



Port Everglades Master/Vision Plan Update

Tenants/Stakeholders Meeting

June 20, 2013

Agenda

- Project Background
- Infrastructure Needs Identified in 2009 Plan
- Review of Priority Projects
- Review of Key Projects
- Going Forward: Overview of Master/Vision Plan Update Process and Schedule
- Stakeholder Outreach



Project Background:

Why do we do a Master/Vision Plan?

- The original Port Everglades Master/Vision Plan was approved by the Board of County Commissioners in December 2008
- Port Everglades Master/Vision Plan Update was approved by the Board of County Commissioners in March 2011
- BOCC has directed that Port Master Plan be updated every two to three years
- Next update now underway!



Facility/Infrastructure Needs Identified in the 2009 Master/Vision Plan Update

- More, longer and deeper cargo berths
- Ability to berth fully laden Post-Panamax vessels
- Rail to Southport/ICTF
- Longer cruise berths and modernized cruise terminals
- Reconfiguration of Northport slips
- Improvements to terminals to accommodate future growth
- Crushed rock/aggregate ship/facility
- Deeper and wider petroleum slips

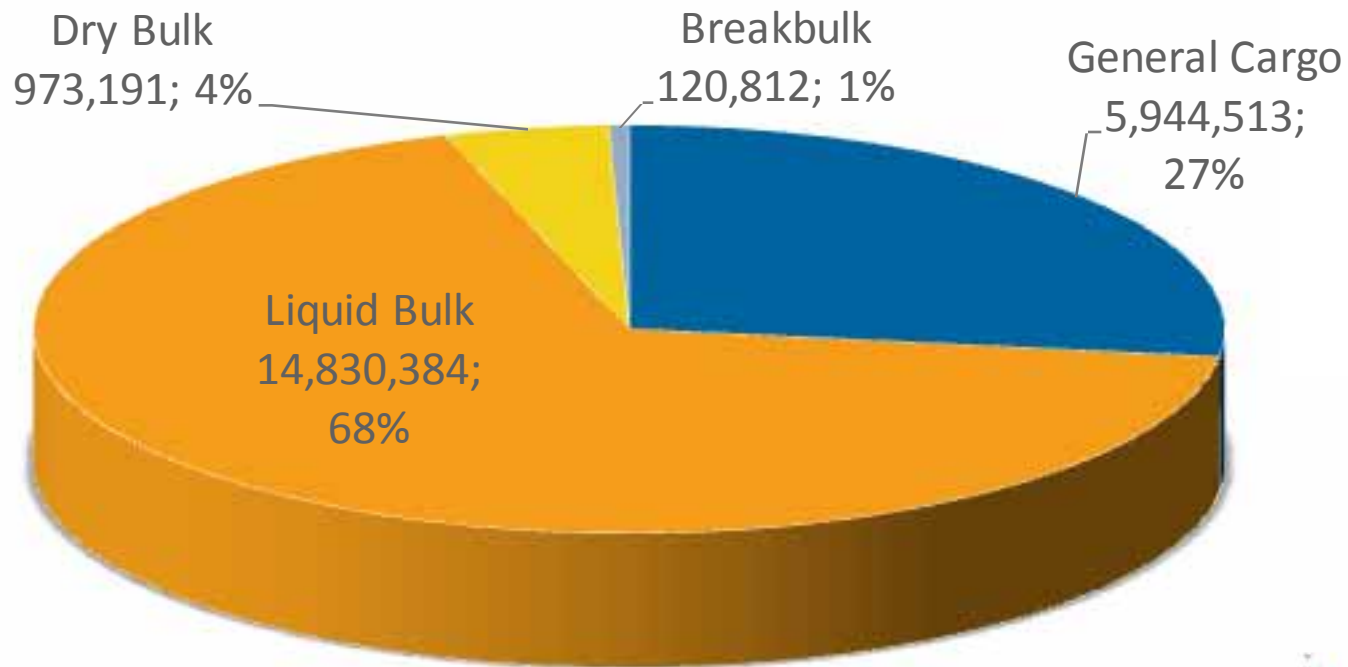


2009 Master/Vision Plan Update Forecast

Business Line	5-Year Plan (2015)	10-Year Plan (2019)	20-Year Plan (2029)
Containerized Cargo TEUs	1,541,258	1,786,740	2,401,230
Non-Containerized Cargo (Dry/Neo- Bulk) TONS	3,476,035	6,517,482	7,625,627
Liquid Bulk Cargo (Petroleum) TONS	15,199,717	16,026,912	16,699,008
Cruise Revenue Passengers	4,014,910	4,471,527	5,161,118



FY 2012 Performance



- Cargo (Tons): 21,868,900
- Containers (TEUs): 923,600
- Cruise (Revenue Passengers): 3,757,320



FY 2013 Year-to-Date Performance

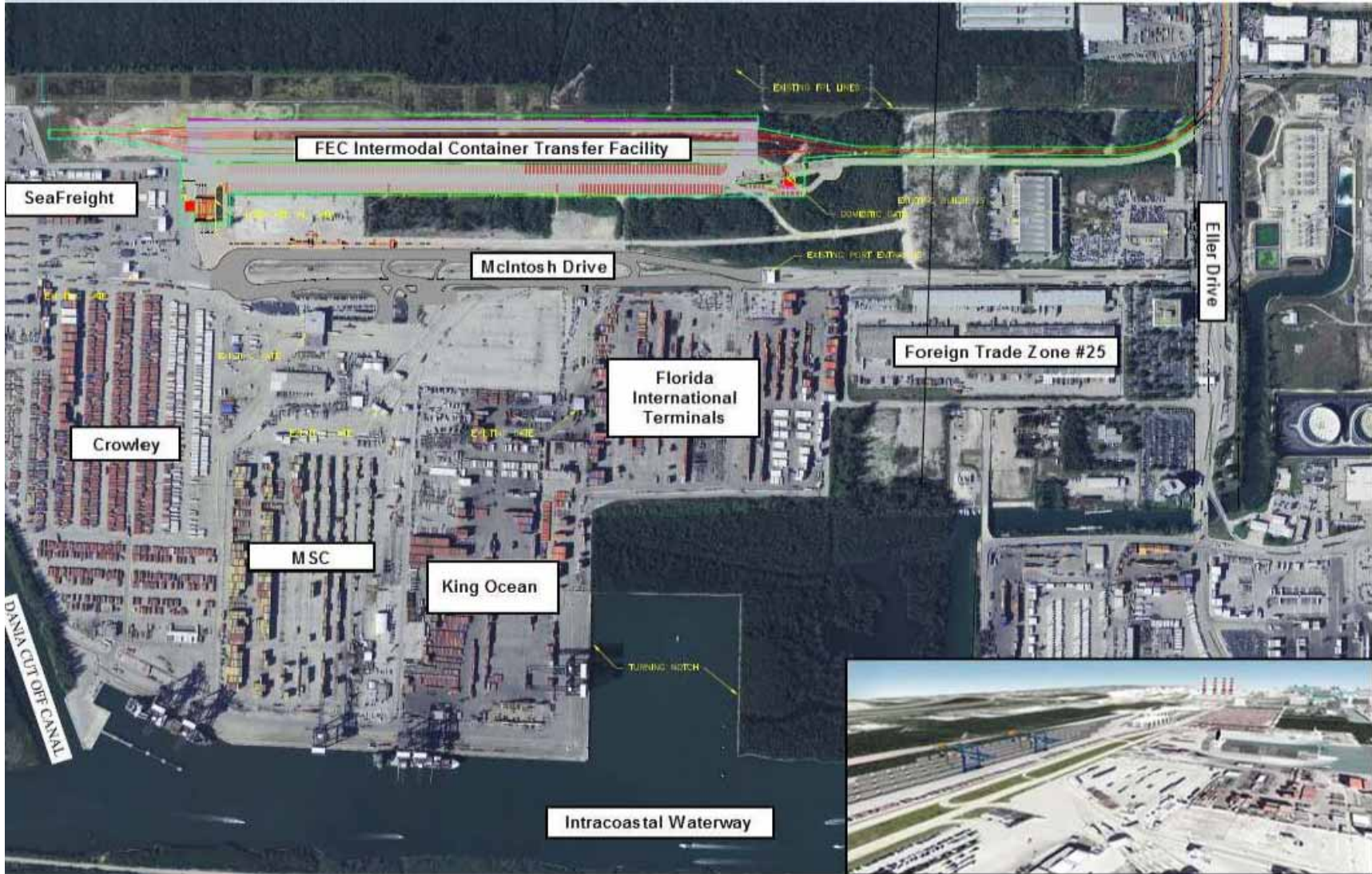
Fiscal Year YTD (through April)	FY 2012	FY 2013	Percentage Change
Cargo TEUs	558,443	561,767	+0.6%
Cruise Passengers	3,017,582	2,844,704	-5.7%
Petroleum Barrels	64,565,630	65,252,693	+1.1%



PRIORITY PROJECTS



Intermodal Container Transfer Facility



Channel Deepening and Widening



Southport Turning Notch Extension

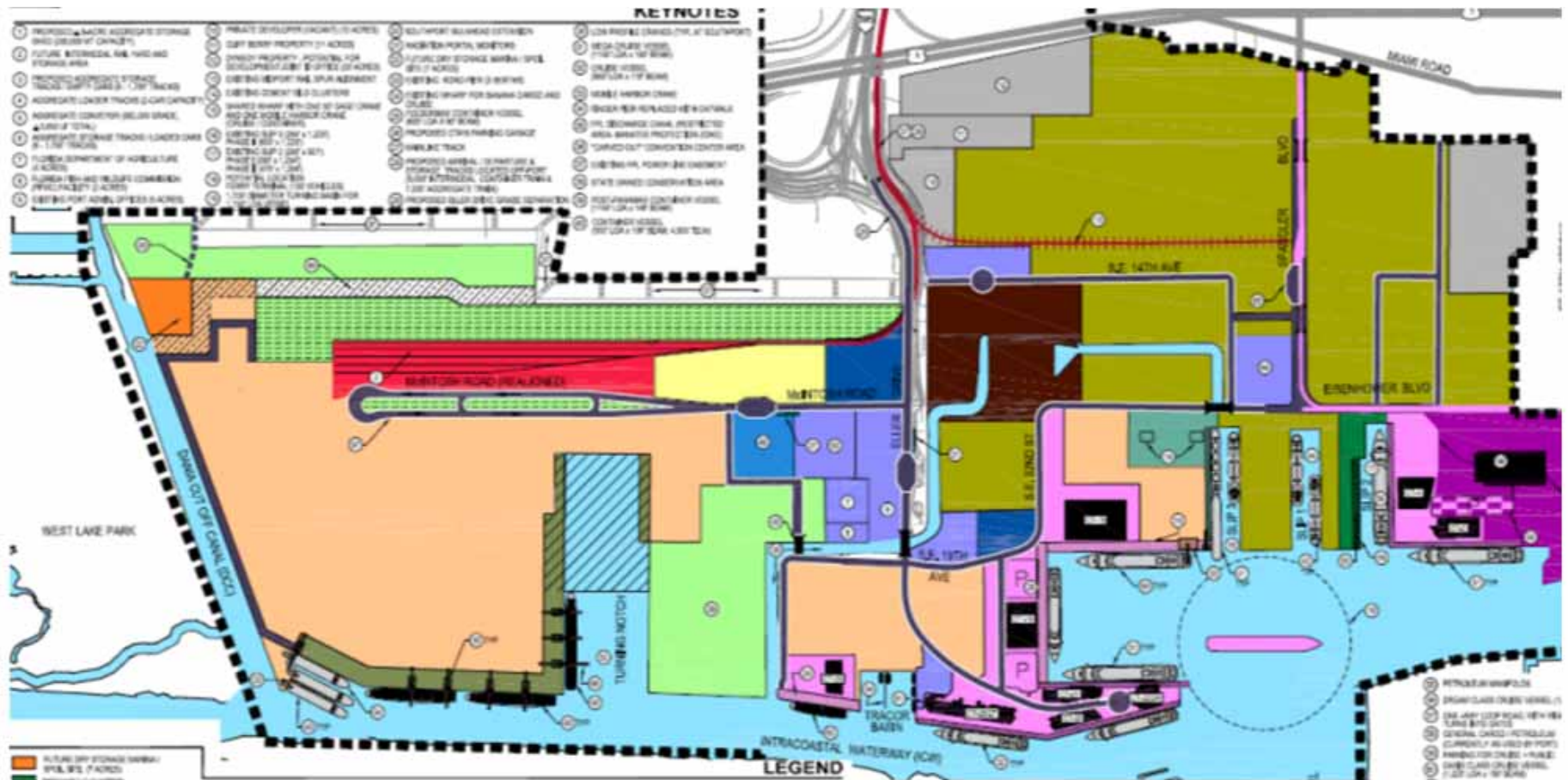


Priority Projects for Port Everglades

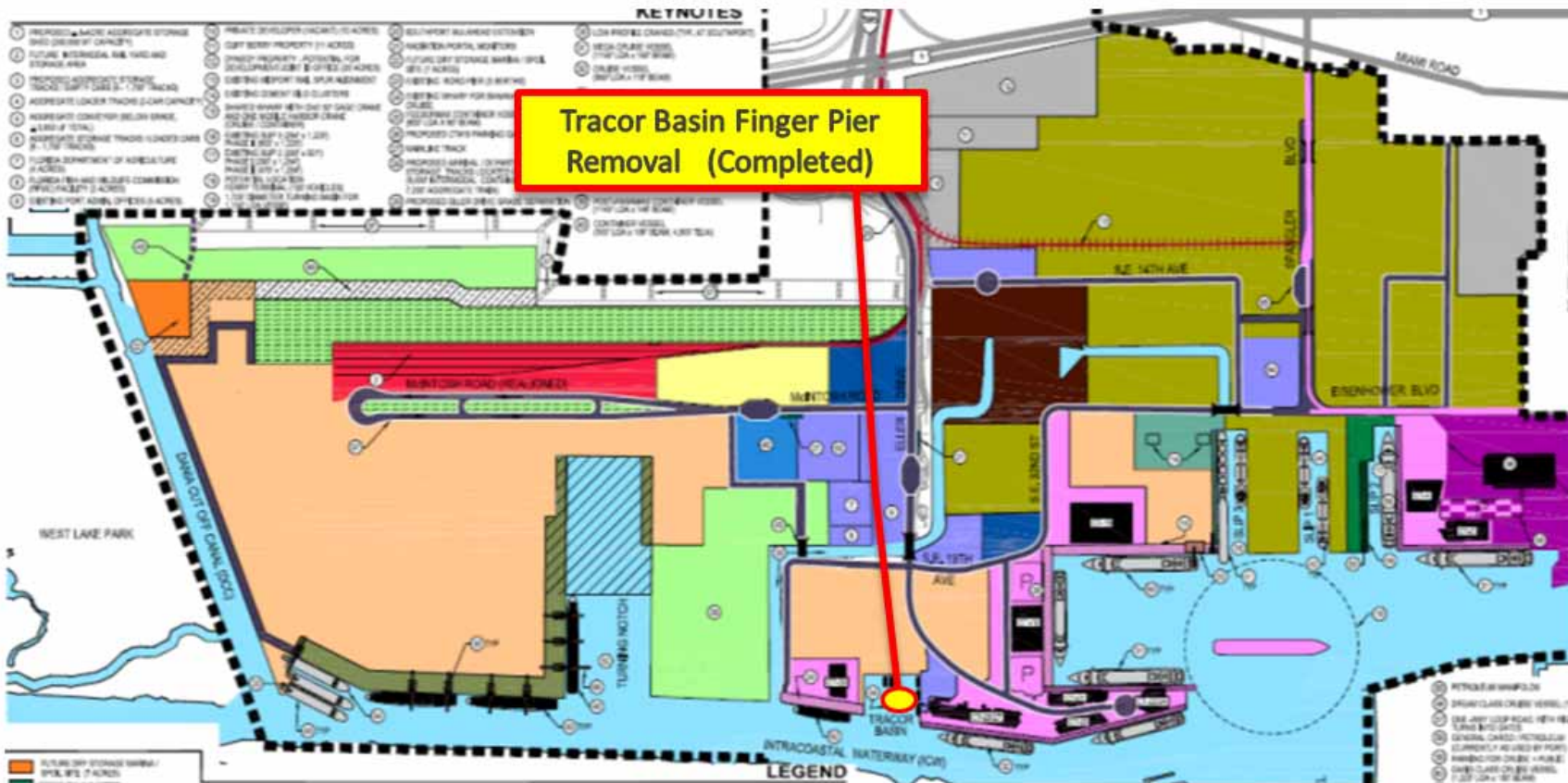
- Intermodal Container Transfer Facility (ICTF)
 - Now under construction
 - Operational Summer 2014
- Port Everglades Channel Deepening and Widening
 - Draft ACOE Feasibility Study projected to be released for public comment June/July 2013
- Southport Turning Notch Extension
 - Upland Mangrove Enhancement
 - Timeline for mangrove creation permits - Summer 2013
 - Site work - early 2014
 - Mangrove planting - June 2014
 - Trending Towards Success - Fall 2015
- Turning Notch Construction
 - Construction Begins Spring 2016
 - Construction Completed Fall 2017



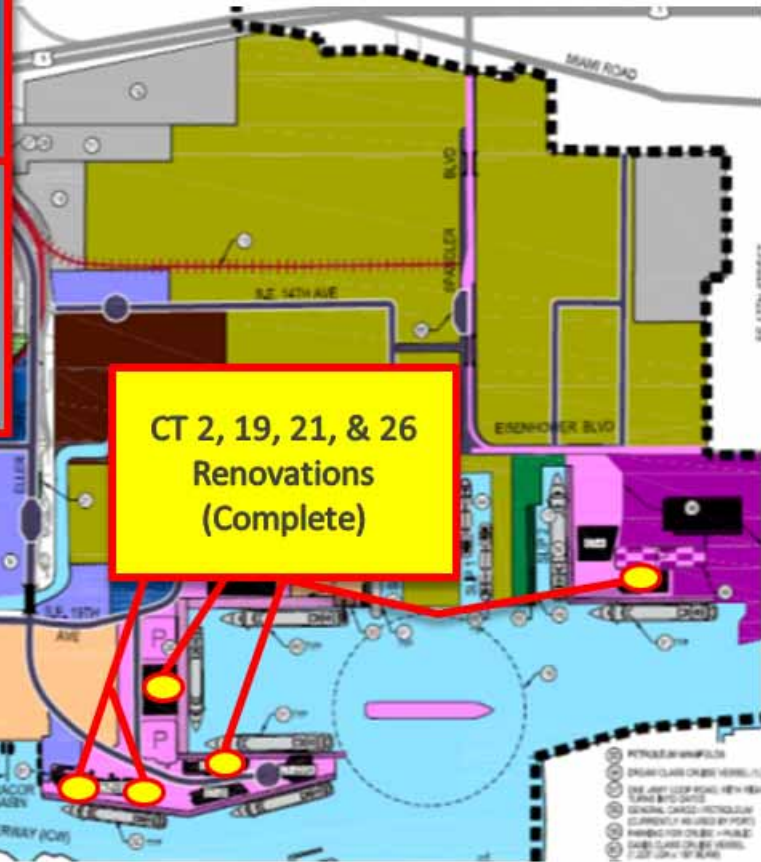
5-Year Master Plan (2011-2015)



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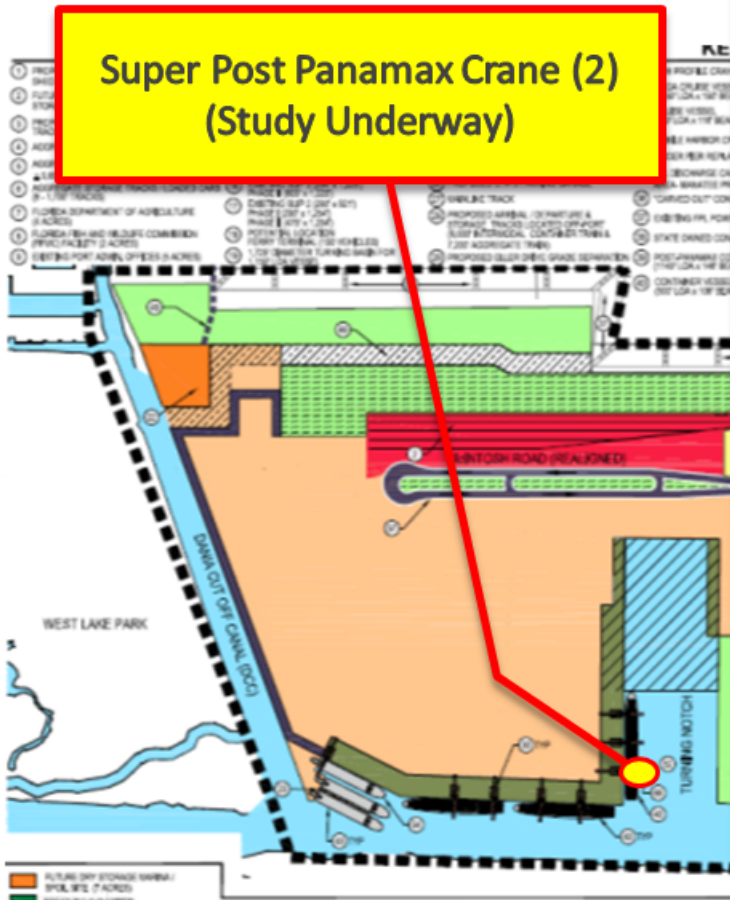
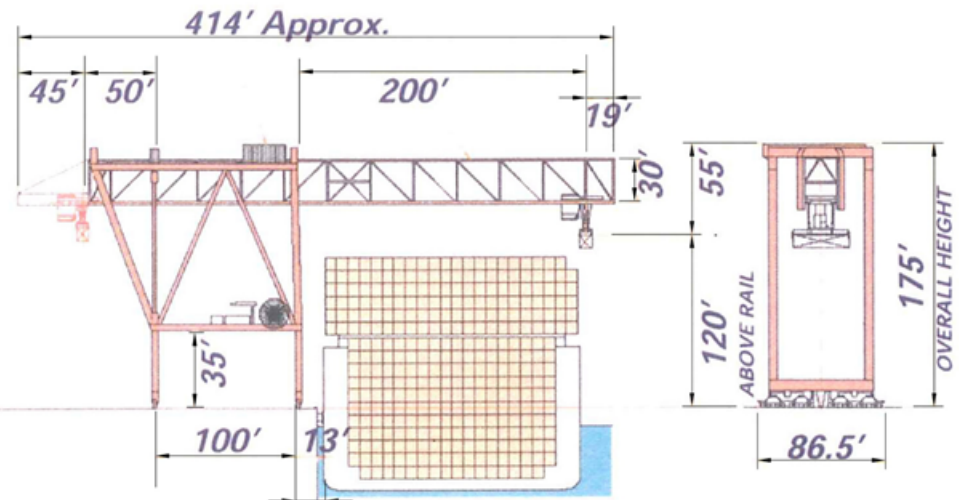


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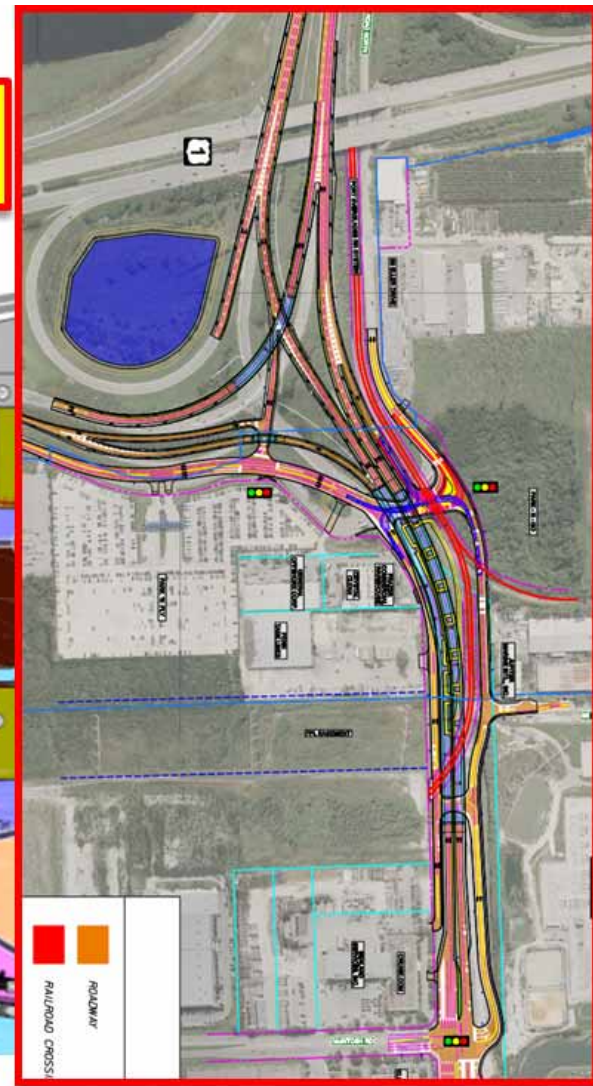


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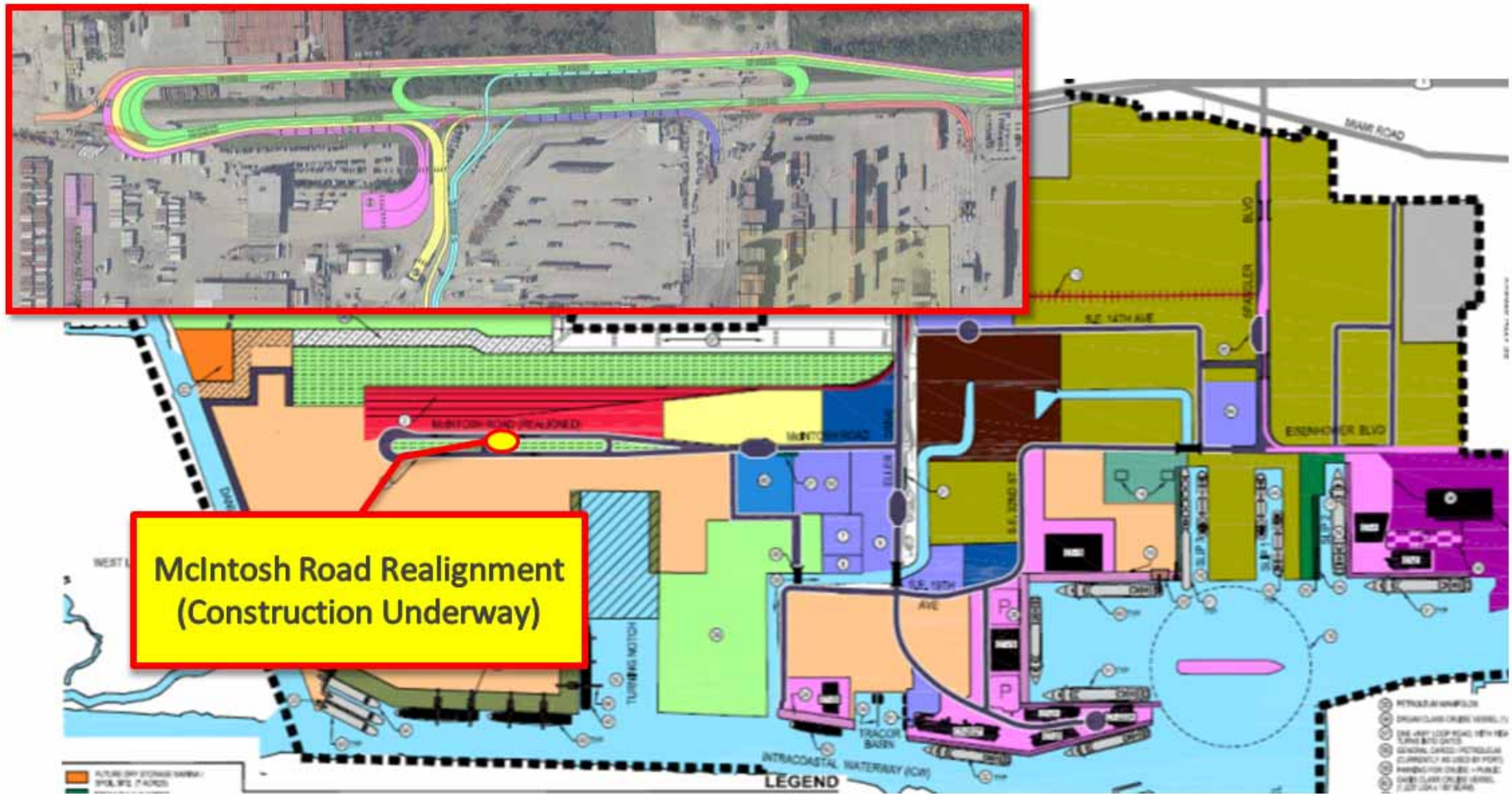
Super Post Panamax Crane (2)
(Study Underway)



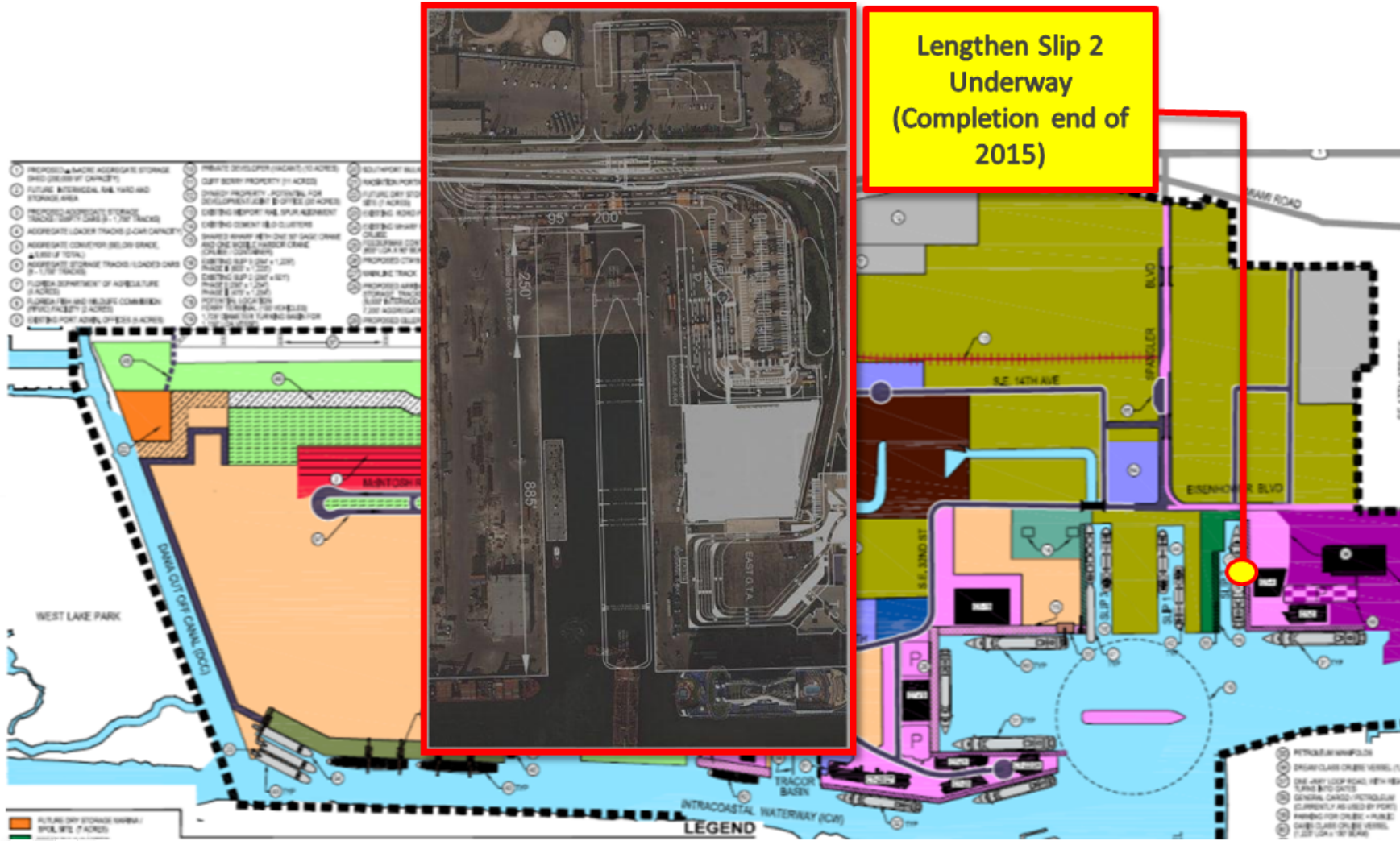
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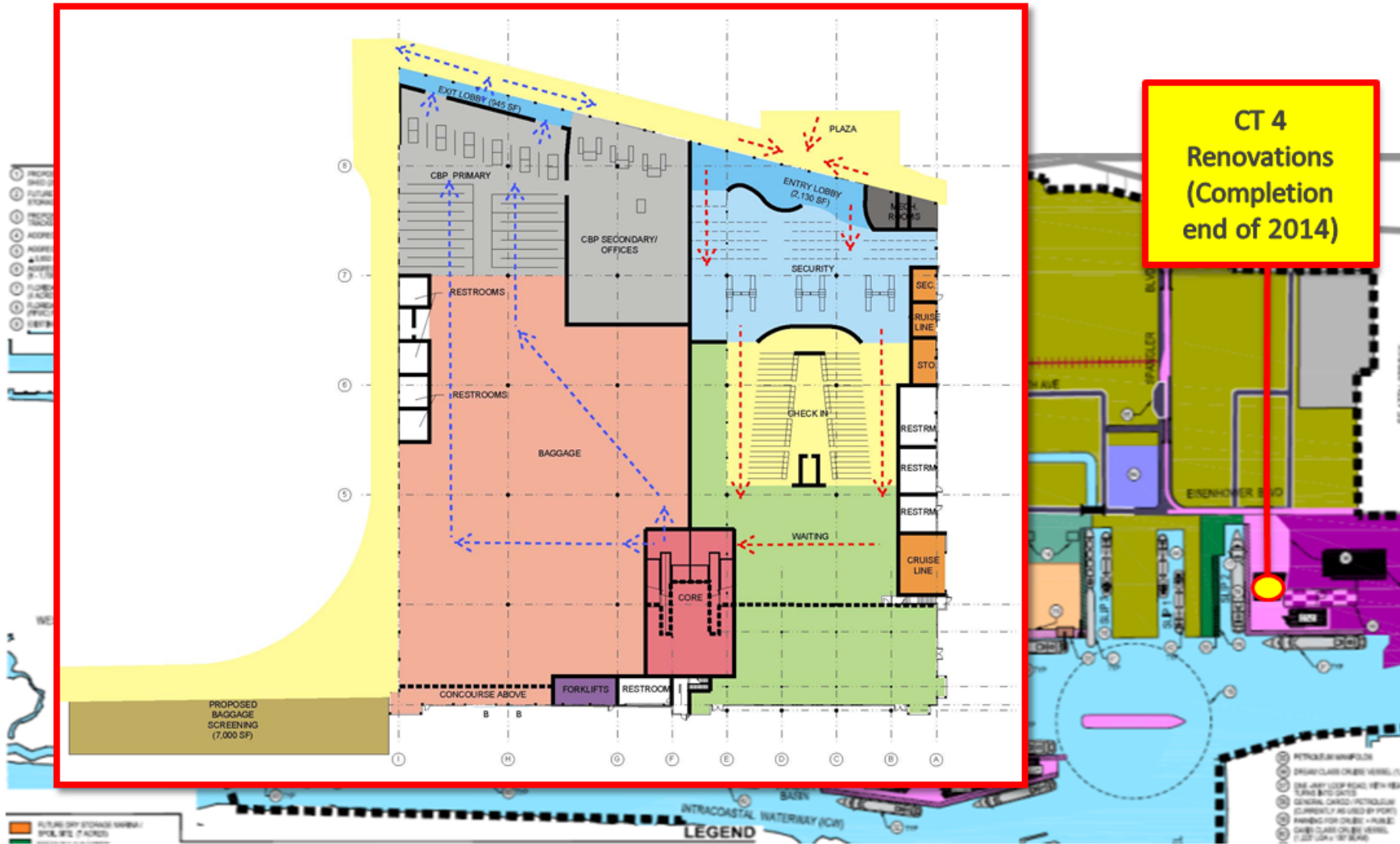
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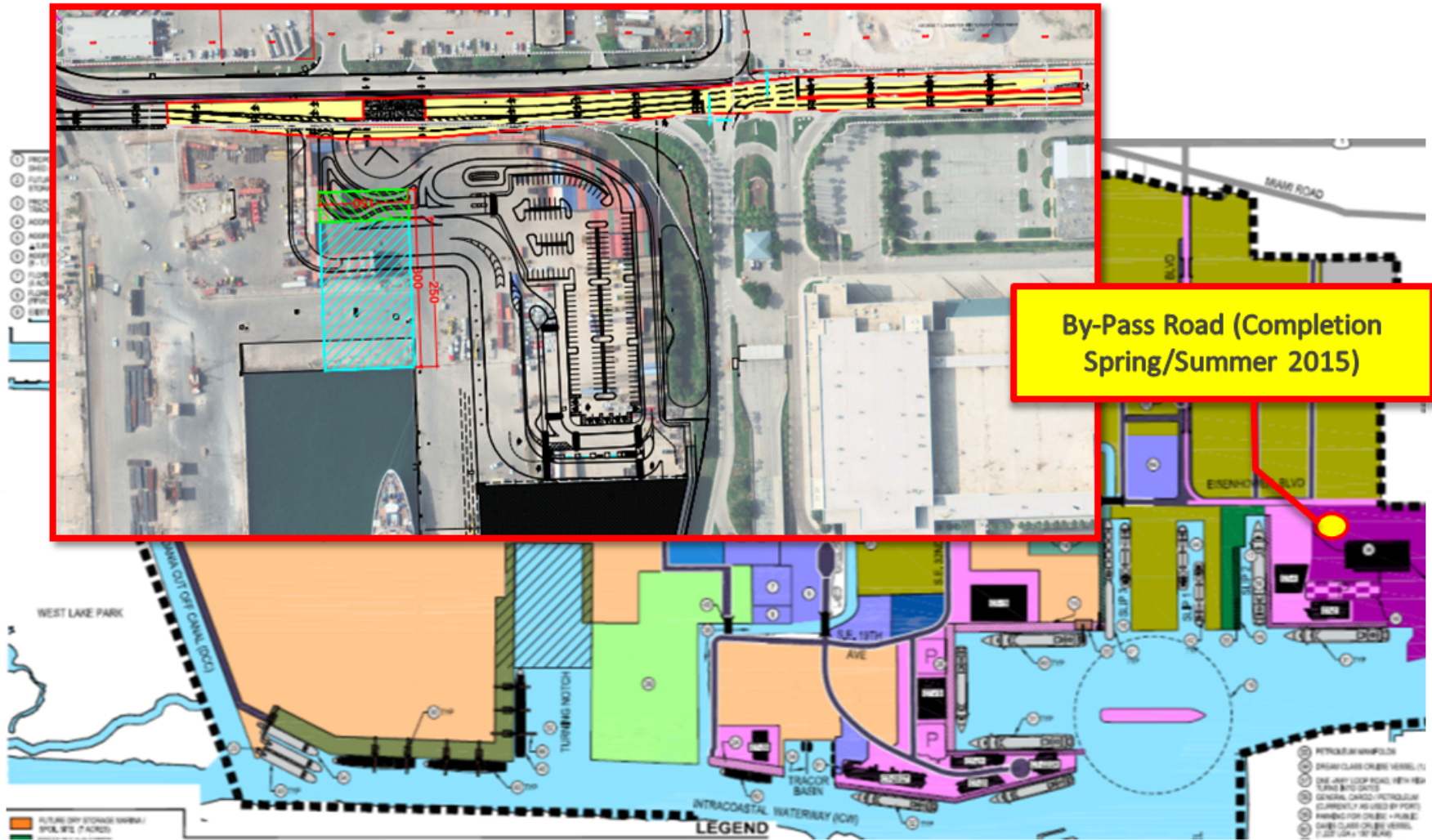
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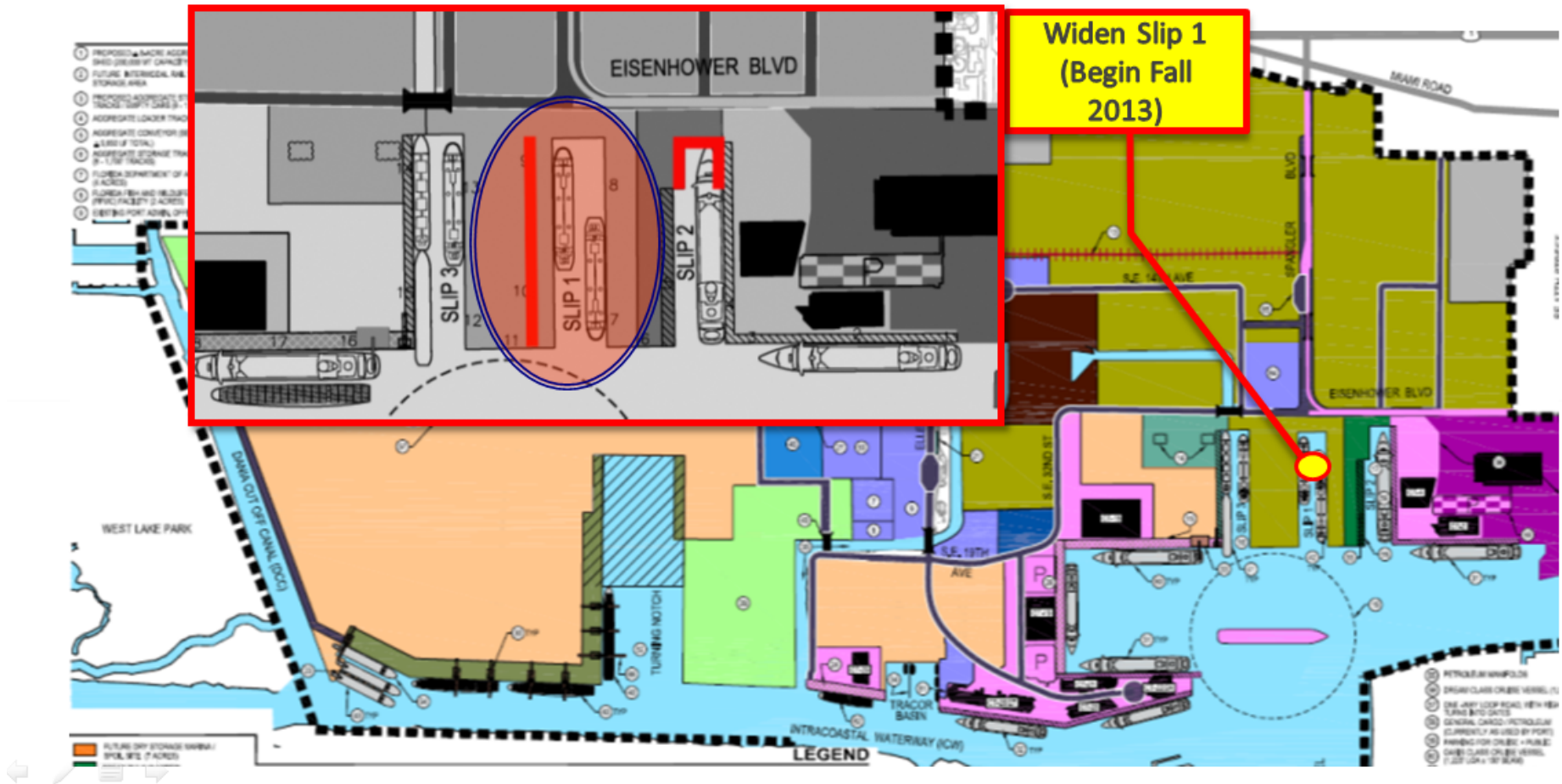
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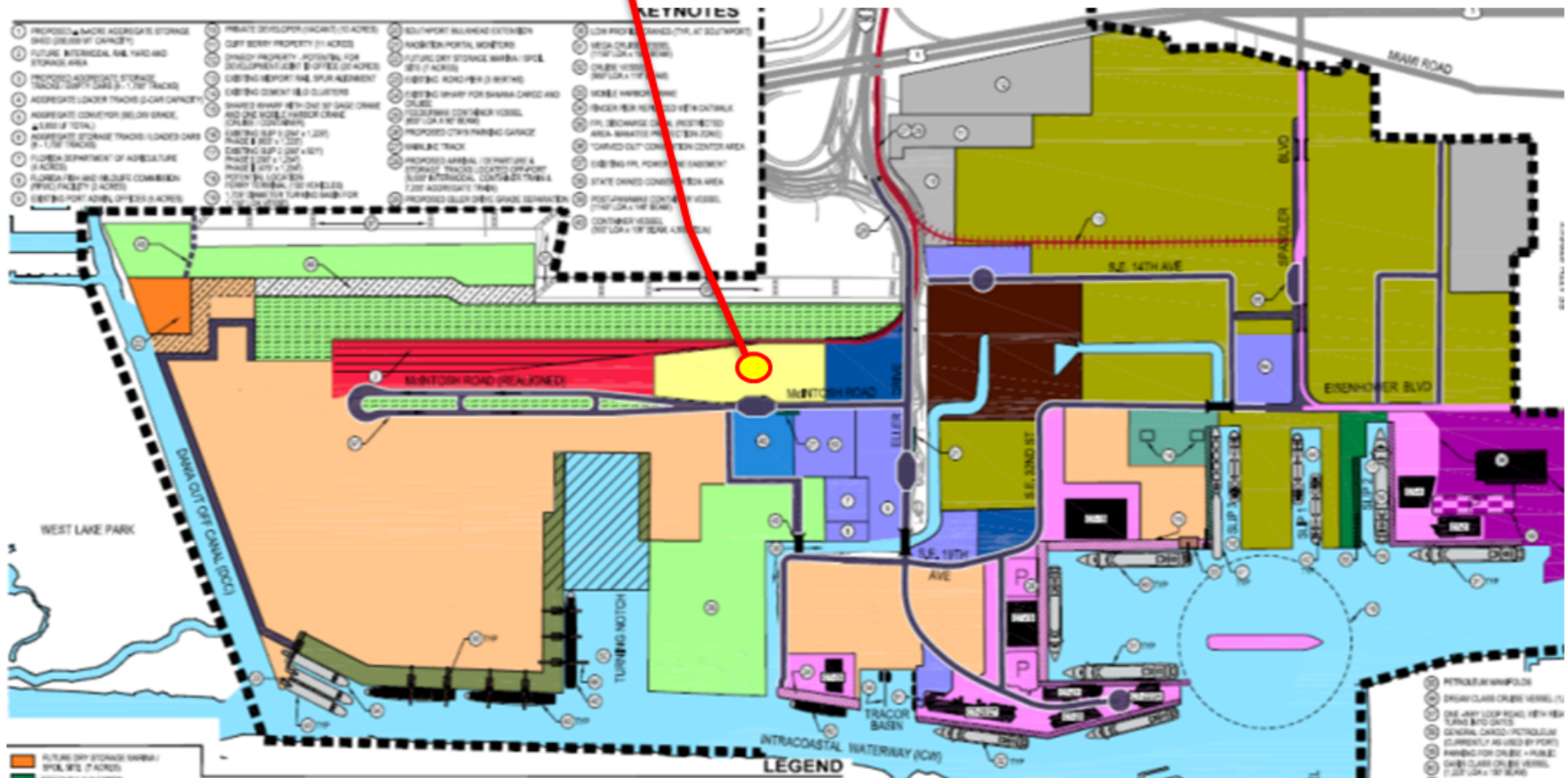


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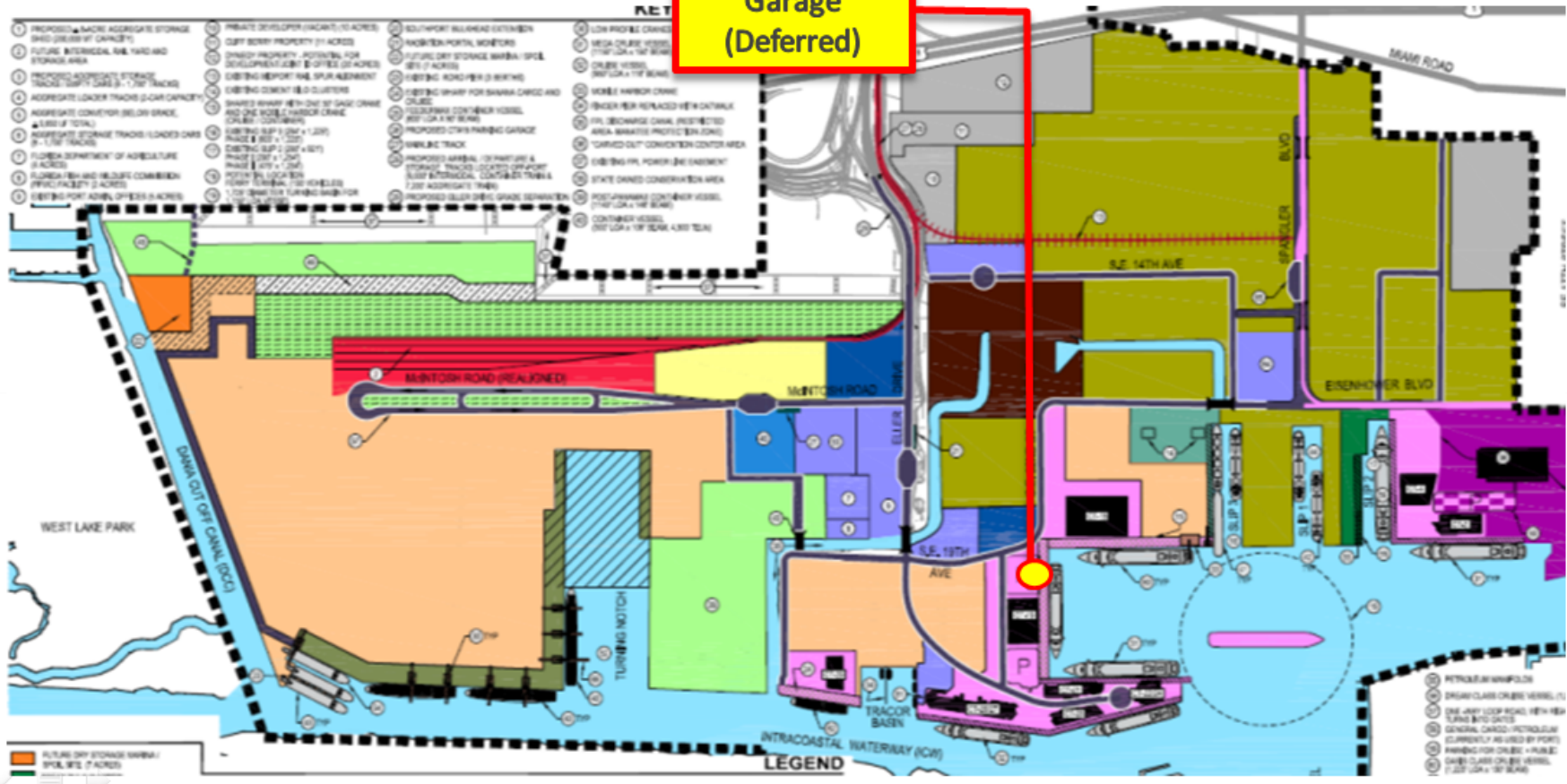
5-Year Master Plan (2011-2015)

**FTZ + CBP Relocation
(Study Underway)**



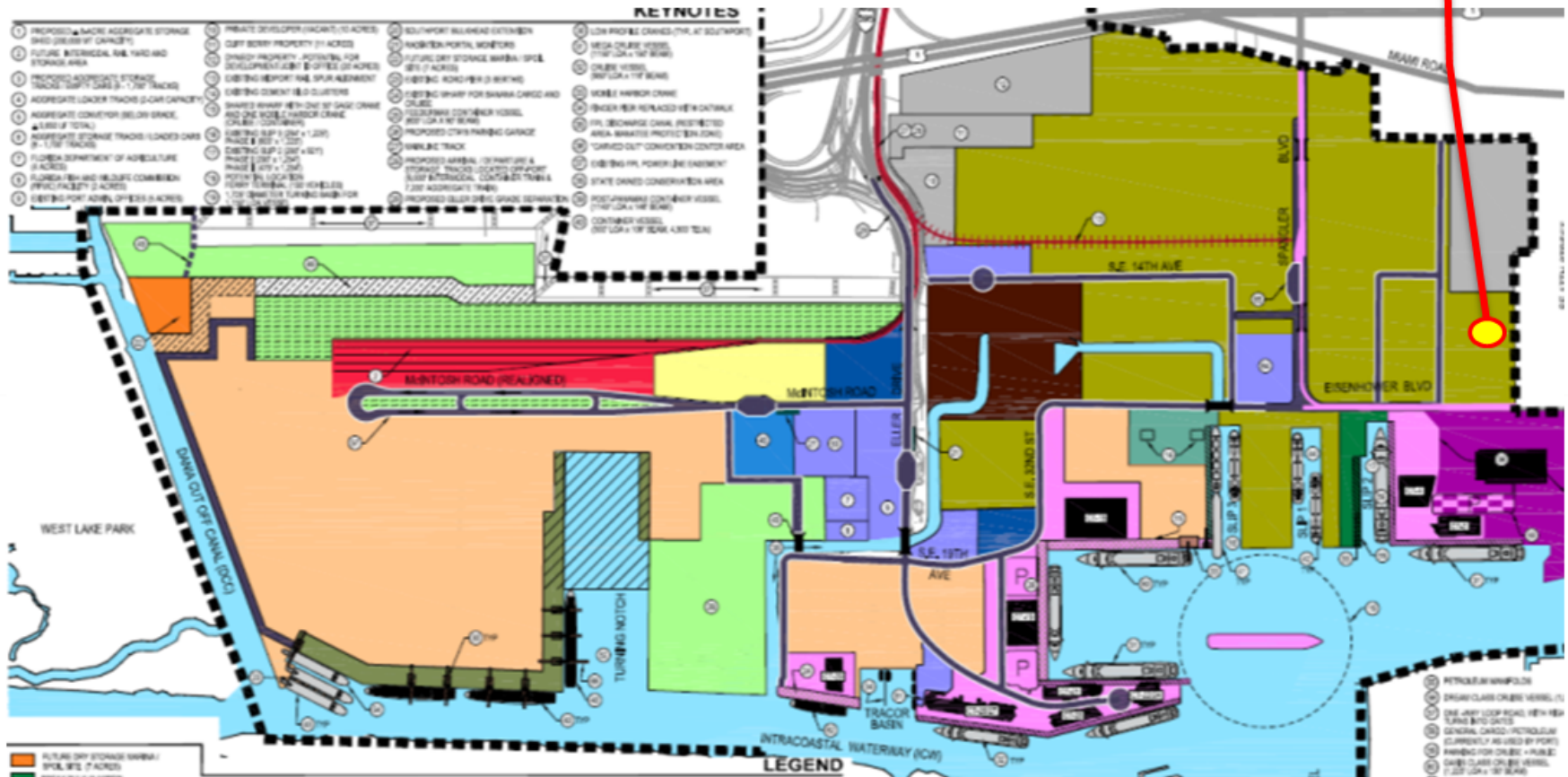
5-Year Master Plan (2011-2015)

CT 18 Parking
Garage
(Deferred)

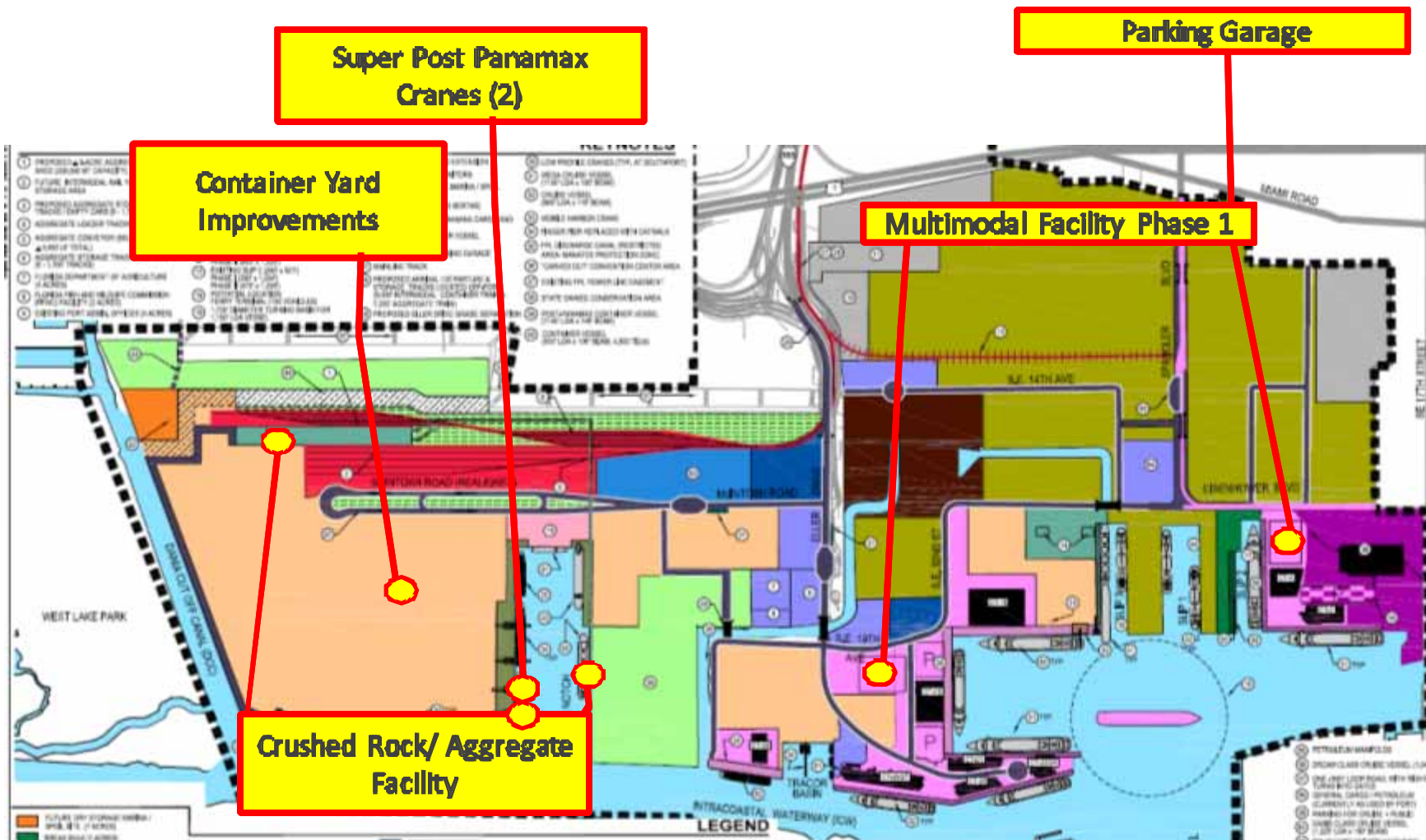


5-Year Master Plan (2011-2015)

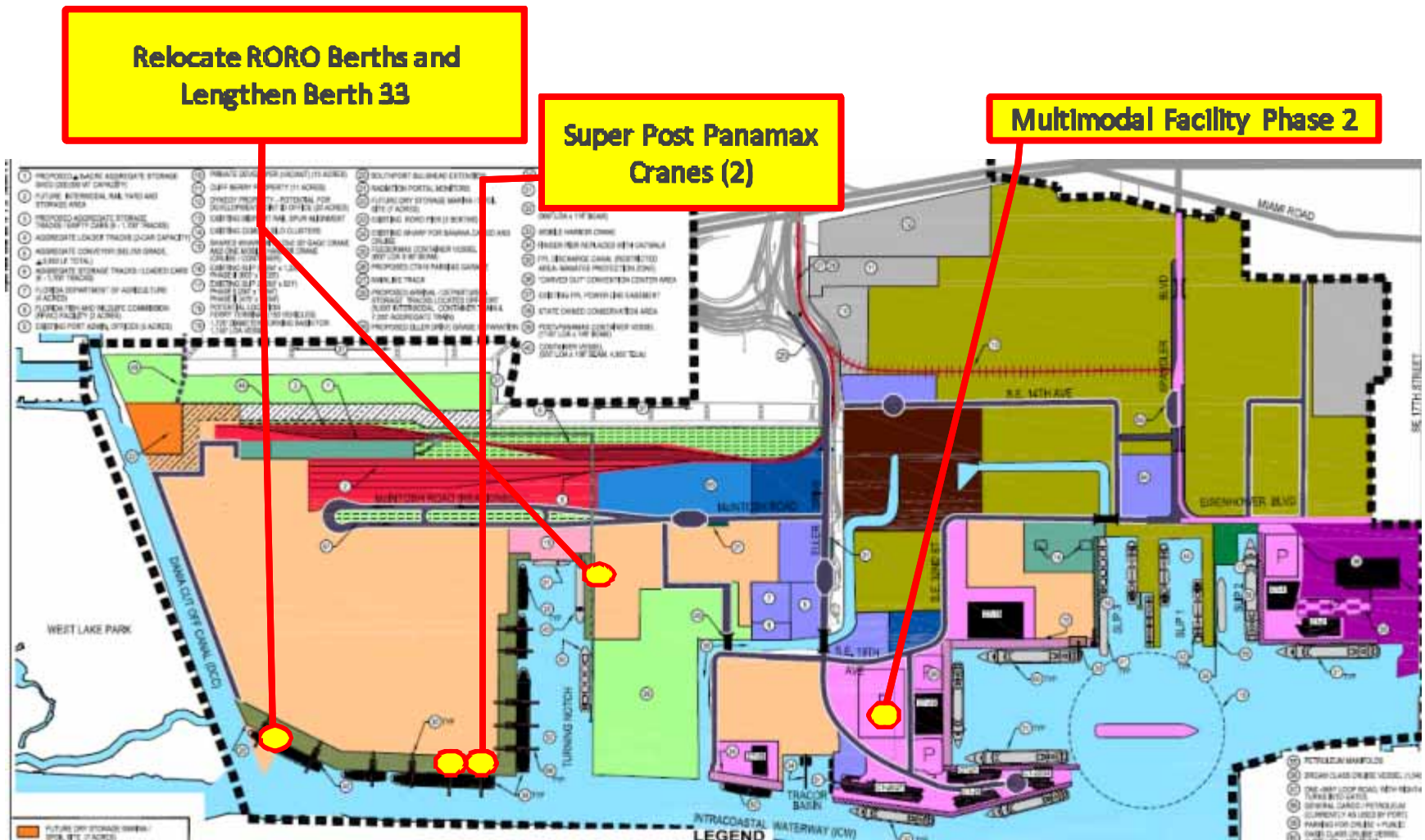
Petroleum Tankfarm
Redevelopment
(Deferred)



10-Year Vision Plan (2016-2019)



20-Year Vision Plan (2019-2029)



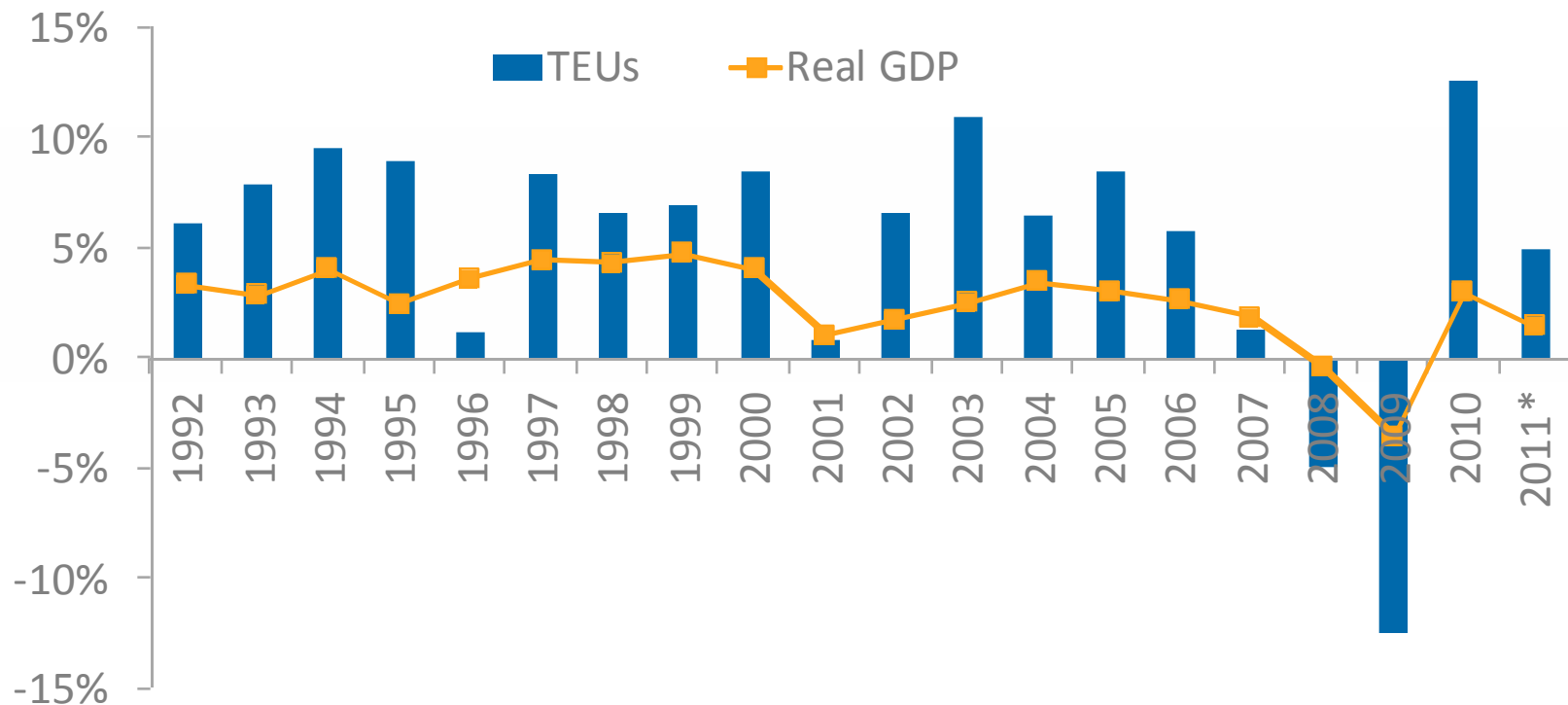
Master/Vision Plan Update Process

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



Industry and Economic Changes Drive Need for Regular Forecast Updates

- US container growth 2 times GDP growth from 1992 to 2007
- Great Recession requires a significant rework of this supposition



Evolving Markets Alter Forecasts Too

- The Caribbean remains the dominant cruise market, continues to grow, but is slowly losing market share as other markets expand
- Future growth in the Caribbean will be impacted by the infrastructure capabilities at key ports of call as vessels continue to increase in size

Market	Bed Days	Share Shift
Caribbean	13.5%	-5.5
Mediterranean	109.4%	7.5
Europe/Scandinavia	24.6%	-0.5
Alaska	4.7%	-1.62
Bahamas	7.2%	-1.4
Mexico (West)	-32.6%	-3.1
Transatlantic	111.2%	1.08
Australia/New Zealand/S. Pacific	101.2%	0.93
Trans Canal	-3.9%	-0.94
South America	81.7%	0.67
Hawaii	-23.9%	-1.5

Market	Bed Days	Market Share
Caribbean	36.2	33.7%
Mediterranean	21.99	20.4%
Europe/Scandinavia	8.47	7.9%
Alaska	6.65	6.2%
Bahamas	6.5	6.1%
Mexico (West)	3.51	3.3%
Transatlantic	3.1	2.9%
Australia/New Zealand/S. Pacific	2.9	2.7%
Trans Canal	2.69	2.5%
South America	2.6	2.4%
Hawaii	2.19	2.1%
Other	10.59	9.9%

Key Dates

June 10 Notice to Proceed

June 17 Port Staff & Consulting Team Kick-Off Meeting

June 20 Tenant/Stakeholder Kick-Off Meeting

June 24 Public Kick-Off Meeting

July 18 Port Everglades Advocacy Team Briefing

August 9 Port Everglades Association Briefing

Late Summer Focus Group Meetings

Fall Phase 2 Meetings

Additional Meetings to be Announced

We'd love to hear your input!

