



2018 Port Everglades Master/Vision Plan Update

Port Everglades First Public Meeting

October 10, 2018



Port Everglades Overview

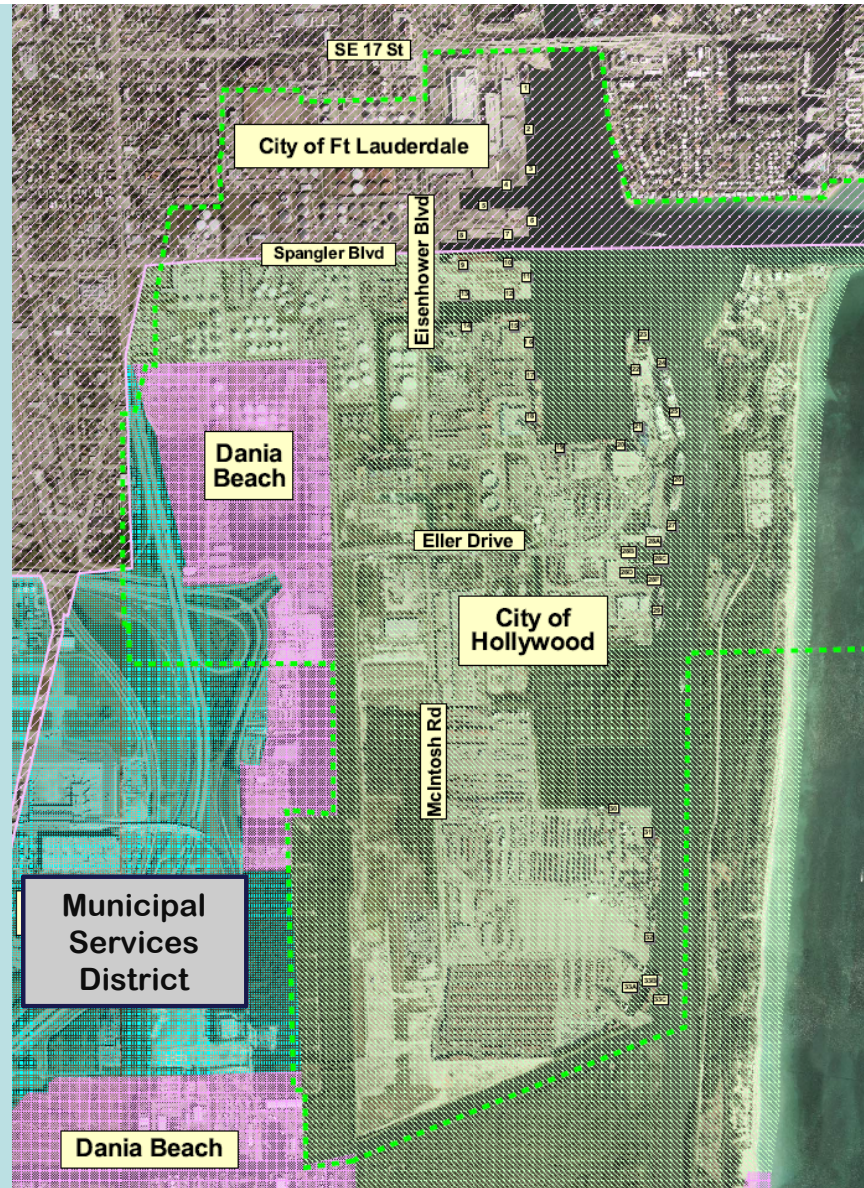
Jurisdictional Area

Located in the cities of:

- Hollywood
- Fort Lauderdale
- Dania Beach

Direct access to:

- I-95
- I-595
- I-75
- Florida's Turnpike



Enterprise Fund of Broward County Government

- Operations are supported 100% by user fees; no local taxpayer dollars
- \$161.7million operating revenue in FY 2017

Landlord Port

- We DO develop and lease land + facilities
- We DO NOT operate terminals or handle cargo

Mission

As a premier gateway and powerhouse for international trade, travel and investment, Broward County's Port Everglades leverages its world-class South Florida facilities and innovative leadership to drive the region's economic vitality and provide unparalleled levels of service, safety, environmental stewardship and community engagement.



By the Numbers...

- #1 container port in Florida (#10 in U.S.) by volume – 1,076,912 TEUs
- #1 seaport for exports in Florida - \$12.1 billion exports, \$11.1 billion imports (CY2017)
- #1 U.S. gateway for trade with Latin America, 15% of all U.S./Latin American trade moves through Port Everglades
- #1 Refrigerated cargo seaport in Florida — #5 in U.S.
- #2 seaport in Florida by revenue - \$161.7 million
- #2 Petroleum port in Florida 122.3 million barrels (5.1 billion gallons)
- #3 cruise port in the world for multi-day total passengers — 3.8 million total passengers, 3.7 million multi-day
- #4 Foreign-Trade Zone in the U.S. with \$5.1 billion in total activity (CY2016)

Economic Powerhouse

FY2017

- \$30.4 billion in business activity
- \$1.1 billion in state & local taxes
- 13,185 direct jobs
- 230,747 Florida jobs supported, earning \$9 billion in wages



Committed to Doing It Right...

- Air Quality
- Coral Reefs / Marine Life
- Environmental Partnerships
- Sustainable Facilities
- Water Quality
- Wetlands
- Wildlife



Ongoing/Recent Capital Improvement Projects

Project	Purpose	Estimated Cost	Jobs: Construction/ Permanent	Status	Completion Date
Southport Turning Notch Extension (STNE)	Lengthen existing deep-water turn-around area from 900 ft. to 2,400 ft., which allow for up to five new berths	\$437.5 million (includes crane rail infrastructure)	3,045 Construction 5,529 Permanent at full capacity	Project permitting is underway. Design for STNE is at 100% completion. Crane rail construction began February 2018.	2022
Super Post-Panamax Gantry Cranes	Install 3 new Super Post-Panamax Cranes. Part of the SPTN project.	\$41.4 million		Cranes being constructed by Shanghai Zhenhua Heavy Industries Co. Ltd. (ZPMC). Contract includes option to purchase 3 more cranes within 5 years.	2019
USACE Navigation Improvements (Deepening and Widening) Project	Deepen navigational channels to 48 ft. (plus 1-ft required and 1-ft allowable overdepth – 50 ft. total)	\$389.3 million (Oct. 1, 2016 price level)	2,222 Direct Construction 2,567 Indirect, Induced construction 1,491 Permanent	Chief's Report signed July 2015. Project authorized by Congress Dec. 2016. Preconstruction Engineering & Design is underway. Estimated construction contract award Dec. 2019.	2025
U.S. Coast Guard Station Reconfiguration (Part of the overall Deepening & Widening project)	Reconfiguring the facility to the east to allow for the widening of the Southport Access Channel by 250 ft.	\$38.4 million (Included in the overall cost of the Deepening & Widening project)		Construction contract is anticipated to be awarded in November 2019.	2022

Ongoing/Recent Capital Improvement Projects (cont.)

Project	Purpose	Estimated Cost	Jobs: Construction/ Permanent	Status	Completion Date
Slip 1 Expansion	Widen slip 1 by 150 ft. to the South to increase vessel capacity	\$83.9 million	1,436 Construction	Design began February 2017. Construction to begin Spring 2022.	2026
Slip 2 Extension	Lengthen berth (Slip 2) by 225 ft. for a total 1,125 ft.	\$18 million	328 Construction	Construction completed. First use occurred September 2017.	2017
Southport Phase IX-B	Construct new container yard on 18 acres of land west of McIntosh Road	\$12.2 million	146 Construction	Construction contract awarded August 2016 Full construction began December 2016 and completed in July 2018.	2018
Terminal 2 and 4 Parking Expansion & Roadway Improvements	Convention Center expansion requires construction of new cruise parking in Northport area	\$60 million	582 Construction	Construction RFP approved by County Commission Dec. 2017. Design contract awarded Jan. 2017 to Cartaya & Assoc. Design development phase is underway. CM Contract with Stiles/Pirtle approved by Board on 10/09/18	2019
Cruise Terminal 25	Cruise Terminal 25 expansion and upgrade improvements required	\$114 million	1927 construction	Completing construction in October	2018

Southport Turning Notch Extension



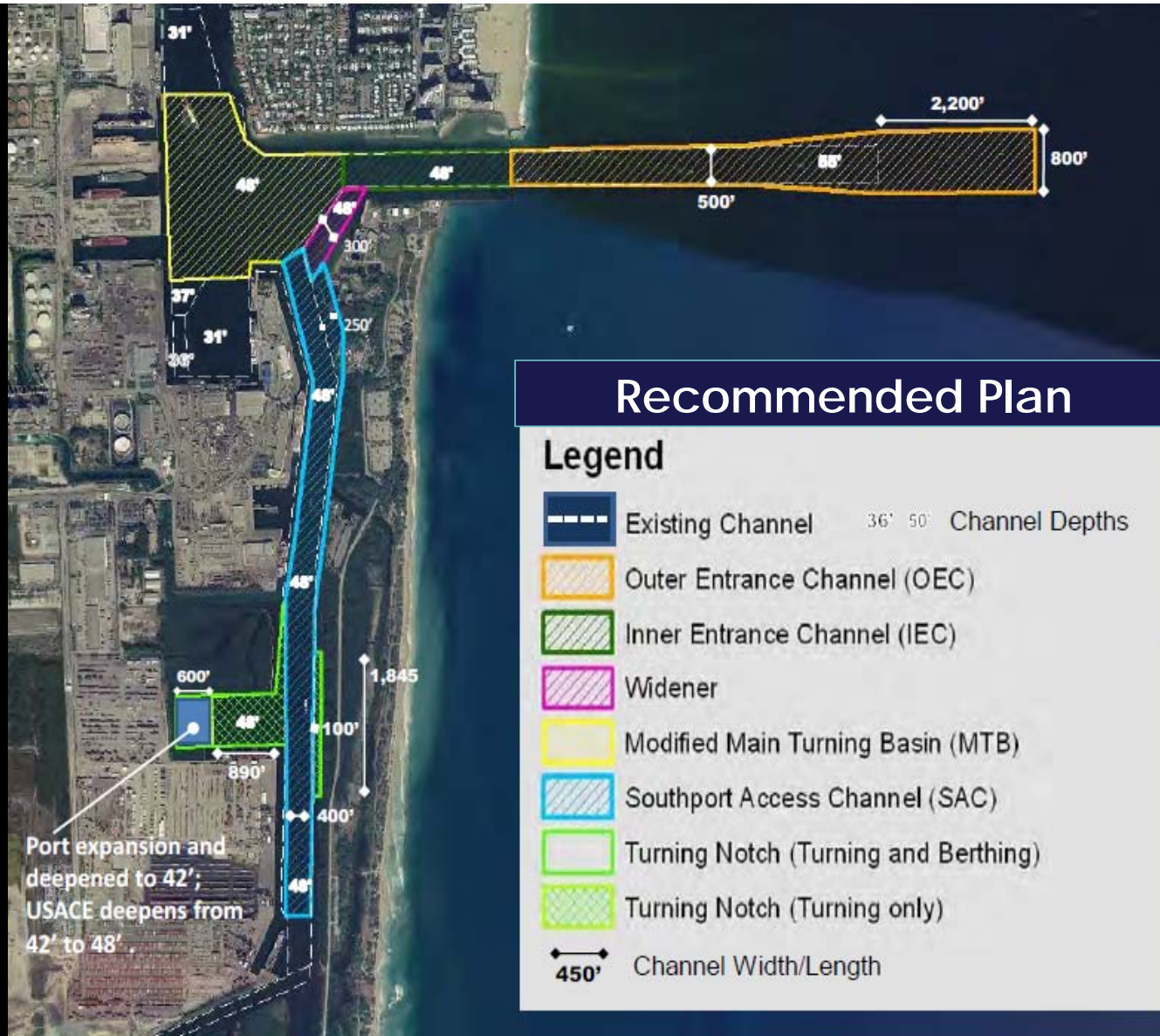
NOW



2022

Deepening & Widening project

- Deepen Outer Entrance from 45 to 55 ft.
- Widen from 500 to 800 ft.
- Deepen Inner Channel from 42 to 48 ft.
 - Plus 1-ft. Required / 1-ft. allowable over-depth
 - 50-ft. total depth
- Widen Southport Access Channel by 250 ft.



Background

- 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 Master/Vision Plan Update

Strategic Master Vision Plan

Practical

2018

2020

2025

2030

2035

2038

Visionary

Approach

- 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

CARGO & LIQUID BULK PROJECTIONS

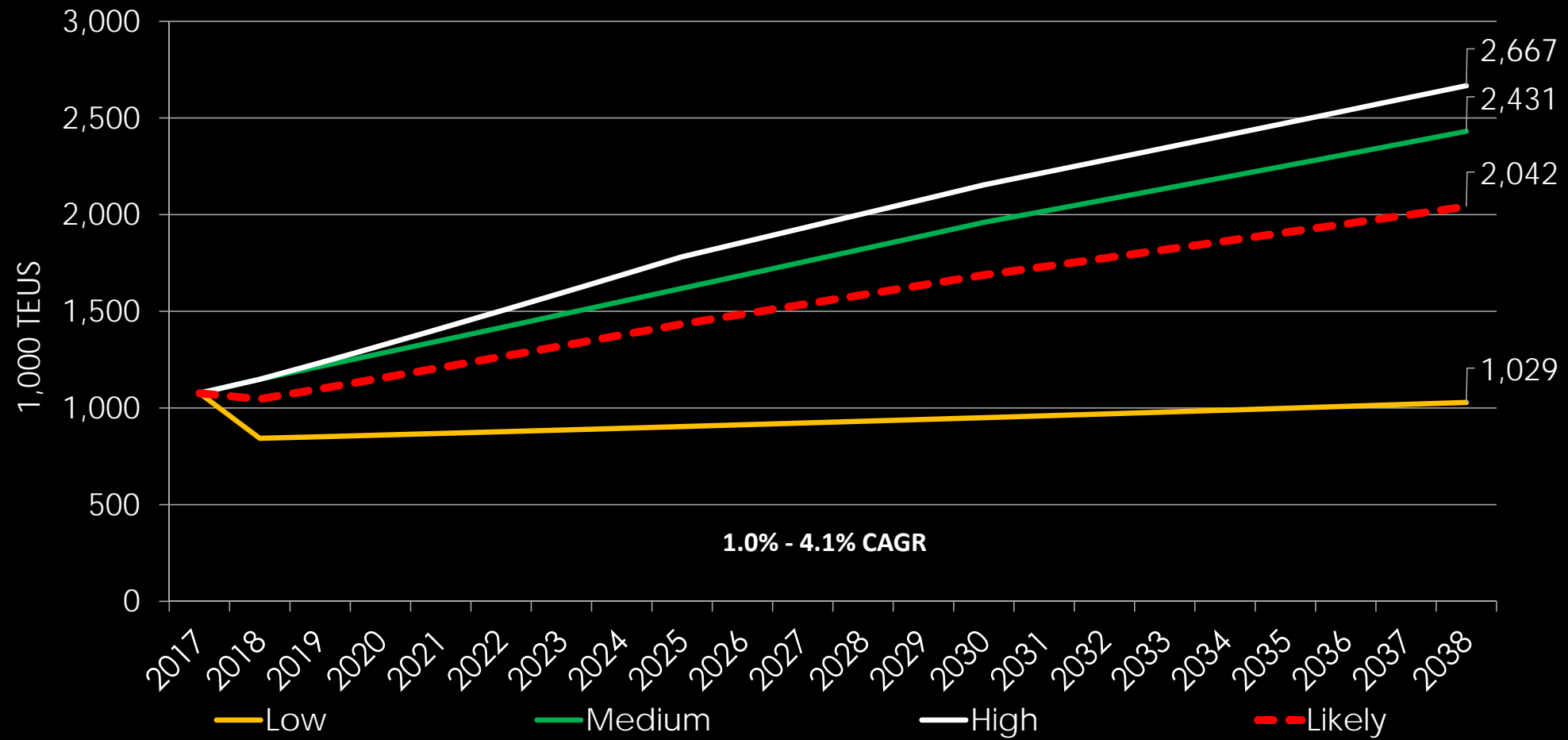
Situation analysis

- Identify key markets
- Terminal operations (existing and planned)
- Understand opportunities and constraints
- Identify planned investments
- Review lease structures
 - Revenue per ton / unit
 - Throughput per acre
- Competitive situation

Market assessment and projections

- Growth in current operations
- Potential new markets

Containerized Cargo Volume Projections (TEUs)



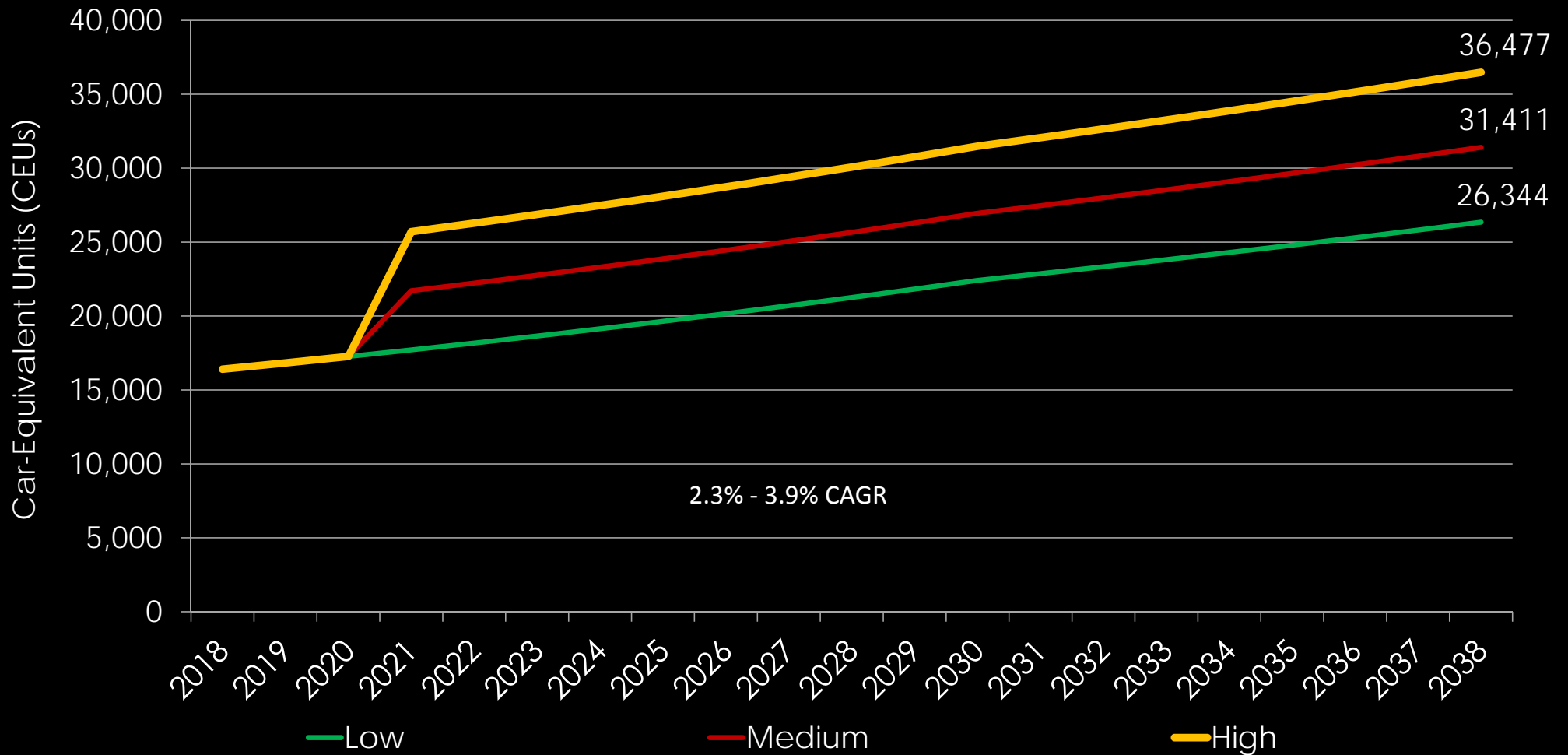
Dry Bulk Volume Projections (000 Tons)



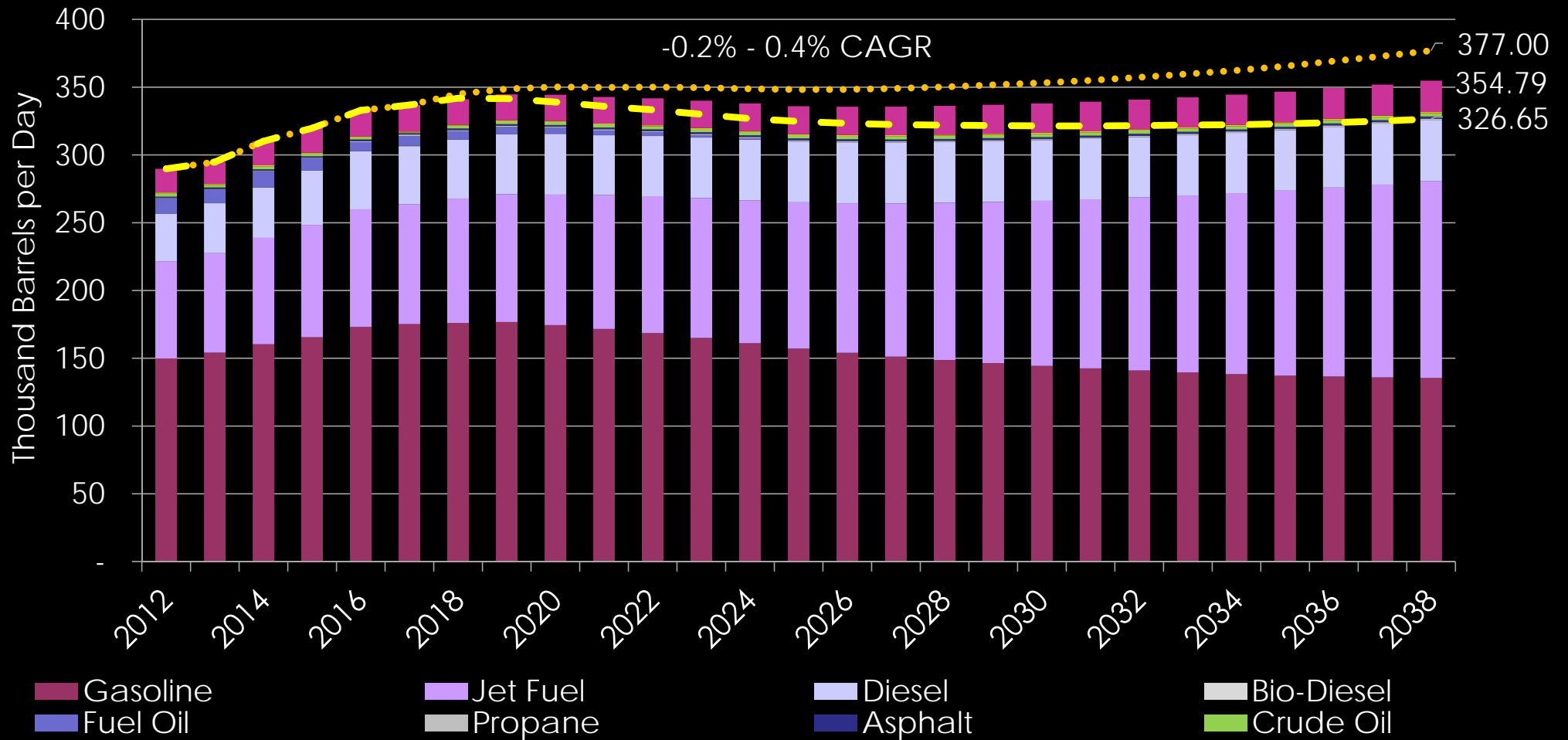
Used Ro-Ro + Yachts Volume Projections (Tons)



Automobile Volume Projections (CEUs)

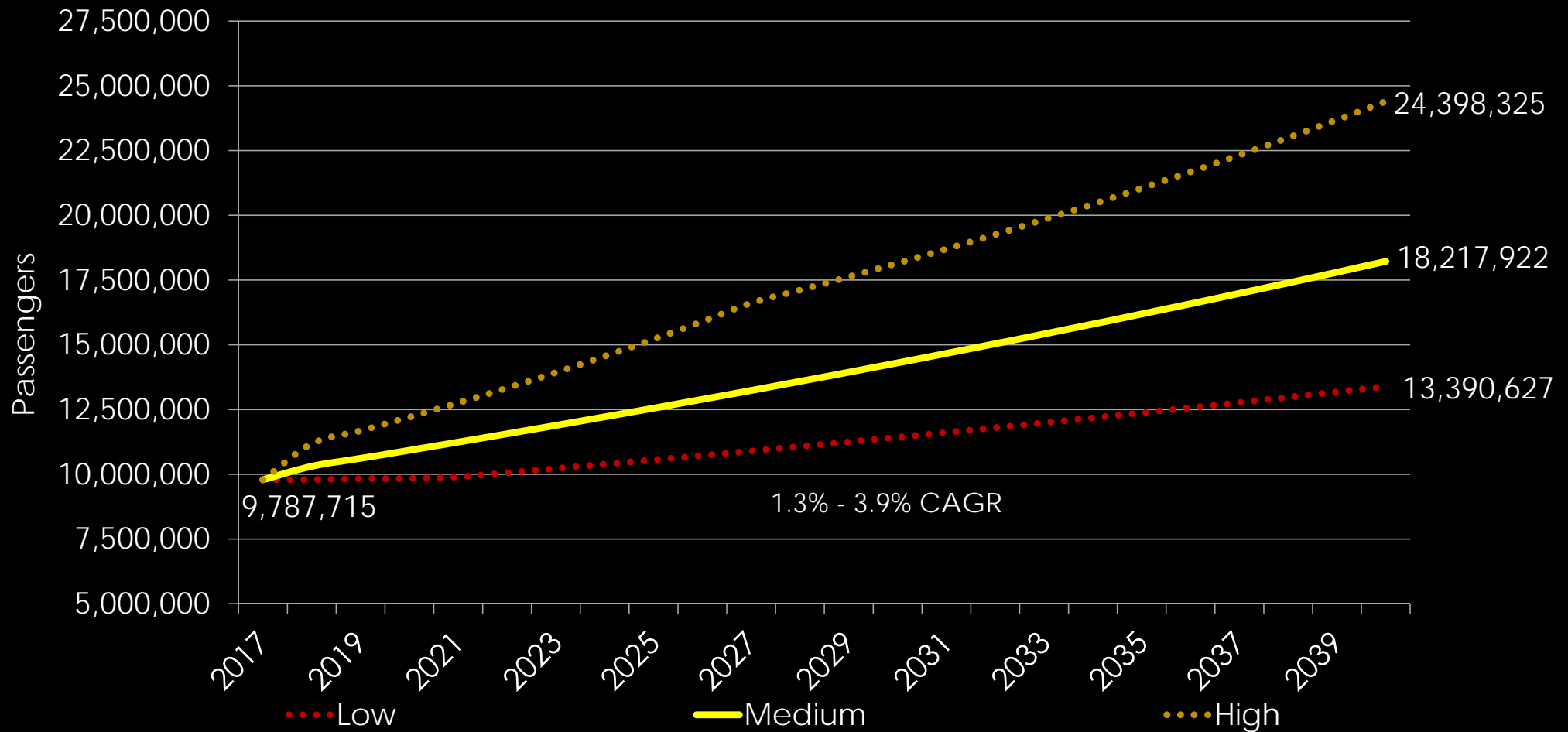


Liquid Bulk Volume Projections (,000 BPD)

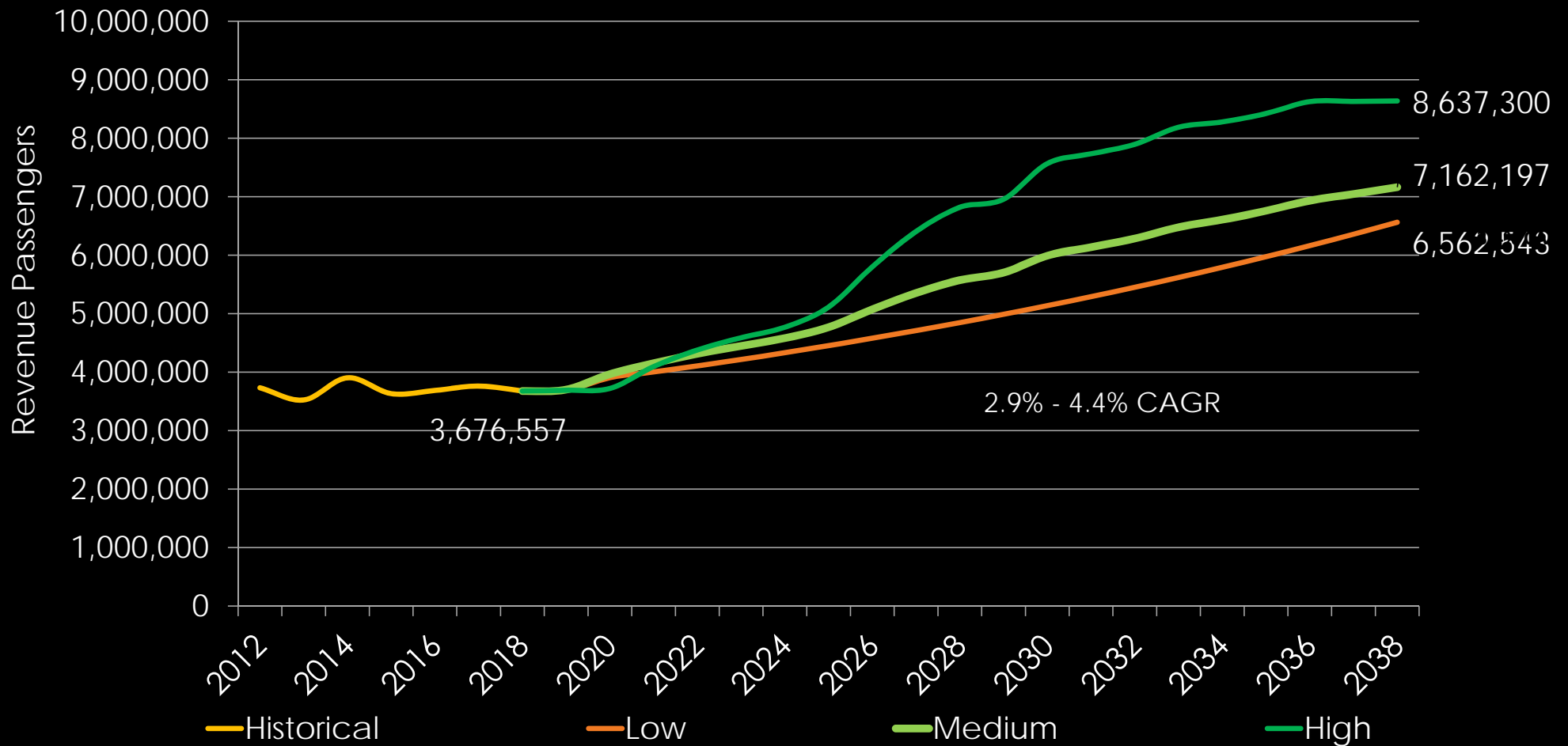


CRUISE PROJECTIONS

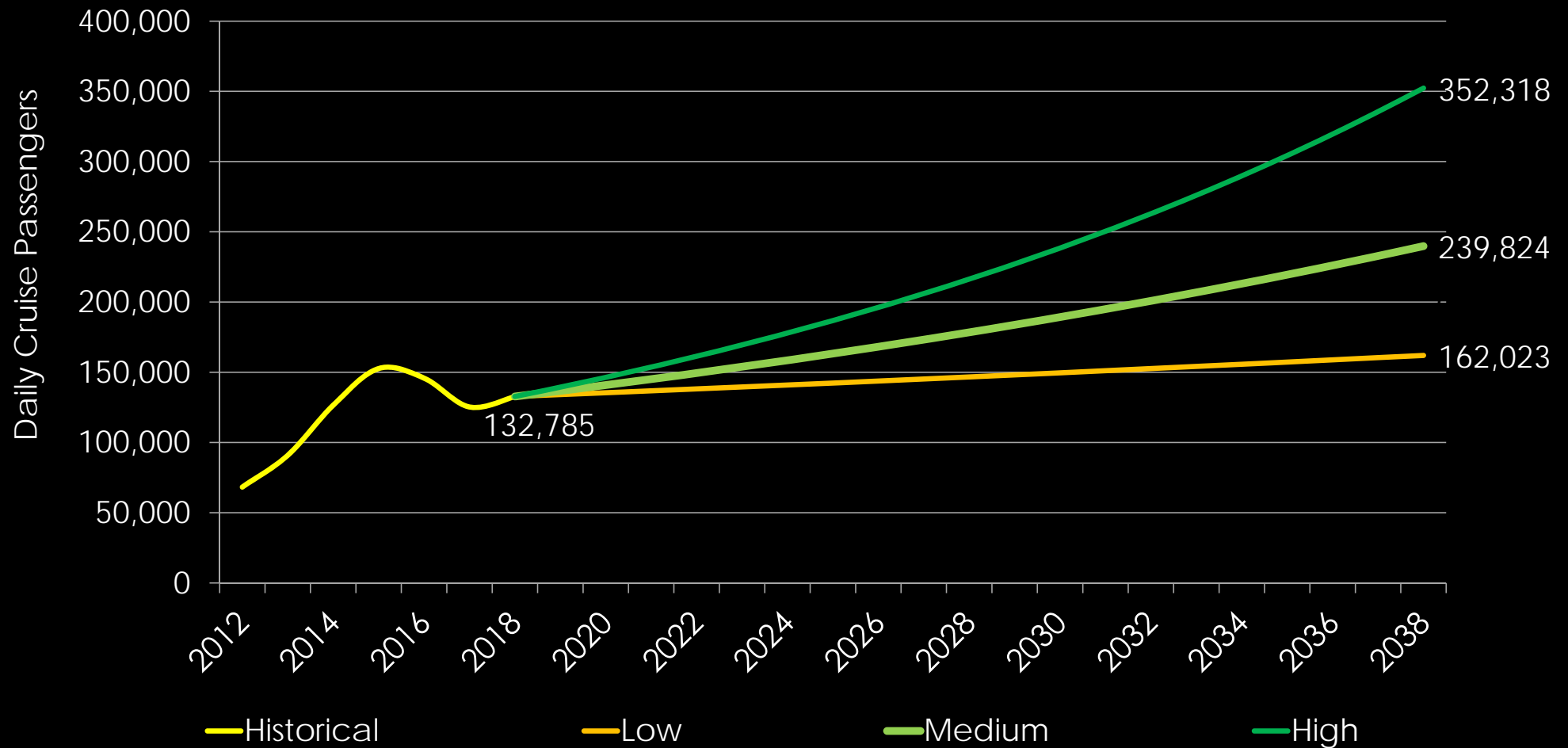
Caribbean growth



Cruise Revenue Passenger Projections (Multi-Day)

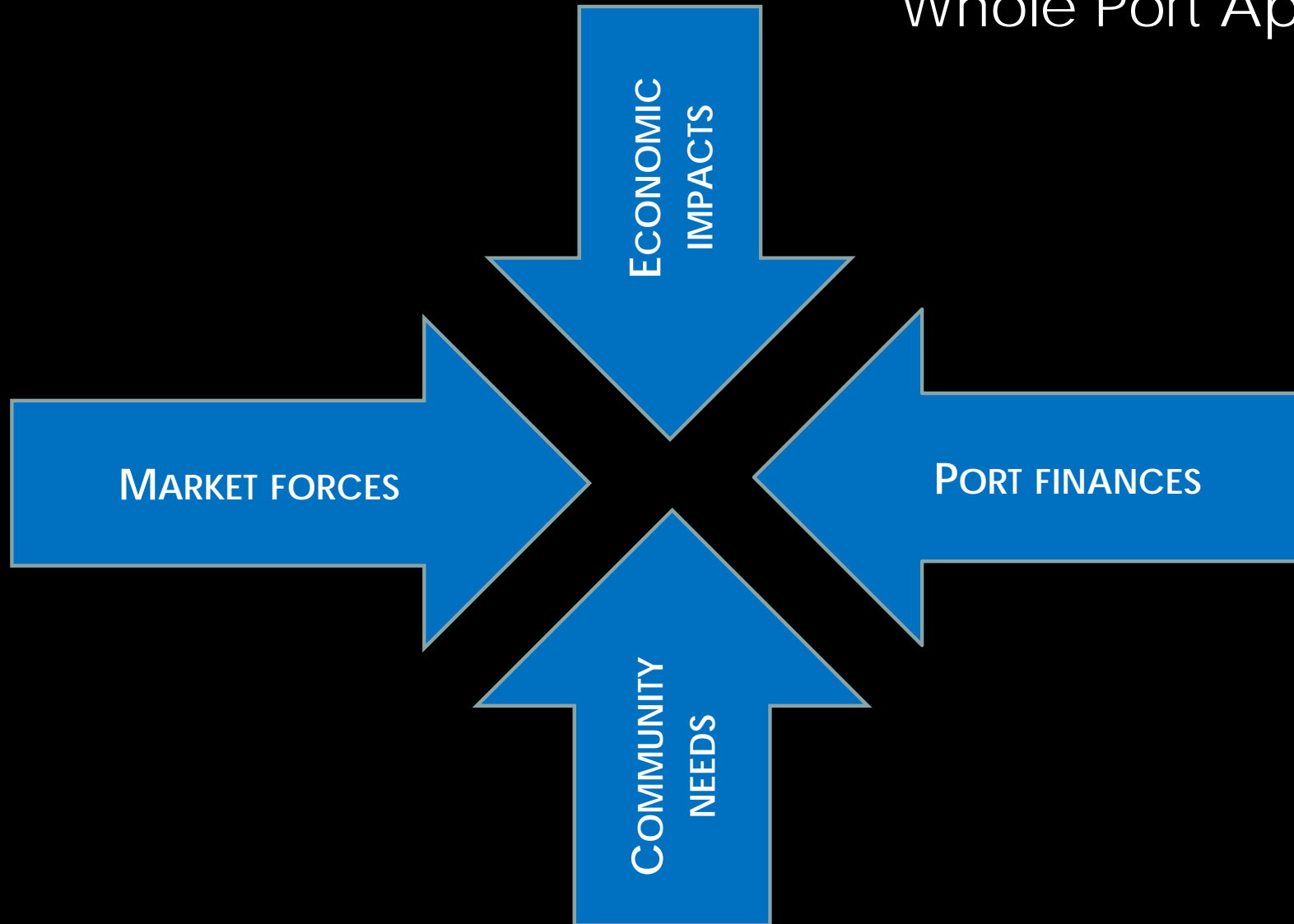


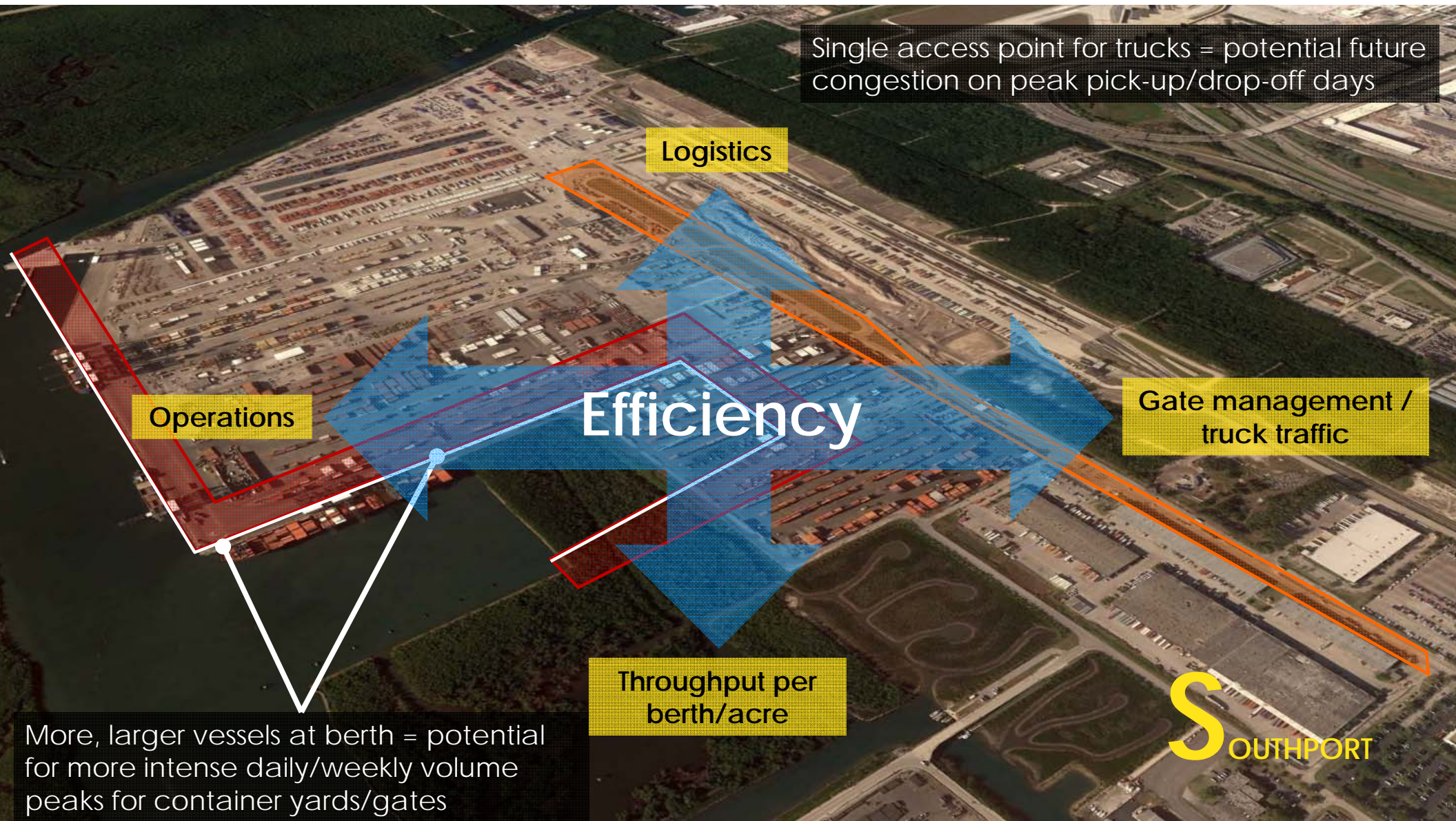
Cruise Revenue Passenger Projections (Daily)



Moving Forward

Whole Port Approach





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

Logistics

Operations

Efficiency

Gate management / truck traffic

Throughput per berth/acre

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

SOUTHPORT

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

M IDPORT

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

N
ORTHPORT

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

Phase 1 – End of August 2018 (Completed)

- Existing conditions assessment
- Market assessment
 - Cruise, cargo, liquid bulk
- **Community and Stakeholder meetings**

Phase 2 – January 2019

- Plan & Strategy Development
 - Financial considerations, market demands, operational enhancements, facility consolidation, business strategies, traffic study (addition to scope)
- Final Plan & Executive Summary
- Plan Implementation
- **Community and Stakeholder meetings**

Phase 3 – End February 2019

- 3-D Computer Animated Video
- BOCC Adoption / MPO Meetings

Phase 4 – End March 2019

- Broward County Comprehensive Plan Update

Master Plan Input

WE LOOK FORWARD TO YOUR INPUT AS PART OF THE PLANNING PROCESS

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