Port Manatee Master Plan Update 2016
### Master Plan
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Manatee County Port Authority Mission Statement

“The mission of Port Manatee is to be a powerful catalyst of countywide economic growth and hub of trade-related activity, by developing diversified and competitive deepwater shipping facilities and conducting maritime-related activities in a profitable and environmentally responsible manner.”

(adopted in open session on June 19, 1996)
Port Manatee – Defining a Vision for the Future Market

• Where are the market growth areas?
• What are the cargo targets?
• How can the Port’s diverse corporate environment sustain and grow Port business?
• How can the Port benefit from intermodal connectivity?
Projected Population Growth in Port’s 20-County Extended Hinterland
## Port Manatee Business Markets

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<th>Business Market</th>
<th>Commodities</th>
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<tr>
<td>Containers</td>
<td>Fruits, vegetables, linerboard</td>
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<tr>
<td>Perishables</td>
<td>Bananas, melons, pineapples</td>
</tr>
<tr>
<td>Energy</td>
<td>Asphalt, bunker C fuel, diesel/gas</td>
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<tr>
<td>Bulk</td>
<td>Citrus juice, granite, limestone, salt, fly ash, sulfur, fertilizer, phosphate rock, slag</td>
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<tr>
<td>General Cargo/Auto</td>
<td>Hardboard, lumber, plywood, steel, aluminum, wood pulp, bagged sugar, scrap metal, vehicles</td>
</tr>
<tr>
<td>Cruise/Ferry</td>
<td>Passengers, autos, general cargo</td>
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Port Manatee: Future Volume Gains Projected with a Changing Cargo Mix (in 000 short tons)

- Traditional import markets & some new inbound commodity opportunities drive growth
- Fertilizer exports reflect the decline in the phosphate industry
- Total growth over the next 10 years is projected at 120% (the equivalent of +8% per year)
- By 2025, tonnage across the berths (which excludes the pipeline) will still be shy of the Port’s last peak performance in 2005

Source: Port Manatee (actual), RKJ&A (forecast)
Strong Growth in Liquid Bulk Cargoes Forecast for the Port
(share of total Port tonnage by key commodity categories)

- In 2005, dry bulk fertilizer exports accounted for 20% of the Port’s total tonnage. The Port is likely to no longer handle this outbound cargo by 2017
- Liquid bulk residual fuel imports have quickly dwindled as a source for generating electricity but the Port’s tank farm operating tenants (current and prospective) have quickly adapted and are at the forefront of supplying gasoline to the growing demand throughout Southwest Florida
- Container tonnage has increased nearly 400% over the past 10 years! Future growth (for existing tenants) is projected at 65% over the next 10 years. Of course, the Port could again see bigger increases … if it attracts added carrier services
- General cargo (excluding the fruit trades) was severely impacted by the recession – tonnage is still down -70% compared to 2005 (a loss of 600,000 tons of business for the Port!) Thankfully, the imported fruit trades are a steady customer for Port Manatee
- As Florida construction activity picks up, the Port should experience growth in such commodities as lumber & aluminum
PORT MANATEE CONTAINER VOLUME
FISCAL YEARS 2004-2025 - In Twenty-foot Equivalent Units (TEUs)
Summary Comments on Market Projections

- The Port’s changing commodity mix presents reasonably strong tonnage growth opportunities

- The Port’s key fruit/juice imports should continue to increase at a moderate, steady pace

- Refined petroleum products will take on a growing importance at the Port

- The success of a new, niche container service with Mexico is promising; and could attract others to the area (but as we know, port competition is intense)

- The Port should benefit from Florida’s (and the local region’s) above-average economic growth in construction & housing related commodities. New tenants serving these sectors are proving successful in such endeavors

- “Success breeds success” – while difficult to forecast a market that has not yet materialized, it does not mean Port Manatee should not actively pursue new opportunities like vehicle imports and project cargo
Prospective Business Opportunities

- Exports to Cuba
- Pilot program for cold-treated fruit from South America
- Shift from reefers to containers for perishables
- New liner service (Mexico, Caribbean feeder service)
PROSPECTIVE NEW LINER/TRANSSSHIPMENT SERVICE

In Twenty-foot Equivalent Units (TEUs)
Strategic Vision

Aquaculture
Bulk Expansion
Future Container Expansion
North Gate
Energy
Bulk

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Admin Zone
Perishables/Containers
Dorian Aerial & Architectural Photographics, Inc.
Scenario A: Containers, Perishables, and Liquid Bulk (Citrus Juice).
Scenario B: Cruise/Ferry and Auto Imports
Scenario C: Dry Bulk and Aquaculture
Scenario D Energy/Petroleum

KEYNOTES
1. ST - BAY STREET EXTENSION
2. LT - RELOCATED SOUTH GATE
3. LT - PETROLEUM AND MULTISUE 3P EXPANSION
4. LT - PETROLEUM EXPANSION
5. DREDGE SPOIL
6. AT-GRADE POND
7. ST - PETROLEUM AND MULTISUE 3P EXPANSION
8. PETROLEUM INTERMODAL EXPANSION
9. ST - PETROLEUM & INTERMODAL EXPANSION

LEGEND
- SHORT-TERM (YEARS 1-5)
- LONG-TERM (YEARS 6-10)
- PORT PROPERTY (LANDSIDE ONLY)
- PROPOSED EZ ACCESS OPTION 1 ROAD
- PORT-OWNED SUBMERGED LAND (APPROXIMATE BOUNDARY)

IMAGE SOURCE: GOOGLE EARTH 2/2015

0 1000 2000 Feet

PORT MANATEE MASTER PLAN UPDATE 2015
Scenarios A - D
Synergy Development Model
Five-Year Capital Improvement Program

- $126 million total over 5 years
- Maintenance projects included
It’s all about location…..and timing is everything!

– Parallel development tracks of residential and port-related uses
– Rebounding housing market
– Port’s diverse cargo mix and soft container growth
– Development of logistics centers outside the Port environs
Port Zone District Recommendations

– Establish a port zone district to protect key strategic areas adjacent to Port perimeter
– Help ensure that future growth near the Port will support market outreach and revenue-generating capabilities
– Facilitate future transportation planning and capital expenditures
– Use existing natural boundaries as buffers between land uses
– Partner with private sector stakeholders, e.g., rail/intermodal providers, commercial/industrial developers
Proposed Port Zoning District
Funding Sources

- Florida Seaport Transportation Economic Development (FSTED) Program
- Florida Strategic Intermodal System (SIS) Program
- Florida Intermodal Logistics Center (ILC) Infrastructure Support Program
- Florida Logistics Zones legislation
- Florida State Infrastructure Bank (SIB)
- Florida Transportation Regional Incentive Program (TRIP)
- Florida Economic Development Transportation Fund (EDTF)
- U.S. DOT Transportation Investment Generating Economic Recovery (TIGER) Grant Program
- U.S. DOT Transportation Infrastructure Finance and Innovation Act (TIFIA) - credit assistance
- U.S. DOT Fixing America’s Surface Transportation (FAST) Act
Port Manatee
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