

2006 Port Everglades Master Plan Update



Draft Phase I Presentation

March 9, 2007

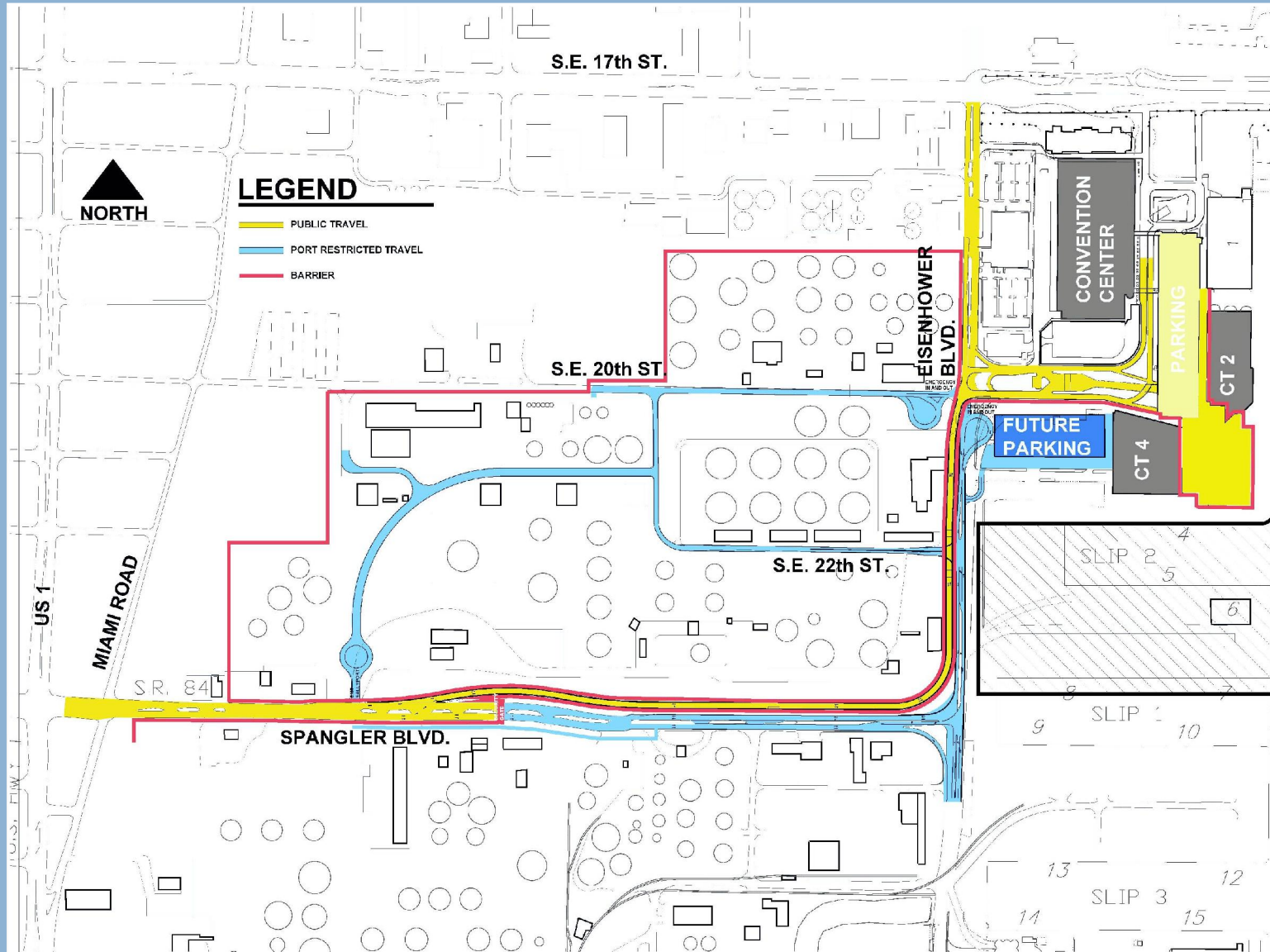
Where We Are Today . . .

- § Prepared Existing Facilities Assessment
- § Developed Market Assessment by Commodity
- § Forecasted Unconstrained Needs Assessment
- § Applied Physical Constraints
- § Created Vision Plans
- § Phase 1 Workshop with the Board of County Commissioners of Broward County
- § View at www.portevergladesmasterplanupdate.com

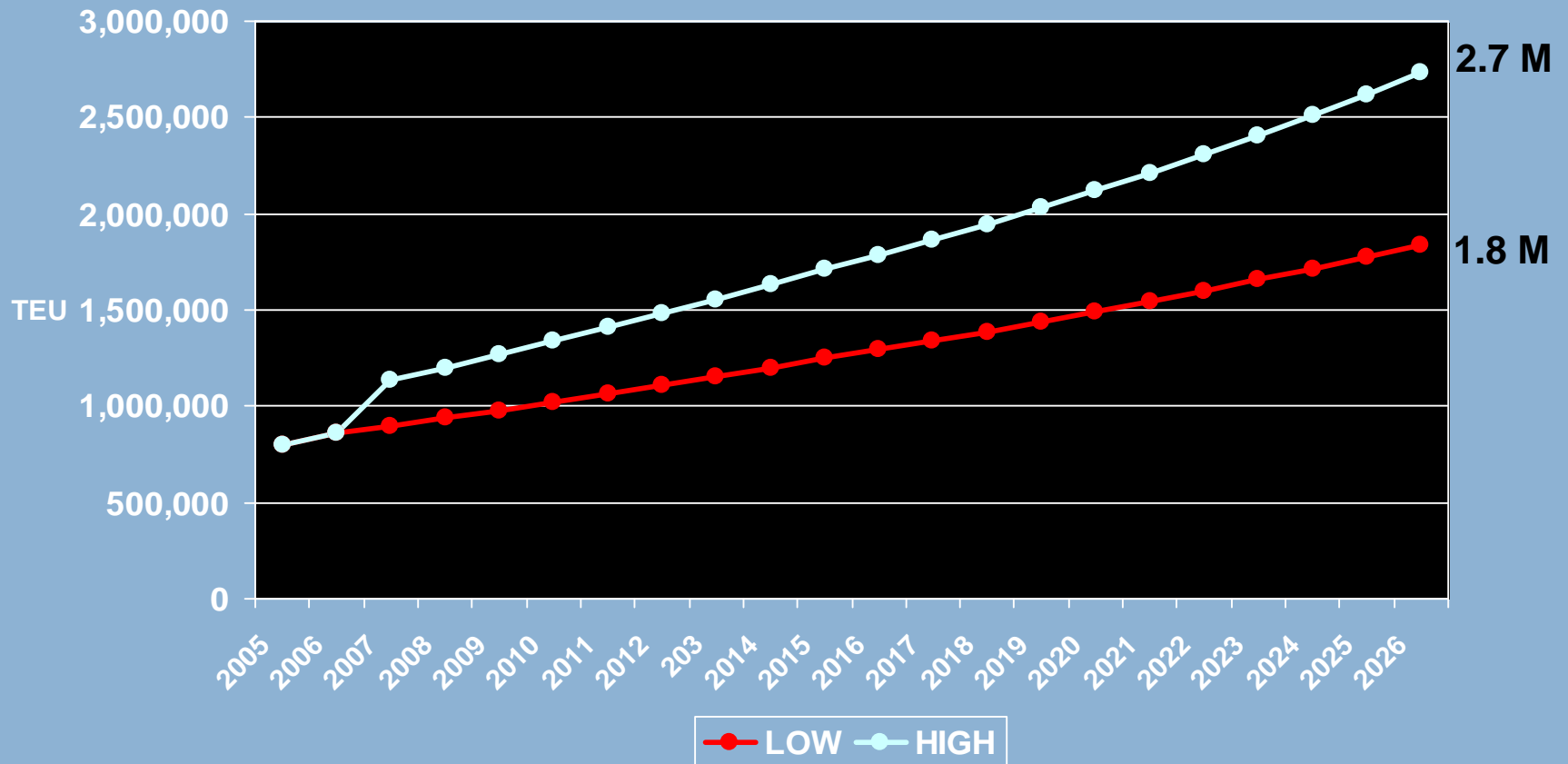
Master Plan Interfaces

- § Broward County Intermodal Center and People Mover
- § Fort Lauderdale-Hollywood International Airport
- § Florida East Coast Railway
- § Army Corps of Engineers Dredging Program
- § Calypso pipeline proposal
- § Convention Center “Carve Out”

Conceptual By-Pass Road



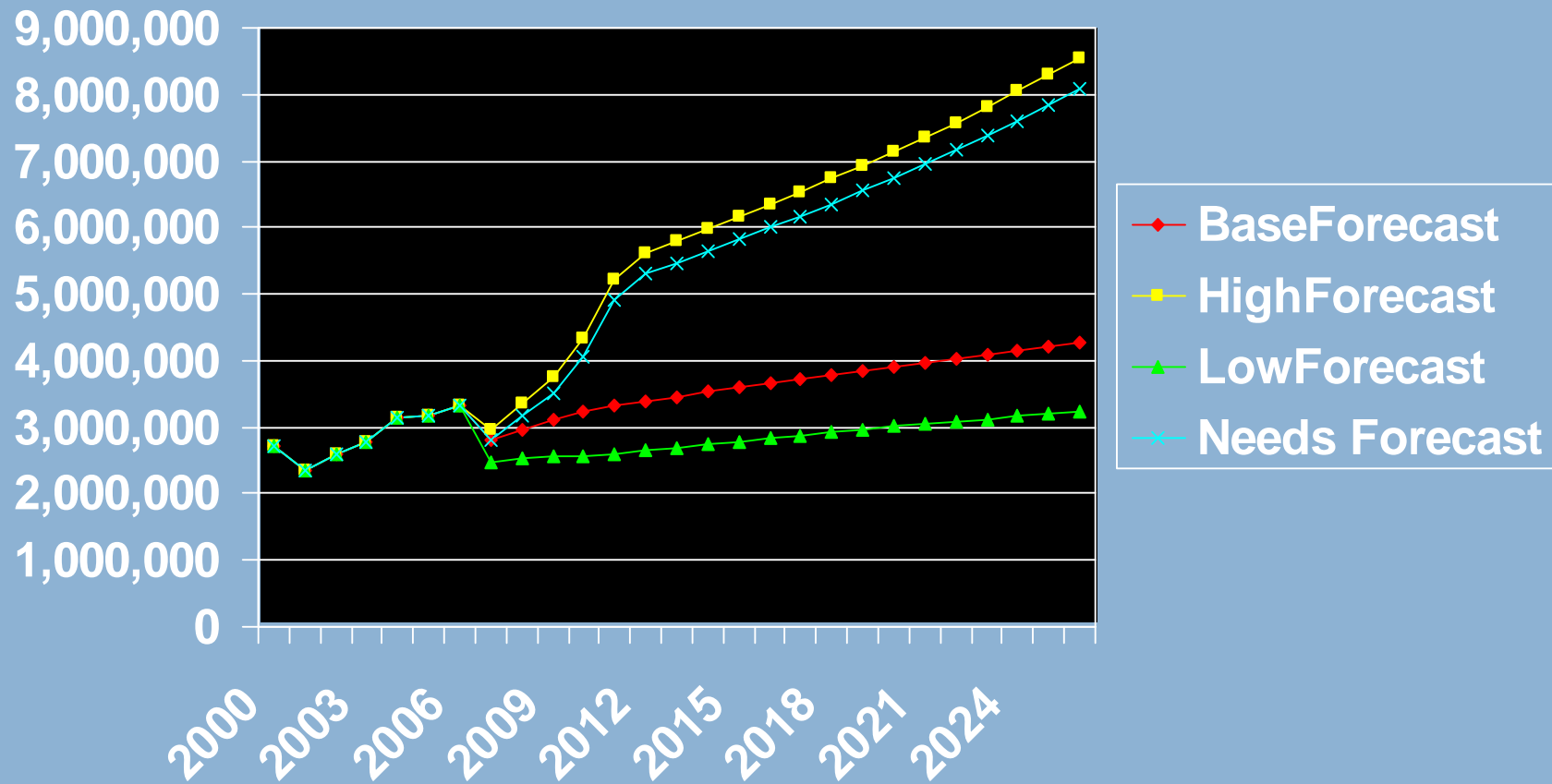
Low/High Container Forecast



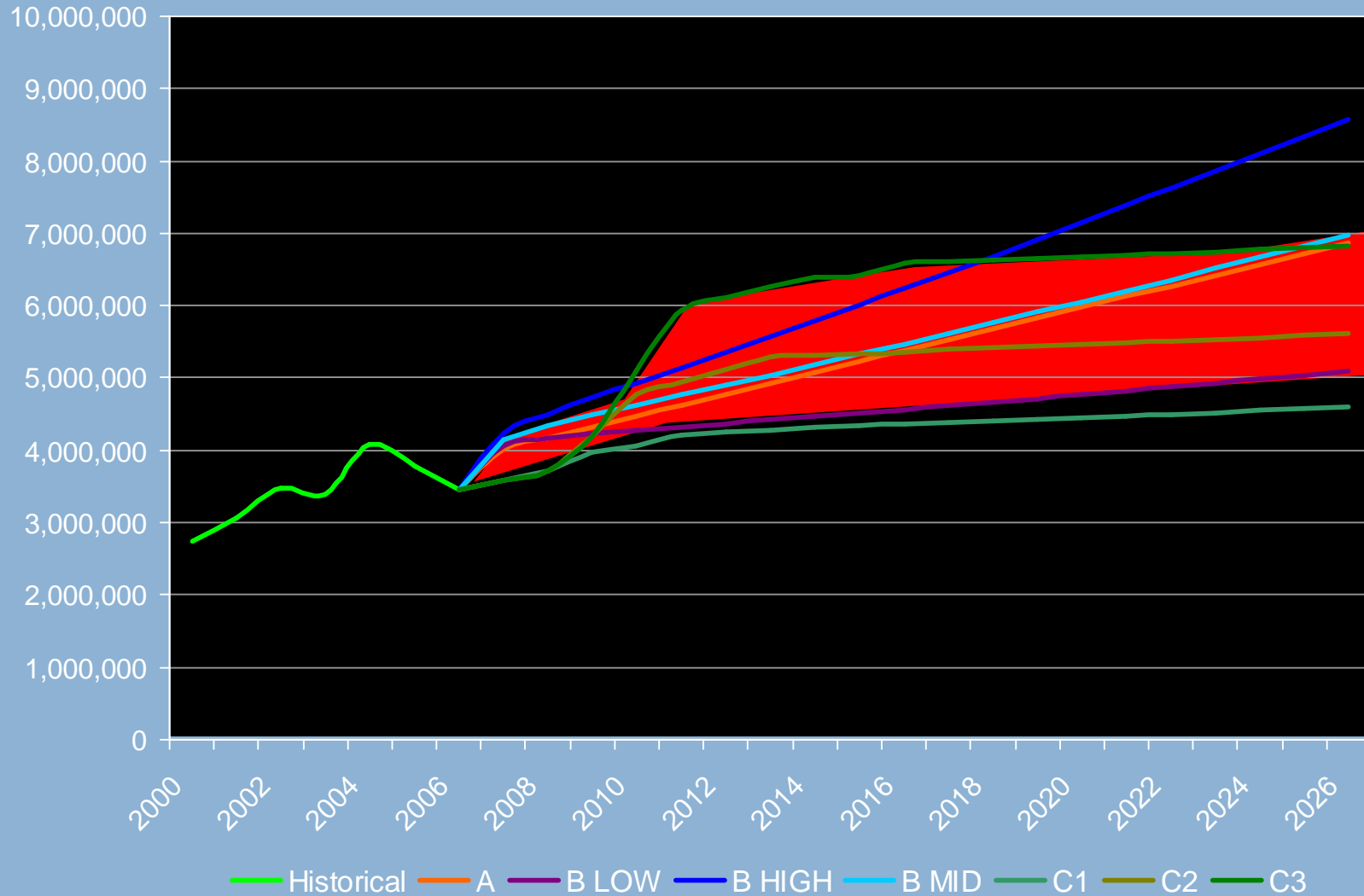
Note: High Forecast TEUs represents the Needs Forecast

High, Baseline, Low and Needs Assessment Forecasts

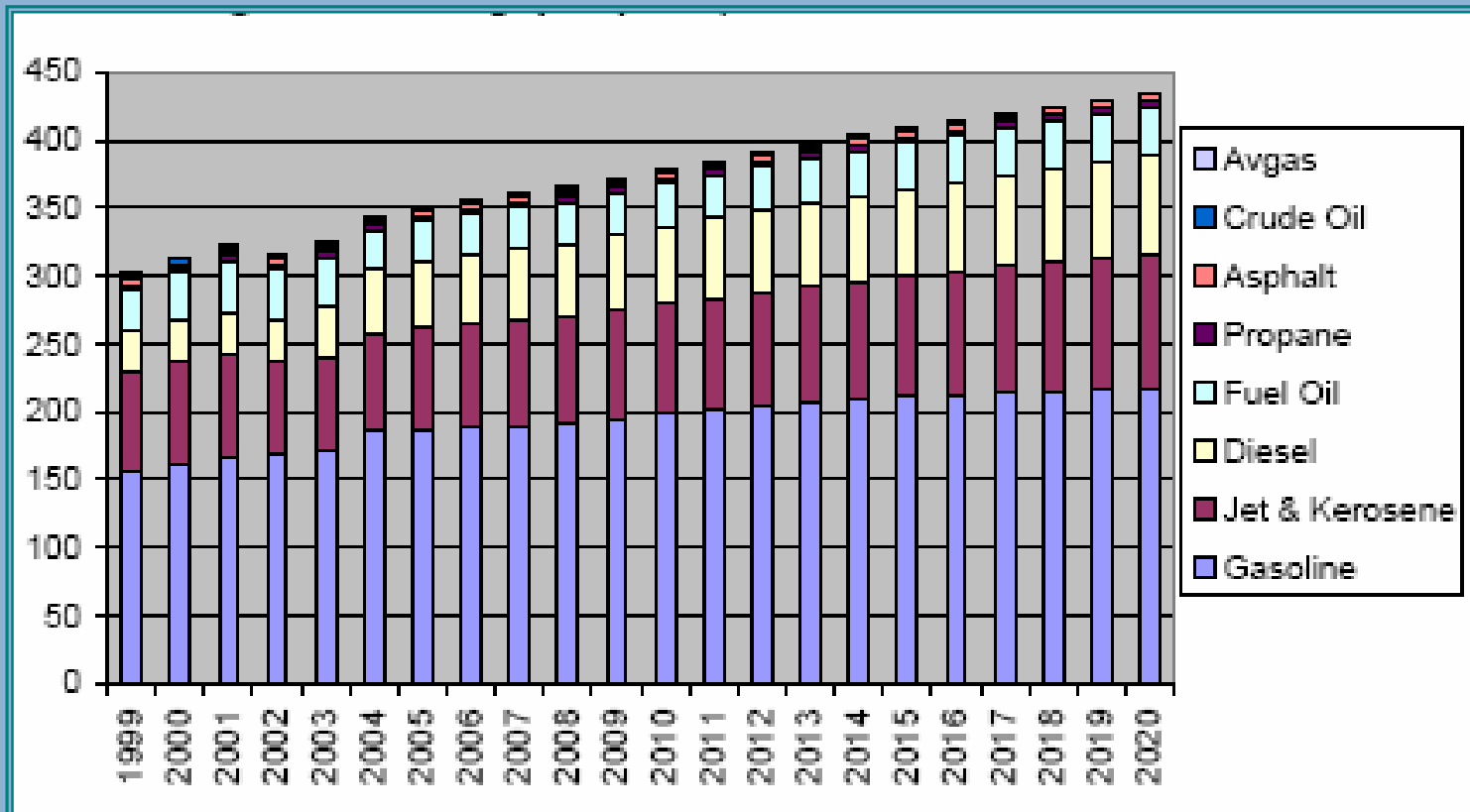
Dry bulk and neo-bulk tonnage for Port Everglades



Range of Revenue Total Passenger Projections



Port Everglades Petroleum Throughput Forecast 1999-2020 (Thousand Barrels per Day)



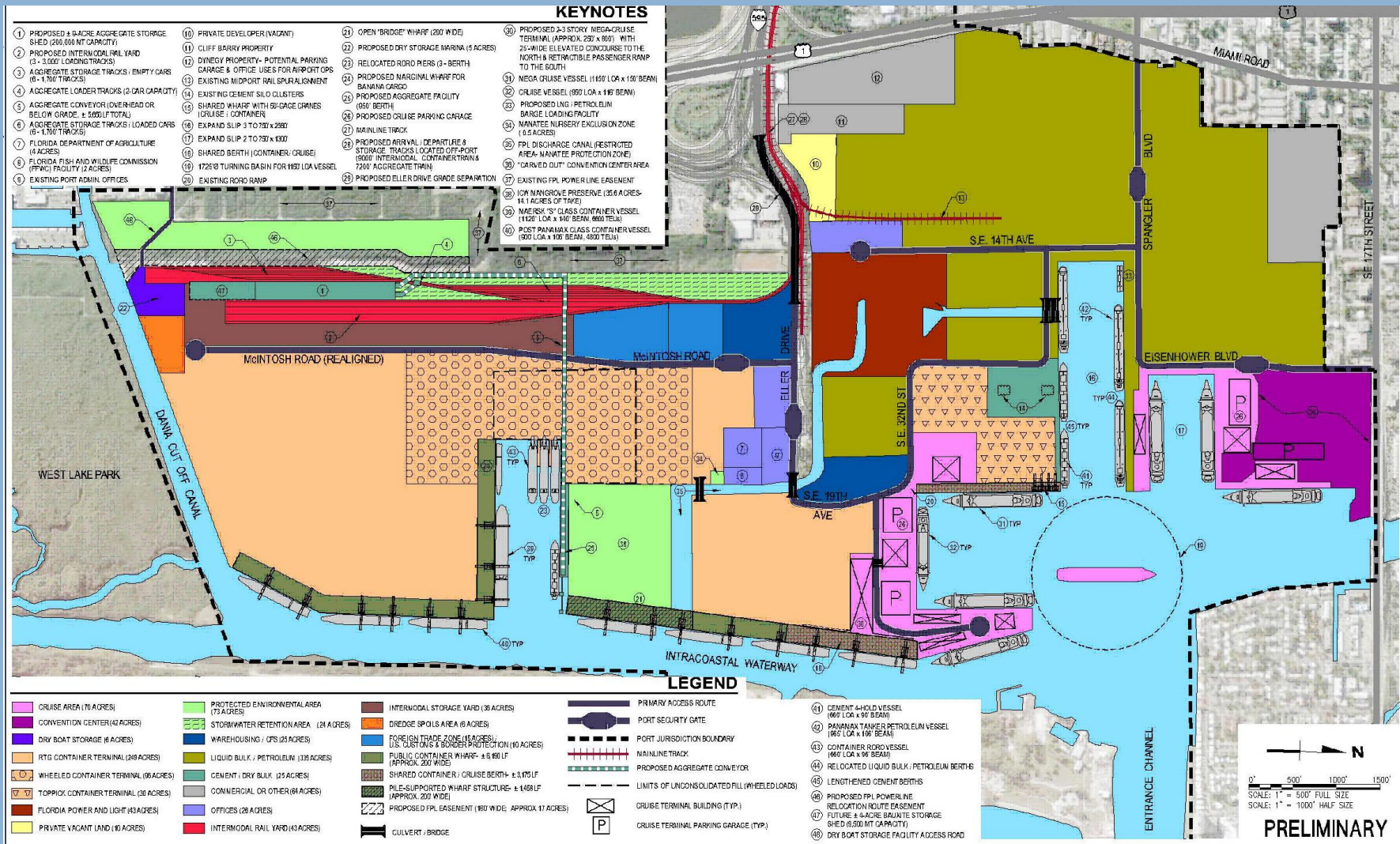
Results of Market Based Needs Assessment (Build Out - 2026)

	Berth Length (Ft)	Berths Required (rounded)	Gross Area (acres)
Container Terminals			
STD Dock Side Cranes	1100	5.6 (6)	140
RORO	700	2.9 (3)	89
Bananas (wheeled)	650	0.5 (1)	6
Non-Container Cargo Terminals			
Steel	700	0.8 (1)	7.7 (8)
Lumber	900	0.7 (1)	1.1
Cement	750	1.7 (2)	8.3 (10)
Aggregate	900	0.9 (1)	4.2 (6)
Cruise Terminals	1100-1300	8-10	NA
Petroleum Terminals	3 vessel/1 barge		292

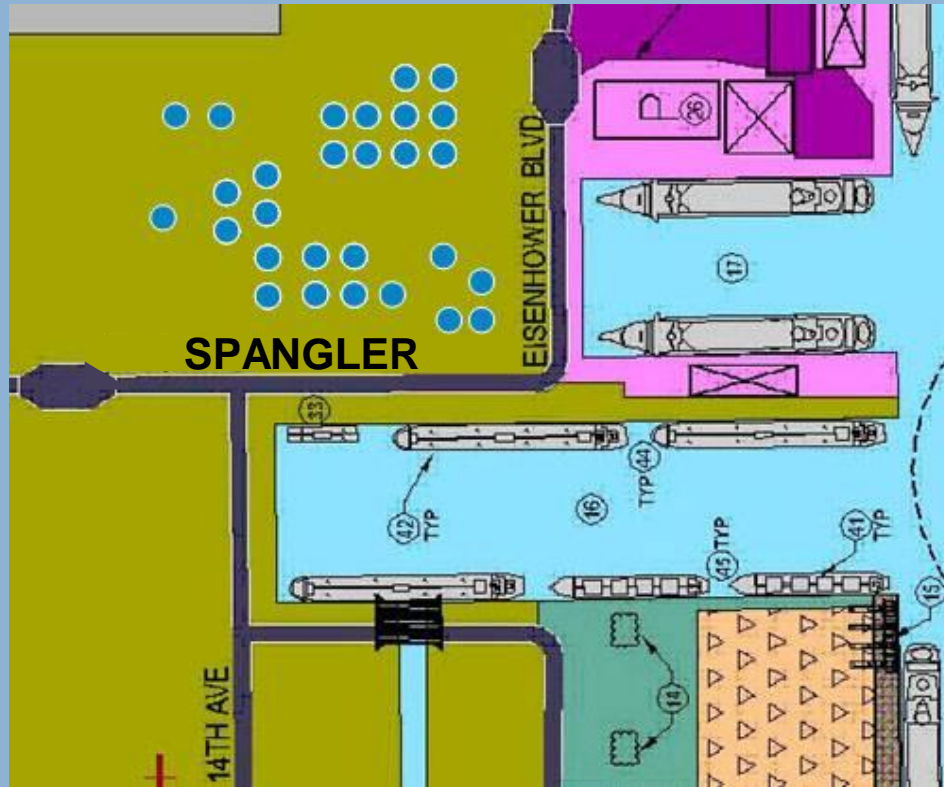
Berth Provisions of 2026 Vision Plan

	Berths Required	Vision Plan		
Container Terminals				
STD Dock Side Cranes	5.6 (6)	6-7		
RORO	2.9 (3)	3		
Bananas (wheeled)	0.5 (1)	1		
Non-Container Cargo Terminals				
Steel	0.8 (1)	shared		
Lumber	0.7 (1)	shared		
Cement	1.7 (2)	2		
Aggregate	0.9 (1)	1		
Cruise Terminals	8-10	7+2 flex		
Petroleum Terminals	3/1 barge	3/1		

2026 Year Vision Plan

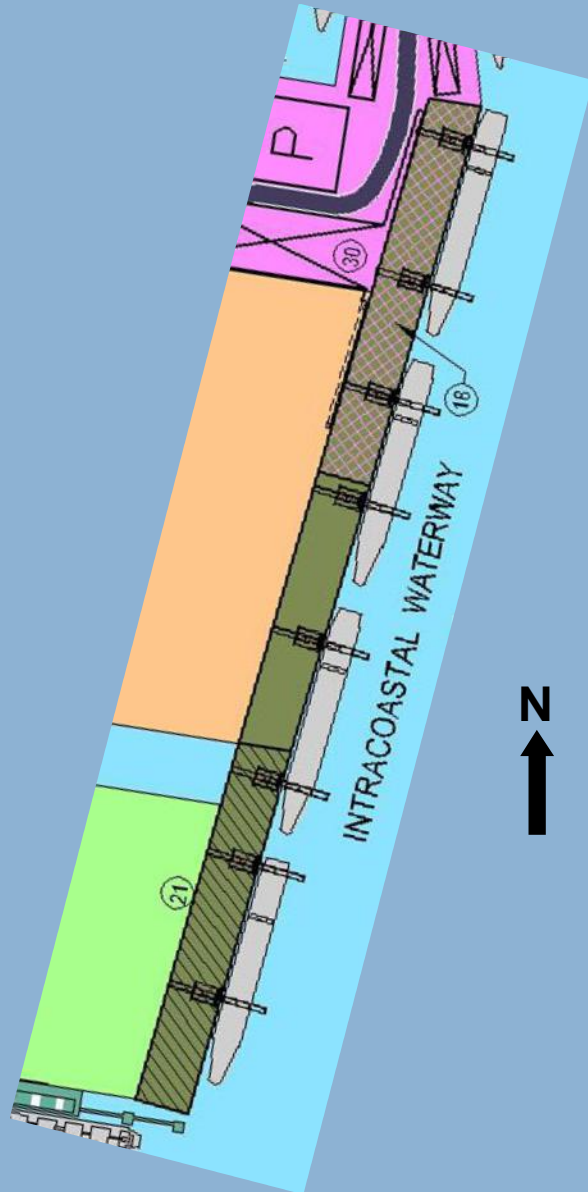


Vision Plan – Area 1



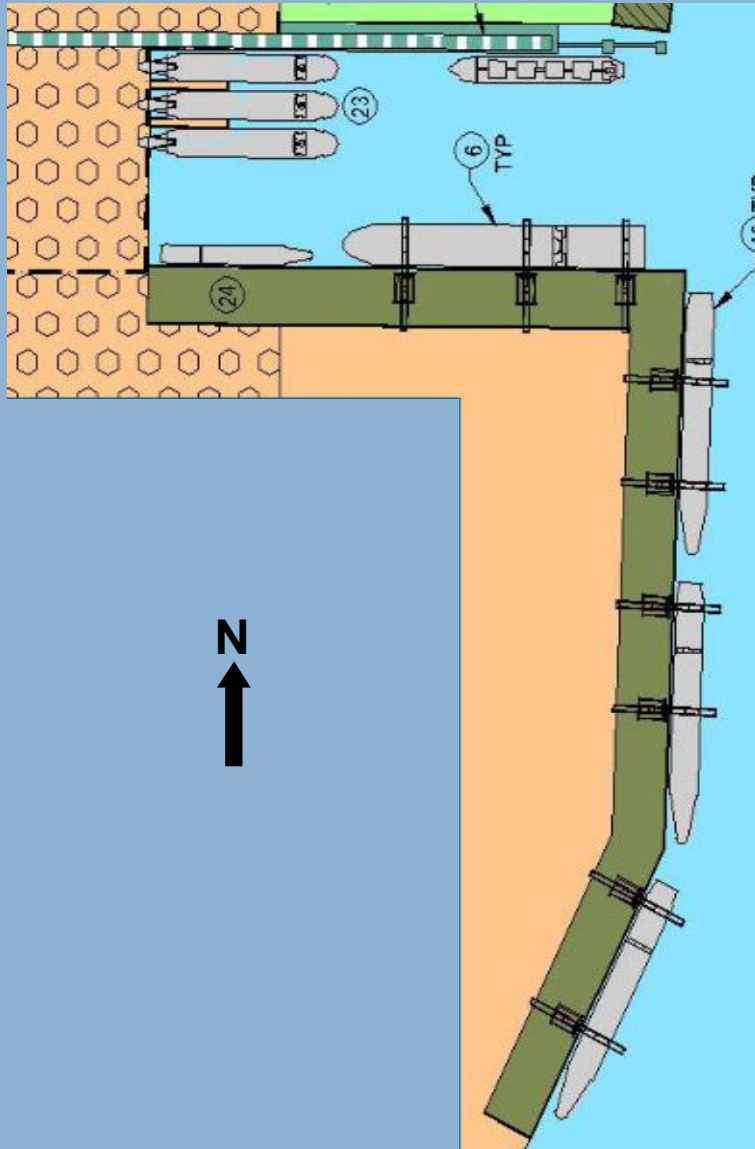
Area	Benefits	Issues
<p>Reconfigure & Expand Slips 1-3</p>	<ul style="list-style-type: none"> •Creates one additional mega cruise berth & enlarges one to mega cruise size •Separates Cruise & Petroleum activities • Accommodates larger vessels •Increases navigational safety •Adds berth length for cement •Mitigates soil contamination • Increases petroleum distribution efficiencies •Reconstructs deteriorating bulkheads 	<ul style="list-style-type: none"> •Take of private property/tank farm relocation •Significant dredging and piping costs •Cost for new terminal

Vision Plan – Area 2



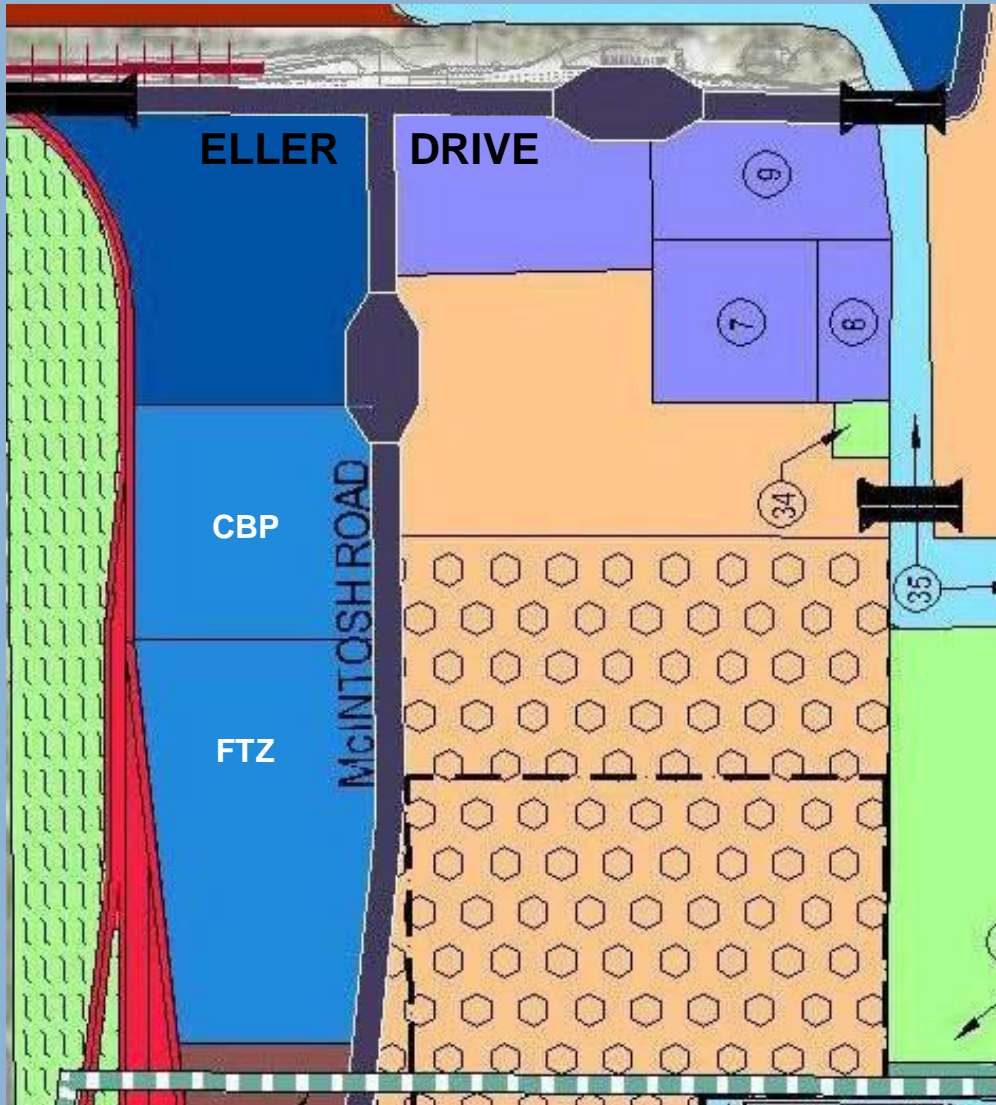
Area	Benefits	Issues
Expand container berths along ICW	<ul style="list-style-type: none"> •Creates additional berth lengths •Increases flexibility to berth longer ships & ability to accommodate both container and mega cruise ships at (2) berths •Reconstructs deteriorating bulkheads 	<ul style="list-style-type: none"> •Significant development cost •Environmental impact to conservation easement

Vision Plan –Area 3



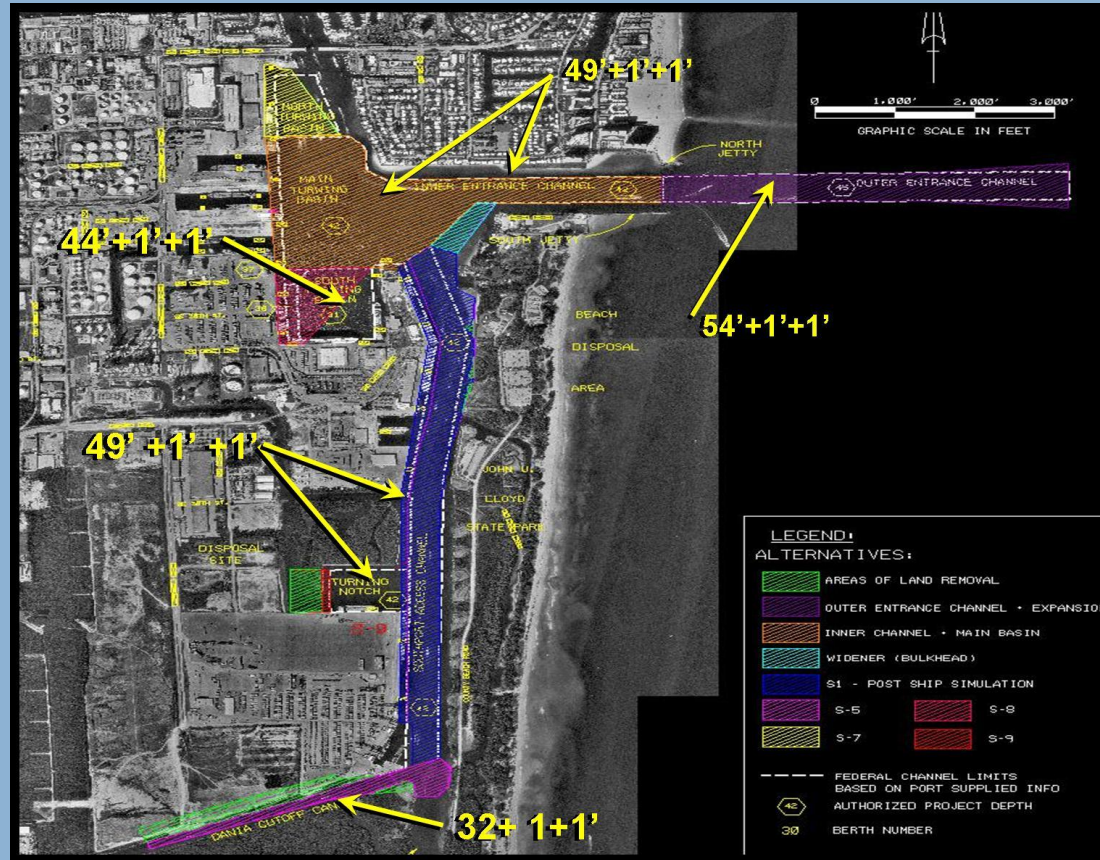
Area	Benefits	Issues
Relocate Southport RORO Piers	<ul style="list-style-type: none"> •Creates additional long container berth •Minimizes impact of larger vessels on aviation flight path •Places wheeled cargo ops on unstable geotechnical property •Minimizes dredging impacts at DCC & West Lake Park •Increases flexibility to berth longer ships 	<ul style="list-style-type: none"> •Significant dredging costs •Excavation in closed landfill •Conservation area impact

Vision Plan – Area 4



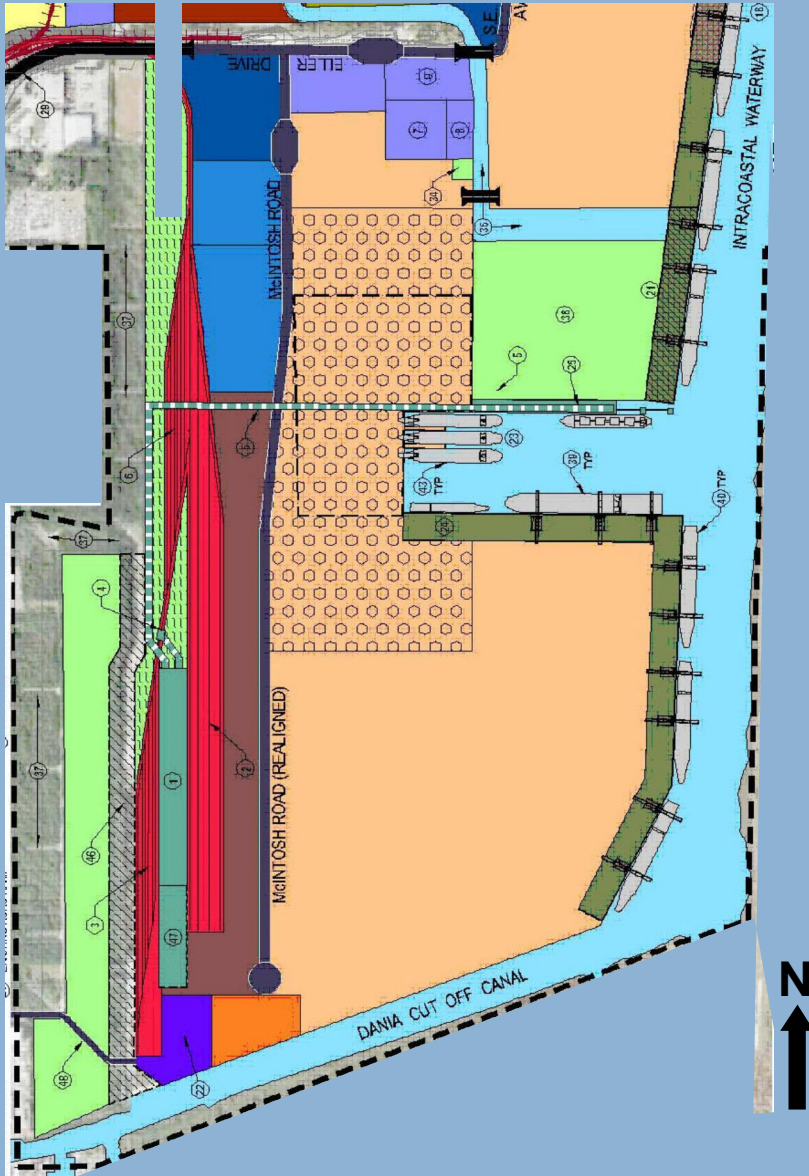
Area	Benefits	Issues
Relocate FTZ & CBP facility west of McIntosh Road	<ul style="list-style-type: none"> •Allows contiguous container terminal expansion of Southport & Midport areas, adjacent to the water •Provides circulation within Port restricted area •Replaces aged buildings 	<ul style="list-style-type: none"> •Cost of relocating FTZ and CBP operations •Cost of new buildings

Vision Plan – Area 5



Area	Benefits	Issues
<ul style="list-style-type: none"> Entrance channel & harbor deepening and widening 	<ul style="list-style-type: none"> Accommodates longer and deeper vessels Increases navigational safety Necessary to meet tenants & future market requirements 	<ul style="list-style-type: none"> Environmental impact Significant shared dredging costs

Vision Plan – Area 6



Area	Benefits	Issues
<ul style="list-style-type: none"> • Intermodal rail yard & import rock facility 	<ul style="list-style-type: none"> • Reduces truck traffic on Port and in Region • Creates potential for greater hinterland market penetration by rail • Supports import of aggregate materials in Florida, to replace potential quarry closures 	<ul style="list-style-type: none"> • Significant costs associated with rail & site infrastructure • Long-term investment with slow start-up revenues

Conclusion – Berth capacity is the primary limiting factor to Port growth

- Maximize flexibility and multi-use of berths
- Balance upland infrastructure improvements and efficiencies to berth capacity

Next Steps - Meet with you for input on the Draft Phase I

Access Draft Phase I, on Monday by:

Going to:

www.portevergladesmasterplanupdate.com **and link to instructions**

Port Director establishing peer review group of clients from each of the major industry segments

Also, further Public and Tenant Workshops as we move forward to a June Workshop with the BOCC

Where We Will Be Going . . .

Phase II . . .

- § Refinement of 10- and 20-year Vision Plans
- § Prepare Economic Impact of Potential Projects
- § Develop Financial Strategy
- § Preparation of 5-year Capital Improvement Program
- § Phase II Workshop with Board of County Commissioners

Phase III . . .

- § Update Deep Water Component of Comp Plan