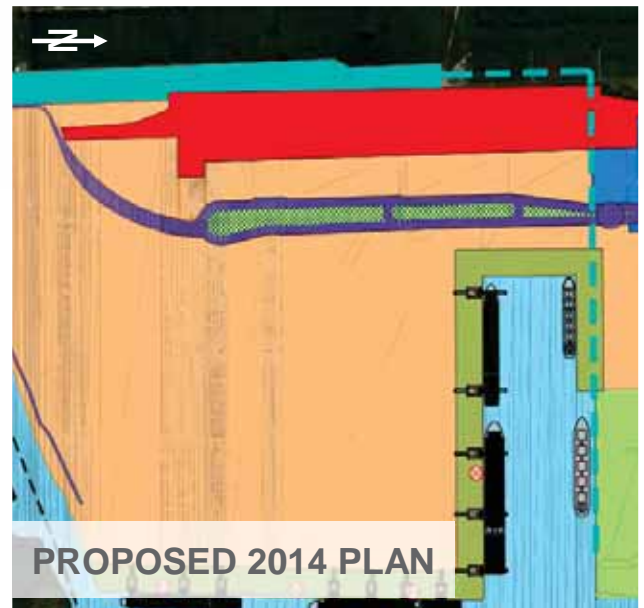


Aggregate Berth and Storage

Development Program

- No Change to berth configuration or conveyer
- Shift laydown facilities from 19.9ac site to acreage west of the ICTF
- 2009 ROM cost is \$55M of which the presented cost is the re-evaluated cost for storage facilities only on ~20.6ac

Project	Berth Number	Gross Cost (\$M)	Plan Year
Aggregate Facilities	TN North Berth	0.805	20



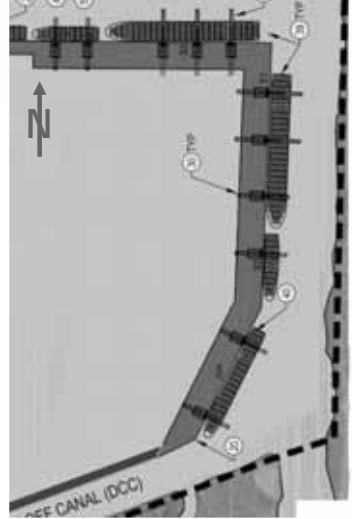
Berth 33 Reconfiguration

Project	Berth	Gross Cost (\$M)	Net Cost (\$M)	Plan Year
Realignment	33	50.9	35.0	10

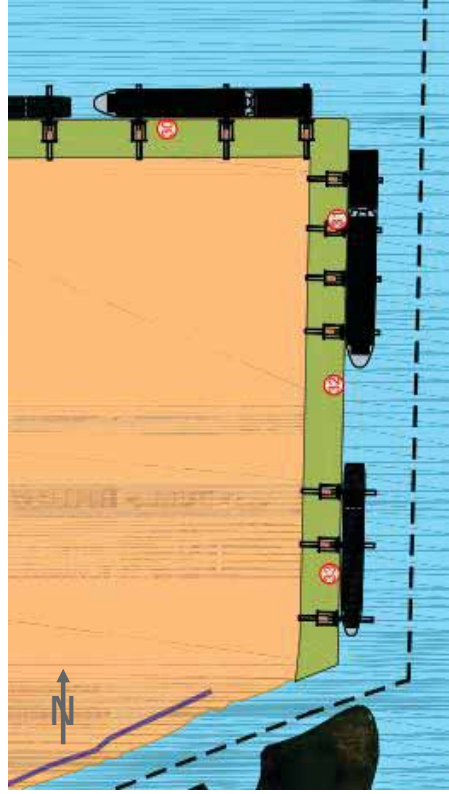
Development Program

- 2.8ac upland development
- Greater operating flexibility
- Cost savings on crane articulation
- Contiguous berth length 31-33: 2,850ft

EXISTING 2009 PLAN



PROPOSED 2014 PLAN



The Project-Decision Matrix Considers these sensitivities:

- Project Cost
- Return on Incremental Investment (ROI)
- Net Present Value (NPV)
- Economic Impact
- Environmental Impact
- Customer/Regulatory Need
- Decision Matrix used to make “Go/No-Go” Decisions, and for placing projects into the 5-yr. CIP

Port Everglades Master/Vision Plan Update Contact Person and Email

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