CANAVERAL PORT AUTHORITY

30 Year Strategic Vision Plan
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Introduction

The future of Port Canaveral is bright. Founded in the 1950’s, the Port has transformed from commercial fishing and cargo vessels laden with oil, newsprint, and orange juice to be one of Florida’s largest ports.

The Port sits at the junction of Florida’s main North-South and East-West corridors creating opportunities for trade and tourism development to serve Brevard County, Central Florida and the state. The future has exciting possibilities and choices for the Port. The ability to balance its traditional and historical uses while growing at record pace is the focus of this Plan.

This Strategic Master Plan ("Plan") is a vision that looks 30 years into the future while at the same time focusing on major short-term steps that the Port needs to take during the next 10 years.

The Plan shows the potential for the Port’s major businesses: cruise, cargo, fishing, parks and recreation, marine recreation and commercial development, as well as the great potential offered by the growth of the new commercial space industry.

This Plan also looks at a way of reorganizing the Port in a manner that will create long-term synergy between the Canaveral Port District, Brevard County and the Central Florida region.

Future demand for land and bulkhead is greater than what is currently available at the Port. Identifying key infrastructure requirements that will enhance and support all business lines into the future is vital. This Plan projects the best future use for limited resources (land and bulkhead).

This is an exciting Plan and represents potentially one of the largest capital programs ever in the history of the Port, understanding the significant role the Port plays in the region’s economic development.
GOALS OF THE MASTER PLAN

Port Canaveral was formed for the purpose of serving the maritime needs of the area and to create value for the community and state. This Strategic Master Plan has set as its logical foundation the following goals:

- To be a great partner to the citizens and users of the Port by providing services and opportunities to the private sector;
- To be a great neighbor by creating developments which are compatible with the adjoining communities;
- To serve the needs of the maritime community by providing the infrastructure needed to facilitate the movement of goods and services.
2047 Strategic Master Plan Vision

1. JETTY PARK
2. BOAT RAMP
3. CT 2-3
4. CARGO AREA
5. CT 1
6. GEORGE KING BLVD
7. THE COVE
8. PORT CENTRAL
9. EXPANSION PARCELS
10. MARINA DISTRICT
11. SERVICE VESSELS BERTH
12. CT 10
13. CT 8
14. CT 5
15. SPACEDPORT
16. GENERAL CARGO
17. PETROLEUM TERMINAL
18. BULK AREA CONSOLIDATION
19. POTENTIAL LNG AREA
20. CT 6
21. DEVELOPABLE PARCELS

*POTENTIAL AQUARIUM SITE
Cruise

Port Canaveral has grown from a brand new cruise port in the 1980’s, to be the second largest cruise port in the world today.

The Port’s successful growth is rooted in the link between Central Florida theme parks and the cruise industry. The Port is a world class cruise gateway serving some of the world’s most sophisticated cruise vessels afloat today. The increase of passengers driving to the Port has been responsible for a boom in hotel and allied industries in the local area. Today, many major cruise lines are operating some of the largest cruise ships in the world at Port Canaveral, underscoring the Port’s significance as one of the most important cruise ports in the United States. Each cruise line has grown by increased ship size and number of ships at the Port. The cruise lines not currently operating at Port Canaveral are now viewing this Port as an opportunity for increased business.

Port Canaveral is unique in that it is a major homeport and also a significant port of call for ships that are homeported in the northeast. These ships view Port Canaveral as an important element in their itinerary. This combination yields higher volumes and higher utilization of the terminals as evidenced by the Port’s highest average passenger per terminal use than any port in the world. The Master Plan presents the potential of exceeding 8 million passengers over the 30 year planning horizon.

Strategically, Port Canaveral is the one Florida port with the highest growth potential thus driving infrastructure development.

The Port currently has five cruise terminals. Future demand indicates that the Port will need to add another three terminals and update an existing berth.

As part of the cruise program, the Plan’s vision includes “Port Central”, an integrated transportation center creating space for a consolidated rental car facility and additional parking.
Cruise Passengers Forecast
New Eastern Cruise Terminal

- Terminal
- Parking Garage
- Provisioning Center
- Developable Parcel
- Bike / Linear Path
- Boat Ramp

Redeveloped West Cruise Center

- Developable Parcel
- CT 10 Expansion
- Service Vessels Berth (Future T)
- Parking
- CT 5
Cruise Capital Program

- CRUISE TERMINAL: $530,005,699
- PARKING: $202,418,350
- BERTH & APRON: $369,836,442
- CRUISE PROJECTS: $1,147,917,217
- TOTAL: $2,250,177,708
Cargo

Bulk and general cargo have been the historic backbone of Port Canaveral - serving the energy needs of Central Florida with a large petroleum operation, aggregate, rock and citrus among other commodities. In recent years, cargo opportunities expanded at the Port to include new auto imports/exports.

Future cargo growth will continue as long as Florida’s growth, population and the economy are maintained. At some point, petroleum traffic may level off or decline as the United States switches to more renewable energy sources.

The Master Plan divides the north sector of the Port into three areas to handle cargo. The Port’s container business has been planned using volumes consistent with overall demand for container movement within Florida, taking into consideration competing ports and logistical challenges of moving containerized cargo outside of Florida.

- The north side cargo area will continue to handle bulk including expansion possibilities to accommodate Liquified Natural Gas ("LNG"). LNG will be an important source of energy in Port Canaveral, where both rockets and cruise ships will increasingly depend on this fuel. LNG capability at Port Canaveral will increase its competitiveness against other ports.
- The central north area will serve general cargo, container and auto facilities. Depending on economic drivers, this area may evolve over time.
- The western end is identified for spaceport operations.

The reality is that the Port may have more demand for land on the north side than what is available. The prudent development of cargo sites to maximize their use will be of critical importance.

On the south side of the channel, the existing general cargo facilities remain in place.
North Cargo Area Redevelopment

- N8 - SPACEPORT BERTH
- N7 - SPACEPORT BERTH
- MAIN SPACEPORT AREA
- EXISTING SPACEX LEASE
- SHORT TERM SPACEX LEASE
- N3 BERTH RECONSTRUCTION
- N4 BERTH RECONSTRUCTION
- PETROLEUM TERMINAL
- BULK AREA CONSOLIDATION
- NEW TERMINAL - AUTOPORT
- GENERAL CARGO TERMINAL
- NEW TERMINAL - CARGO / SPACE
- ROAD IMPROVEMENTS
- LNG FACILITY
- NEW GATES
- NEW CRANES
Cargo Capital Program

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<tr>
<th>BERTH &amp; APRON</th>
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<tr>
<td>SECURITY</td>
<td>$4,527,839</td>
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<td>CARGO YARD</td>
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<td>AUTOMOBILES</td>
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<td>DREDGING</td>
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<td><strong>TOTAL</strong></td>
<td><strong>$355,656,460</strong></td>
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THOUSANDS
Spaceport

The Port has been historically vital to the space program. The operational concepts of commercial space companies utilizing water landings of their rockets makes the Port a critical component - as important as the launch pads at Kennedy Space Center and Cape Canaveral Air Force Station. Thus, it is imperative that the Port have capability to support the needs of this strategic industry which is so vital to Florida and the nation.

This industry, still in its nascent years, has potential needs which are yet to be fully determined. The Plan has built-in flexibility which includes dedicated area for spaceport operations to transfer rockets and equipment to nearby commercial space facilities, as well as provide berth space for marine vessels transporting space mission components.

The Plan provides for additional phases to accommodate growth needs of the industry and represents the first east coast seaport to have a spaceport component.

| WORK BOATS LAY BERTH (SPACEPORT) | $11,200,000 |
| SPACEPORT BERTH N8 | $43,260,000 |
| SPACEPORT BERTH N7 | $24,500,000 |
| TOTAL | $78,960,000 |
Commercial Fishing

Commercial fishing has been a key element of Port Canaveral. As an original user, it is embodied in the enabling legislation that created the Port Canaveral District. In the past, the fishing industry has been scattered along the south channel in locations where they could coexist with adjacent areas but without a dedicated facility. Currently, some of the business is located adjacent to the restaurants.

The Plan acknowledges the importance of the industry and has created a commercial fishing center. This center will have the necessary berthing facilities for the fleet, and more importantly, the yards for working the boats including nets and equipment. The area will be part of the expanded Port Canaveral waterfront and incorporates a retail direct-to-consumer market. This unique investment highlights the integral role of commercial fishing in Central Florida.
Parks & Recreation

Parks and Recreation have been important components of Port Canaveral. The Port historically regards this as an important mission to benefit the community. From its founding, the Port dedicated the most valuable piece of property in its inventory for parks and recreation. Jetty Park and the adjacent boat ramps at Freddie Patrick Park are located on beachfront property and at the mouth of the channel. This Master Plan reaffirms the importance of those facilities.

A comparison of parks and recreation at other major ports shows that Port Canaveral is in a leadership position in this area. Most ports in Florida have no parks and recreation as part of their mission or their inventory. Parks have only been introduced in very urban ports, particularly on the Pacific Coast where cities have evolved adjacent to ports.

Port Canaveral currently has bay walks, beachfront, fishing piers, boat ramps, viewing areas and many of the important features related to parks and recreation; more than all 14 Florida ports combined.

The Master Plan, however, goes one step further proposing a new central park for activities and events as part of its new central waterfront facilities. This additional park will be at the entrance of the Port and looks to provide a different level of experience than those of the other two parks.

The Plan identifies a linear park connecting Rodney Ketcham Park on the west end of the Port to Jetty Park on the east. The linear park will provide bikeways, jogging paths, connectivity between the two parks and access to the City of Cape Canaveral, as well as offer a gentle buffer between the city and port activities.
Parks Capital Program

THOUSANDS

$6,000
$5,000
$4,000
$3,000
$2,000
$1,000
$0

2017  2018  2019  2020  2021  2022  2023  2024  2025  2026  2027  2028  2029  2030  2031  2032  2033  2034  2035  2036  2037  2038  2039  2040  2041  2042  2043  2044  2045  2046  2047  2048
Marine Recreation

The Port has always had significant dedicated marine recreation facilities with wet slips and dry slips. Strategically, marine recreation is commercially attractive and in high demand by the community. With direct ocean access, it has significant growth potential.

The Plan envisions state-of-the-art marine recreation facilities on the west end of the Port with wet slips and increases the number of dry slips. This Plan calls for realigning dry slips into a more compact area with a proper functioning yard and service equipment. Retaining marine recreational elements, such as the Yacht Club and all other marine uses is important, along with consolidation of the facility into a more efficient use of land.
Commercial Development

The Port Canaveral Strategic Master Plan has a vision for commercial development, which includes preserving its popular restaurant row. In the past, commercial development at the Port reflected land use when there was minimal demand.

Looking ahead the Plan prioritizes commercial development to reflect best use of maritime assets, such as bulkhead, to ensure the Port continues to grow and sustain its economic viability in the region. The ability to generate revenues from suitable land use will ensure the Port remains competitive in the maritime industry.
The Master Plan shows a vision for the development of a central waterfront area using a cove theme. This calls for building upon the success of restaurant row by creating an inner cove area to offer opportunities for more waterfront venues in a different setting. Shallow water berthing space is created for recreational marine and commercial fishermen. This new cove area is a working waterfront concept including a section for work boats. A central area for tugs and service vessels, along with a necessary maintenance yard, will be a critical component.
The Cove Capital Program

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<tr>
<td>THE COVE - DEVELOPMENT</td>
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<tr>
<td>THE COVE - WORK BOAT CENTER</td>
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<td>THE COVE - COMMERCIAL FISHING CENTER</td>
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<td><strong>TOTAL</strong></td>
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The Plan shows the incorporation of Exploration Tower into a more functional use facility by shifting from predominately an observation platform to a business center. The Plan calls for developing a conference center, which will allow businesses in the community the opportunity to host meetings and conferences. This will be attractive to commercial space organizations and other companies that are moving into the area. Such a facility would not compete with any surrounding developments in the community, as it is not intended to be a convention center.

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