

Florida's Seaport System

February 3, 2009
Florida Ports Council

Florida's 14 Public Deepwater Seaports Line the State's Coasts



As They Address Basic Maritime Industry Imperatives...

- **Operational efficiencies**
- **A seamless integrated intermodal system**
- **Timely responses to changing user needs**
- **Capital investment decisions based on market demand**
- **And constant competitive challenges**

...the Seaports Interface with a Network of Maritime Industry Partners

- **The local governments that own and operate the public seaports**
- **Florida Legislature**
- **State agencies: FDOT, OTTED, DCA, DEP, FDLE, ODC, FDHSMV**
- **Private sector tenants and users**
- **Local communities**
- **Diverse service providers**

**Florida Seaport Transportation and
Economic Development (FSTED)
Program was created in 1990 to:**

**“Finance port transportation or port facilities projects that will improve the movement and intermodal transportation of cargo or passengers in commerce and trade and that will support the interests, purposes, and requirements of ports located in this state.”
(s. 311.07(1), Florida Statutes)**

**A 50-50 state/seaport
partnership – through the
FSTED Program -- has
invested more than**

\$1 billion

**in seaport facility
improvements consistent with
Port Master Plans**

Why Should We Care
About Our Seaports?

Florida's Lifestyle Flows through Florida's 14 Seaports

- **Almost everything Floridians wear, eat or use in their daily lives flows through our seaports.**

- **Goods shipped through our seaports include:**

Aggregates, Asphalt, Automobiles, Automotive Parts, Aviation Fuel, Building Materials, Clothing, Coffee, Concrete, Cooper, Dairy Products, Feeds, Fertilizers, Fruits, Furniture, Gasoline, Grain, Household Appliances, Leather Goods, Lumber, Newsprint, Orange Juice, Paper Products, Power Plant Fuel, Refrigerated Products, Salt, Steel.

A Quick Comparison between FY 06/07 and FY 07/08

FY 06/07

FY 07/08

Florida's international trade (2007):

\$114.9 billion

Awaiting 2008 data

Revenue passengers:

14.1 million

13.3 million

Cargo tonnage:

121.2 million

114.2 million

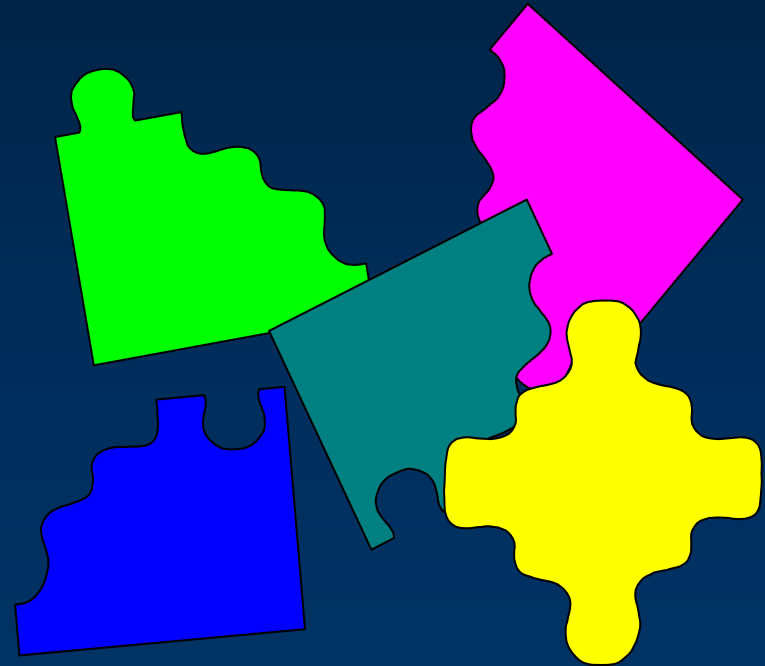
TEUs (Container movements):

More than 2.9 million

More than 2.8 million

Florida's Seaports Are All Different

- Some are just a few acres in size; others, more than 2,000 acres.
- Some are urban ports, locked in the middle of busy downtowns; others are in tourist-based communities; still others are rural.



They Differ in Resources

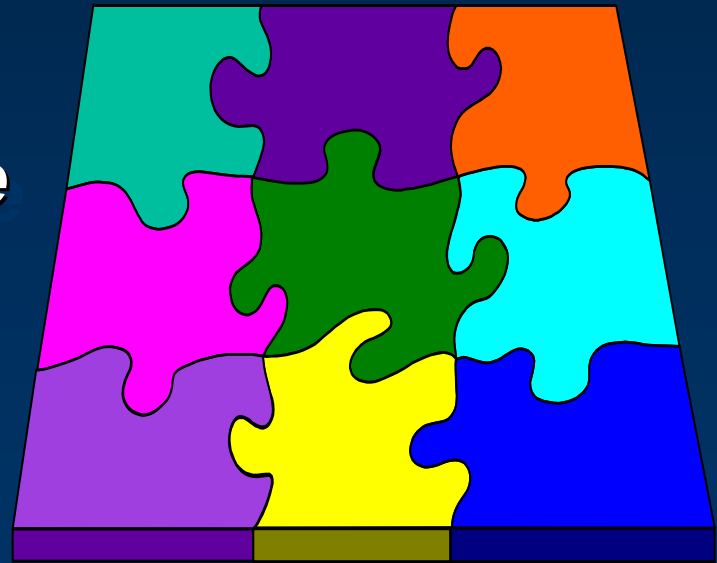
- **Channels and harbors?**
- **Room to grow?**
- **Rail and interstate access?**
- **Supportive communities?**
- **Taxing authority?**
- **Revenues?**
- **Security needs?**

They Differ in Operations and Governance

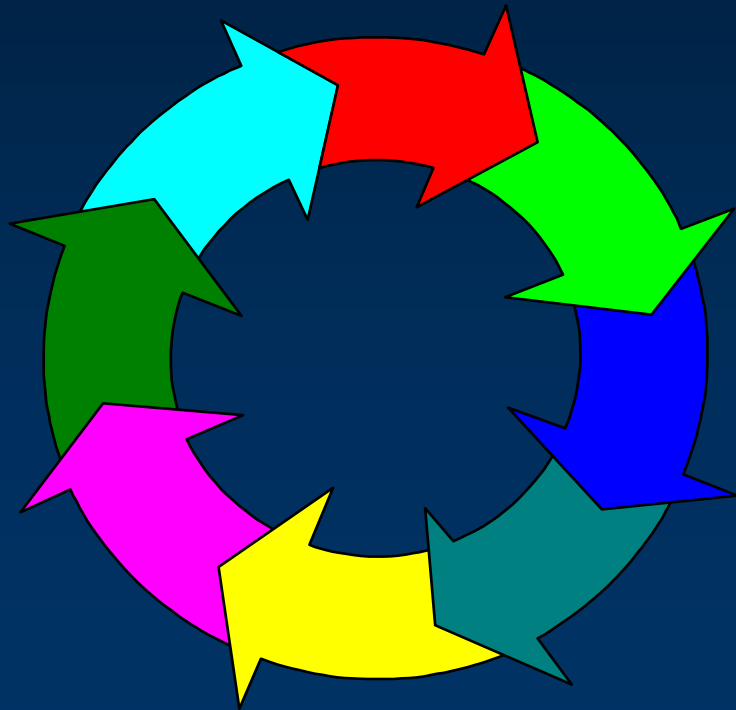
- Some are “operating” ports; others are “landlords.”
- Some control all port operations in their area; others are surrounded by private terminals.
- Some are single purpose cargo ports; others have diversified to include multiple operations.
- Some are special districts; others are county or city departments.

But: They Share a Common Public Purpose and Create Florida's Dynamic Seaport System

The **collective mission** of Florida's seaports is to *“enhance the economic vitality and quality of life throughout the state **by fostering the growth of domestic and foreign waterborne commerce....”***



That Purpose Is the Movement of Goods....



- **Automobiles**
- **Apparel**
- **Fertilizer**
- **Computer Parts**
- **Cement**
- **Fresh and frozen foods**
- **Petroleum**
- **Lumber and paper**

...and People

- Florida, as the capital of the North American cruise industry accounts for 56 percent of all U.S. cruise embarkations
- These passengers rely on **Florida's transportation system -- its airport-seaport-highway connectors --** to reach our cruise ports



That's Why We Must Care about Our Seaports

- Florida's seaports are **dynamic facilitators of trade**
 - creating jobs now and for the future
- The international commerce and cruise tourism made possible by our seaports = **Statewide economic development**

But.....

**In our changing world, are
we doing enough to be
competitive in the
21st century?**

These Issues Are Shaping the Future

- **Changing patterns of global trade:**
Urbanization, economic activity, hubs, corridors
- **Energy / economy / environment:**
Supply and demand, system impacts
- **Institutional frameworks:**
Ownership, policies, regulations, investments, benefits

Changing Our Structural, Spatial, and Temporal World

People, goods, and information move
continuously around the world

How is Florida positioned in the network?

A new geography:

Redefined market areas

Trading blocs and regions

What is Florida's economic geography?

A new economy:

Globalization of the marketplace

Effect of technology on economic activity

How does Florida fit in the new economy?

“Global trade is being driven by a combination of political, economic, technological and environmental trends and forces, and Florida must choose how to respond.”

--Global Trade Trends: Challenges and Opportunities for Florida’s Ports,
(FDOT/Cambridge Systematics Inc., July 2006)



Collectively, in 2006, the Seaports Initiated a Statewide and Regional Strategic Visioning Process

- Four regional workshops with seaports, tenants, users, and partners (held at the Ports of Miami, Jacksonville, Tampa and Everglades).
- Online survey on 10 key shared issues.
- Workshops with the Florida Ports Financing Commission, the Florida Seaport Transportation and Economic Development Council, and the Florida Ports Council.
- Florida Maritime Leadership Conference.



Components of the Strategic Visioning Program

- **Florida seaports' 2016 Vision of Success**
- **Challenges to achieving that success**
- **Value of seaports to Florida's future**
- **Florida seaports' business model and key elements**
- **Working together with partners**



The 2016 Vision of Success

In 2016, five themes will characterize the tremendous success of Florida's statewide seaport system in achieving a competitive edge

- A.** Public and private partnerships have increased investments in seaport growth
- B.** New freight and passenger transportation corridors have created seamless intermodal connectivity improving landside and waterside access
- C.** Port capacity has expanded to allow for new business opportunities
- D.** The values of and synergies among ports, communities and industries for economic development have been recognized and supported
- E.** Regional and statewide cooperation is enabling the optimization of port assets



*One seamless intermodal system
moving goods and people between
the channel and the marketplace*



SHIP

PLANE

SEAPORT

TRUCK

RAIL



Florida Seaports' 2016 Vision of Success

Working Together with Partners

The seaports, their users and partners should engage in a collaborative planning process to build consensus on the shared vision of success and on the needs, policies and strategies can achieve that vision.



Essential Seaport Capital Investments

- Harbor deepening
- New berths
- Cruise terminals
- Container terminals
- Equipment
- Rehabilitation of aging infrastructure
- Intermodal road and rail improvements

Tomorrow's Needs... Today!!

- **Better service response time to meet user needs**
- **Cooperation in providing landside capacity and services**
- **All modes must come together as partners to plan (and find an accelerated means of funding) the integrated transportation system essential to our continued competitiveness**

2009 Legislative Priorities

- **Update and reaffirm legislative investments in Florida's seaports.**
- **Remove unnecessary and duplicative state seaport security requirements.**

Update and Reaffirm Legislative Investment in Florida's Seaports

- **Update Florida's statutory minimum investment in Florida's seaports from \$8 million (established in 1990) to the current level \$15 million – this has been appropriated by the Legislature since 2004.**
- **Work with Florida's Federal Delegation to ensure federal infrastructure investment dollars are available for priority seaport investment projects in Florida.**

Remove Unnecessary and Duplicative State Seaport Security Requirements.

- Replace state criminal history background credentialing system with federal Transportation Workers Identification Credential (TWIC) credentialing system that includes a criminal history background AND a terrorism, immigration and mental health check. (Note: As of January 2009 a TWIC is required at every seaport facility in Florida.)
- Revise other state security requirements given significant changes made to federal and international seaport security standards.

The End