



PORT TAMPA BAY™

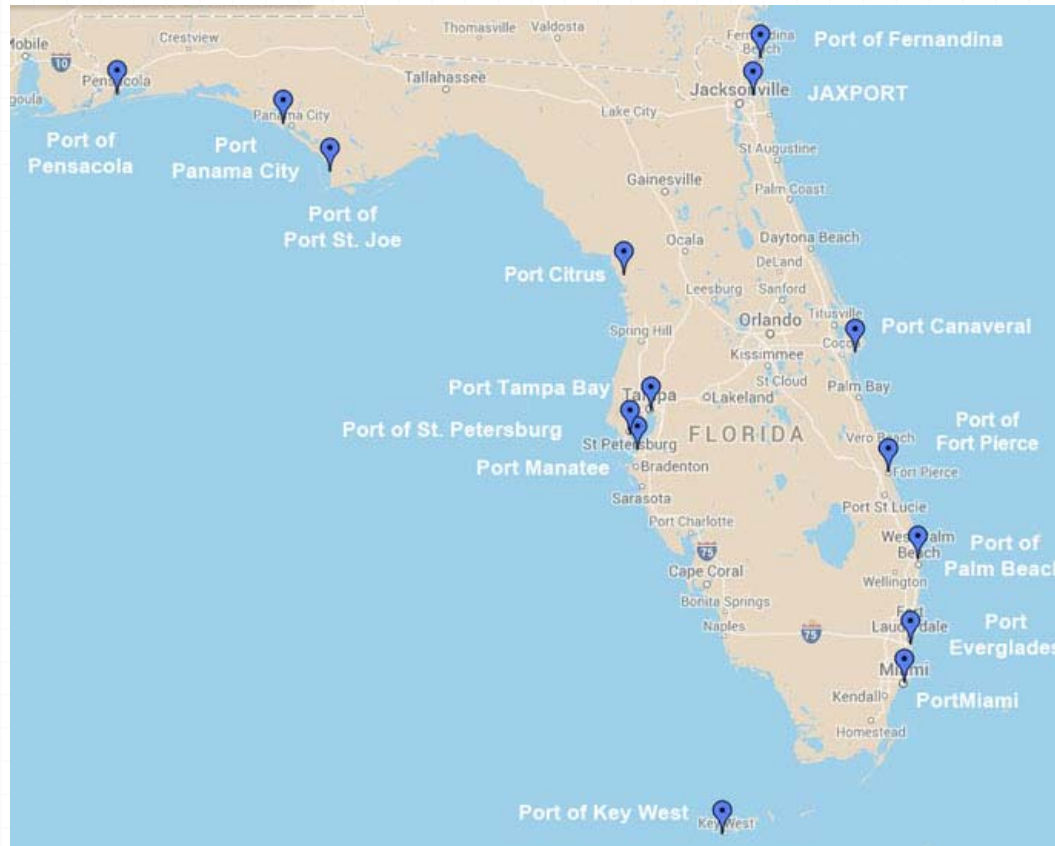
VISION 2030



**Small Group Transportation
Peer Exchange
March 24, 2017**

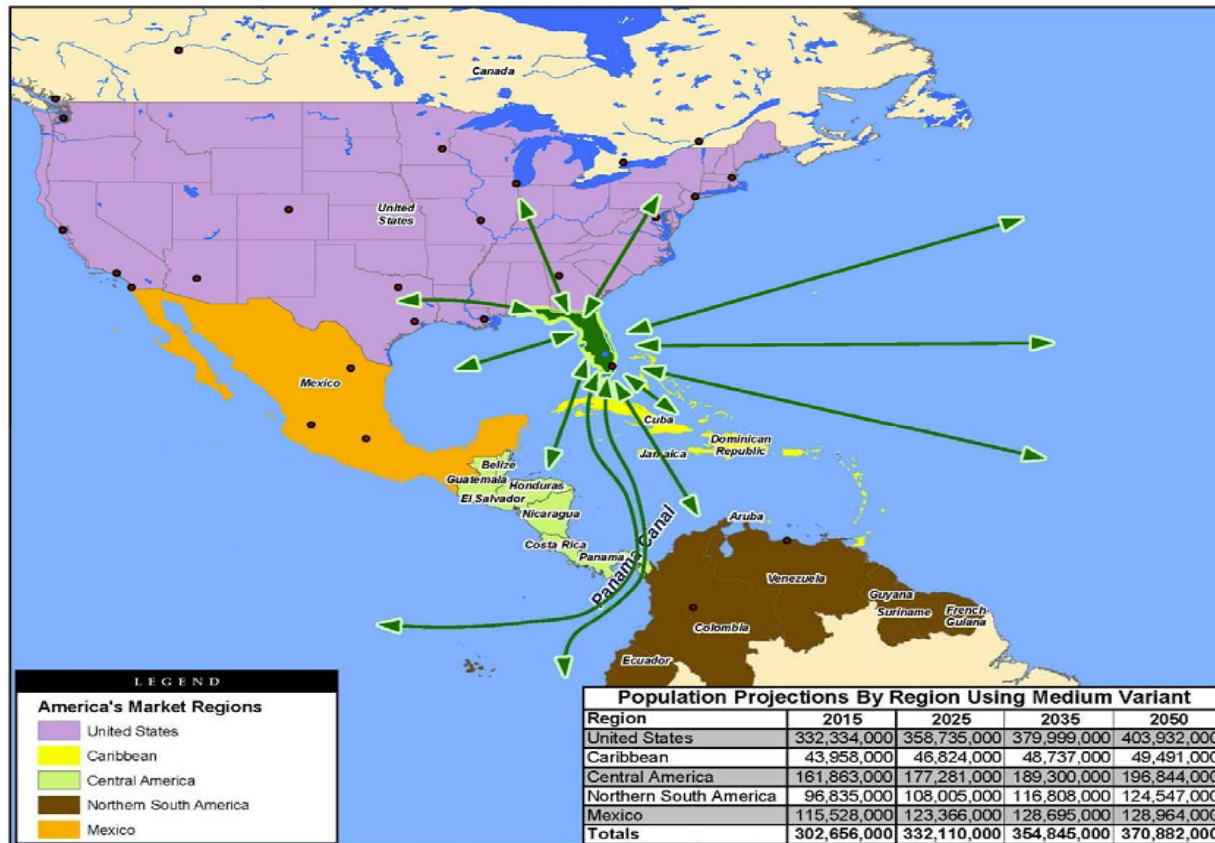
**By: Ram Kancharla
Vice President of Planning & Development**

Florida Seaports

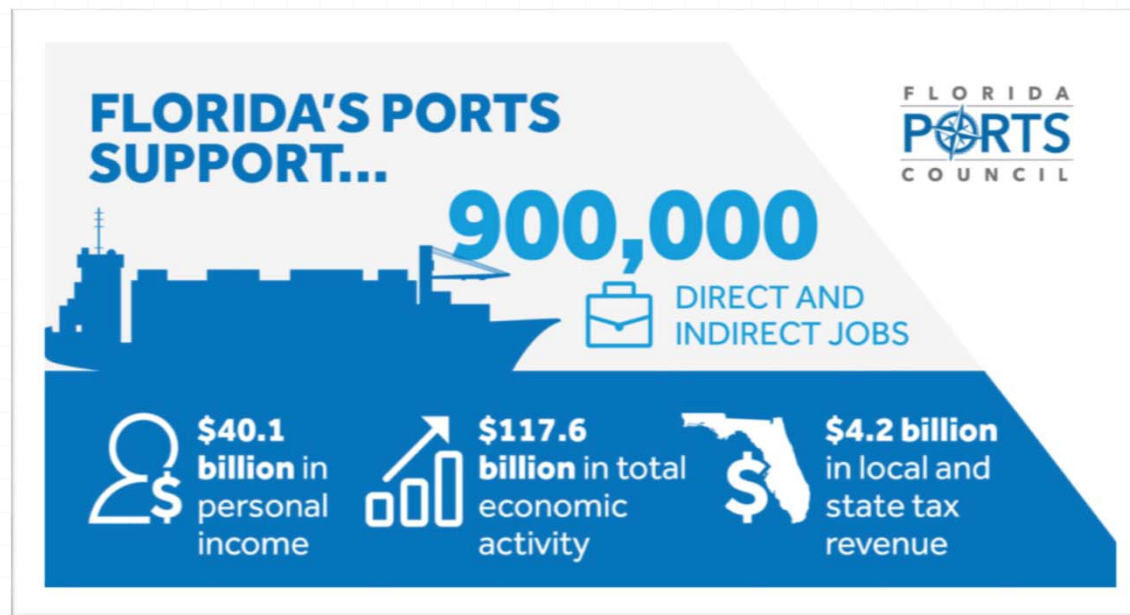


#flaports

Key Markets for Florida Seaports



Economic Impact of Seaports



Goods shipped through Florida Seaports include:

- ⚓ Aggregates, Asphalt, Automobiles, Automotive Parts, Aviation/Jet Fuel, Biofuels, Building Materials,
- ⚓ Clothing, Coffee, Cement, Computers and Electronics, Copper, Dairy Products, Feeds, Fertilizers, Fruits, Furniture
- ⚓ Gasoline, Grain, Household Appliances, Leather Goods, Lumber,
- ⚓ Orange Juice, Natural Gas, Petroleum, Power Plant Fuel, Refrigerated Products, Salt, Steel, Sugar, Wood Pellets



PORT TAMPA BAY OVERVIEW

- Florida's largest port in cargo tonnage and area
- 37 million tons cargo/year and encompassing 5000 acres
- Diverse mix of bulk, breakbulk and container traffic
- Huge and expanding local market
- Energy products gateway for Central Florida
- Major fertilizer export port
- Shipyard/ship repair center
- Major cruise homeport
- Expanding container gateway/distribution center gateway



Energy



Fertilizer



Building Materials



Cruise



Containers

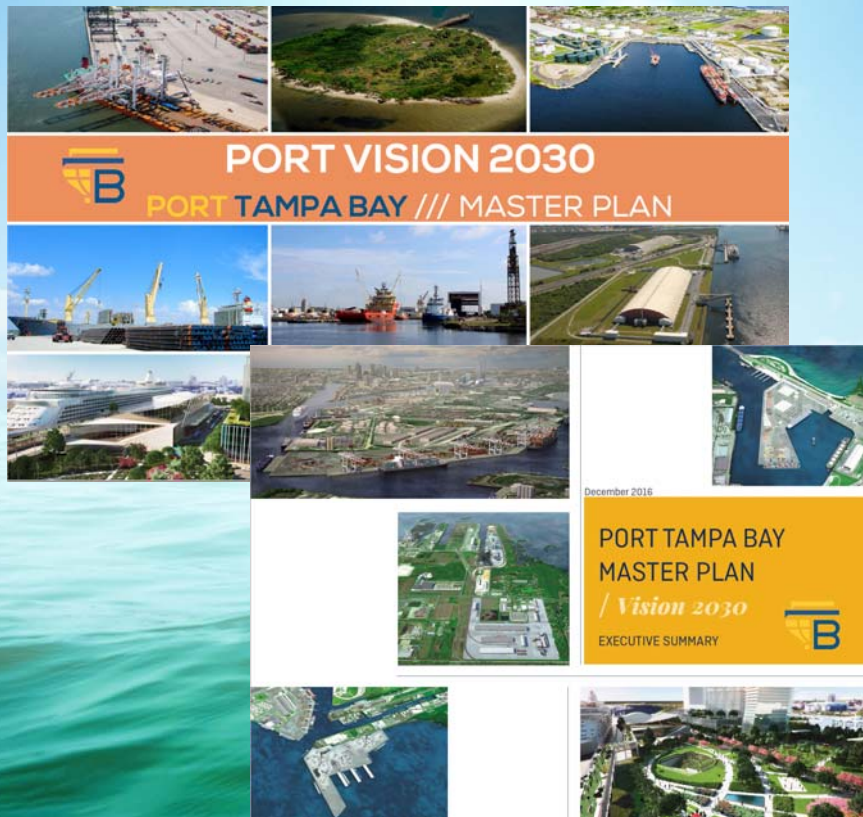


ECONOMIC IMPACT

\$17.2B

**ECONOMIC IMPACT
AFFECTS 85,000+ JOBS**

PORT VISION 2030



MASTER PLAN PROCESS

Business Strategy

- Competitive Assessment
- Market Assessment
- Financial Analysis
- Strategic Opportunities

Investment Strategy

- Facility Conditions
- Capacity Analysis
- Needs Assessment
- Capital Improvement Plan

Port Vision 2030

- Integrated Land Use and Transportation Vision
- Business Driven Capital Investment Strategy

STAKEHOLDER ENGAGEMENT

Customers & Tenants

- Amalie Oil Company
- Maritime Industries Association
- Propeller Club
- Harbor Safety Committee
- Spill Committee
- TECO
- International Ship
- Gulf Marine
- Tampa Ship
- Tampa Juice
- Mosaic Company
- Kinder Morgan
- Ports America
- CSX

Agency Stakeholders

- Hillsborough MPO
- Hillsborough County Planning Commission
- Hillsborough County
- FDOT
- Tampa Hillsborough Expressway Authority
- Visit Tampa Bay
- Tampa Chamber of Commerce
- Hillsborough Economic Development Commission
- Central Florida Development Council
- City of Tampa
- Tampa Bay Partnership
- Florida Petroleum Council
- USACE
- Tampa Bay Pilots Association



June 3, 2016 Public Workshop



December 8, 2016 Master Plan Unveiling

PTB LINES OF BUSINESS

Dry Bulk

Liquid Bulk

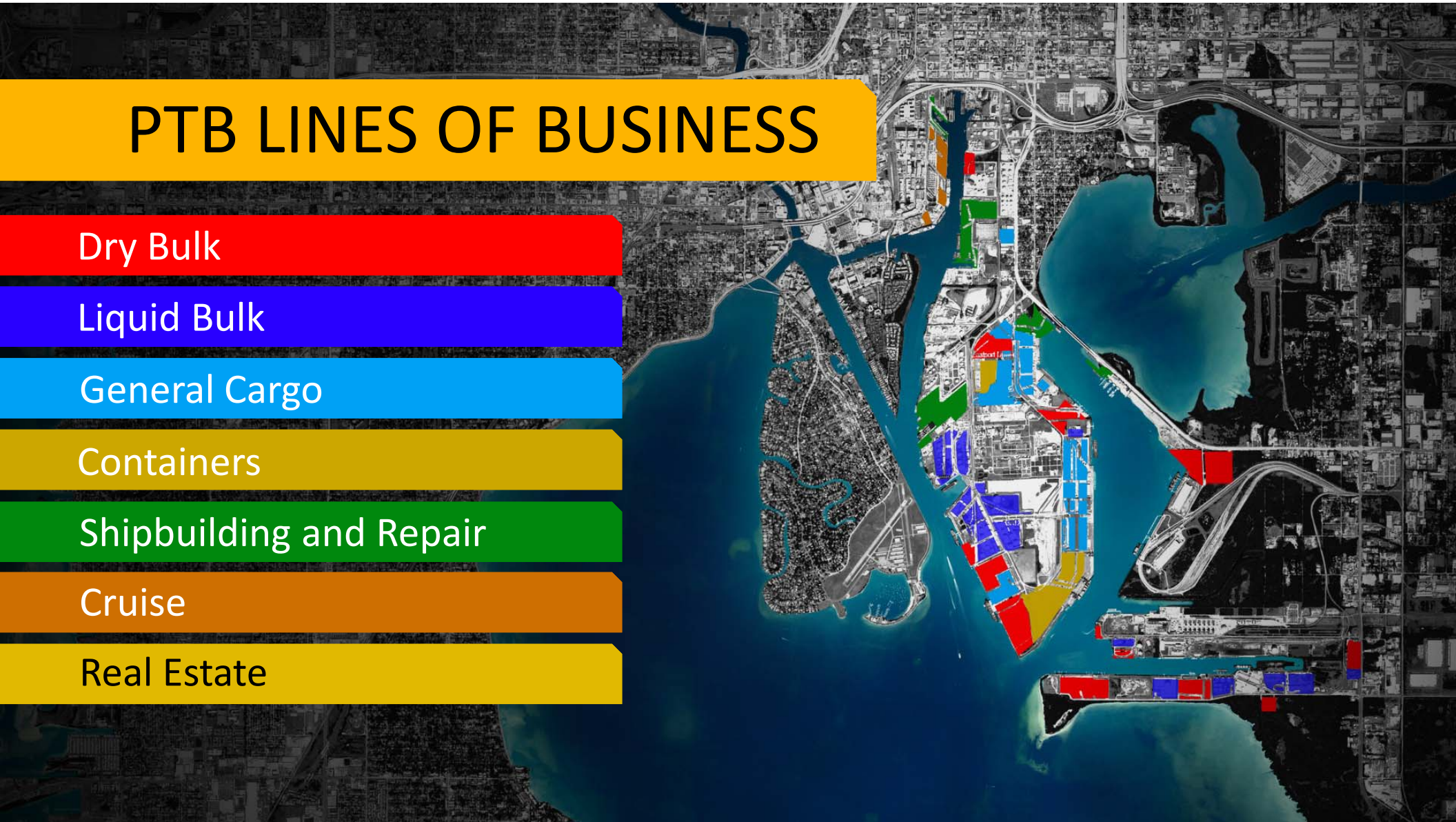
General Cargo

Containers

Shipbuilding and Repair

Cruise

Real Estate



PTB LINES OF BUSINESS

Dry Bulk

Liquid Bulk

General Cargo

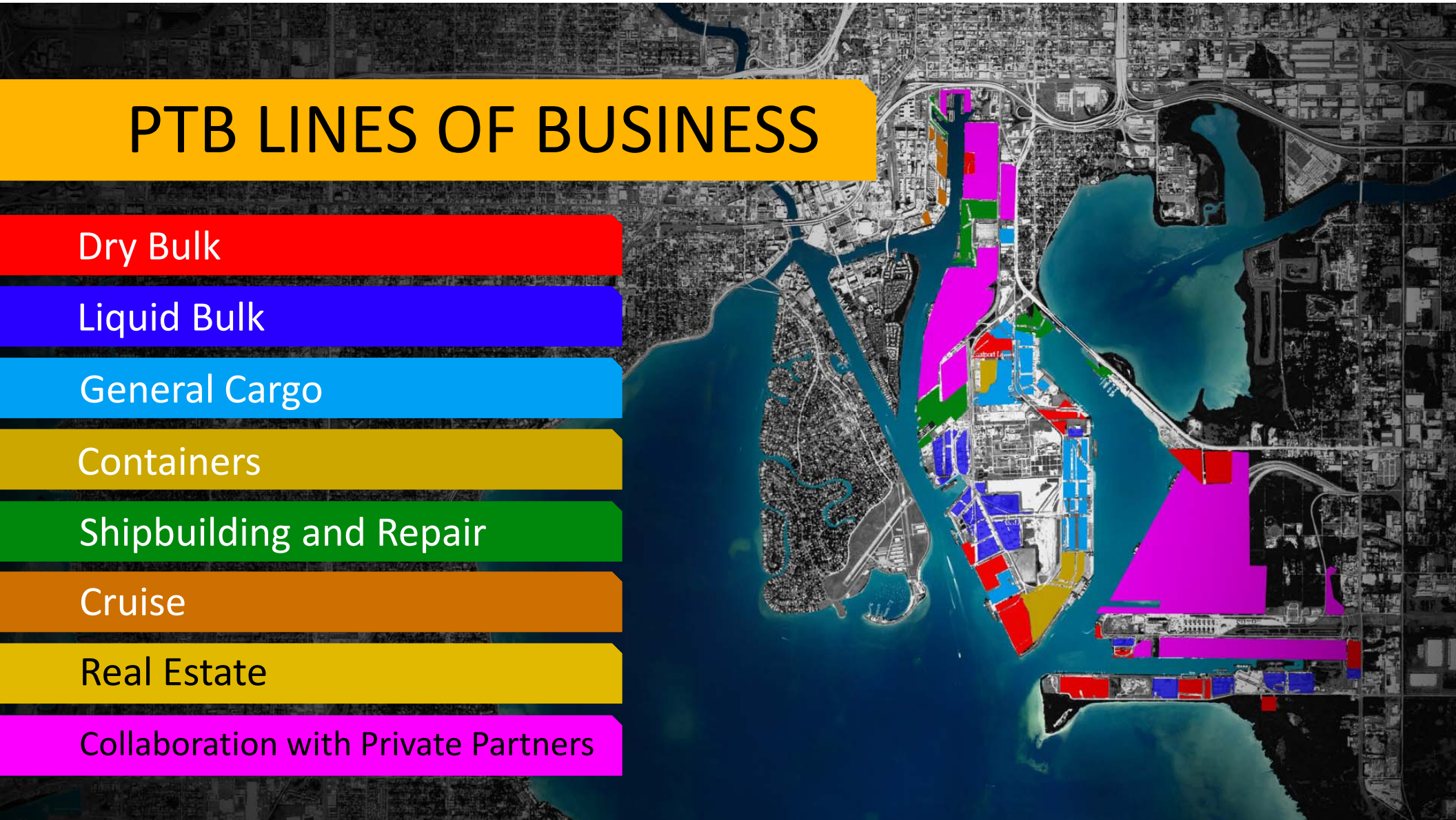
Containers

Shipbuilding and Repair

Cruise

Real Estate

Collaboration with Private Partners



An aerial photograph of a coastal area, likely a harbor or bay, with a city or industrial zone on the right. A specific area is highlighted with three overlapping colors: yellow, red, and blue. The yellow area is the largest, covering a peninsula and a large section of the harbor. The red area is a small, narrow strip on the left side of the peninsula. The blue area is a thin, horizontal strip along the top edge of the yellow area. The background is a grayscale aerial map showing land, water, and urban development.

PTB LINES OF BUSINESS

Dry Bulk

General Cargo

Cargo/Industrial Development

An aerial photograph of a coastal region, likely a port area, showing water, land, and infrastructure. The image is used as a background for the text overlays.

PTB LINES OF BUSINESS

Dry Bulk

General Cargo

Cargo/Industrial Development

Collaboration with Private Partners

INVESTMENT MILESTONES

Petroleum Complex



INVESTMENT MILESTONES

Expanded Container Terminal



INVESTMENT MILESTONES

I-4 Connector Opened



INVESTMENT MILESTONES

Constructed Gateway Rail



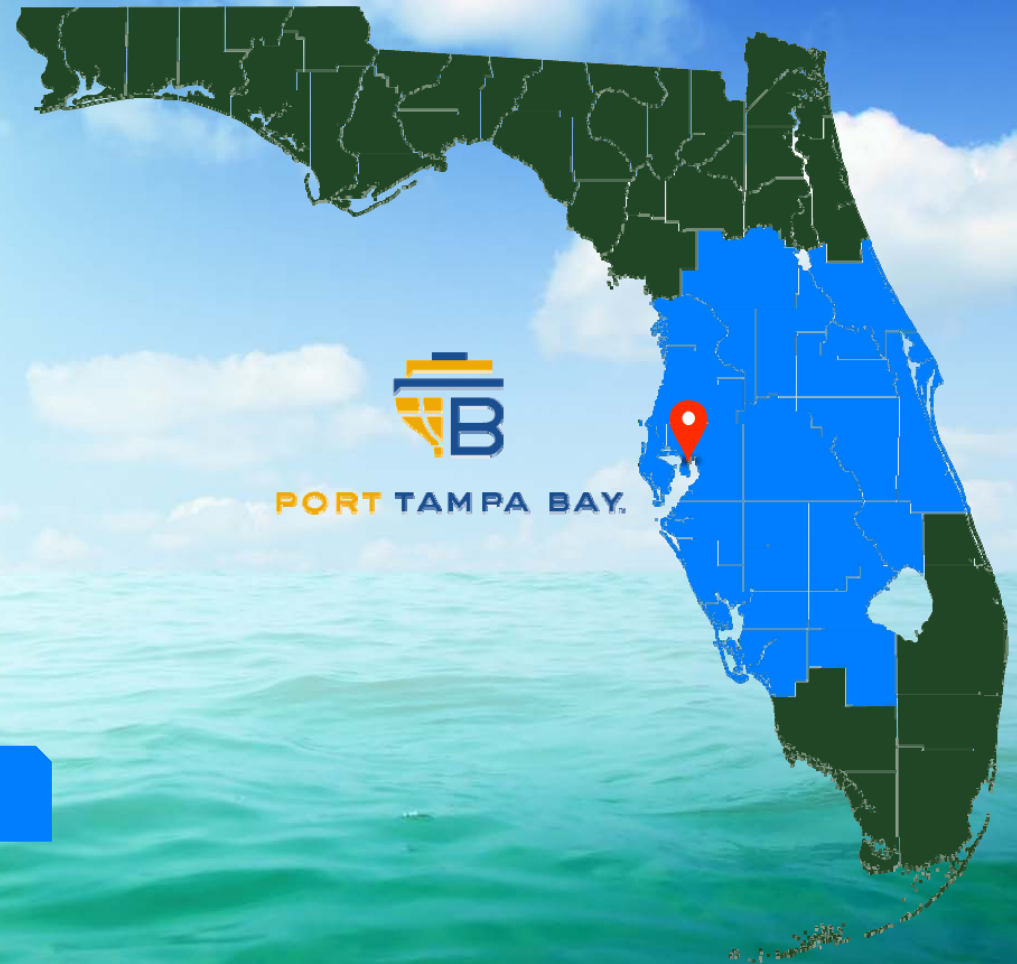
CORE MARKET

25 Counties

10+ Million People

Projected as Fastest
Growing Population
Center in Florida

66 Million Tourists Annually



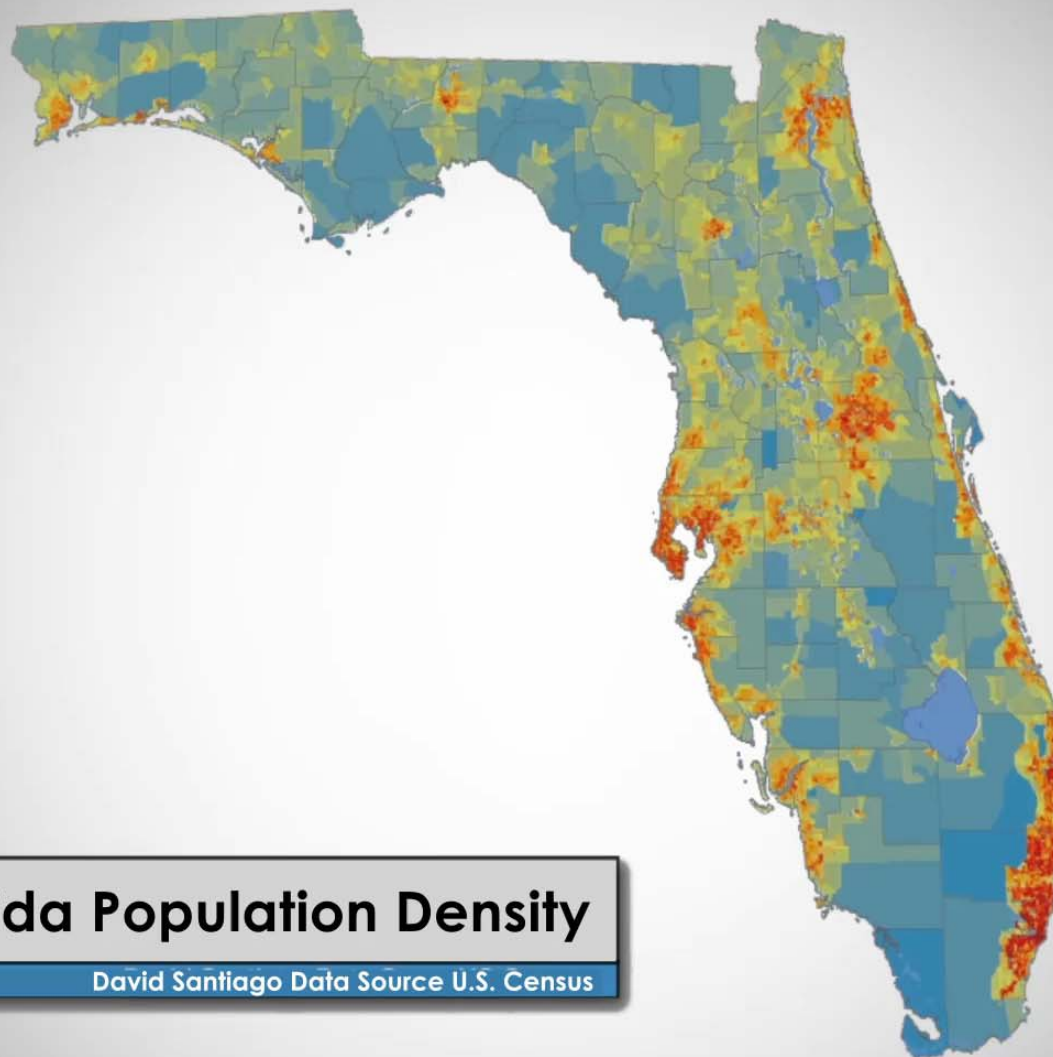
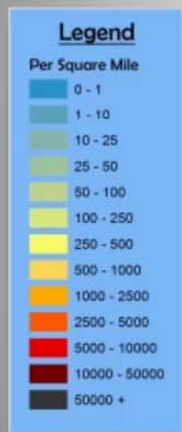
DISTRIBUTION CENTERS

219 Distribution Centers

Totaling 87 Million Square Feet

197 Distribution Centers
Within 10 Miles of I-4



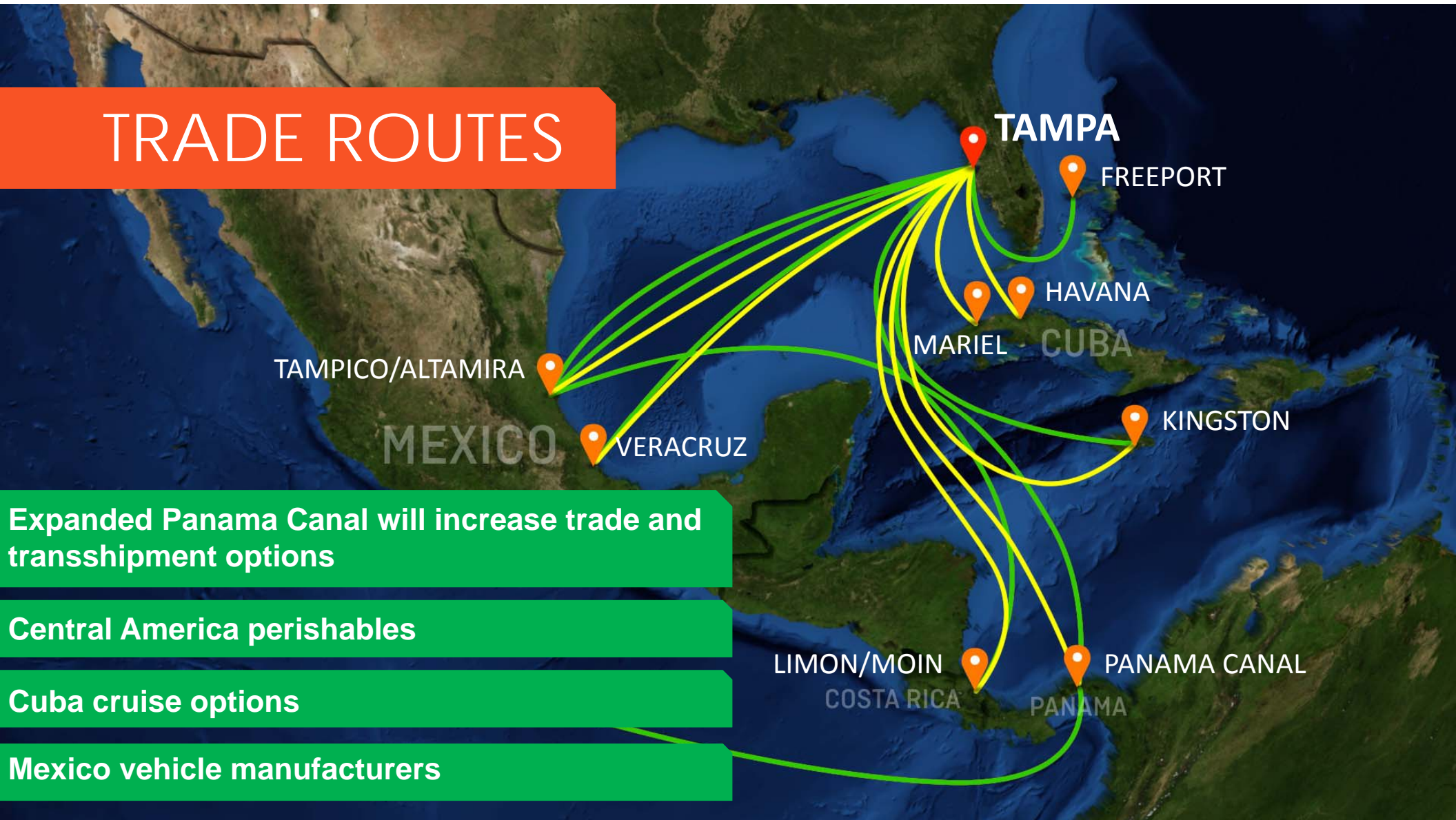


Central Florida Population Density

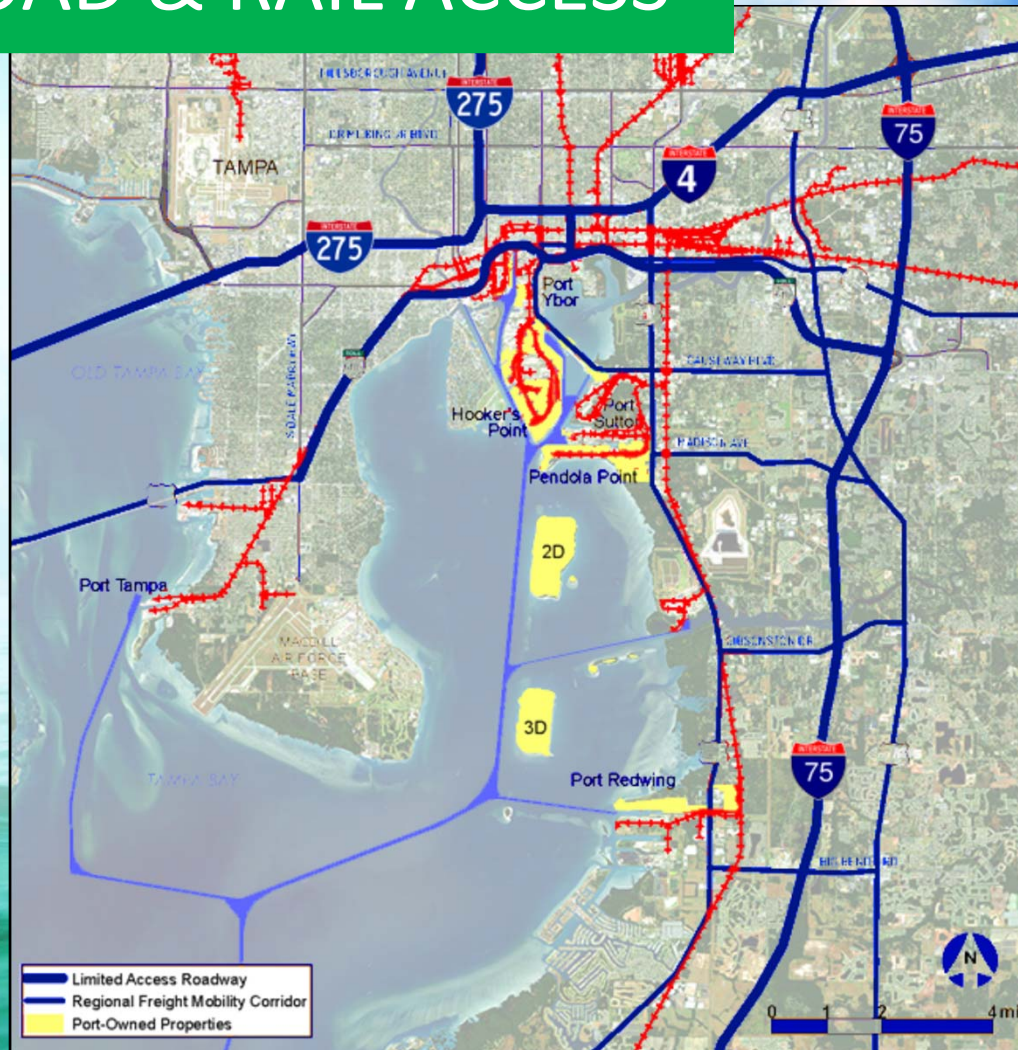
Census Block Group

David Santiago Data Source U.S. Census

TRADE ROUTES



EFFICIENT ROAD & RAIL ACCESS



ENHANCED MOBILITY FOR FREIGHT AND PEOPLE

Separated grade crossing on US 41

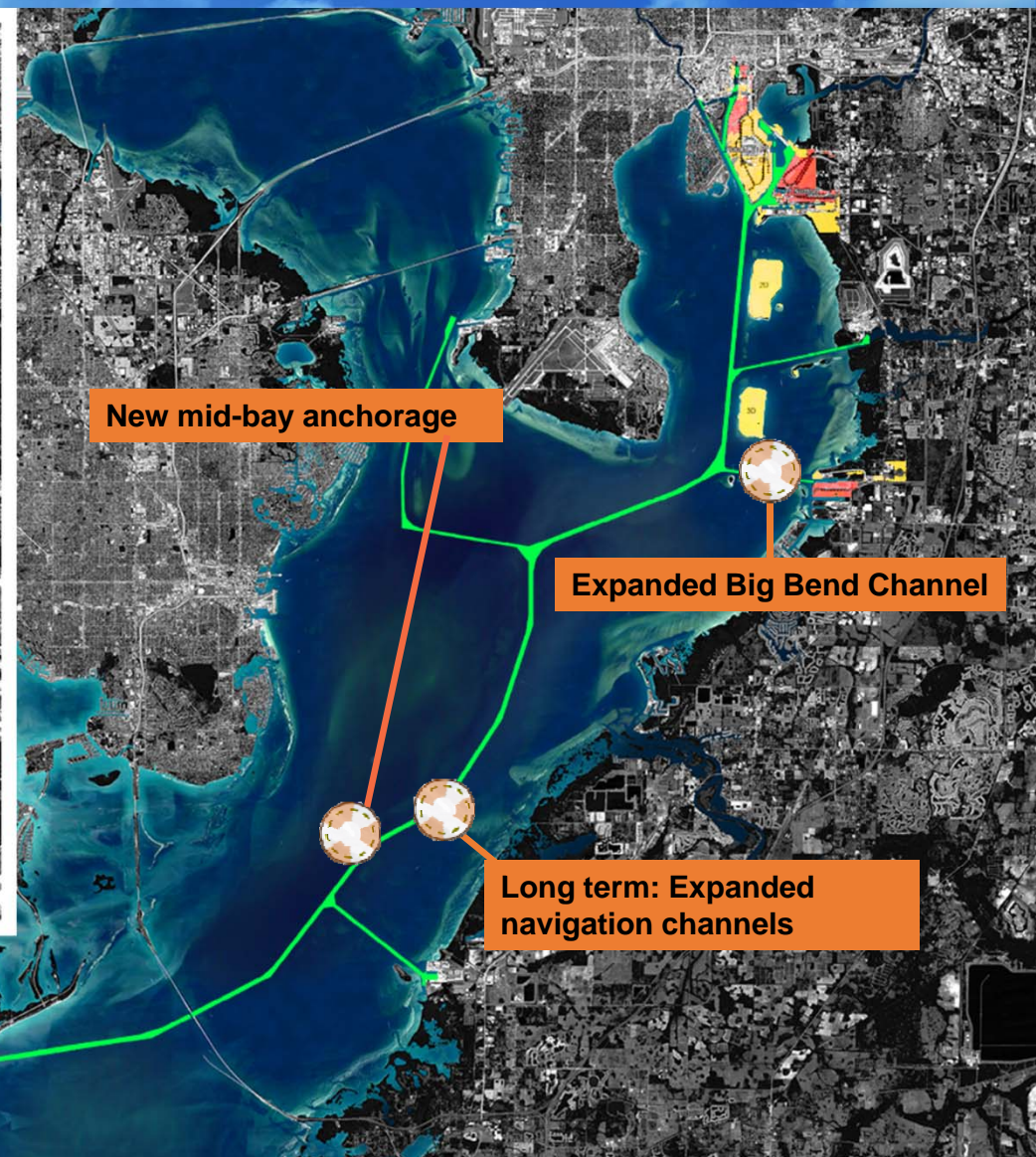
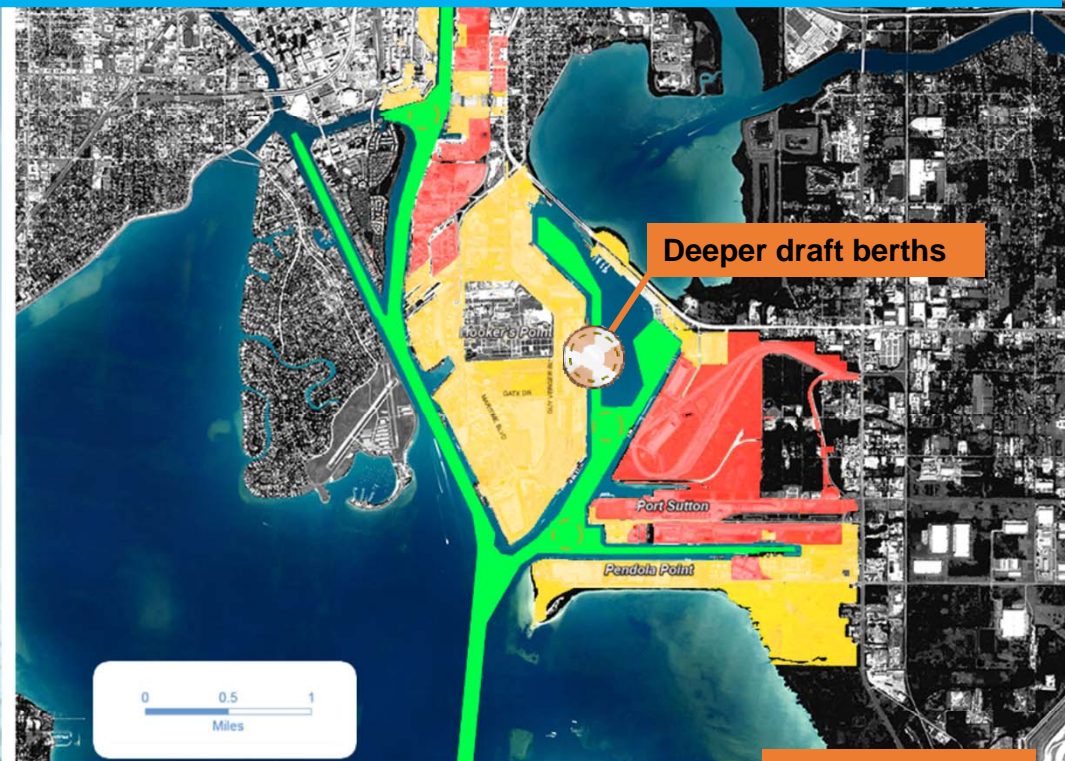
Expanded capacity on I-4 and I-275

Expansion of PTB main gate facility and staging area

Channelside multimodal improvements



ENHANCED NAVIGATION



EXPANDED PANAMA CANAL

Opened July 2016

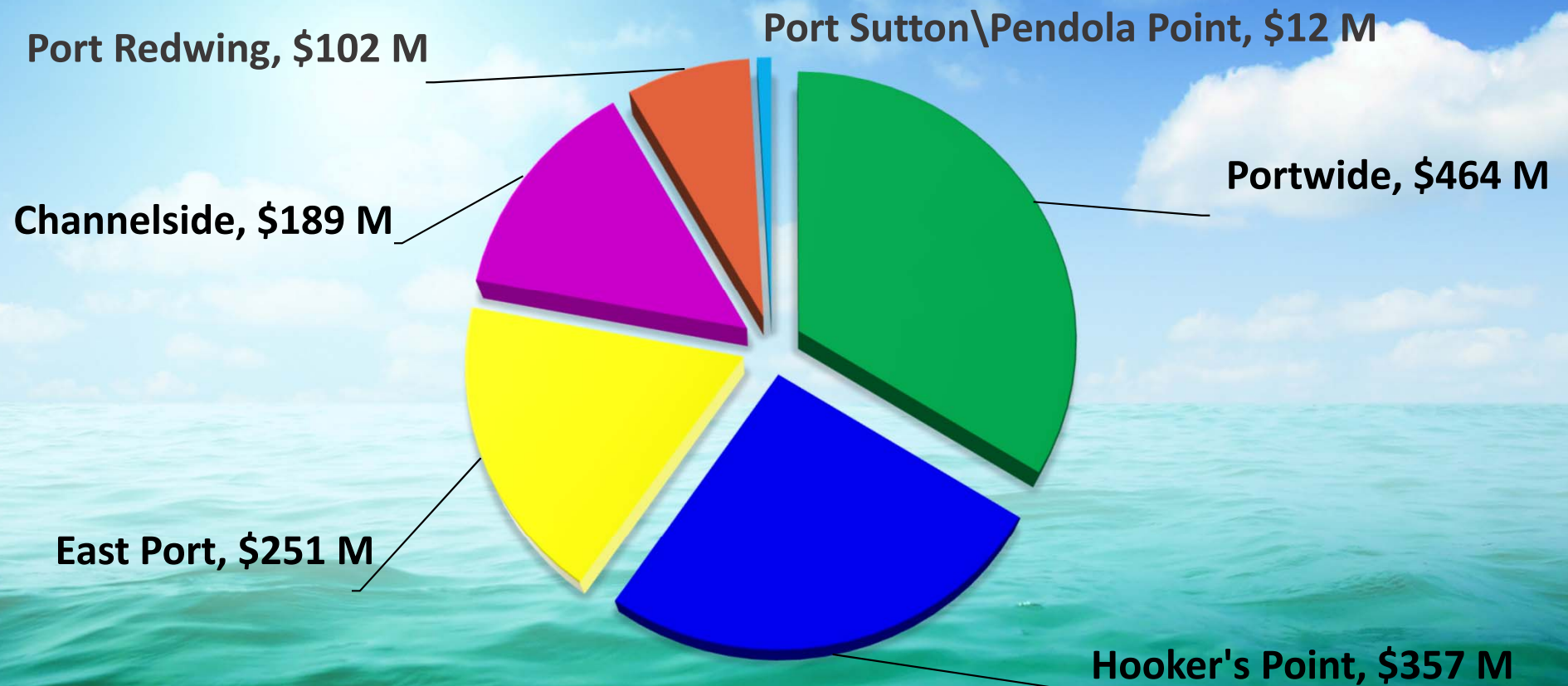
Upsizing of container and bulk vessels is underway

New U.S. Gulf container services have been announced

Additional opportunities will emerge in 2017 & 2018



PTB'S \$1.4 BILLION CAPITAL IMPROVEMENT PROGRAM



2017 - 2021

2022 - 2026

2027+

HOOKER'S PONT



HOOKE'S PONT, \$357 M

2017 - 2021

HOOKER'S PONT

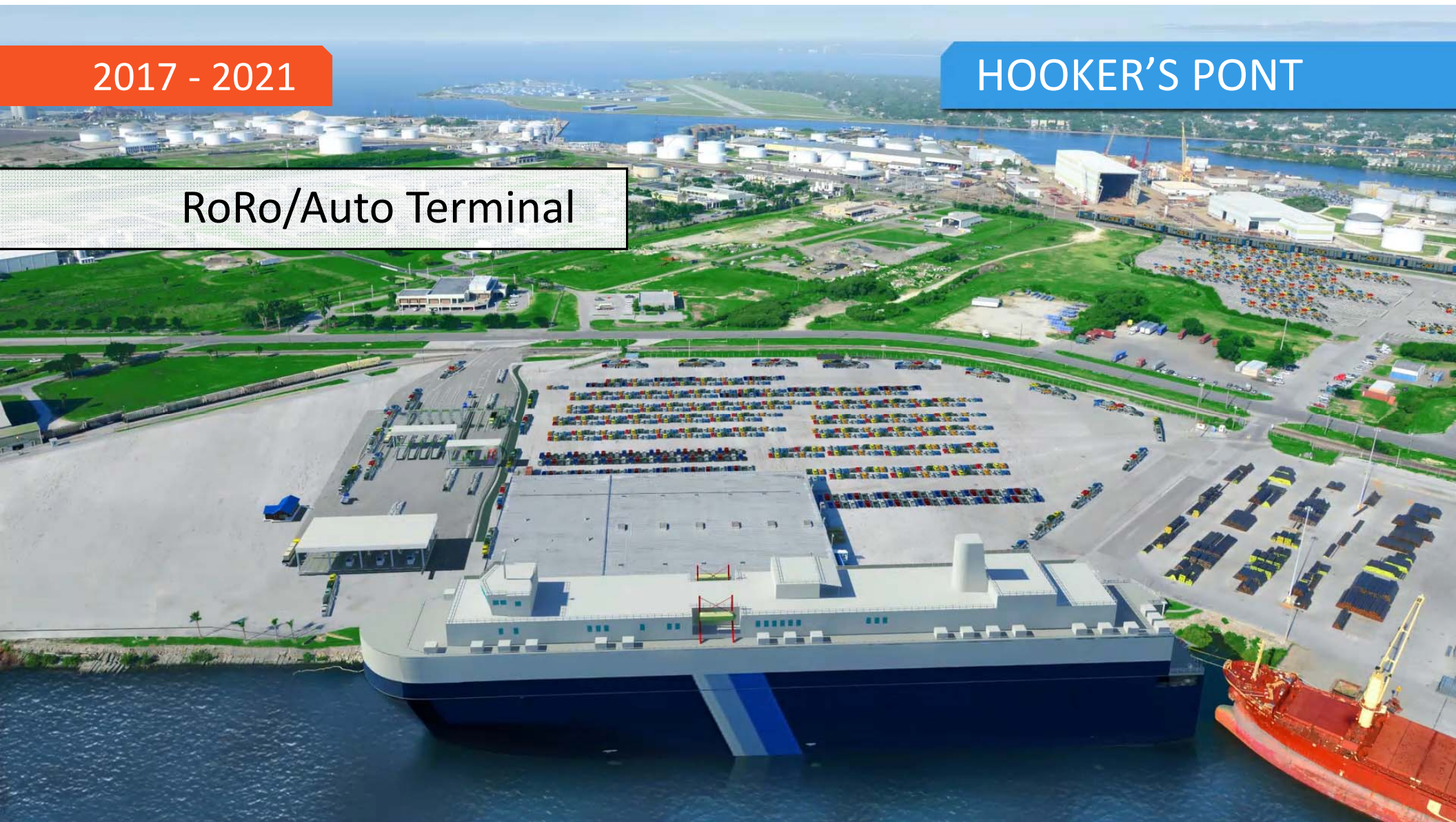
Refrigerated Warehouse



2017 - 2021

HOOKER'S PONT

RoRo/Auto Terminal

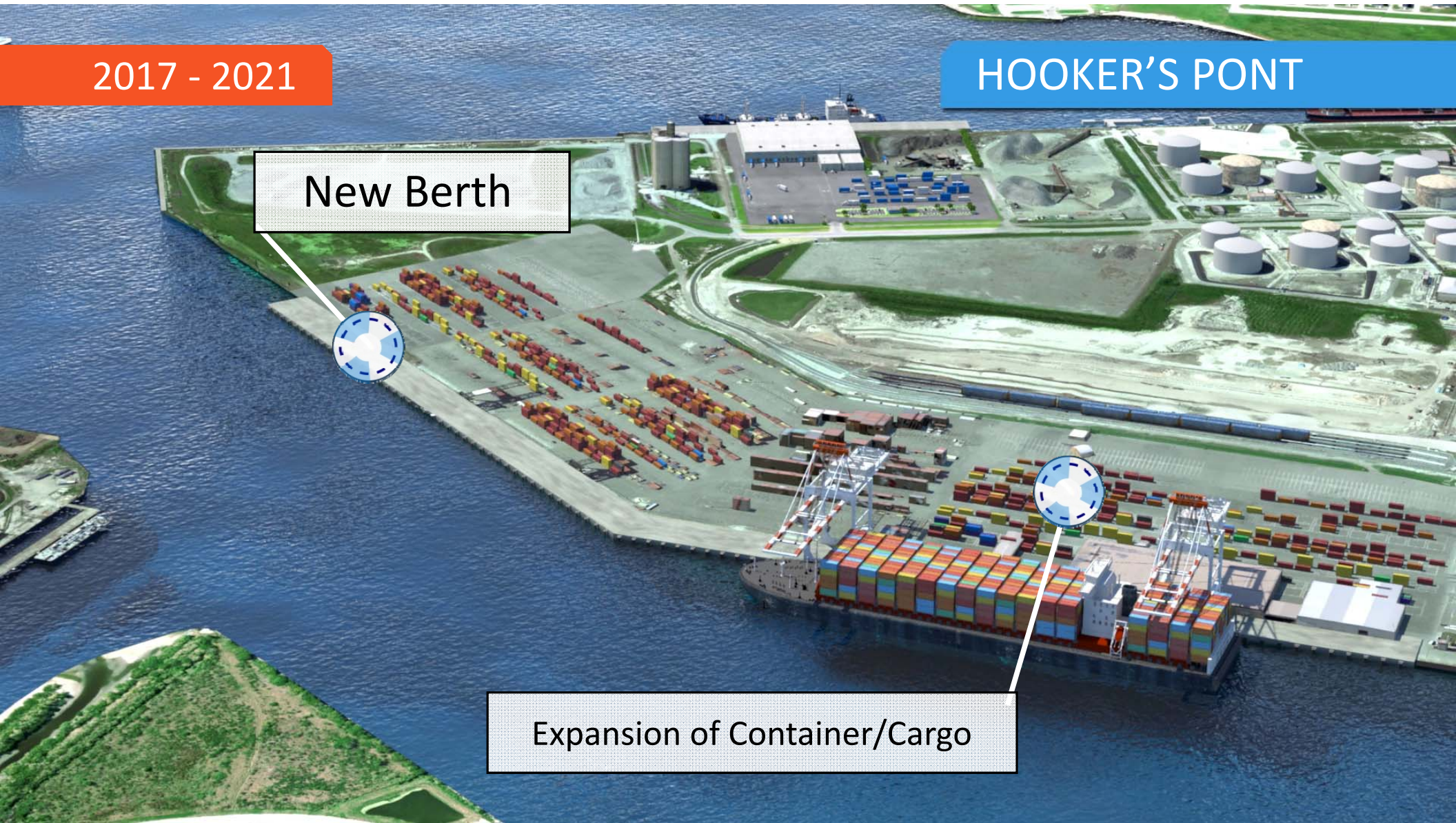


2017 - 2021

HOOKER'S PONT

New Berth

Expansion of Container/Cargo



2022 - 2026

New Berth

HOOKER'S PONT

2 Gantry Cranes



2022 - 2026

HOOKER'S PONT

North Cargo Yard Expansion

Intermodal Cargo Yard Expansion

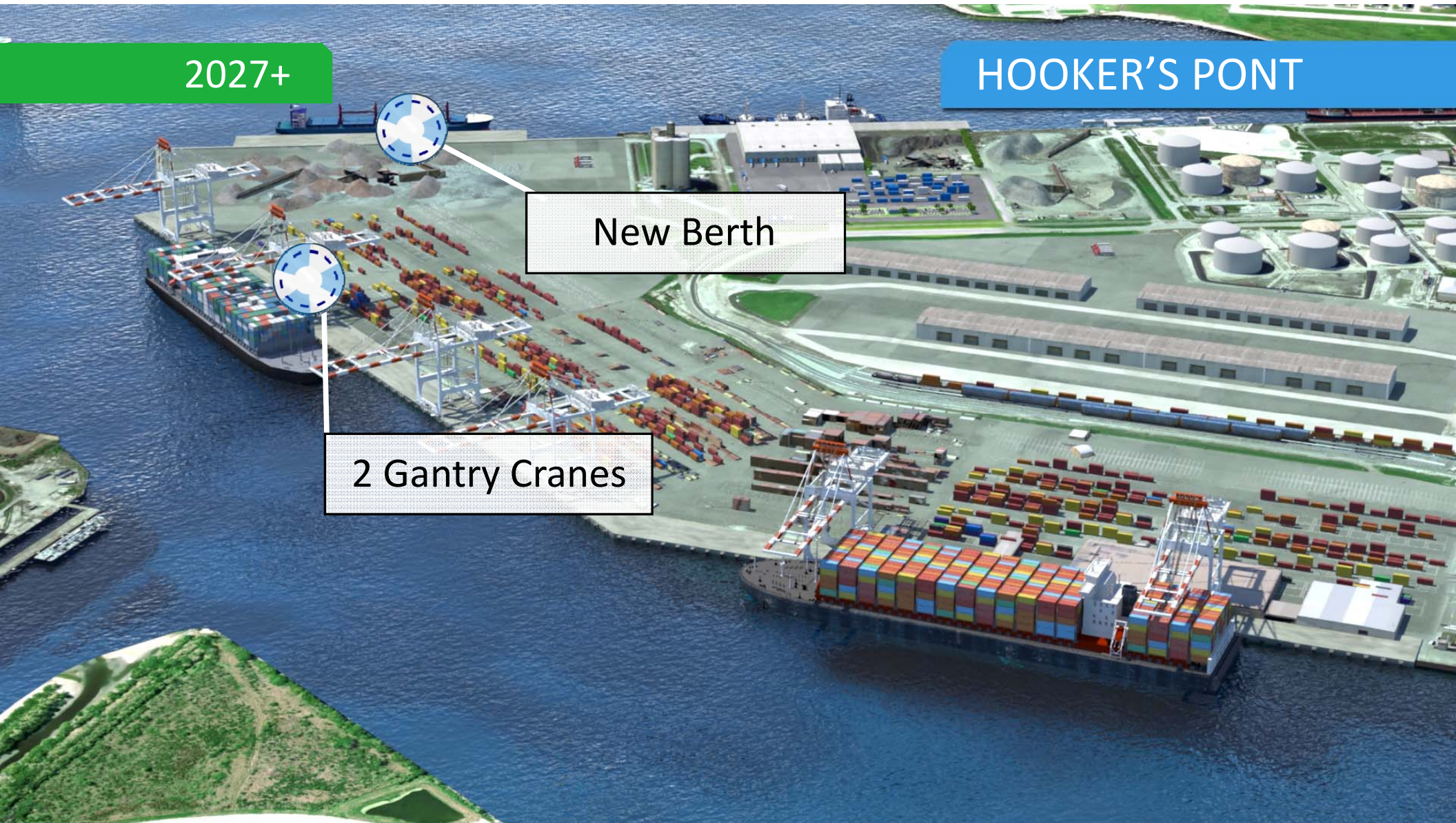


2027+

HOOKER'S PONT

New Berth

2 Gantry Cranes



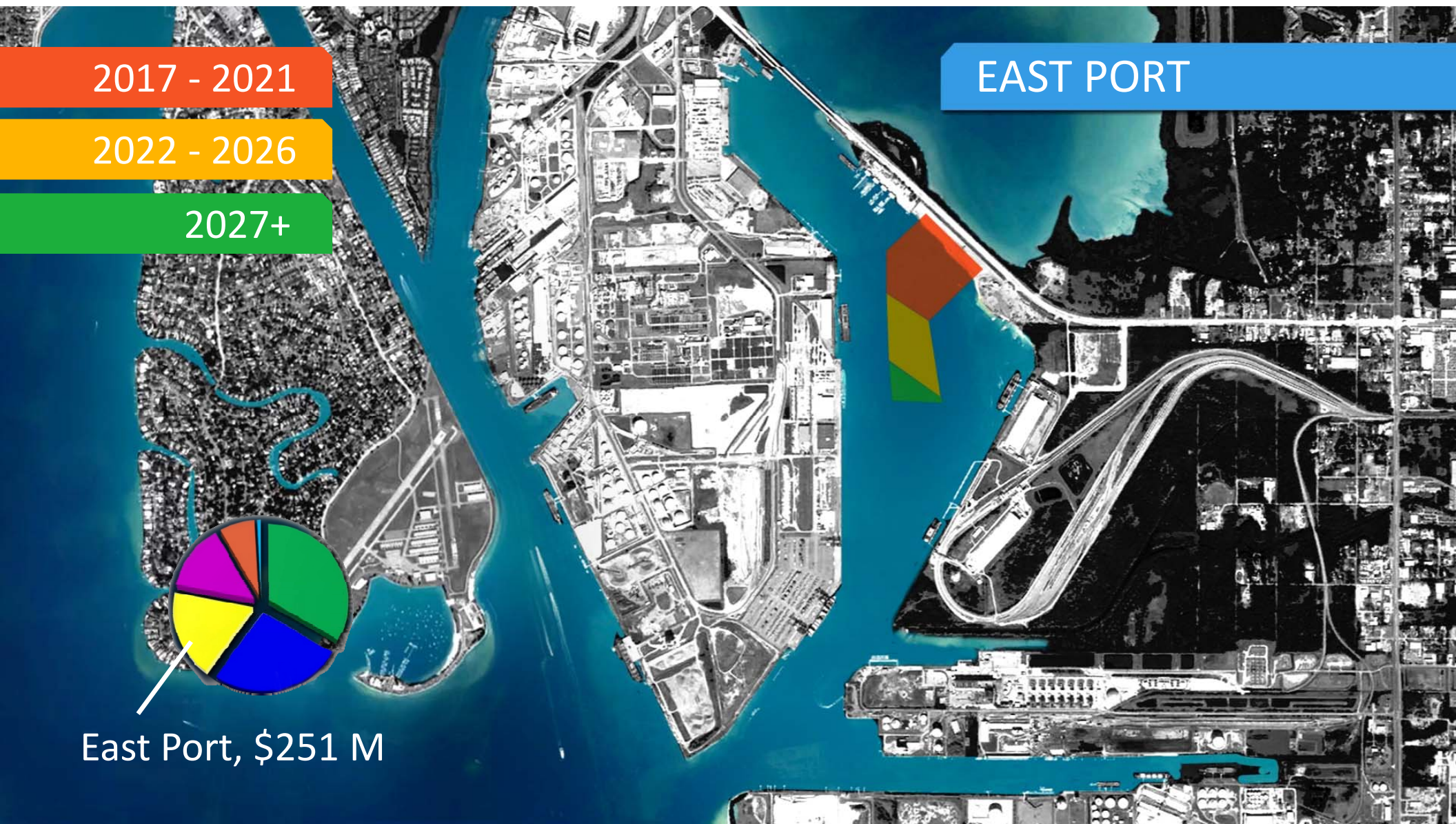
2017 - 2021

2022 - 2026

2027+

EAST PORT

East Port, \$251 M



2017 - 2021

Phase 2 Expansion

EAST PORT



2022 - 2026

Phase 3 Expansion

EAST PORT



2027+

Phase 4 Expansion

EAST PORT



2017 - 2021

2022 - 2026

2027+

PORT REDWING

Port Redwing, \$102 M



2017 - 2021

PORT REDWING

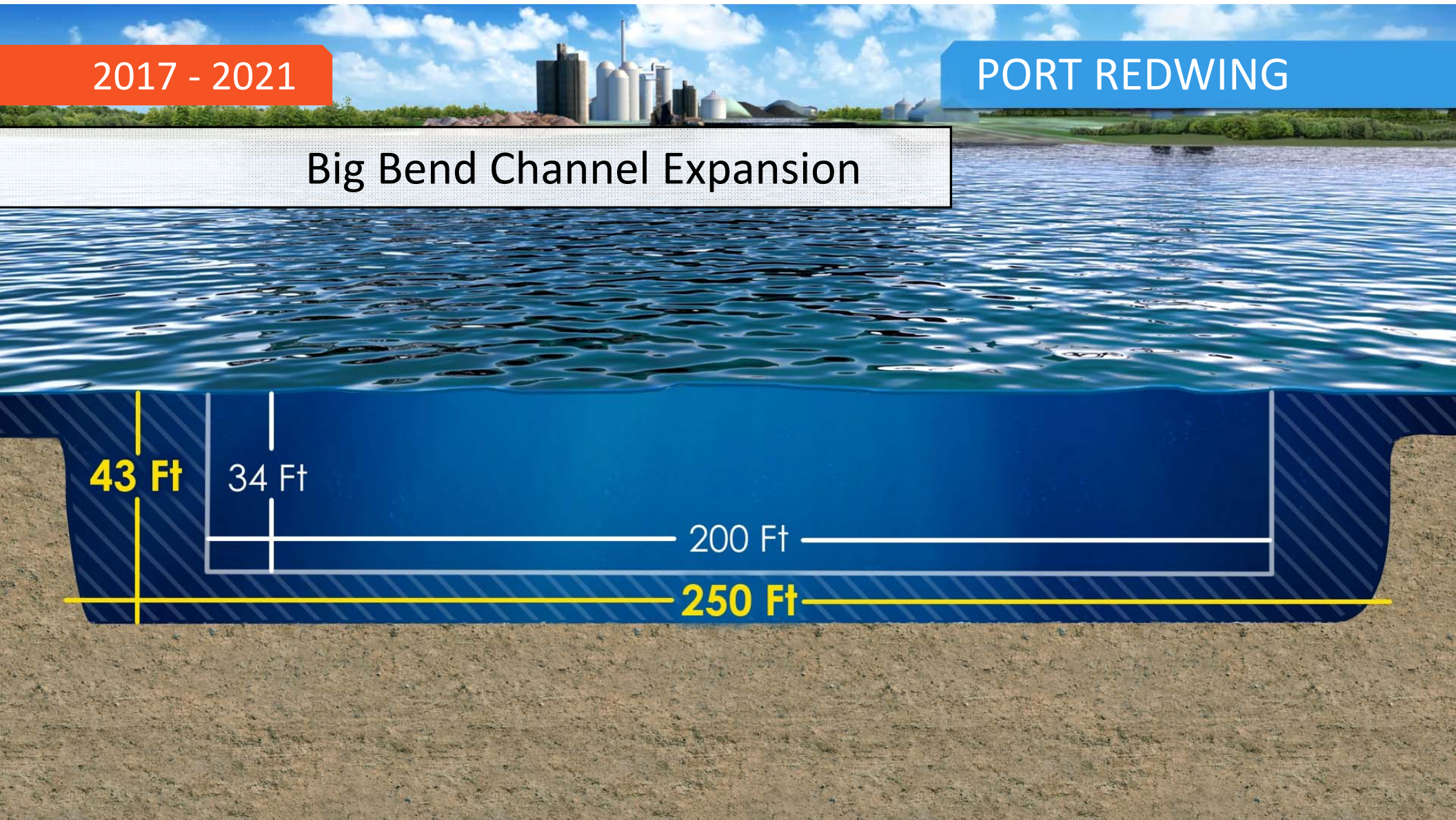
Big Bend Channel Expansion

43 Ft

34 Ft

200 Ft

250 Ft



2017 - 2021

PORT REDWING

Industrial Development



2022 - 2026

PORT REDWING

Cargo/Industrial Development



2027+

PORT REDWING

Industrial Development



CHANNELSIDE

MARINA DISTRICT

CENTRAL WATERFRONT

PARK DISTRICT

CRUISE DISTRICT



CHANNELSIDE

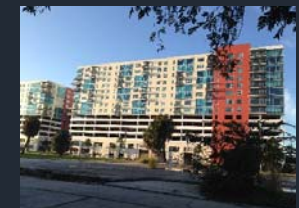
THEN...

- Channelside properties were acquired with the purpose to serve the cruise industry
- Elements were added to create tourism destination

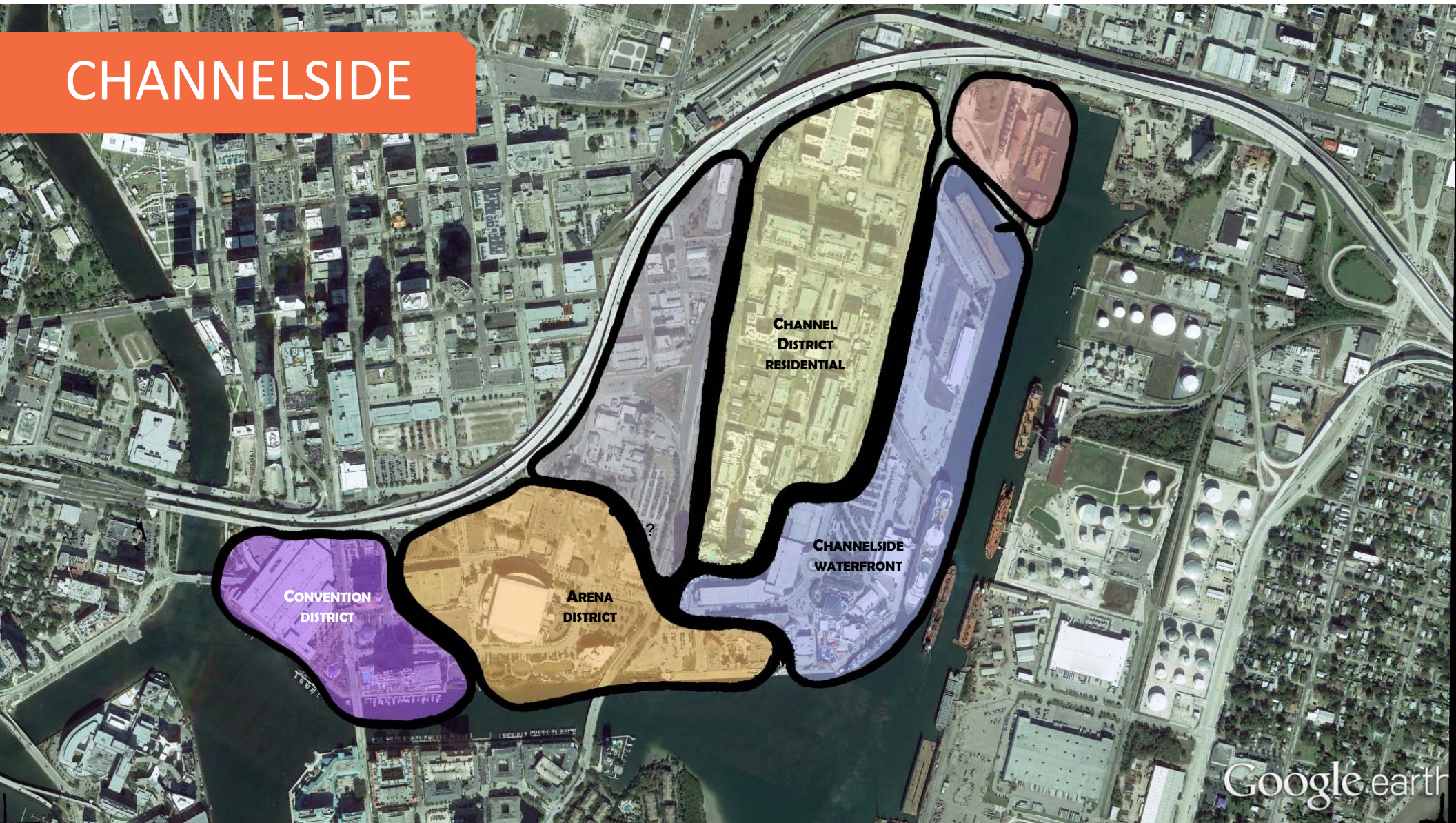


NOW...

- The Skyway Bridge will begin to limit cruise traffic in the future
- A neighborhood has grown around it



CHANNELSIDE



Google earth

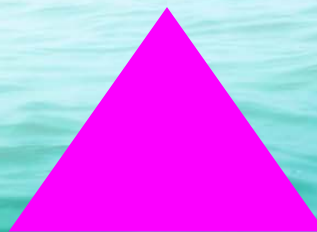
A PERFECT BALANCE



URBAN LIVING



PORT TAMPA BAY.
WORKING WATERFRONT





GREAT WATERFRONTS

- Accessible and continuous - public access
- Connected - Extension of city grid to the water
- Distinct activity centers and districts
- Retail, culture and entertainment
- Central plazas and open space
- Dramatic architecture



CHANNELSIDE

MARINA DISTRICT

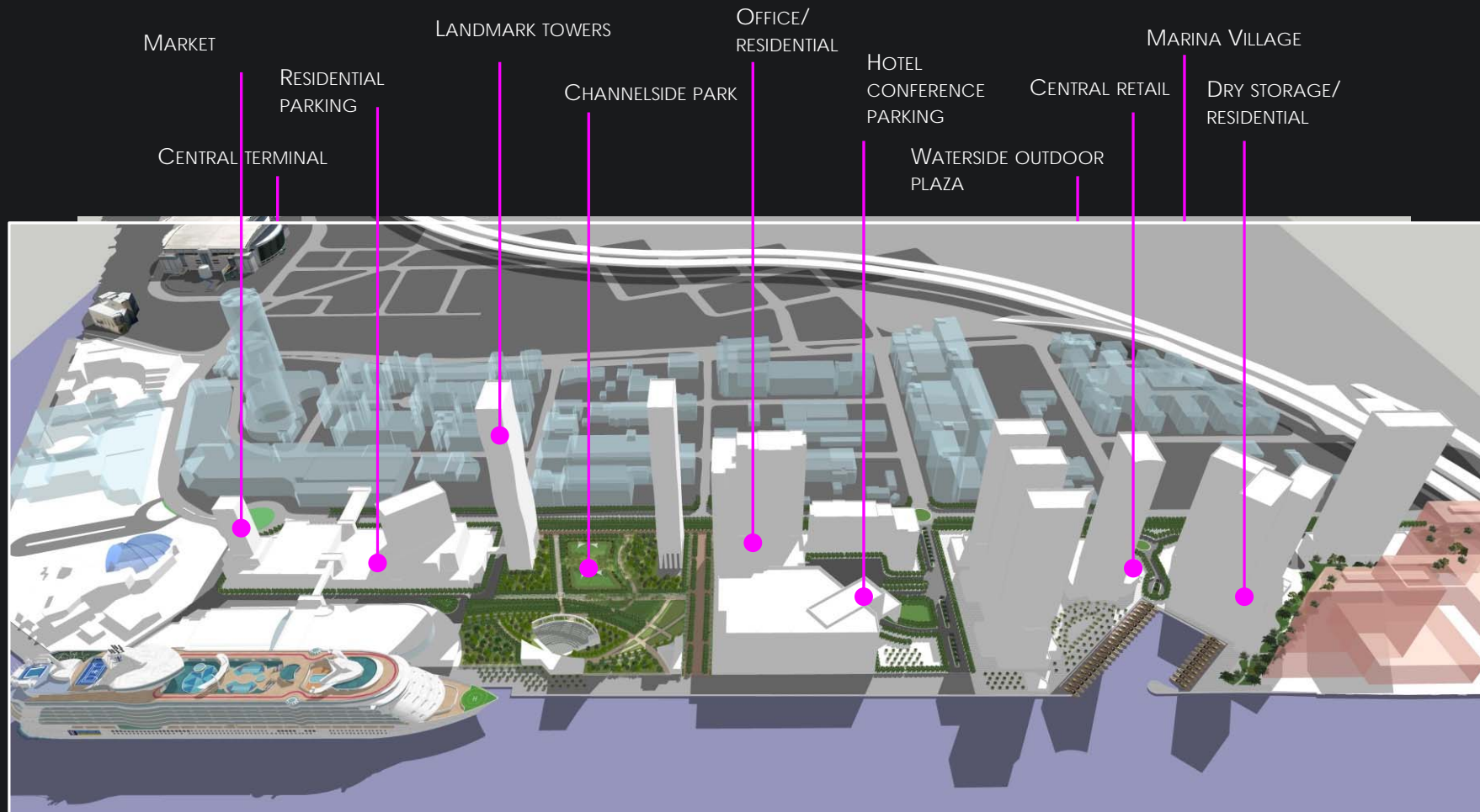
CENTRAL WATERFRONT

PARK DISTRICT

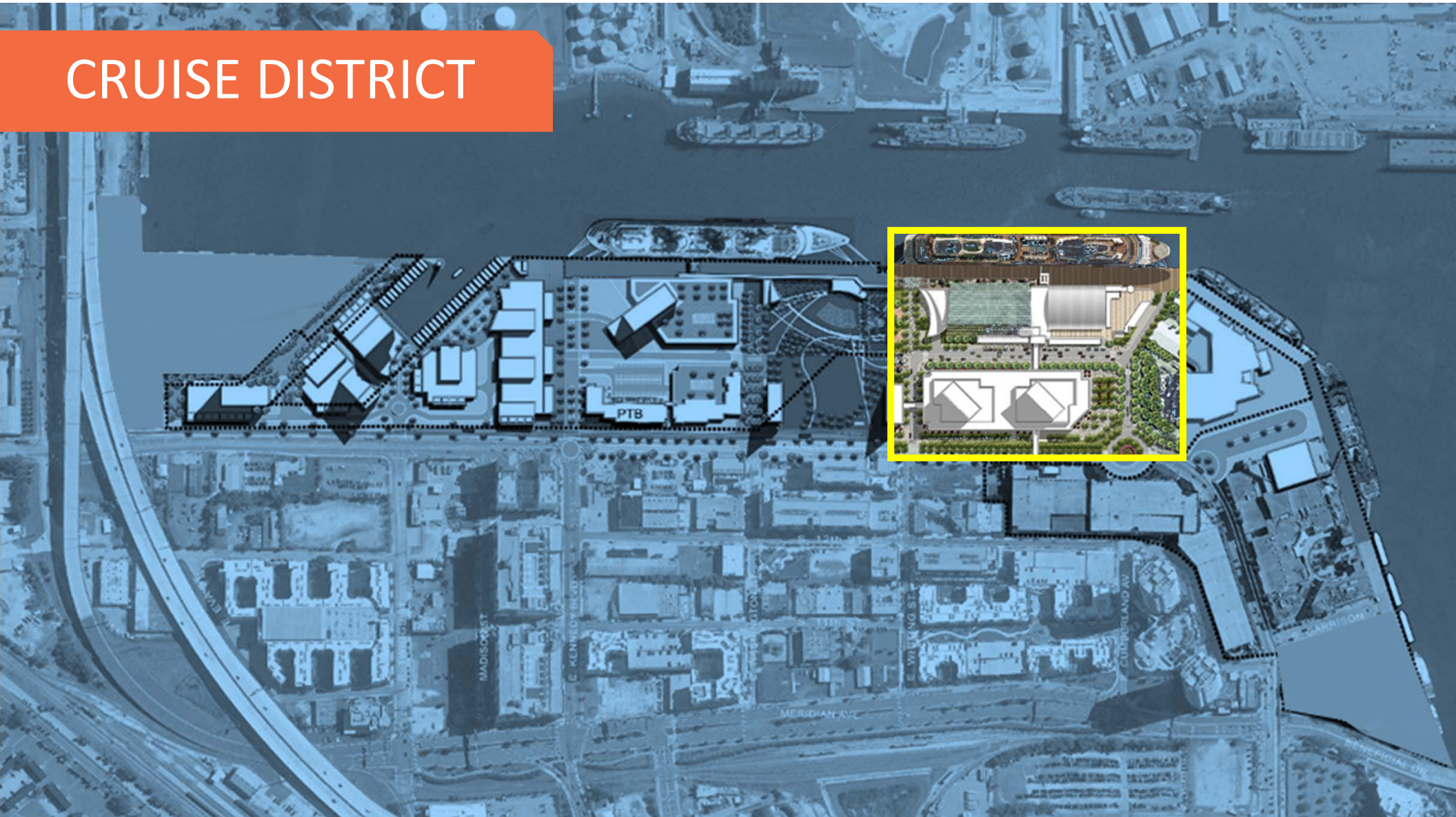
CRUISE DISTRICT



REDISTRIBUTION OF DENSITY

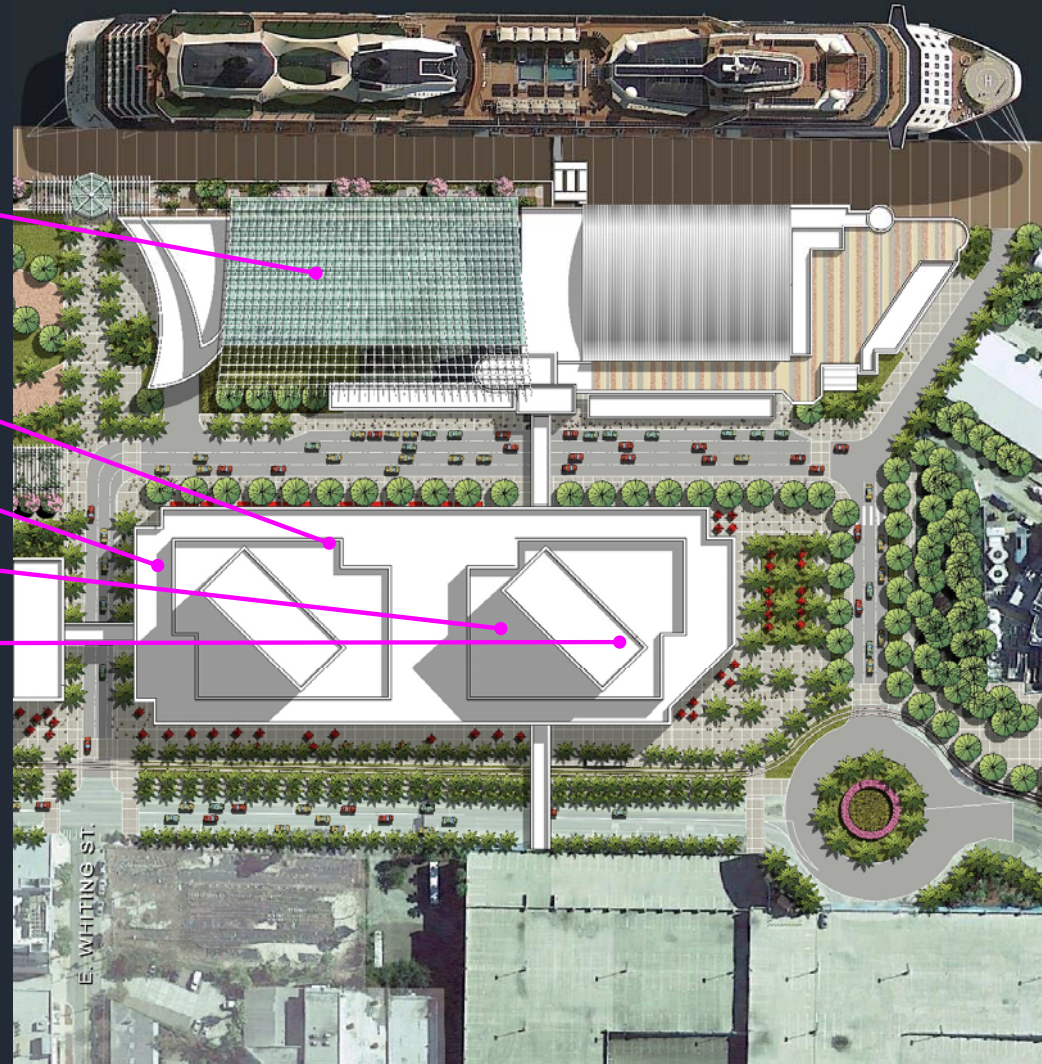


CRUISE DISTRICT



CRUISE DISTRICT

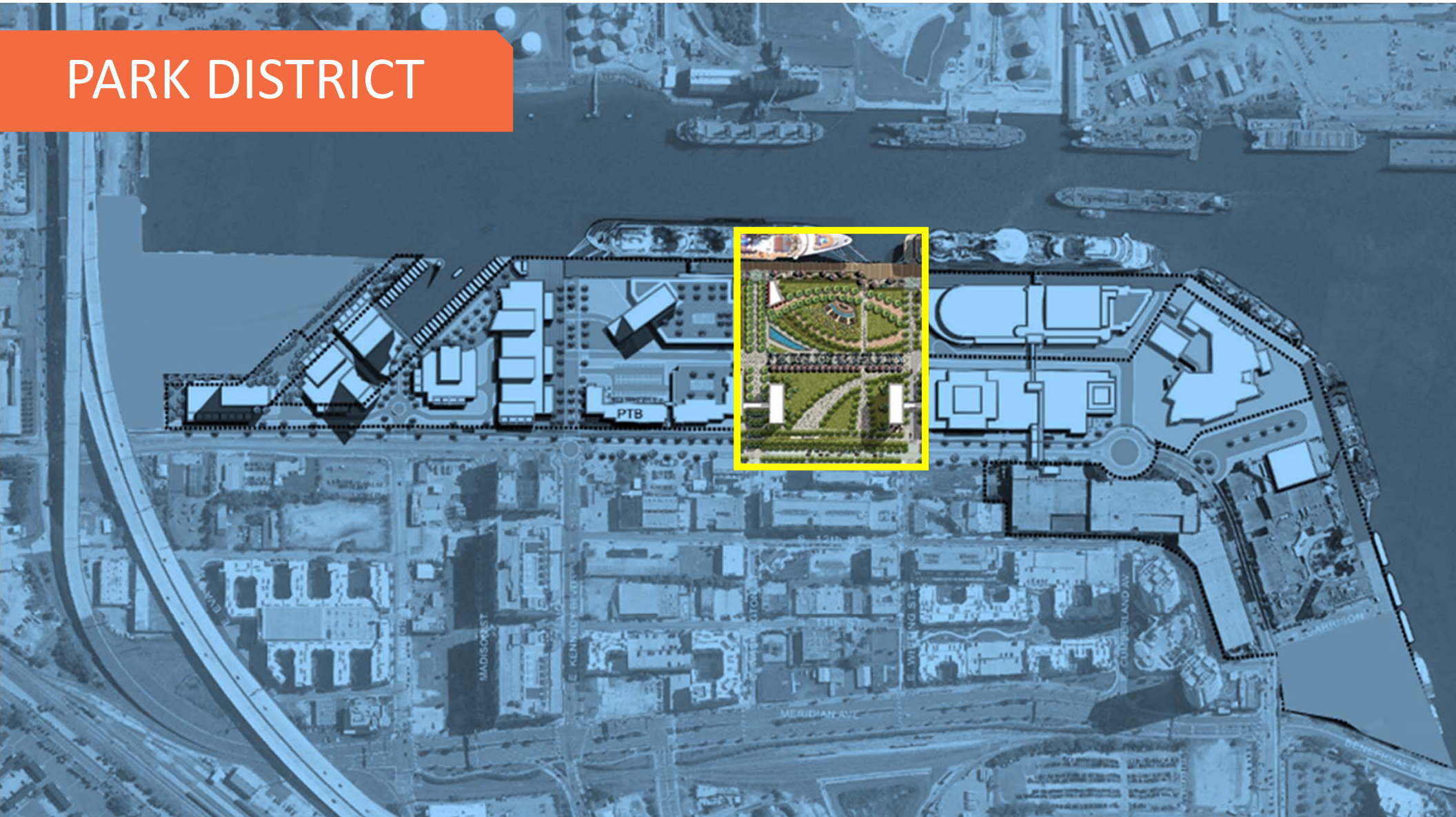
- Expanded terminal
 - Multi purpose
- Expanded parking
- Residential tower
- Hotel / commercial
- Mercado



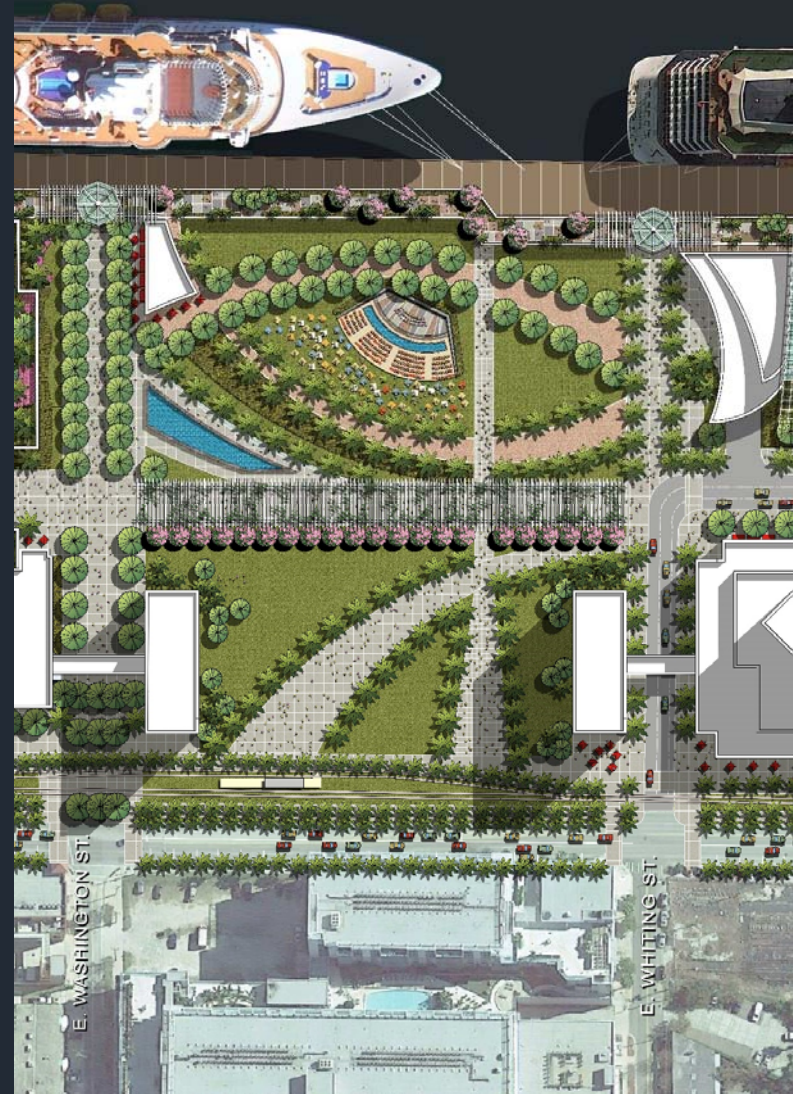
CRUISE DISTRICT



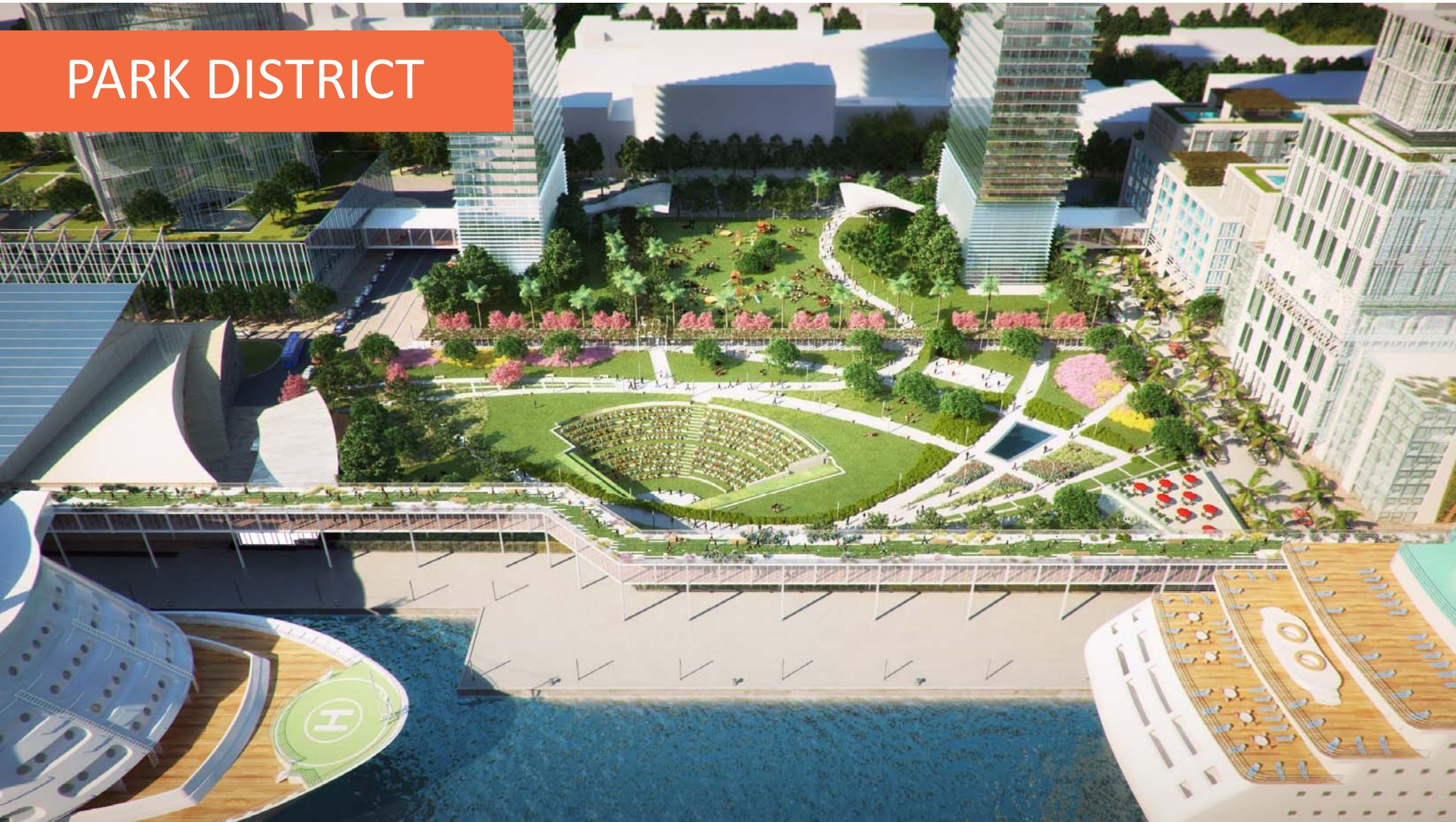
PARK DISTRICT



PARK DISTRICT



PARK DISTRICT



PARK DISTRICT



AN URBAN / WORKING WATERFRONT



MULTIPURPOSE WATERFRONT



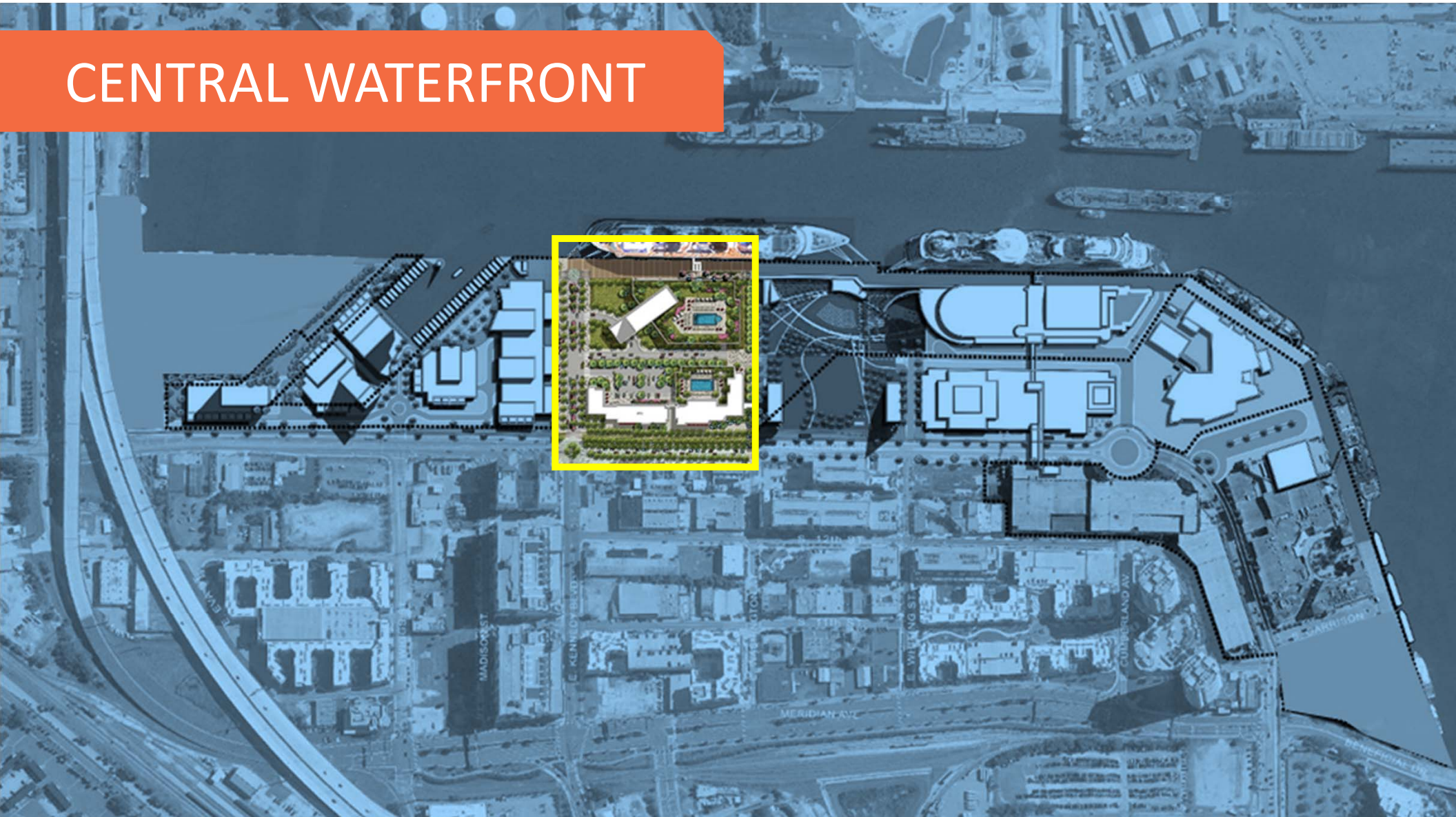
PARK DISTRICT



CHANNELSIDE

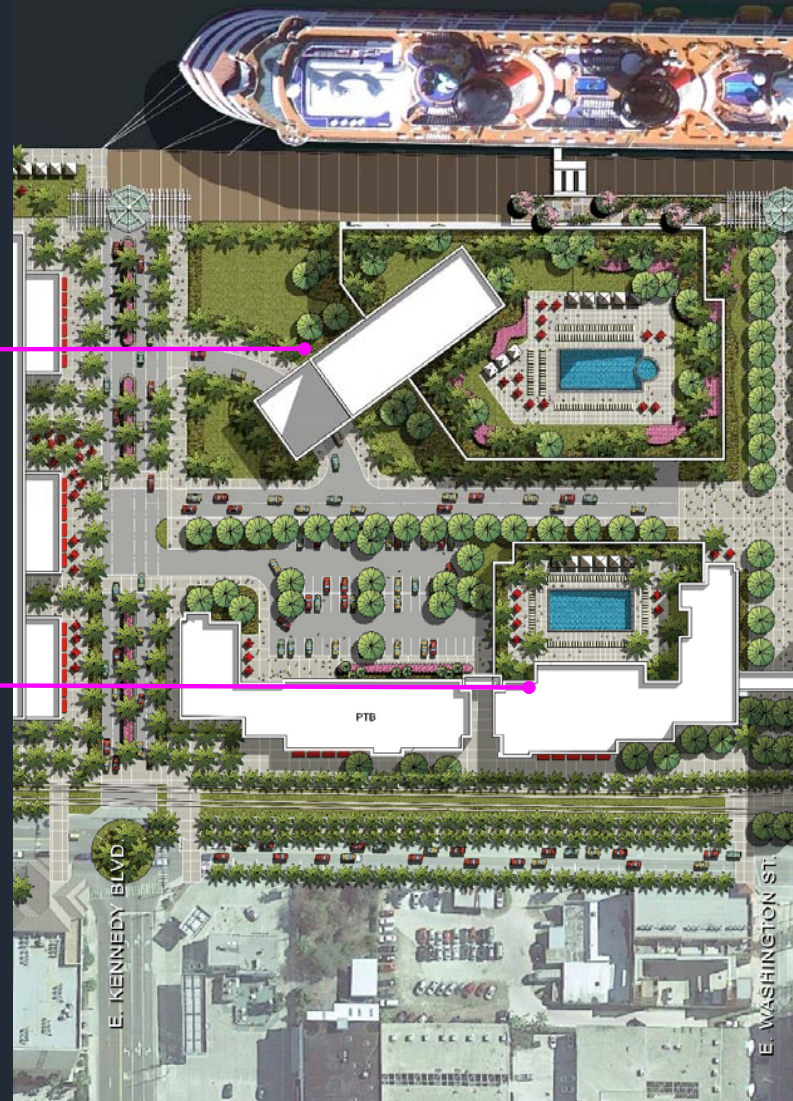


CENTRAL WATERFRONT



CENTRAL WATERFRONT

- Hotel / Commercial
- Office / residential



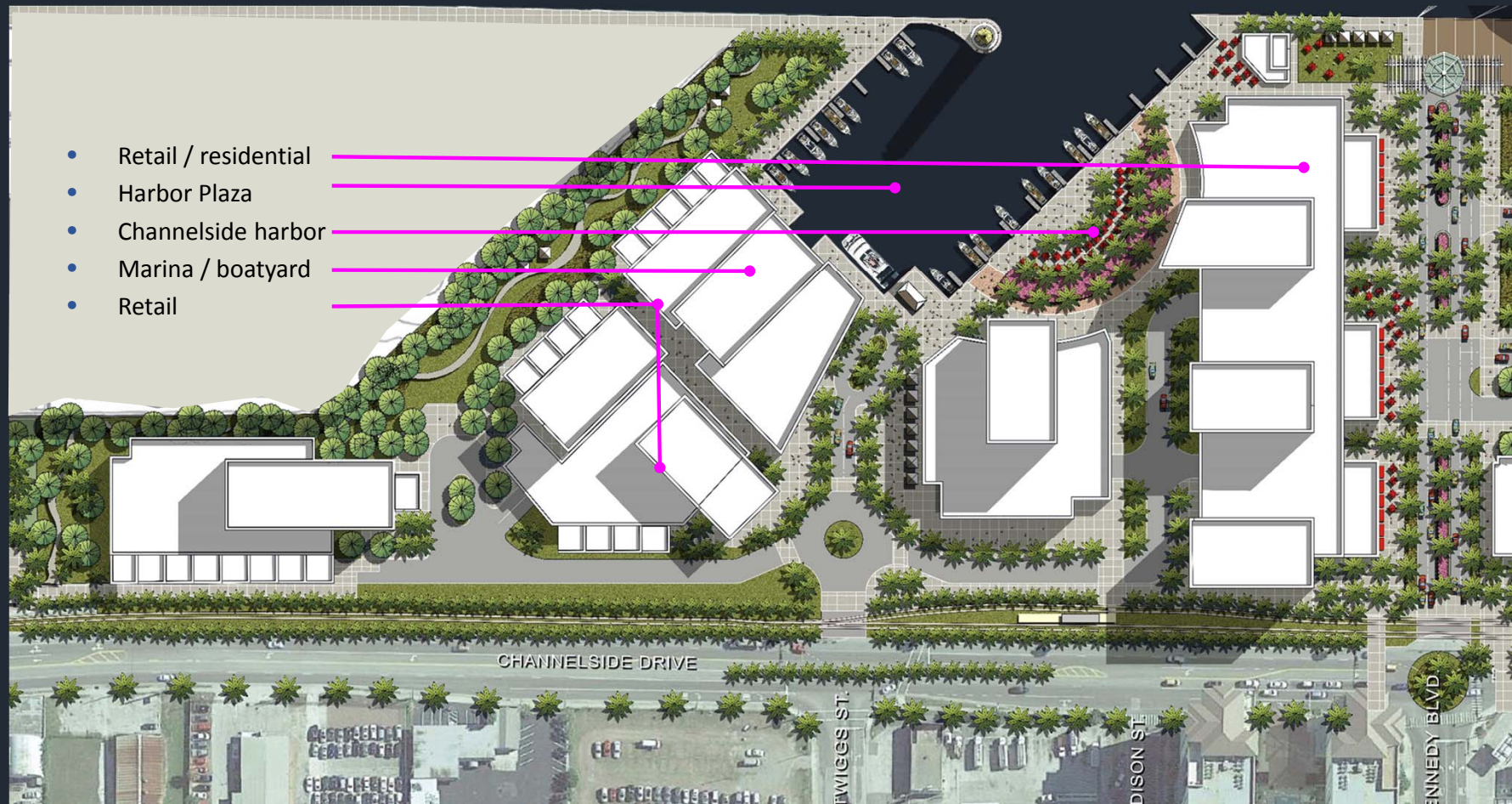
MARINA DISTRICT

PTB

MADISON ST



MARINA DISTRICT



CHANNEL HARBOR



CHANNELSIDE DRIVE



CHANNELSIDE DRIVE (PROPOSED)



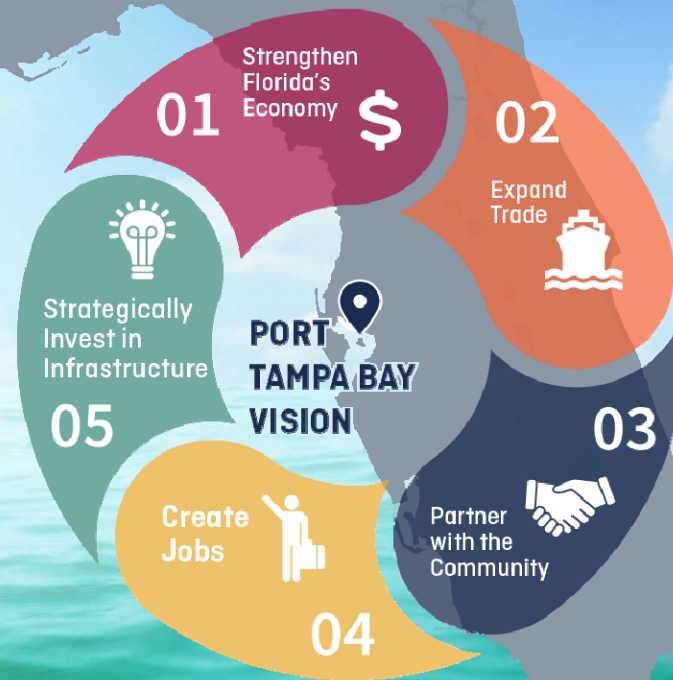
CHANNELSIDE DRIVE (PROPOSED)



CHANNELSIDE VISION



PORT TAMPA BAY VISION





THANK YOU

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Port Tampa Bay

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For more information on *Port Vision 2030*:

<https://www.tampaport.com/Real-Estate/Masterplan-Vision-2030>



PORT TAMPA BAY™
VISION 2030

