

Thank you for having me speak with you today. **[Slide 1: Paul Anderson President and CEO Port Tampa Bay]**

Let me start by stating the obvious: “the importance of seaport planning and development cannot be overstated because our seaports are directly tied to the trade competitiveness of our nation around the world”.

Among you - my colleagues here – I am honored to share just a snapshot if you will, **[Slide 2: 1st overall port aerial]** on some of our planning, development and achievement at Port Tampa Bay.

As Florida’s **[Slide 3: breakbulk with Falcon’s Fury part]** largest cargo tonnage port, and its largest land area - 5,000 acres – Port Tampa Bay is also the state’s most diverse, **[Slide 4: ship with phosphate]** handling dry bulk, liquid bulk, break-bulk cargo as well as container **[Slide 5: container/crane shot]** and Ro-Ro business.

We are also in the cruise business as Port Tampa Bay **[Slide 6: cruise]** handles almost 1 million cruise passengers a year - a number we will be proud to exceed this year for the first time in our history.

Further setting the stage and painting the picture for **[Slide 7: Ship with welder]** our challenges in planning, the port is also a massive complex that includes the largest ship repair facilities between Norfolk and Pascagoula.

We own a little more than half of the 5,000 acre complex, but we have administrative and certain oversight responsibilities that **[Slide 8: 2nd overall port aerial]** impact the entire port area. Needless to say, the challenges of master planning this sprawling and diverse port complex are expansive.

To address the dynamic port environment and prepare for the future, PTB just completed a thorough Strategic Plan **[Slide 9– cover of MP Executive Summary]** and Master Plan – called *Port Vision 2030*.

This includes a creative and comprehensive working waterfront plan for the entire eastern downtown port-owned waterfront known as Channelside. **[Slide 10– Channleside rendering]**

Vision 2030 is a strategic, market driven roadmap for modernizing and expanding our port's marine terminals **[Slide 11 – operation marine terminal]** and supporting infrastructure.

It identifies critical and interrelated strategies to optimize the return on port resources for the broadest spectrum of port stakeholders.

[Slide 12: bullets on image bckgrnd:

- tenants
- carriers
- customers
- passengers
- maritime community
- residents
- business partners
- overall community]

And this is key – as there are a lot of stakeholders involved. Certainly planning for our customers – both cargo owners and carriers - but also our business partners, our maritime community and private maritime companies, real estate partners and the public at large **[Slide 13– Community Outreach]**

The extensive stakeholder engagement effort included more than 75 meetings with port tenants, agency partners, environmental interests and the Tampa Bay community, as well as two public workshops.

The diversity of the port's lines of business is so great that the Master Plan had to focus on the following eight areas: **[Slide 14 – Bullets of the following on image background:**

Dry Bulk, Liquid Bulk, Container, General Cargo, Industrial Real Estate, Cruise, Shipbuilding and Repair, and Mixed-Use/Commercial.

The last area is so large that it required an entire separate study of its own that was rolled into the larger Master Plan document.

Port Tampa Bay owns 46 acres of downtown Tampa waterfront property in an area known as Channelside [Slide 15 – Channelside elevation] which is primed for major mixed-use development -residential, office space, retail, public space- in the next 10-15 years.

This development, primarily private sector driven, is expected [Slide 16 – Channelside rendering] to generate a significant revenue stream to the port that can then be plowed back into traditional port infrastructure.

Another unique area within these eight areas of focus is industrial real estate. Port Tampa Bay enjoys a significant inventory of large footprint sites available for development and actually [Slide 17 - Eastport] has been able to expand its real estate portfolio through acquisition and through unique fill projects such as the 23-acre site you see here. [Slide 18 - Eastport]

Developing an integrated industrial development leasing strategy in collaboration with regional economic development agencies is a key element of the *Vision 2030* Master Plan. [Slide 19 – 2030 rendering]

To close, I would like to talk about the importance of implementation of key master plan/strategic plan elements. The follow-through on these plans is what ultimately delivers value to a port region.

It's one thing to put up beautiful renderings and talk about what can be. It's another to stay engaged with the community and your audiences and see it through.

[Slide 20 – Three Success Stories] I want to highlight three successful elements from our 2010 strategic and master plans. These plans emphasized the need for rail and road improvements, and Port Tampa Bay aggressively pursued and advocated for both following the 2010 strategic plan and master plan.

The I-4/Selmon Expressway Connector, [Slide 21 – Selmon] opened in January 2014 after decades of planning. Port Tampa Bay has been a vocal advocate for this project to link Interstate 4 with the LeRoy Selmon Expressway, with dedicated truck lanes dropping right into the port. With this dedicated link between our port and the U.S. interstate system, it means it is now possible for a truck to exit the port and travel all the way to the Canadian border without

hitting a stop light. Furthermore, the Connector takes thousands of city truck moves off surface roads in Ybor City, **[Slide 22 – Ybor City]** a national historic landmark district. This project was accomplished primarily through state funding but also received an important federal infusion from the American Recovery and Reinvestment Act of 2009.

Public-private partnerships drive all that we do, and a second success story from the 2010 strategic and master plans **[Slide 23 – Gateway Rail]** was the Tampa Gateway Rail Project, the first on-dock multipurpose unit train facility for ethanol in Florida. Tampa is the energy gateway for all of west central Florida handling about 16 million tons of petroleum annually to support the needs of about 10 million residents in West Central Florida and approximately 66 million annual visitors to the region.

Ethanol must be delivered efficiently to Tampa to be blended **[Slide 24 – second Gateway Rail shot]** with gasoline and the Tampa Gateway Rail project, completed in 2012, accomplishes just that. Close to 4 million barrels of ethanol annually can be delivered by rail through this state-of-the-art on dock unit train terminal which is connected by pipeline to facilities owned and operated by energy giant Kinder Morgan. **[Slide 25 – logos for Port, CSX, FDOT, Kinder Morgan]** CSX, Port Tampa Bay, the Florida Department of Transportation and Kinder Morgan formed the unique public private partnership to complete this project.

As noted, Port Tampa Bay is the energy gateway for the center of our state. When our main port petroleum terminal was in need of significant modernization and expansion, the port partnered with four petroleum companies **[Slide 26 – logos from the oil companies – Kinder Morgan, Marathon, Transmontaigne Buckeye]** and the State of Florida to completely redesign and construct a \$55 million state of the art petroleum facility that allows offload of petroleum products at any one of four docking facilities for delivery to **[Slide 27 – Petroleum facility]** multiple terminals through a central manifold system.

Recognizing the vital, ongoing importance of the rapid delivery of fuel throughout the center of our state, the port has proactively pursued initiatives to ensure our citizens and residents are reconnected to cargo flows, and in particular fuel, following a natural disaster such as a hurricane.

In 2015 Port Tampa Bay was certified by **[Slide 28 – Storm Ready logo]** the National Weather Service as “Storm Ready.” The StormReady program recognizes communities or organizations that have protocols in place to mitigate weather disasters and promote the protection of life and property. Port Tampa Bay was the first port in the nation to receive this certification when it received the designation in 2015.

Furthermore, the Port has purchased a state-of-the-art mobile command unit that is capable **[Slide 29– Mobile Command Unit]** of handling many of the technology requirements of operating the port during and after a storm.

Also, the port leases space in a building 40 miles east of the port that can withstand Category 5 winds. Port operations can be conducted from that remote site as well if needed.

In closing, **[Slide 30 – Andy’s slide of the cruise ship from the top of the University Club hanging outside Christyna’s cube]** we view port planning as the integral, front end piece that ultimately drives decision making which leads to projects, which in Tampa’s case are often good examples of robust public-private partnerships.

The projects we are building are often legacy type projects that will deliver general benefits. Today cargo is the currency of the world and ports are the gateways for that cargo to **[Slide 31 – thank you slide comes up]** enter and leave our nation. Our role in port planning and development must be strategic so as to maximize our economic contribution to the regions we serve.