



# 2018 Port Everglades Master/Vision Plan Update

Cargo Charrette

April 30, 2019



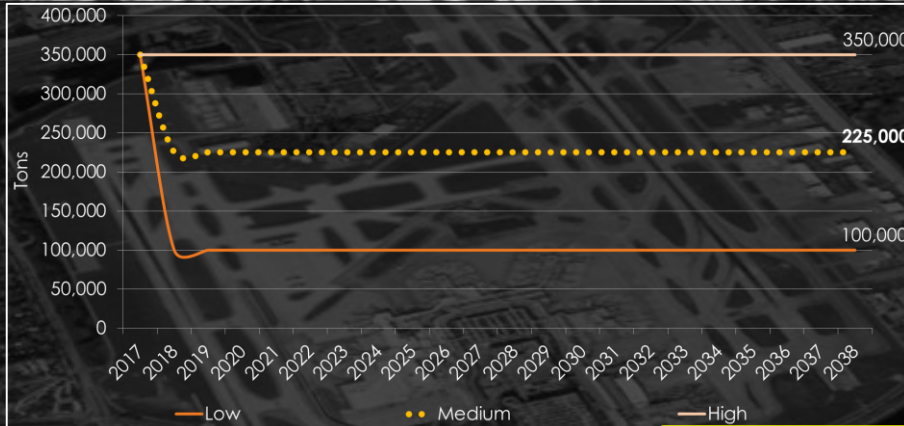
Many of the concepts included are preliminary in nature. Additional analyses and input will continue through the Master/Vision Plan process.

An aerial photograph of an airport and surrounding urban area, overlaid with a dark, semi-transparent grid. The airport features a large terminal building, multiple runways, and taxiways. The surrounding area includes residential neighborhoods, commercial buildings, and a body of water in the foreground.

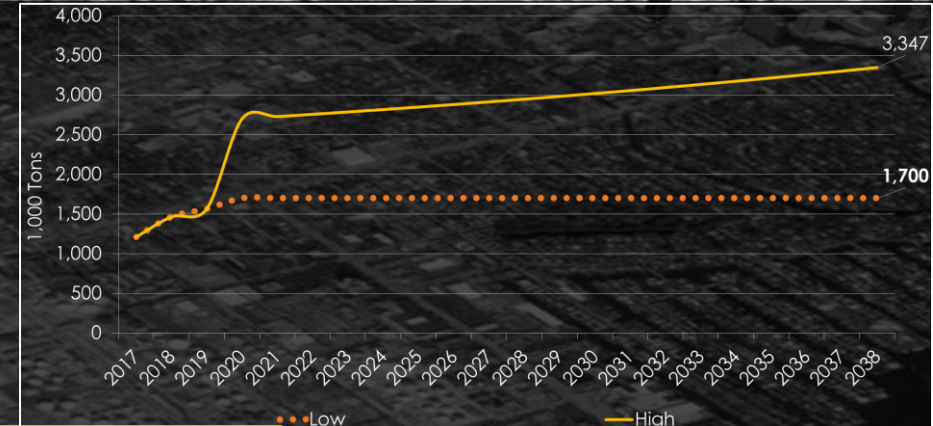
# 2018 Master/Vision Plan Update

## **Phase 1: Market Assessments**

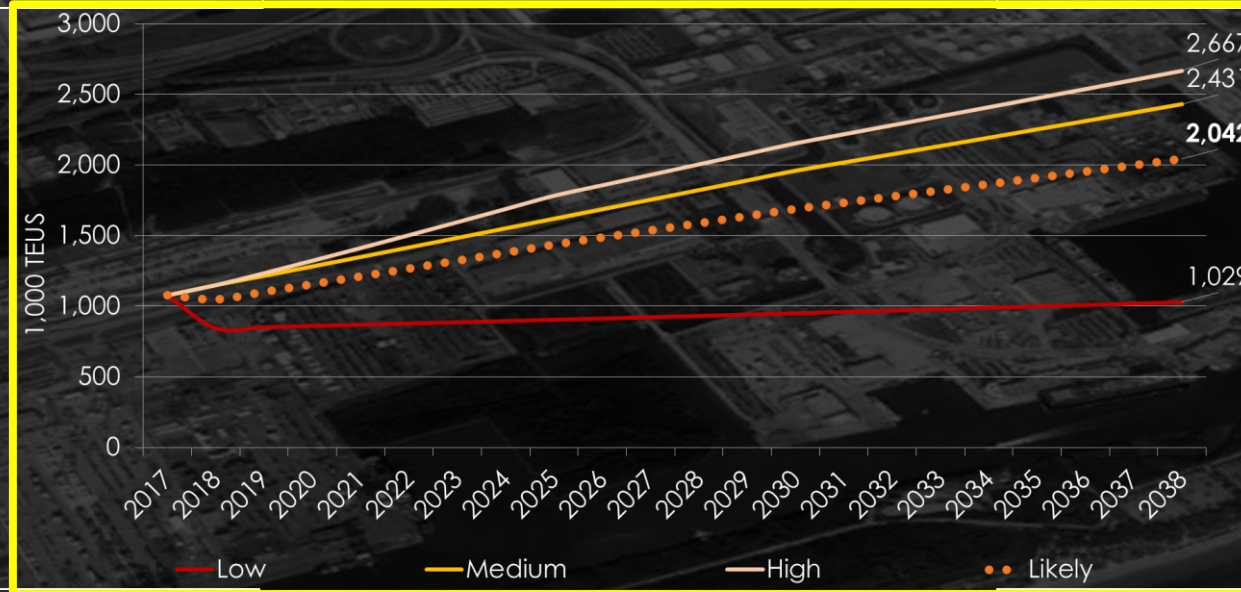




Break-bulk

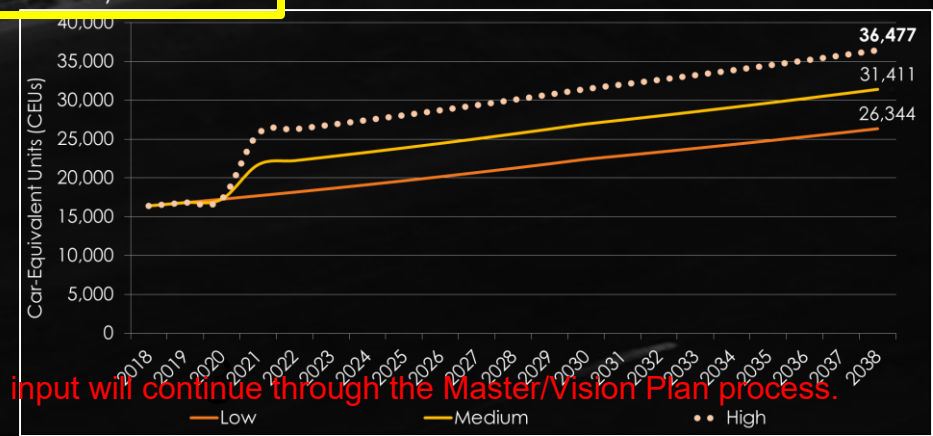
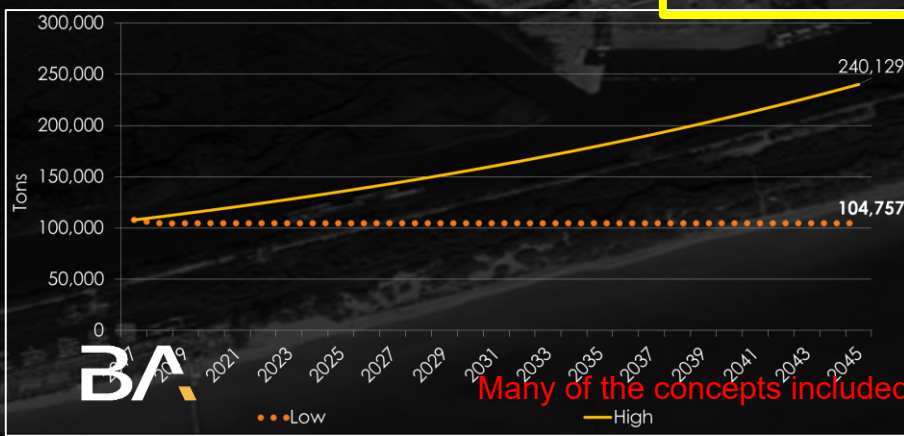


Dry Bulk



Used Ro-Ro + Yachts

New Autos



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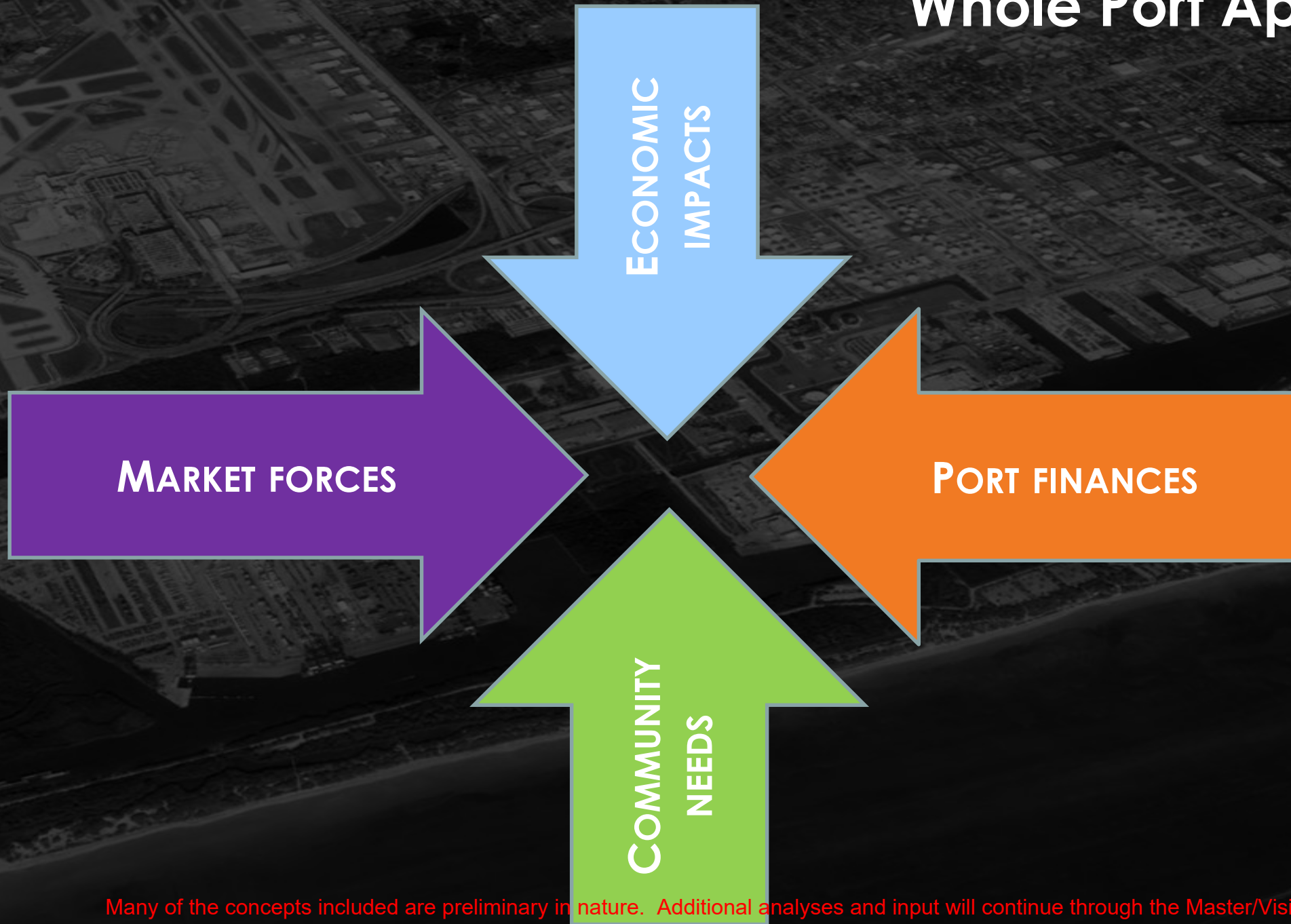


# 2018 Master/Vision Plan Update

## **Phase 2: Plan Development**



# Whole Port Approach



Many of the concepts included are preliminary in nature. Additional analyses and input will continue through the Master/Vision Plan process.

# Major Future Development Considerations

- Market projections for each PEV line of business
- Vessel sizes (cruise, cargo, liquid bulk)
- On-port traffic
- Core trade lanes/source markets, trade policy and macro-economic conditions
- Ongoing PEV improvements (STNE, USACE deepening/widening, etc.)
- Cruise industry expansion and transition to LNG
- Competitive dynamics and developments at other Florida ports
- Technology, industry best practices and supply chain evolution
- Environmental and community impacts
- Return on investment and economic impacts
- Resiliency
- **Demand vs. Capacity**



# Current vs. Future Demand/Capacity – LNG Preferred

		Berth Requirements (berths)		KPIs	Δ 2018-2038	Land Requirements (acres)		KPIs	Δ 2018-2038
		2018	2038			2018	2038		
Cruise (including parking)		9.0	10.0		1.0	88.0	109.0		21.0
	Multi-Day	8.0	10.0			84.0	109.0		
		467,676	716,220	PAX/berth		44,541	65,708	PAX/acre	
	Daily	1.0	0.0			4.0	0.0		
		128,934	n/a	PAX/berth		32,234	n/a	PAX/acre	
Liquid Bulk		3.0	3.0		0.0	23.0	15.0		-8.0
		112,698	118,280	BPD/berth		14,700	23,656	BPD/acre	
Containers		5.5	8.0		2.5	327.0	294.0		-33.0
	Southport (w/ cranes)	4.0	6.0			279.0	294.0		
		252,116	330,529	TEUs/berth		3,615	6,947	TEUs/acre	
		80,037	84,751	Moves/crane					
	Southport (w/o cranes)	0.0	2.0						
		n/a	29,600	TEUs/berth					
	Midport	1.5	0.0			48.0	0.0		
		66,667	n/a	TEUs/berth		2,083	n/a	TEUs/acre	
Break-bulk		0.9	0.5		-0.4	14.0	10.0		-4.0
		403,396	409,514	Tons/berth		25,933	20,476	Tons/acre	
Dry Bulk		3.6	1.0		-2.6	16.0	14.0		-2.0
		416,553	1,700,000	Tons/berth		93,724	121,429	Tons/acre	
Automobiles		1.0	0.5		-0.5	9.0	25.0		16.0
		107,208	72,954	CEUs/berth		3,219	1,459	CEUs/acre	
Commercial		n/a	n/a			20.0	13.0		-7.0
		n/a	n/a			n/a	n/a		
Warehousing/Logistics/Miscellaneous		n/a	n/a			46.0	78.0		32.0
		n/a	n/a			n/a	n/a		
Vacant/Other		n/a	n/a			99	52		-47.0
		n/a	n/a			n/a	n/a		
Total		23.0	23.0		0.0	642.0	610.0		-32.0

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# Current vs. Future Demand/Capacity – LNG Alternative

		Berth Requirements (berths)		KPIs	Δ 2018-2038	Land Requirements (acres)		KPIs	Δ 2018-2038
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		n/a	n/a			n/a	n/a		
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		n/a	n/a			n/a	n/a		
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		n/a	n/a			n/a	n/a		
Total		23.0	23.0		0.0	642.0	606.0		-36.0

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# Plan Development – Guiding Principles

- **Increase Efficiency**

- Increase effective capacity and minimize intra-port drayage and associated truck trips/costs through operational improvements
- Consolidate similar operations/operators
  - Southport = containers + logistics + commercial (office)
  - Midport = cruise + ro-ro + dry bulk
  - Northport = liquid bulk/break-bulk + cruise + logistics + CVB/commercial
- Separate modes of transportation to minimize truck and non-truck traffic

- **Preserve Flexibility**

- Meet projected future demand without precluding changes in market conditions over time
  - Berths are the primary asset of all ports
  - Land should be configured to support berth utilization
  - Technology will drive future operations in unexpected ways

# Plan Development – Guiding Principles

- Facilitate Integration
  - Integration within the port
    - Cruise/Bulk/Liquid Bulk/Containers/ICTF/Parking/Logistics/Commercial
    - Traffic and transportation
  - Integration between the port and surrounding area
    - FLL-PEV-CVB synergies
    - Logistics (cargo and people)
    - Traffic and transportation
  - Integration across the broader supply chain
    - Cruise: PEV/PortMiami/Port Canaveral/Caribbean destinations
    - Containers: shippers/vessel operators/MTOs/3PLs/trucking community
    - Liquid bulk: critical regional and national energy infrastructure
    - Bulk/break-bulk: regional alternatives and business cycle dynamics



An aerial photograph of an airport and surrounding urban area, rendered in a dark, monochromatic style. The airport features a large terminal building, runways, and taxiways. The surrounding area includes residential neighborhoods, commercial buildings, and a body of water in the foreground.

# 2018 Master/Vision Plan Update

## **Phase 2a: Port Projects**

# Port Projects by Area by Year

	0-5 Year Projects		5-10 Year Projects		10-20 Year Projects	
Northport	T2/T4 Parking Garage	2020	Port Access Road	2025		
	Slip 1 Expansion	2022	Slip 3 Expansion	2026		
	Maintenance Facility Consolidation	2022	LNG Bunkering + Storage Facility	2028		
	Break-bulk Yard	2023				
Midport	T21 Redevelopment	2021	Tracor Basin Fill	2024	Berth 19 Finger Pier	2029
	Ro-Ro Yard Relocation/Expansion	2023	T29	2027	T19/20	2030
			Ro-Ro Yard Expansion	2027	Berths 14/15 Realignment	2037
			T26	2028	Ro-Ro Yard Expansion	2033
Southport	PEV ILC	2020	Phase 9C-1	2025	Phase 9C-2	2029
	3 SPP STS Cranes	2020	Phase 9A-2	2026		
	Phase 9A-1	2021	Griffin Road Extension	2026		
	STNE + 3 SPP STS Cranes	2023	McIntosh Road Realignment	2027		
			Berth 33 Alignment	2028		
			Container Terminal reconfiguration	2028		
Portwide/Other	USACE Deepening & Widening (USCG Relocation)	2022	Shaw Property Development	2024	APM	2035
	Shaw Property Acquisition	2022	USACE Deepening & Widening	2025		
	I-595 Flyover	2022	Commercial Consolidation	2025		
	Former Dynegy Logistics Development	2023				
	Auto Terminal West	2023				

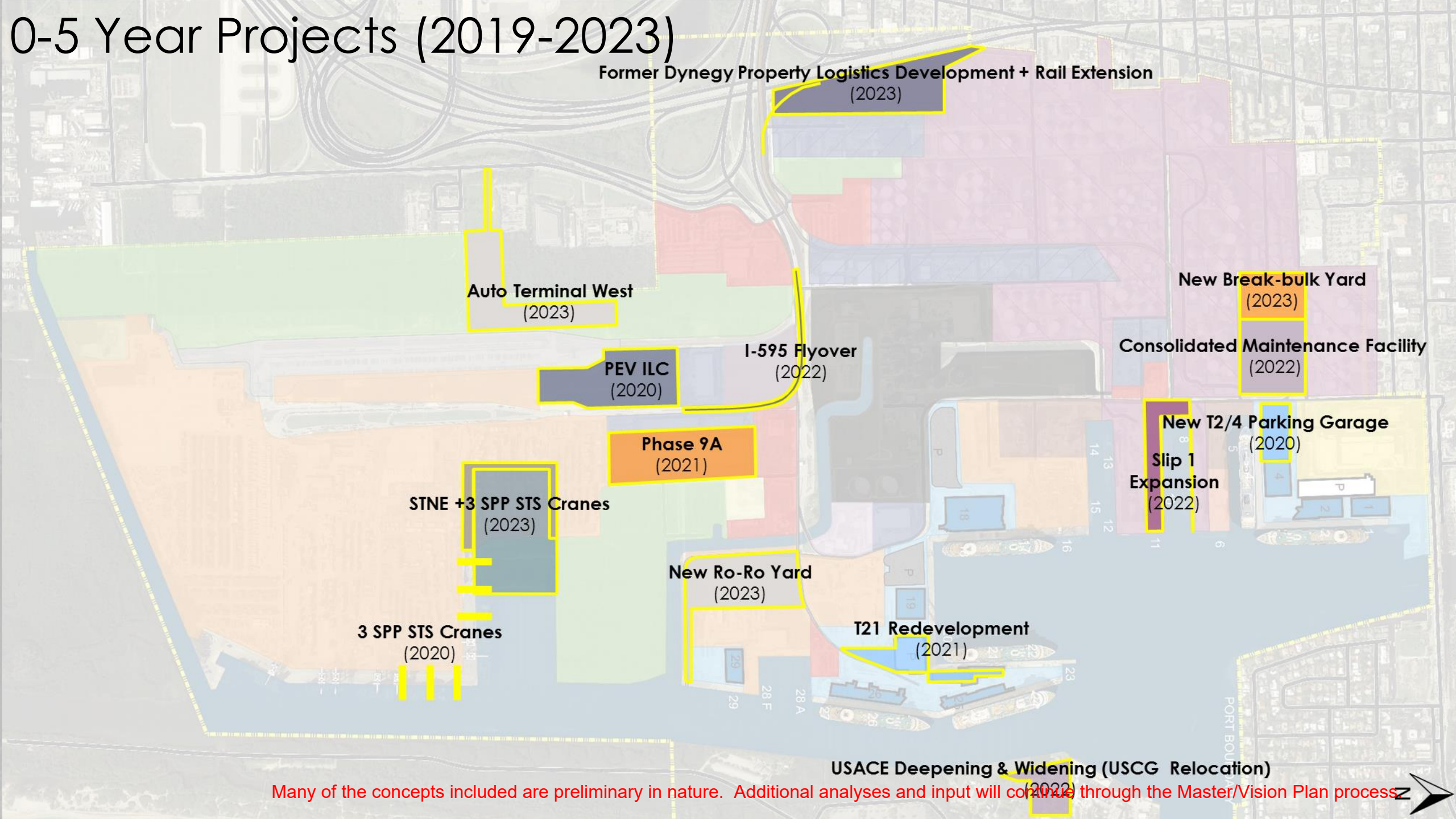


# STATUS QUO





# 0-5 Year Projects (2019-2023)



Former Dynegy Property Logistics Development + Rail Extension  
(2023)

Auto Terminal West  
(2023)

PEV ILC  
(2020)

I-595 Flyover  
(2022)

Phase 9A  
(2021)

STNE +3 SPP STS Cranes  
(2023)

3 SPP STS Cranes  
(2020)

New Ro-Ro Yard  
(2023)

T21 Redevelopment  
(2021)

USACE Deepening & Widening (USCG Relocation)  
(2022)

New Break-bulk Yard  
(2023)

Consolidated Maintenance Facility  
(2022)

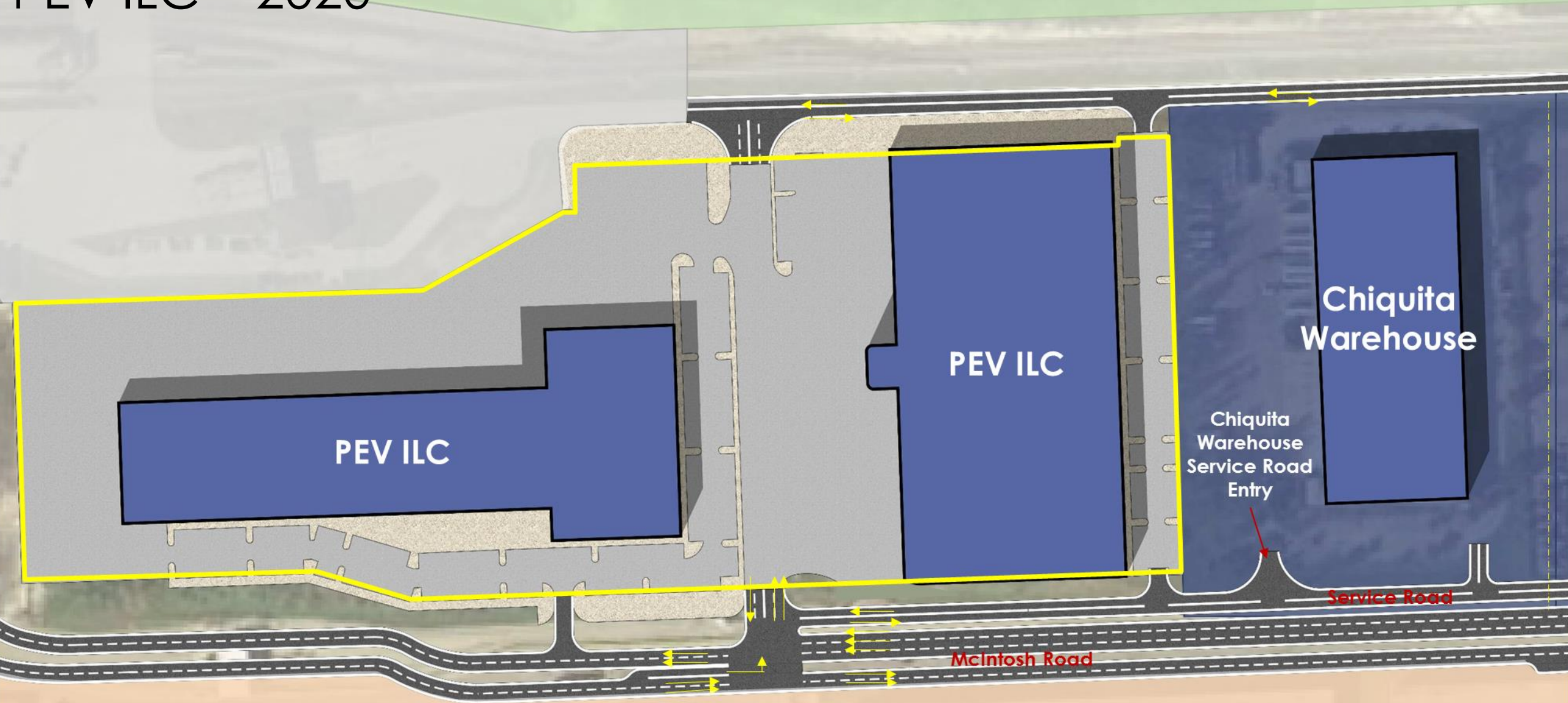
New T2/4 Parking Garage  
(2020)

Slip 1  
Expansion  
(2022)

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# PEV ILC – 2020



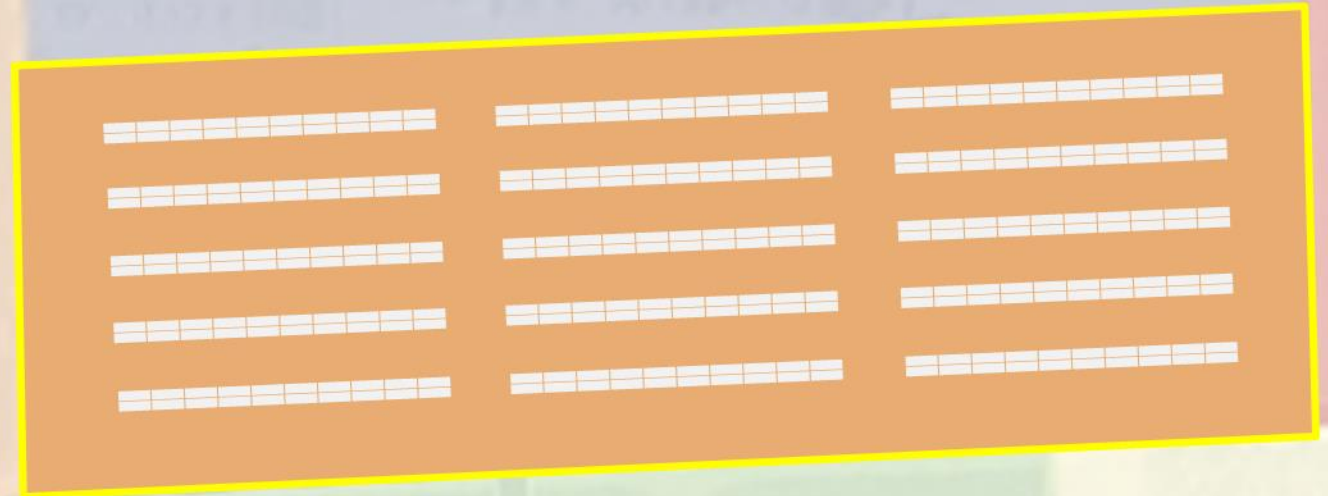
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# Phase 9A-1 – 2021

## New Container Yard

20 acres

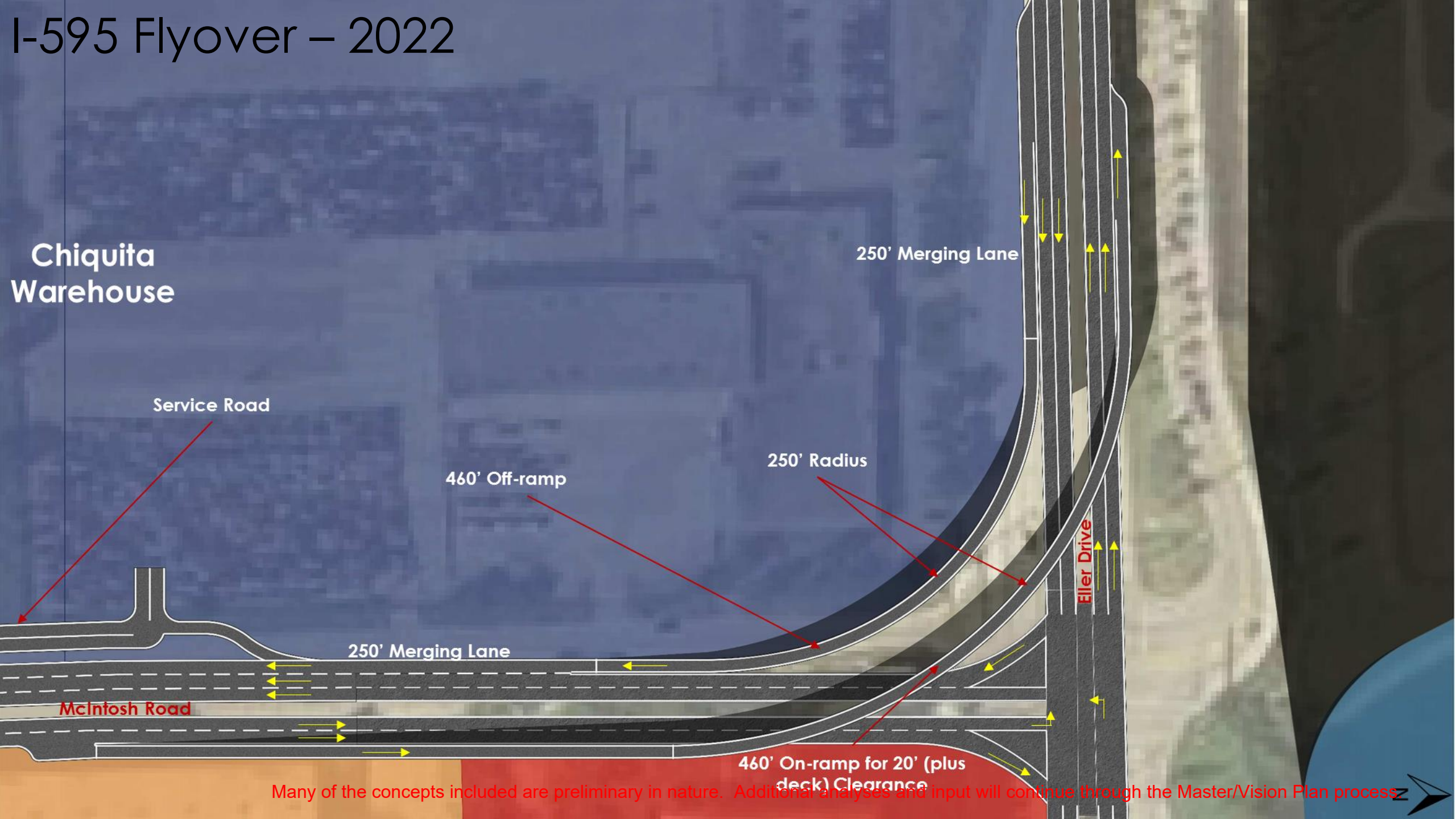


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# I-595 Flyover – 2022



Chiquita  
Warehouse

250' Merging Lane

Service Road

460' Off-ramp

250' Radius

Eller Drive

250' Merging Lane

McIntosh Road

460' On-ramp for 20' (plus  
deck) Clearance

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# Consolidated Maintenance Facility – 2022

## New Break-Bulk Yard – 2023

**New Break-bulk Yard**

7 acres

**Consolidated  
Maintenance Facility**

11 acres

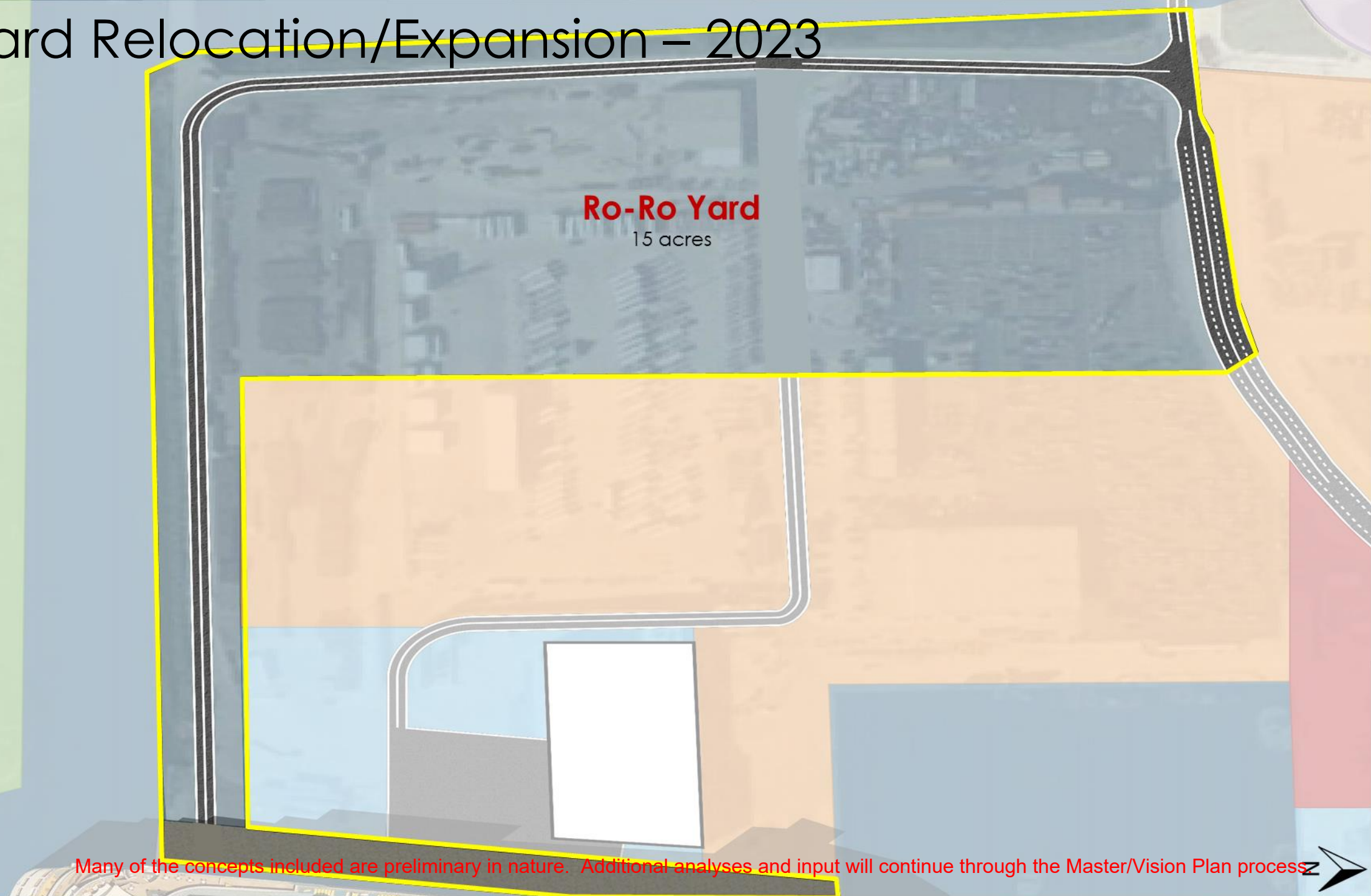
Spangler Blvd/SR 84

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# Ro-Ro Yard Relocation/Expansion – 2023



**Ro-Ro Yard**  
15 acres

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SE 38th St

800'

700'

## Southport Turning Notch

33 acres (including new aprons)

1,500'

900'



# Former Dynergy Logistics Development – 2023

An aerial photograph of a landscape with a large, irregularly shaped area highlighted in a solid purple color. A yellow dashed line runs horizontally across the top of the image, just below the title. The background shows a mix of green fields, some buildings, and a road network. The purple area is located in the lower half of the image, extending from the left towards the right. A yellow solid line outlines the purple area, which has a jagged, non-rectangular shape. To the right of the purple area, there is a pinkish-purple shaded region. The overall image has a semi-transparent, map-like appearance.

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# Auto Terminal West – 2023

**Auto Terminal West – Parcel 2**

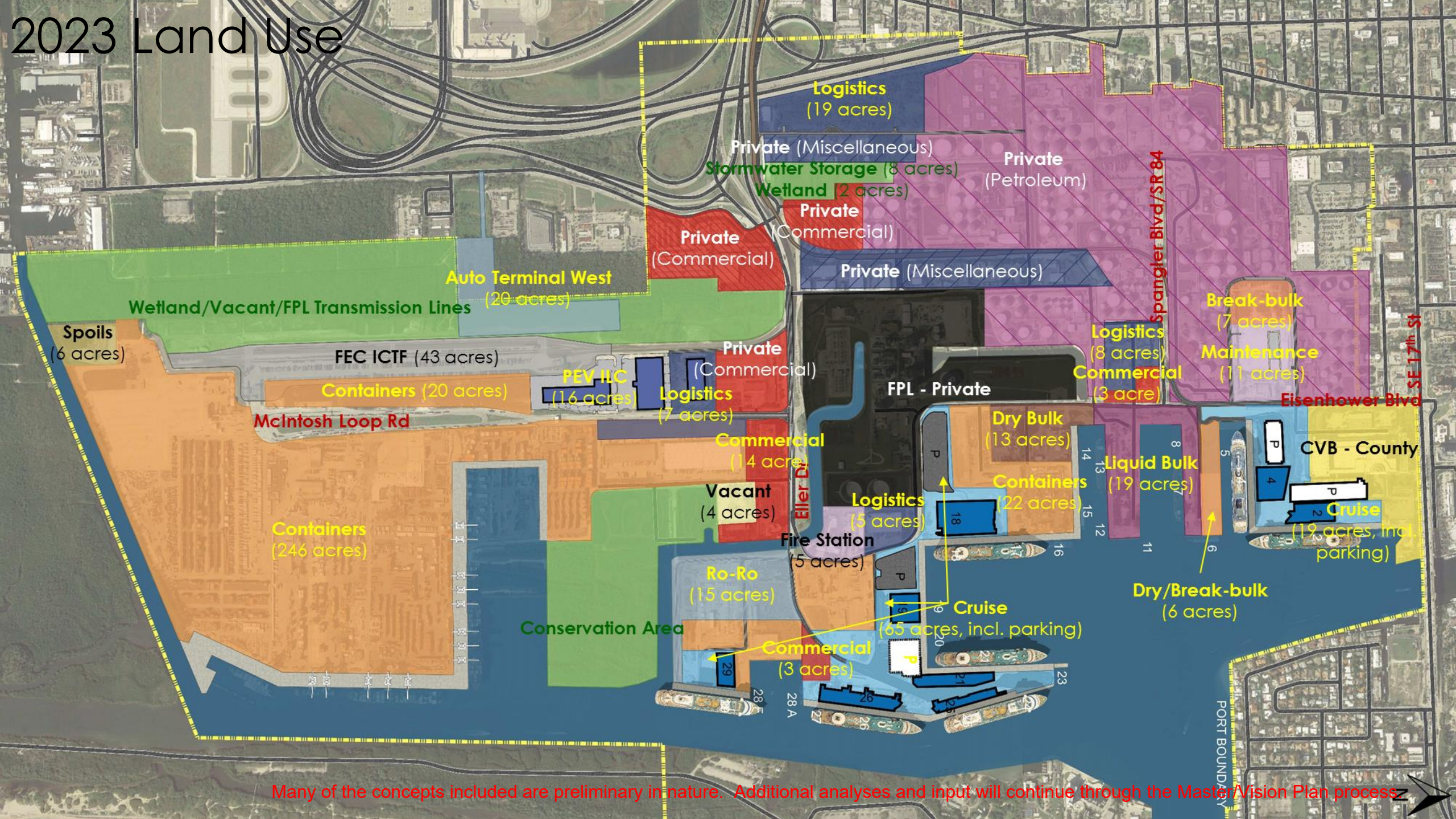
7 acres

**Auto Terminal West – Parcel 1**

13 acres



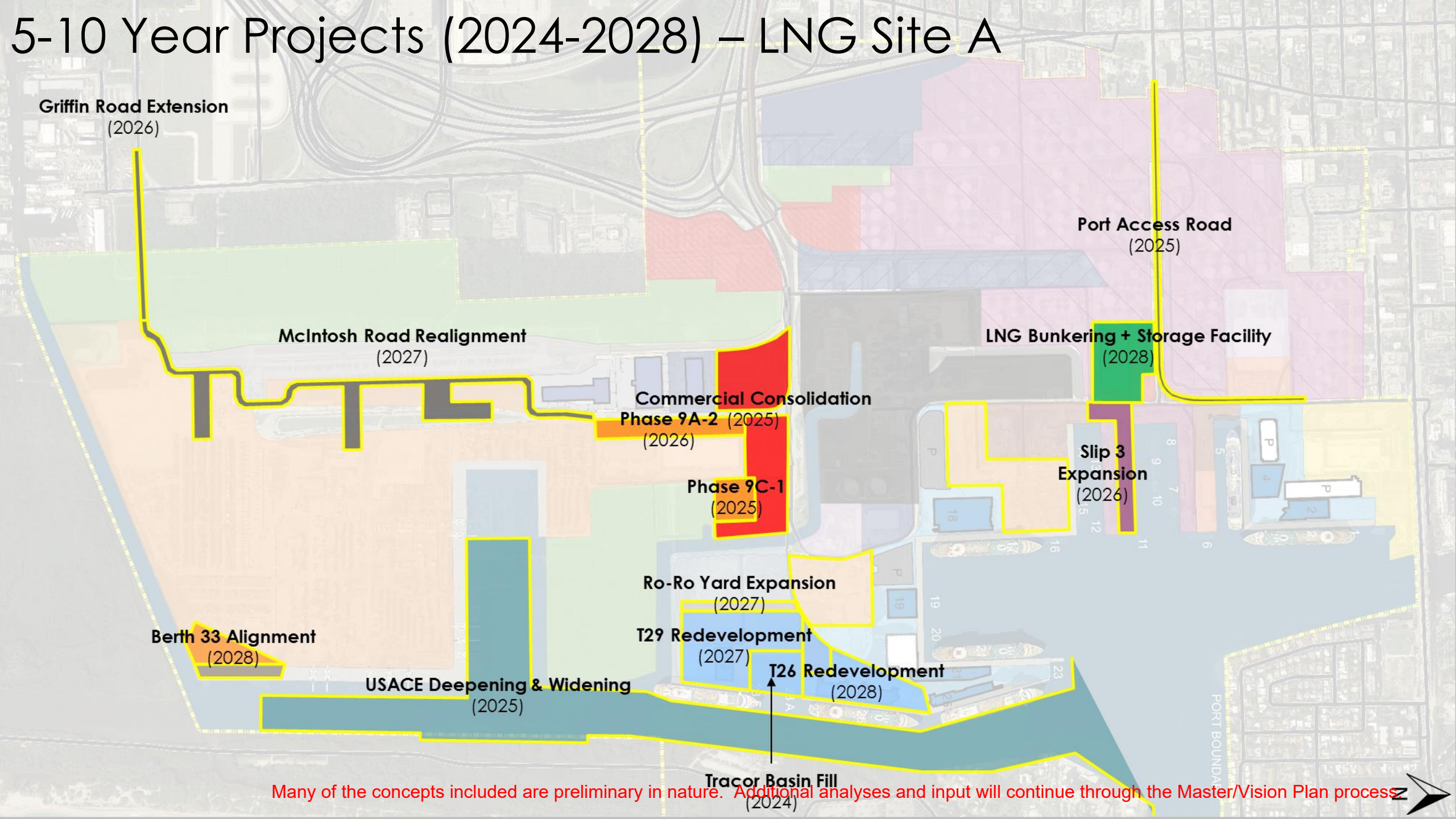
# 2023 Land Use



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# 5-10 Year Projects (2024-2028) – LNG Site A

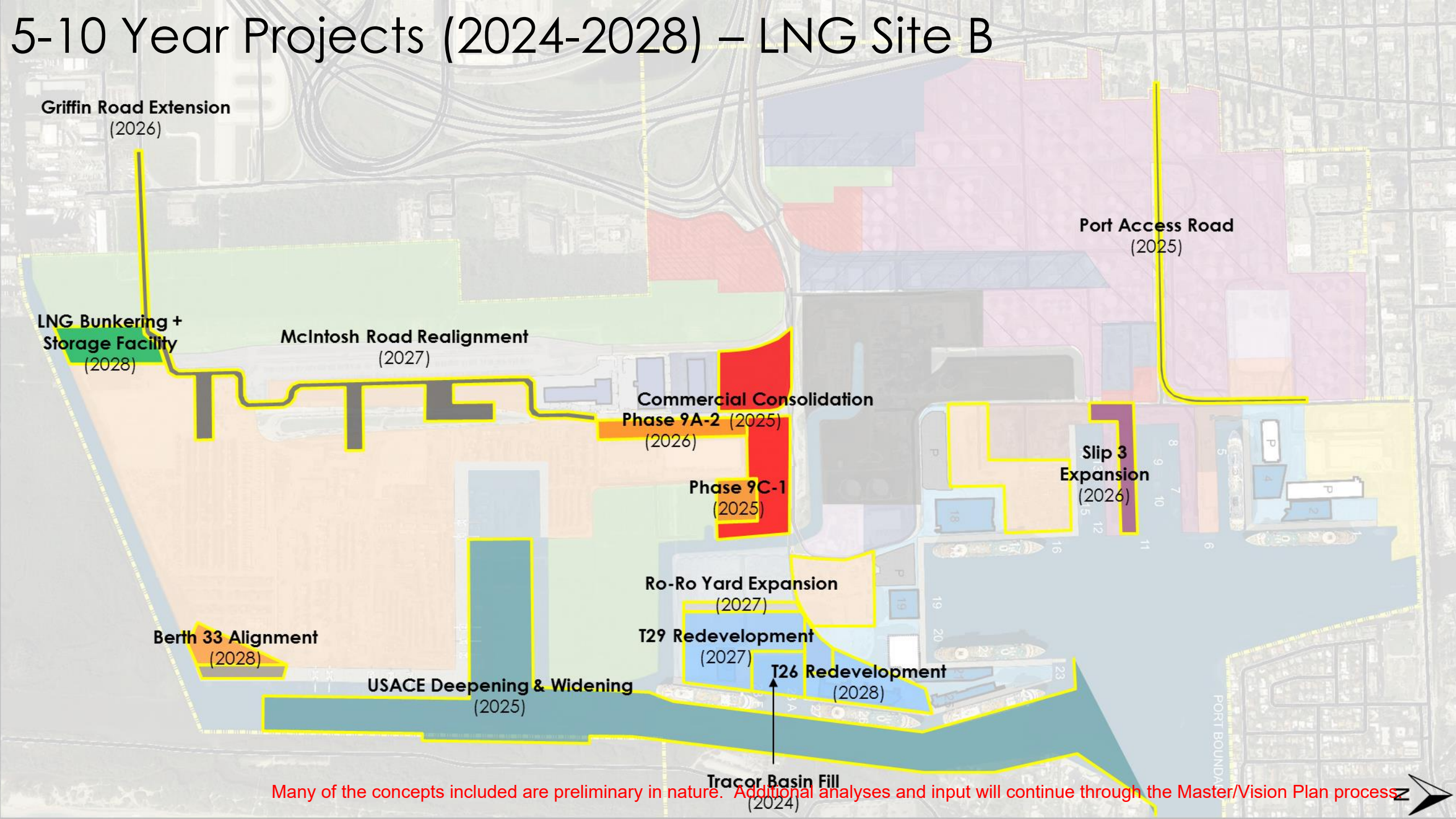


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# 5-10 Year Projects (2024-2028) – LNG Site B





# Port Access Road – 2024

## New County Road

Connects US1 northbound to SE 17<sup>th</sup> Street via partial grade separation over existing road (SR84/Spangler Blvd & Eisenhower Blvd)

Spangler Blvd/SR 84

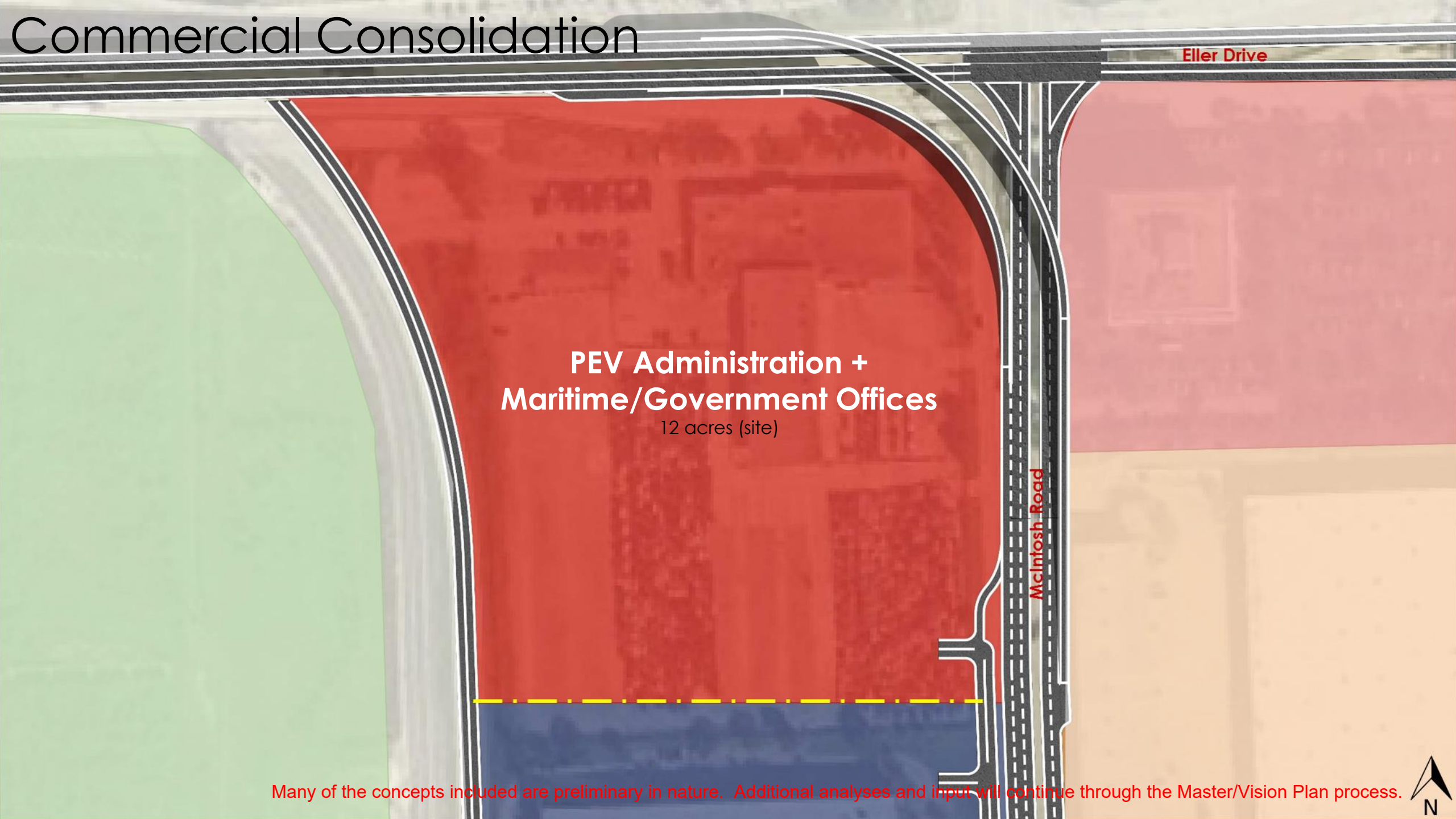
Eisenhower Blvd

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# Commercial Consolidation



**PEV Administration +  
Maritime/Government Offices**  
12 acres (site)

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# Phase 9C-1 – 2025



**New Container Yard**  
4 acres

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# Phase 9A-2 – 2026

## New Container Yard

6 acres



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# Berth 33 Alignment – 2028

## Berth Alignment

3 acres (fill)  
80,500 SF (new apron)

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# Griffin Road Extension/McIntosh Road Realignment (2026/2027)

Griffin Rd Extension

Wetland/Vacant/FPL Transmission Lines

Private (Commercial)

FEC ICTF  
(43 acres)

McIntosh Rd

Container Terminal  
Entrance/Gate

Container Terminal  
Entrance/Gate

PEV ILC

PEV ILC

Chiquita  
Warehouse

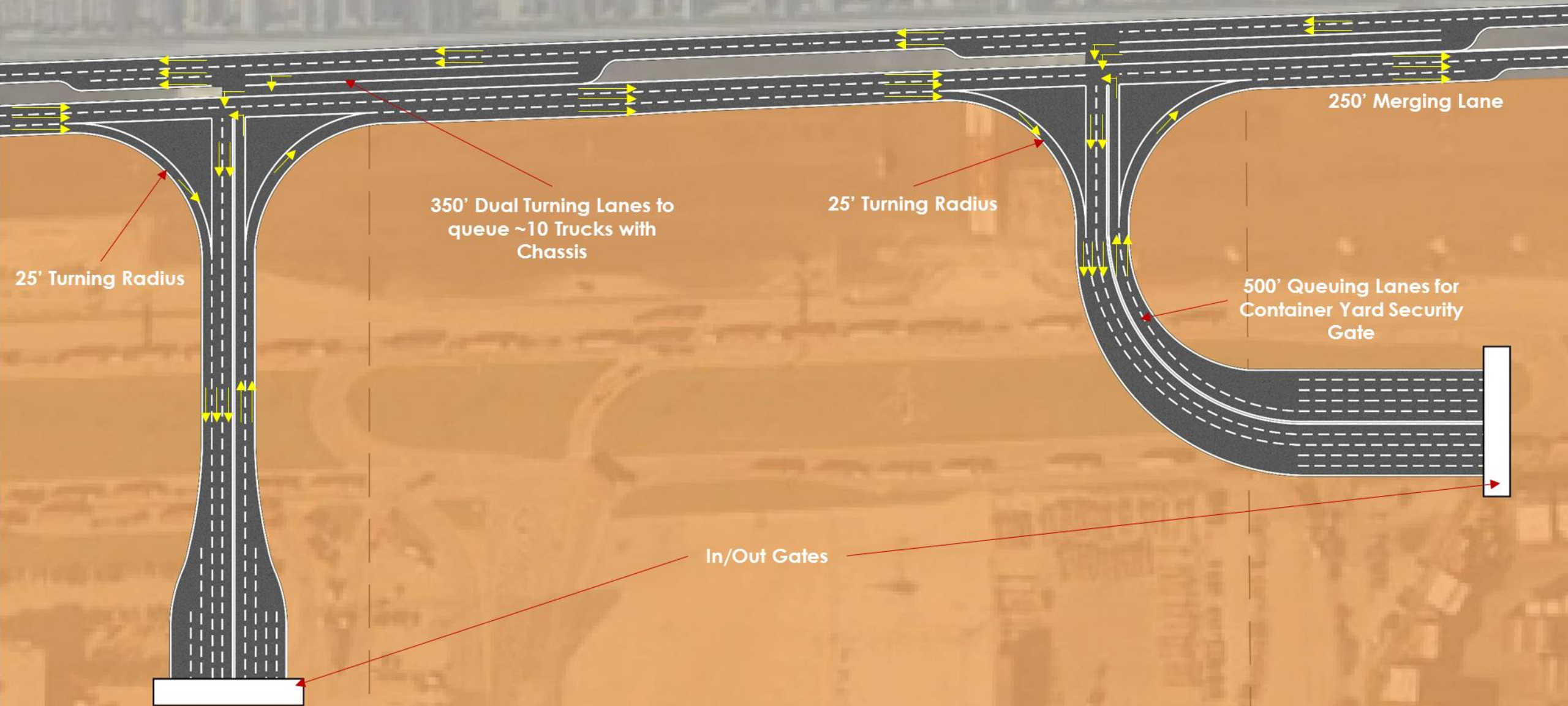
New  
Commercial  
Area

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# McIntosh Road Realignment (2027)

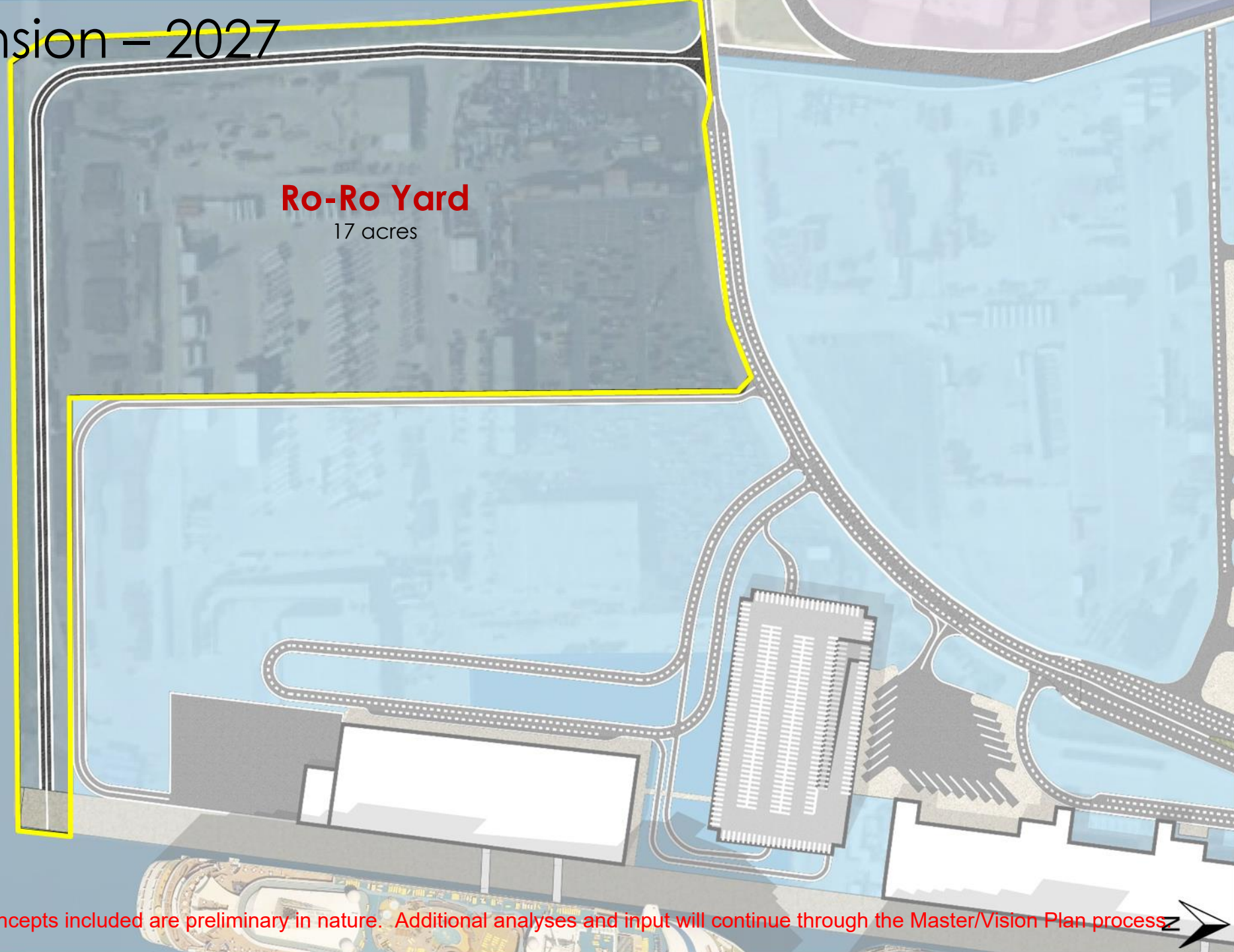


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# Ro-Ro Yard Expansion – 2027



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# LNG Bunkering + Storage Facility Site A – 2028

**LNG Bunkering + Storage Facility**  
10 acres

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# LNG Bunkering + Storage Facility Site B – 2028



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# 2028 Land Use – LNG Site A



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# 2028 Land Use – LNG Site B

Griffin Rd Extension

McIntosh Rd

Spangler Blvd/SR 84

SE 17th St

Eisenhower Blvd

CVB - County

PORT BOUNDARY

Private (Commercial)

Private (Miscellaneous)

Private (Petroleum)

Stormwater Storage (8 acres)

Wetland (2 acres)

Private (Commercial)

Private (Miscellaneous)

Logistics (19 acres)

Private (Commercial)

Private (Miscellaneous)

Proposed PEV Port Access Road

Break-bulk (7 acres)

Maintenance Commercial (11 acres)

Logistics (8 acres)

Commercial (11 acres)

Vacant (2 acres)

FPL - Private

Dry Bulk (13 acres)

Vacant (22 acres)

Liquid Bulk (15 acres)

CVB - County

Cruise (19 acres, incl. parking)

Dry/Break-bulk (6 acres)

Cruise (77 acres, incl. parking)

Vacant (11 acres)

Fire Station (5 acres)

Logistics (5 acres)

Commercial (14 acres)

Commercial (12 acres)

Logistics (7 acres)

PEV ILC (16 acres)

FEC ICTF (43 acres)

Auto Terminal West (20 acres)

Wetland/Vacant/FPL Transmission Lines

LNG (10 acres)

Containers (276 acres)

Conservation Area

Ro-Ro (17 acres)

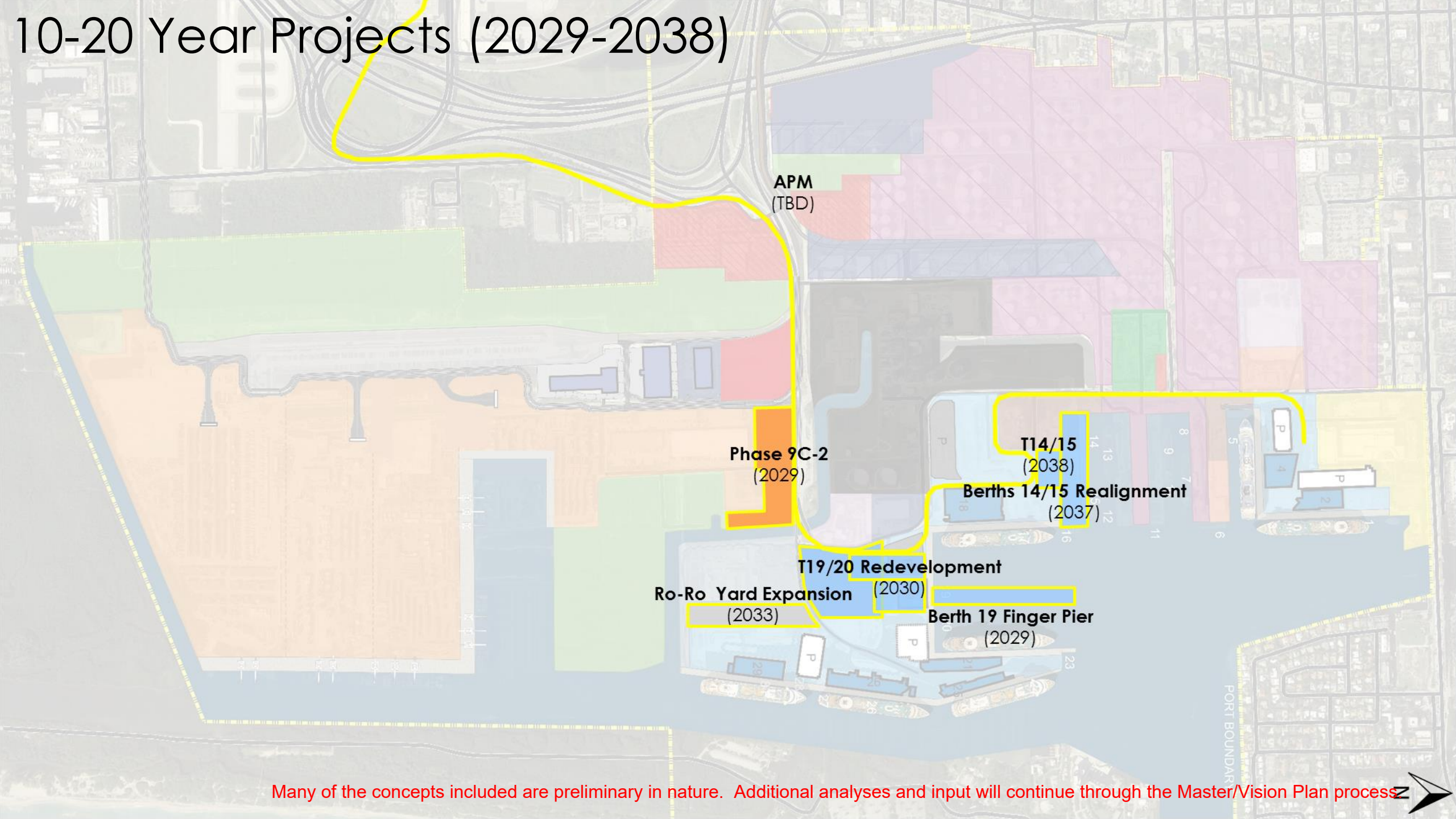
Private (Commercial)

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# 10-20 Year Projects (2029-2038)

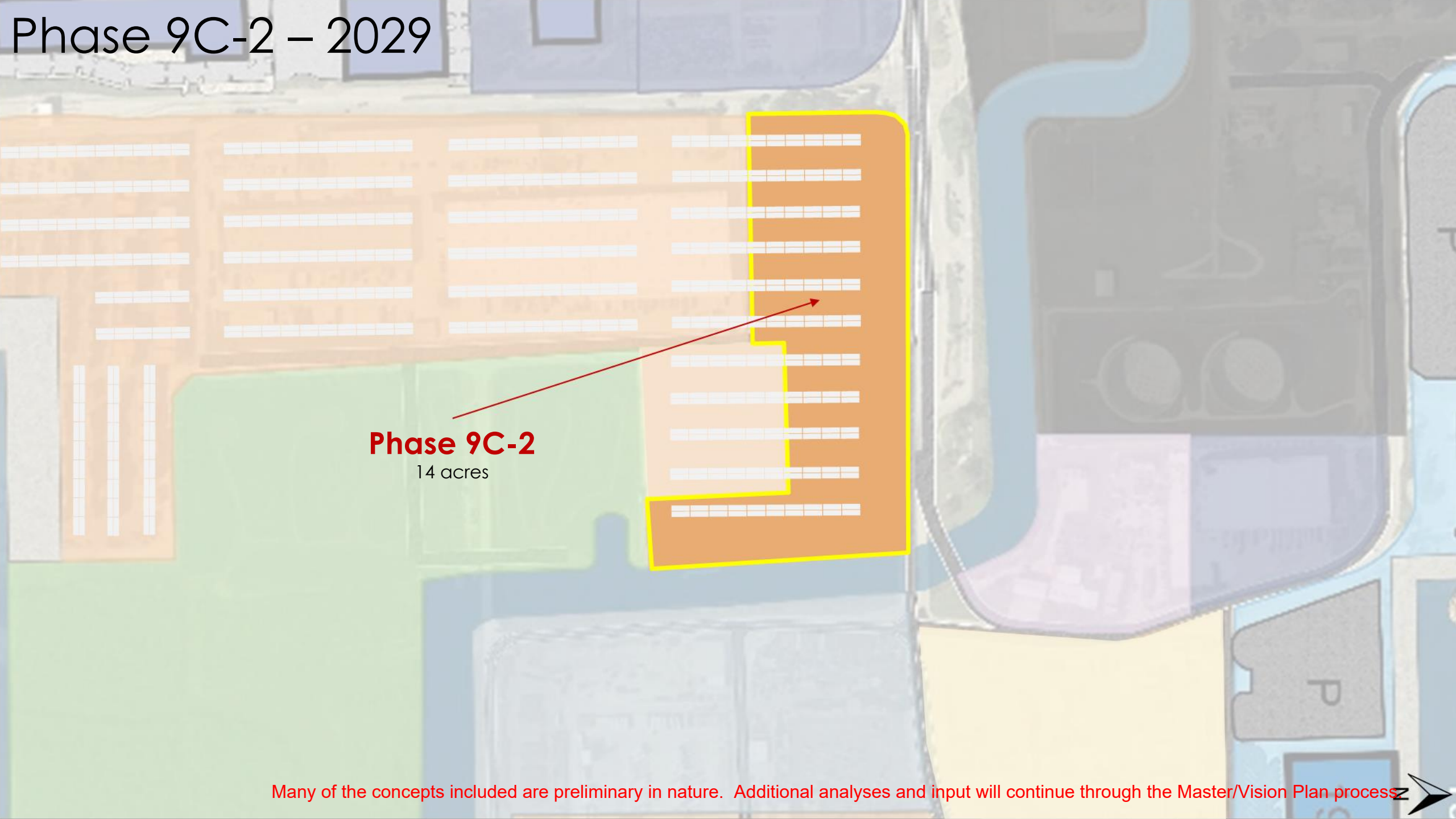


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# Phase 9C-2 – 2029



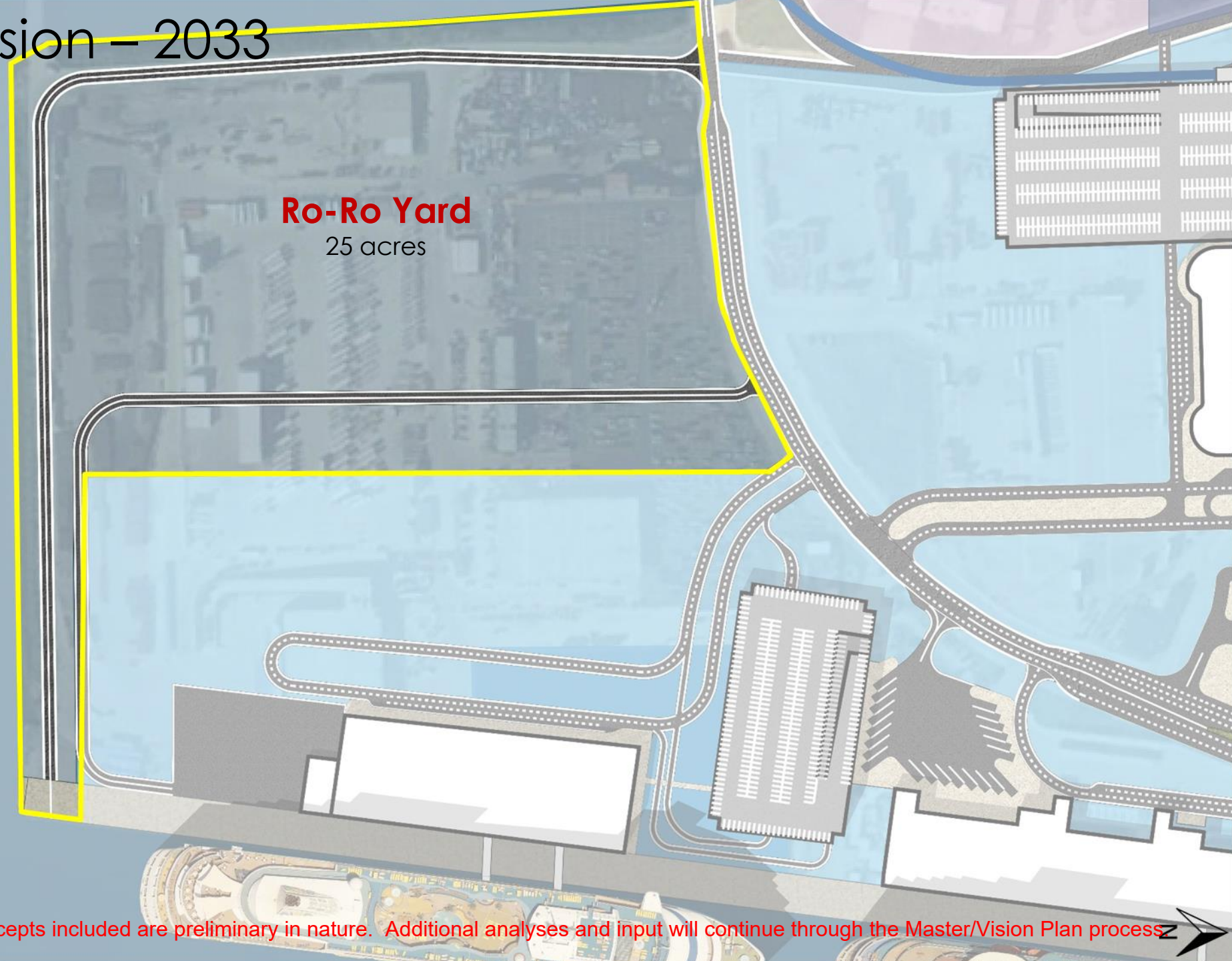
**Phase 9C-2**

14 acres

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# Ro-Ro Yard Expansion – 2033



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# Shaw Property Development – 2033

Shaw Property – Parcel 1  
~24 acres

Shaw Property – Parcel 2  
~3 acres

Shaw Property Acquisition  
(2022)

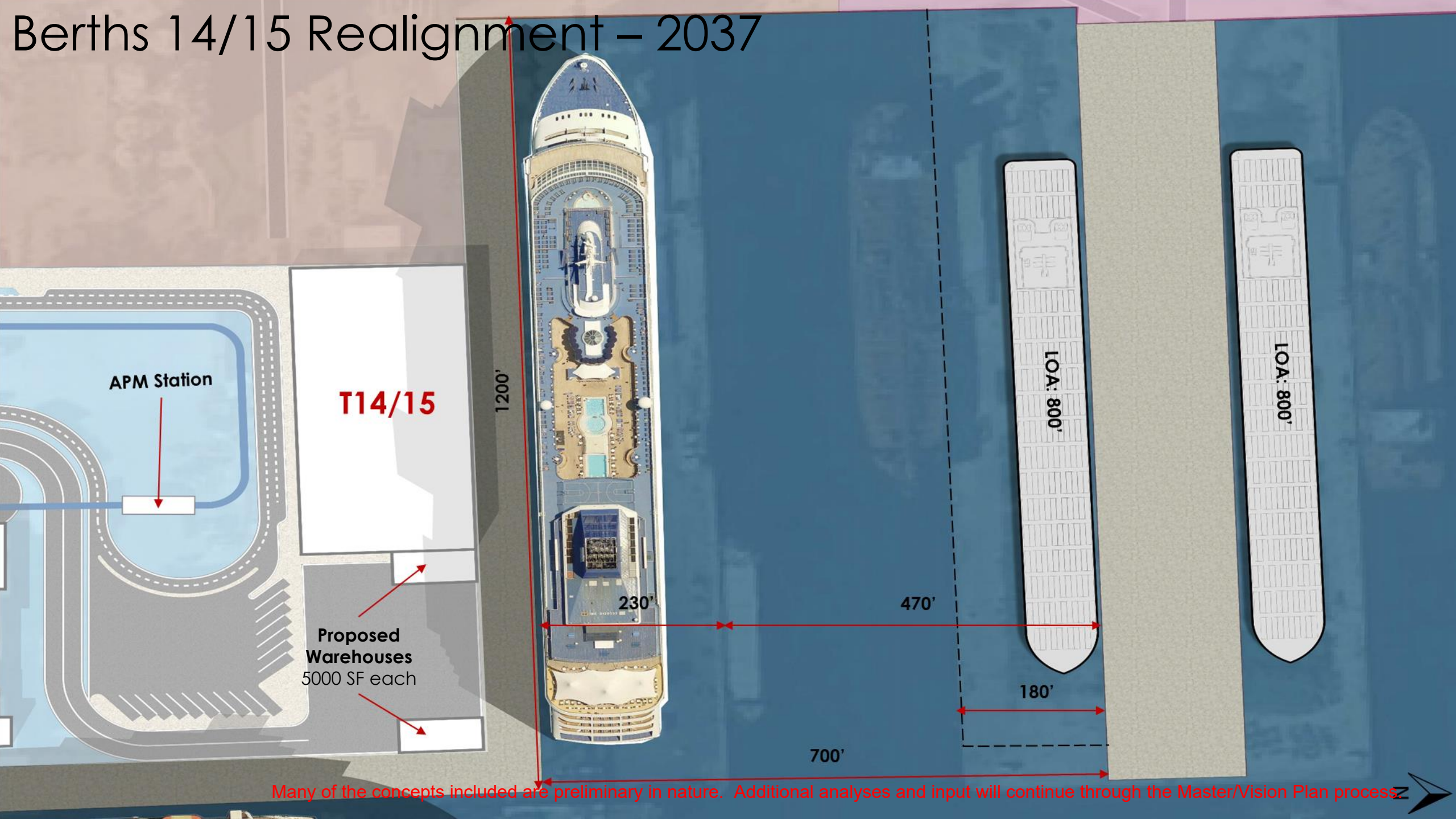
Shaw Property – Parcel 3  
~5 acres

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# Berths 14/15 Realignment – 2037



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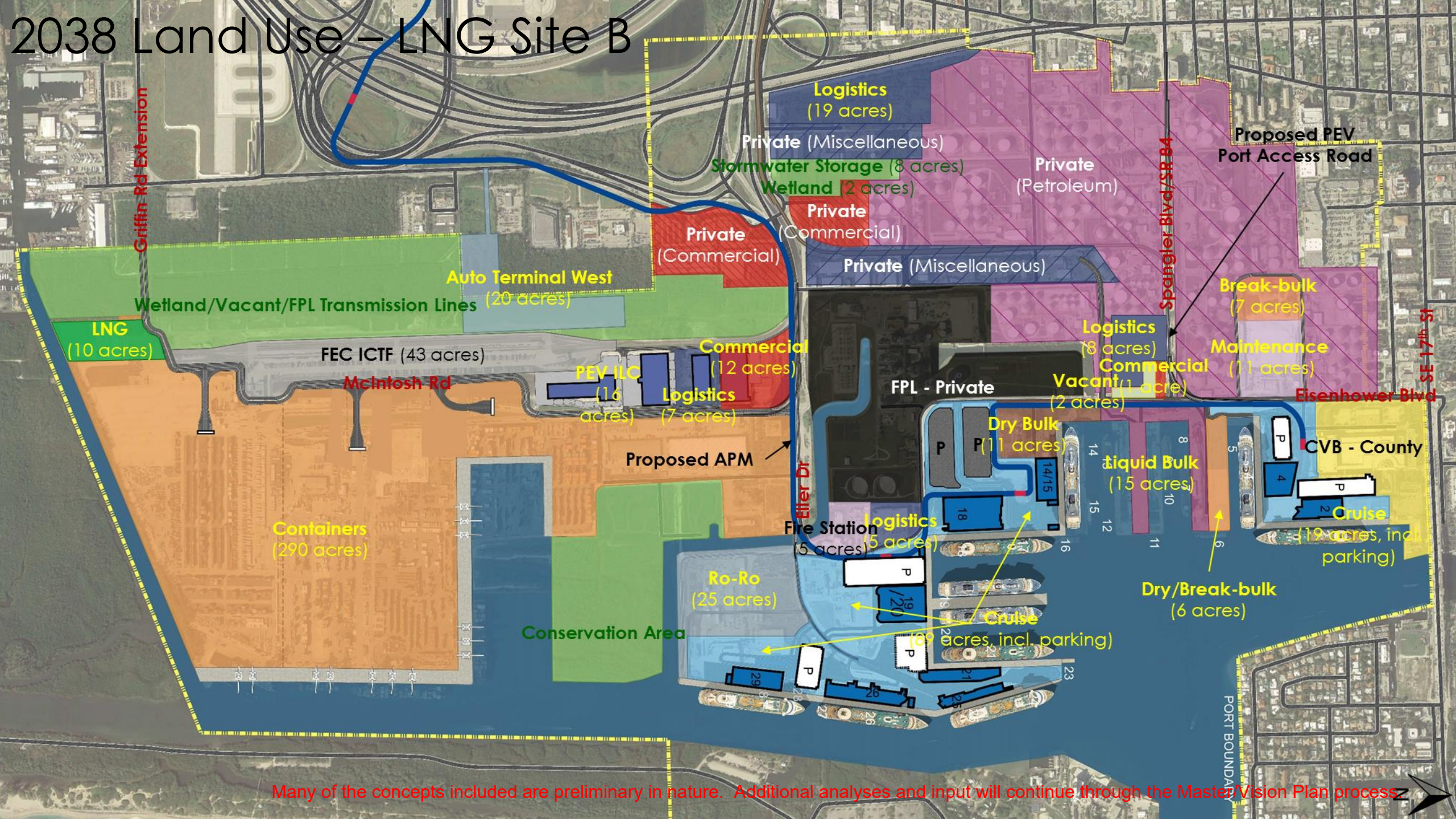
# 2038 Land Use – LNG Site A



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# 2038 Land Use – LNG Site B



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# Issues and Opportunities

- Ability to add berths/acres very limited
  - Prioritization of berth/land use against different criteria required
  - More volume on same footprint required
    - Liquid bulk: steady as she goes
    - Cruise: more berths and percent utilization of berths will need to increase
    - Containers: moves per crane/berth and TEUs per acre need to increase; dwell times need to decrease
    - Bulk/breakbulk: tons/acre need to increase
    - Ro-Ro: high growth market; requires more land
- Regional demand vs. PEV demand
  - Three ports (PEV, PortMiami, Port of Palm Beach) serve the core South Florida market
  - Market conditions will drive future berth and land demand in the region
  - Value proposition, capacity, efficiency and relationships will drive port selection
  - Infrastructure and efficient operations are key to PEV's future success



# Immediate Next steps

- Phase 1
  - Phase 1 (Elements 1 and 2) final report delivered in October, 2018
- Phase 2
  - Future development concepts and projects
    - Berth and land demand for each line of business
    - Operational and infrastructure enhancements
    - Commercial and logistics opportunities
    - Traffic and parking
    - Financial evaluation
  - Final recommended plan
  - Strategies for implementation





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