

## 4.0 Future Markets and Projections

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### 4.1 Background

The Port of Fernandina, while being a relatively small port when compared to nearby competing ports, has several distinct water-side advantages. The Port of Fernandina's main competitive advantage, when compared to other ports, is its proximity to the Atlantic Ocean that is unencumbered by air draft limitations. The Port of Fernandina also benefits from the common deep water channel used by the US Navy for the Kings Bay Naval Base, and is afforded the benefit of the U.S. Government ensuring that that the common channel depth is maintained. The Navy's use of the channel is infrequent and has not created a delay for shipping traffic to the Port. The Port of Fernandina has an approximate 2.2 mi channel length, significantly shorter than the 38 mi channel in Savannah or the 20 mi channel length at JAXPORT or the 17 mi length in Charleston. The channel configuration to the Port of Fernandina is also without restrictions for two way ship traffic or access restrictions while other ships are at fueling stations. In many cases ships equipped with bow thrusters can enter and exit the Port without the assistance of tugs.

The Port of Fernandina competes with 14 Florida ports for port business as well as State & Federal financial resources. Brunswick, Savannah and Charleston are the primary out-of-state East Coast Ports in the region that directly compete for Eastern U.S. cargo.

The Port of Fernandina is a non-union port for all operations, but because of its small size, may be able to provide broader services to both International Longshoreman's Association (ILA) and non-ILA serviced ships that are in the market and move between union and non-union ports.

The Port of Fernandina is underutilized for its existing size and configuration and is under marketed given the apparent market opportunities. The Port of Fernandina currently functions as an export port for a limited number of export products that are manufactured in close proximity to the Port. The Port primarily exports steel manufactured locally and from other southeastern steel manufacturers. The Port also exports kraft fiber liner board made at the Fernandina RockTenn plant, along with paper products from other southeastern manufacturers.

The Port has the potential to increase business on traditional regionally exported freight as well as imports destined for distribution in the Southeast and consumed in the substantial import market of Florida. Specific markets and business development opportunities defined to grow beyond existing capacities will have to address adequate storage space, ancillary acreage, berthing facilities, intermodal capabilities, and the availability of equipment.

The potential business markets, market capture and projections within a 3, 5 and 10 year horizon are discussed below in more detail.

### 4.2 Global Shipping Market

The Panama Canal expansion scheduled for 2015 is expected to produce an 18% increase in container freight volume moving through the canal. This increase is further projected to produce 2% more container volume specifically destined for the Eastern U.S. ports. Since this increased volume will be housed in Post-Panamax scale ships, several ports have begun substantial infrastructure investments to accommodate the larger ships. Many other ports are not yet able to fund expansion based on ship size issues related to physical channel or air draft restrictions. This global shipping trend creates two new local market opportunities that can be targeted by the Port of Fernandina.

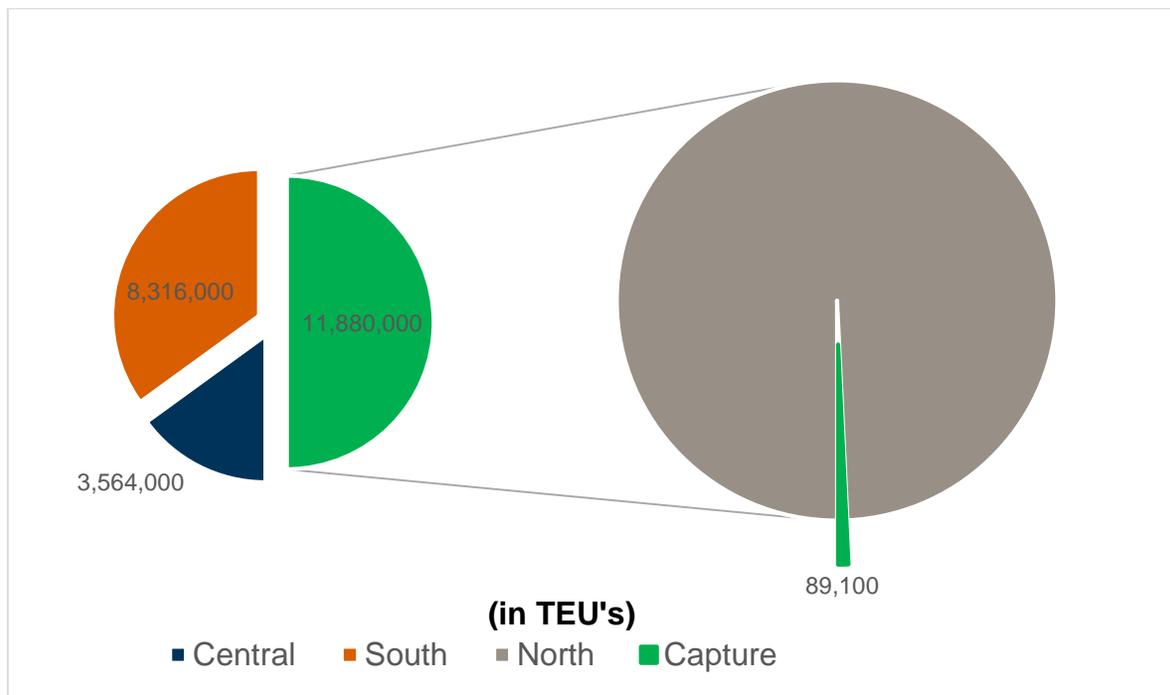
#### 4.2.1 Transshipment Hubs in the Caribbean

Based on discussions with industry executives in Panama and direct knowledge of specific island transshipment facilities, we estimate that 18,760,000 (TEU) containers will hub transfer via Post-Panamax ships in northern, central and southern Caribbean locations during the period of 2015 to 2016. The 2014 period will still be focused on infrastructure construction and business development activities related to this expected increase in Post-Panamax freight volume. This trans-hub based freight will serve as one large target market for the Port of Fernandina, where smaller ships can provide U.S. distribution and drop exported freight destined for more extended Asian markets into these Caribbean hubs. We further estimate this Caribbean Transshipment Hub market to grow to 23,760,000 TEU by 2017 on an annual basis as new Post-Panamax ships currently in the development pipeline are delivered into this market space. Future growth in this submarket will depend on global economic activity and the ability of the Caribbean economies to finance port and port-side infrastructure.

Projecting flat growth from 2017 forward, with a targeted business development effort, the Port of Fernandina can expect to capture a maximum of 0.5 % of this total Caribbean Hub freight movement volume, where Southeastern U.S. distribution is needed and the Port can accommodate exports from the same region destined for transshipment hubs. We expect new charter based feeder ships and carriers already in the regional market to be active in this submarket given the proximity to the Caribbean and ability to access South eastern U.S. rail and interstate systems. Specific short term business development targets include:

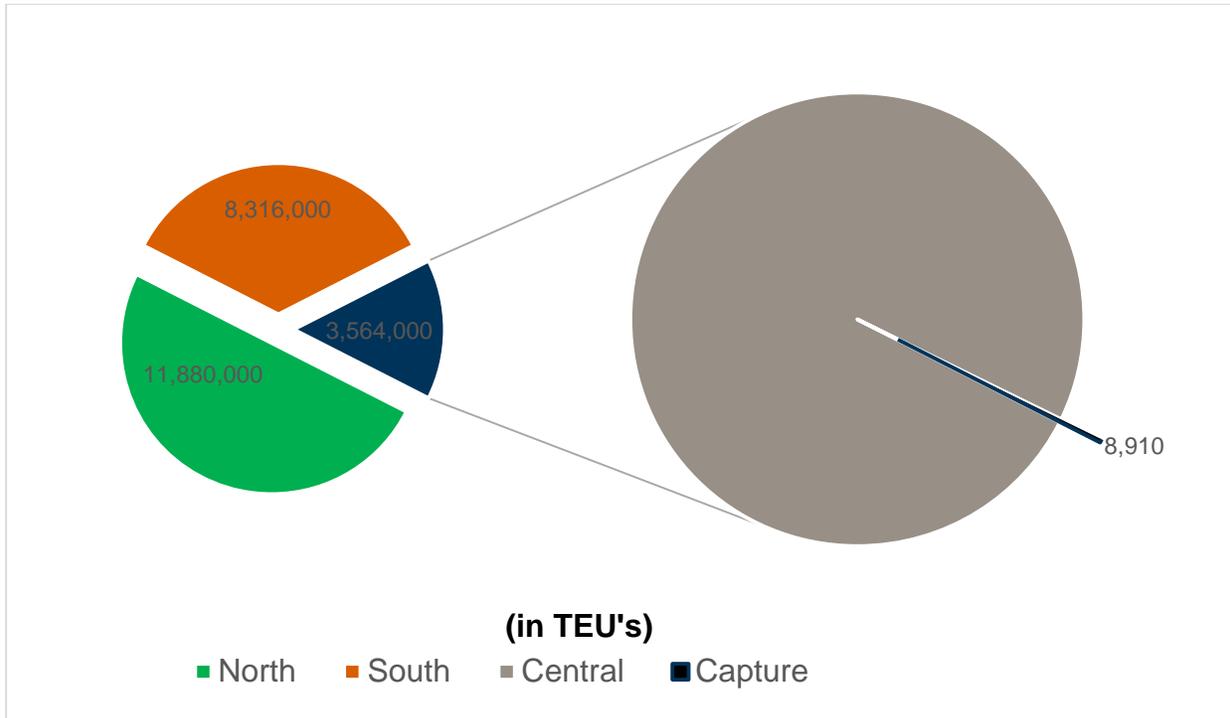
- X-PRESS FEEDERS, Florida Caribbean Express (CASFCX), Sea Star Lines, National Shipping & Other existing carriers active in the region with small ship inventory.

Our list of carrier specific executive contacts will be provided upon request to OHPA board members or staff assigned to support business development activities. Reference graphs below for sub market projections.



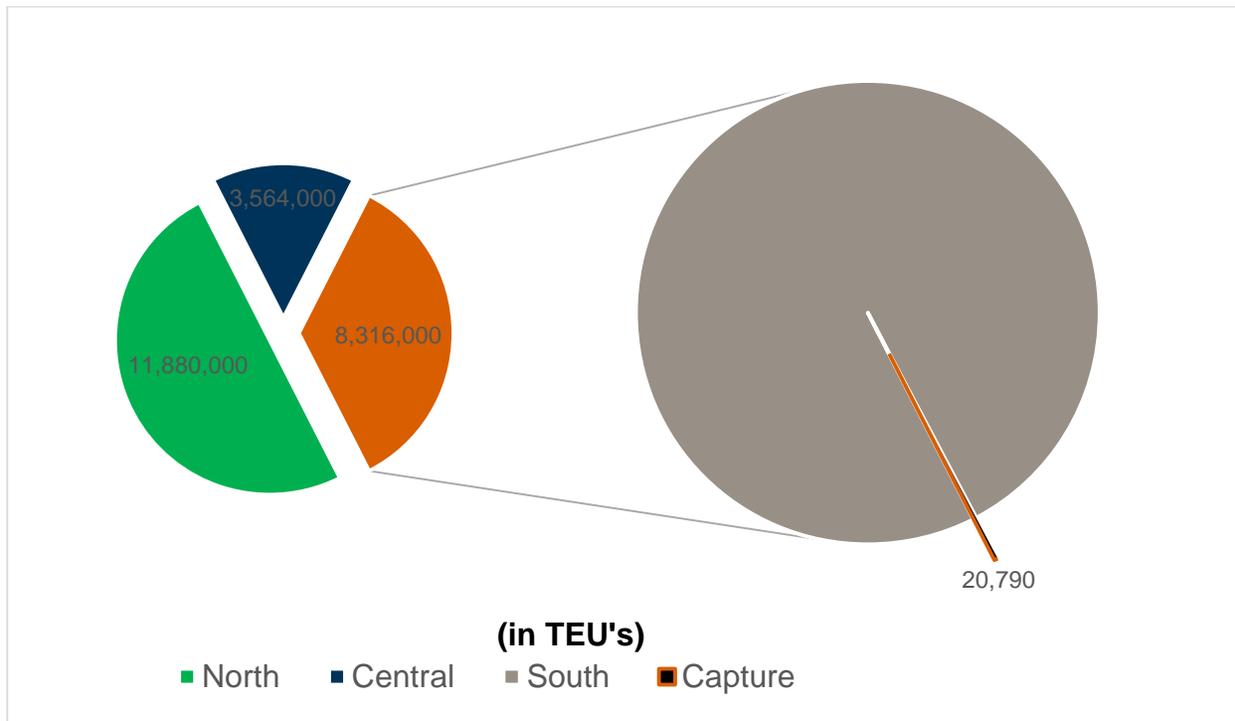
Marshal Strain Enterprises & Genesis Group 2013

Figure 4.2-1 . Northern Caribbean Transshipment Market



Marshal Strain Enterprises & Genesis Group 2013

Figure 4.2-2 . Central Caribbean Transshipment Market



Marshal Strain Enterprises & Genesis Group 2013

Figure 4.2-3 . Southern Caribbean Transshipment Market

## 4.2.2 Relocated Small Ships

This market is created as smaller ships are displaced by larger ships at the Eastern U.S. Post-Panamax capable ports, with infrastructure to accommodate Post-Panamax ships but not also able to service the same number of smaller ships due to limited berthing length/availability or availability of landside support.

Industry executives have estimated that Southeastern U.S. ports are expected to receive 2% of the increasing Panama Canal container volume in the form of Post-Panamax ships. Distributing this in terms of the number of Post-Panamax ships projected, route times, ship container volume and port call time between the three East coast ports capable of receiving these ships during the 2015 to 2017 period can provide a numerical understanding of the market potential for smaller ships to migrate towards smaller ports that can be responsive to call schedules. Given the geographic dispersion of the initial Post-Panamax capable ports, we cannot project local ship migration opportunities for the Port of Fernandina until Savannah begins Post-Panamax operations in 2018. Given the Savannah River channel width restrictions for ship movements, Elba Island restrictions for ship movements and berth length crane limitations at the Port of Savannah, we can project small ship displacement as potential market volume in the region that will migrate towards Brunswick, the Port of Fernandina and JAXPORT.

Based upon the arrival of Post-Panamax container volume projected in Savannah, we calculate a potential total small ship displacement volume in TEU, based on ship berthing and landside support, to be approximately 360,000 on an annual basis. This market should be approached in 2018-19 and should focus on the shipping lines currently calling in Savannah with ships below 2,500 TEU.

Target Carriers include:

- HANJIN, COSCO, K LINE, YANG MING
- GRAND ALLIANCE - HAPAG LLOYD, NYK, & OOCL, ACL
- CMA CGM, ANL, MARFRET
- NYK, HYUNDAI, EVERGREEN LINE, MAERSK LINE

The Fernandina Port should be able to attract 20% of this regional Relocated Small Ship container market or a maximum of 72,000 TEU on an annual basis beginning in 2019. Some of the major shipping lines might have contract issues with the labor arrangements at the Port, since the current operator uses non-ILA labor. However, in the past, shipping lines have been able to justify a call at Fernandina because of the general lack of unionized longshore labor in the immediate area. (Analysis and estimates provided by Marshal Strain Enterprises & Genesis Group 2013)

## 4.3 National & Regional Markets

The population concentrated along the U.S. Eastern I-95 corridor and reinforced by multiple Class I Rail lines, highways and numerous ports creates both direct freight import/export market volume as well as intermodal market volume as the freight business seeks savings in both time and cost across any available mode or travel. The strategic position of the Port of Fernandina supports development of both of these markets.

### 4.3.1 Inland Intermodal

The proximity of CSX, Norfolk-Southern, and FEC rail systems supports the movement of rail-to-port and port-to-rail freight as part of the larger Eastern U.S. import/export market. This import/export market can be defined by rail carrier data with freight origins or destinations at Ports along the East coast. An analysis of CSX in this regard indicates that this one rail network moved 6.4 million TEU in 2012. The intermodal only market volume was 2.5 million TEU for the same period. It should be noted that the intermodal only market segment has grown at a rate of 15% since 2009, which has been considered a depressed economic period for the overall transportation market.

The ability of the Port of Fernandina to effectively participate in both of these markets exists in the current condition since the short-haul line connecting the Port to CSX is capable of carrying double stack containers, and has significant room for increased railcar capacity. Genesee & Wyoming estimates a 1,000 railcar capacity exists, which greatly exceeds the on-site railcar handling capacity of the three major industrial properties including the Port of Fernandina. The Rock-Tenn property currently holds only 23 railcars at a time and the Port holds 20. The Rayonier paper mill will hold 110. It should be noted that the side yard area south of Centre Street effectively serves as ancillary port infrastructure for railcar handling and dwell time requirements and will support 350 railcars. This adjacent storage and handling capacity will allow multiple deliveries of 60 to 80 railcars at a time, which is a desirable transport size for efficiency of time and cost and will easily operate within existing rail and roadway intersection constraints.

Utilization of the regional rail and interstate network and Florida Strategic Intermodal System to contribute to market share through the Port of Fernandina, would require the identification of inland intermodal locations that can be cost effectively developed with infrastructure to support Port operations and enhance dwell-time capacity currently limited by land area available at or near the Port.

Given the limited scope of this market analysis to support the ten year planning horizon of this master plan, we cannot allocate or project a specific increase in Port freight market share related solely to available or programmed inland intermodal capacities, since many of the critical components of transport (time, cost, land and infrastructure) are regional, cross jurisdictions, are not currently in place or would likely consume the entirety of available resources for the OHPA to aggressively pursue.

The OHPA should however consider supporting regional transportation initiatives to construct new short haul rail connections or alignments to existing rail lines that support the east-west movement of freight between the regional Class I rail lines and the regional ports. The identification of inland land parcels that can support private sector manufacturing/distribution/warehouse functions as well as offer operational agreements to the OHPA under a joint land use designation of inland-intermodal will be a first step in a longer process of attracting the necessary business capital. It should be noted that the State of Florida has added Intermodal and Logistics to the list of Qualified Targeted Industries that share state and local tax and grant incentives.

The ability of the OHPA to exercise its charter in the form of Public Private Partnership projects or co-operation agreements will create additional incentives necessary in today's economic climate to produce both jobs and business for the Port. Shorter term business development opportunities based on specific markets that desire rail service, should be pursued without concern for constraints based on the rail infrastructure serving the Port.

#### **4.3.2 Import – Export**

Since the Port of Fernandina has rail service to the Port, a logical business development partner is the rail line services that will benefit from improved volume through the Port. This market segment would be focused on the types and volumes of freight that would benefit from rail service and may already utilize CXS service in other ports along the East Coast. A review of the carriers that currently fall into this category, and serve as the top rated volume clients of CSX include the following:

- CMA/CGM, MSC, CROWLEY, APL, ZIM, HAMBURG/SUD, MOL
- MAERSK, HAPAG/LLOYD, HYUNDAI

We cannot accurately project a specific local market capture from the broadly defined export-import freight volume that would also utilize rail as the preferred modes of movement. However, the joint business development opportunities that exist between the locally headquartered, CSX and Genesee & Wyoming should be investigated as a strategic part of a business development plan for the Port.

### 4.3.3 Short-Sea Freight Market

The short sea initiative for the Eastern U.S. coast is focused on the relief of inland traffic congestion by transferring trucked freight travel modes towards barge or ship services where the predominant pattern of movement is north-south. A significant volume of imports to Florida arrive via truck from other Ports over 450 mi away. This freight volume (defined in section 3.2) is split across all types of products, so the comparative value of time and the actual expense of comparable travel modes become the predominant data points to project market volume by mode of transport. Based on our analysis of this potential market, including the cost and time efficiencies of the interstate and highway systems to support trucked freight, combined with the last mile of distribution requirements for truck delivery, we conclude that short-sea shipping (port to port) is not yet positioned economically to capture freight market volume from the current mode splits. However, the trend toward traffic congestion pricing, tolled highway improvements, limited federal highway trust funds and the deferred maintenance expense of our bridges and drainage facilities, will create local and regional opportunities for short-sea shipping to become more competitive over the next ten years. This market can be monitored for shifts that would make short-sea more viable, but should not receive the business development efforts of the Port of Fernandina for the next five years. No growth is projected in this submarket for the Port of Fernandina during the planning horizon.

### 4.3.4 Barge Opportunities

The presence of numerous regional navigable waterways connected to the Port of Fernandina including the Intracoastal Waterway combined with organized entities such as the Florida Inland Navigation District, USACE and others creates opportunities to distribute or receive freight by barge. The specific regional waterways with direct connections, without requiring an open sea connection, create another unique feature for the Port of Fernandina that should be developed as part of a business development strategy. It is anticipated that the highest probability of regional barge traffic will be derived from southeast Georgia economic development efforts and less so from Florida due to navigation restraints on the Intracoastal Waterway south of Fernandina. The identification of “A” rated industrial manufacturing/distribution-sites that are regionally significant and connected to this barge navigable network of waterways has been identified in Section 3, as well as “B” rated sites without barge potential. Based on the size and location of these sites, we can project a total freight transport capacity of approximately 2,818,400 TEU per year at build-out based on industry standards. This freight volume can be split between rail, road or barge from these key regional industrial sites. The OHPA strategic position, in this regard, is to support the reservation of compatible land use designations and to support the potential development or expansion of these sites through the exercise of infrastructure investment consistent with the OHPA Charter where private sector or government sector development opportunities arise.

These industrial sites collectively can be projected to produce annual freight volumes split between modes as follows:

- Truck – 2,391,085
- Rail – 422,760
- Barge – 4,555

Actual mode splits for the target “A” listed site may be different depending on the actual density of site development and manufacturing characteristics. The development of industrial sites of this size can typically take between two to three years depending on the specific types of permits and equipment needs both for construction and operations. Active participation with regional economic development initiatives, for manufacturing based business development targeted at industries that are well matched to the “A” list sites, and participation in deal-flow with prospects will be required as part of a business development plan. We would expect at least one of these sites will become developed in the next five years generating freight exports to the Port via all modes of transport.

Independent Barge Carriers include: Crowley Barge Services, Trailer Bridge Barge Services, Banacol, McAllister, Crescent, Columbia Coastal, and Stevers Towing.

## **4.4 Targeted Freight Markets**

The influence of Post-Panamax shipping and related logistics, although significant, does not itself create the regional market for freight, which still requires a buyer and seller to operate within normal business parameters. Since the Port of Fernandina has been shown to be a cost effective port option for small volume freight in the past, it will be important to create relationships with specific business sectors that are engaged in the region or projected to grow. Business development activities will need to include representatives from both the Port Operator and Port Ownership to successfully obtain new business partners. Target regional markets include the following:

### **4.4.1 Forest Products**

#### **4.4.1.1 Lumber**

The Southeastern U.S. is one of the main growth areas for new housing. There is a great deal of lumber moving through ports in this area because of the strength of the housing market. A very strong case can be made for direct shipment into the closest port where the product is being used.

#### **4.4.1.2 Wood Pulp and Chips**

There is also a continuing demand in the building trade for the manufacturing of linerboard / press-wood. There are significant supplies of this raw material within a 180 mi radius of the Port.

#### **4.4.1.3 Hardwood**

With the increase of Central & South American hardwoods being imported into the U.S. for the housing market, the Port has a good opportunity to capture some of this business.

#### **4.4.1.4 Wood Pellets**

Wood pellets are increasingly being used in the UK and Northern European market in their thermal utilities industry.

Collectively increasing these forest products will require additional enclosed storage and the completion of the extended dock that is currently permitted. These facilities could be used to store additional dry cargoes and the dock will accommodate any additional barge traffic.

### **4.4.2 Bulk Products**

#### **4.4.2.1 Phosphates & Fertilizer**

Phosphates are generally a marginal product for the Port Industry as a bulk product. It is best handled in proximity to the end user or near the origin of the product. The Port of Tampa has just added a million-ton facility in addition to an existing facility. This expansion was through their efforts of working with CSX. The new facility, called "Rockport", is in addition to the existing Eastern Terminal that was already in existence.

Although phosphates are a regionally mined product, because of the cost margins in the marketplace, it is typically transported to the closest port in the region. Fertilizer on the other hand is a Northeast Florida regionally manufactured product sometimes comprised of bi-products that originate from the manufacturing of paper products and other industrial processes common in the region. The relative market value of finished fertilizer combined with the easier handling and storage requirements align well for the Port and warrant business development efforts.

Specific targets in this submarket include the import of fertilizer in bulk for companies like Mayo Fertilizer, exporting phosphates mined in nearby White Springs, Florida. Liquid Natural Gas (LNG)

The U.S. is increasingly producing and permitting for export bulk LNG in specialty ships and ISA containerized freight that moves by rail or truck. Several ports are building fuel platforms in association with new product transmission lines or are linking up to existing fuel bunker terminals to export LNG. There are major challenges for the Port of Fernandina to overcome if they want to export bulk LNG: cost of construction, space, security and port operation interruption. The initial cost would be significant because it is a new product with its own requirements for unloading, storage, transmission, and safety. LNG facilities also require a great deal of space, and with little or no available space in close proximity to the Port, and because the Port of Fernandina shares a channel with the Kings Bay Naval Base, there will likely be blast zone security issues associated with the establishment of a bulk LNG commodity. Port activities will also have to be coordinated with an LNG ship arrival and unloading. When an LNG ship arrives at a port, the port has to shut down for approximately three hours while it unloads. The product also has to be kept in a cold state while shipping. Accordingly we do not consider this to be a supportable market for the Port.

The Containerized ISA form of LNG export is well suited to the Port of Fernandina and is the preferred method of delivery and distribution in the Caribbean market which is undergoing a conversion away from diesel and gasoline for their trucking fleets, electric generation and desalinization plants. New regional pipelines, compression stations and delivery business ventures and distribution partnerships are actively creating business development opportunities for the Port that need to be addressed in the next year, if the Port is going to participate in this market space.

Business development opportunities in this regard should include Kinder Morgan with their ability to provide introductions into their primary business units and industry contacts. We have identified Belvedere Terminals as a specific opportunity for the Port due to their focus on the Georgia, Florida, and Caribbean fuel distribution markets. Belvedere is interested in partnering with the OHPA to both provide ISA tanker distribution through the Port (via rail) and development of an import platform for refined fuels at an ancillary location. Specific business volumes remain confidential, until a non-disclosure agreement can be executed.

#### **4.4.2.2 Compressed Natural Gas (CNG)**

The U.S. Environmental Protection Agency is targeting ports to improve their air quality as part of their “Green Ports” initiative. There will be more demand for CNG for ships as they will be required to convert over to CNG from diesel fuel as they enter and dock at a port. Most of the ports on the West Coast have already begun requiring ships to switch over to CNG when in the port which will save on electricity and other utilities that were normally using fossil fuels.

#### **4.4.3 Breakbulk**

##### **4.4.3.1 Steel & Metals**

With the Port already handling steel product, wire, steel sheets, re-bar and aluminum rolls, we can project continued growth in this submarket as the “feeder to hub” logistic plan is implemented over the next three years.

##### **4.4.3.2 Fruits and Vegetables**

The Port of Fernandina is strategically located for handling fruits and vegetables from South America and is supported by the proximity of distribution centers for three of the major food chains (Wal-Mart, Publix and Bi-Lo). A pilot program in South Florida is targeting this market which seeks to shorten the traditional Philadelphia based distribution to Florida. This pilot study should be monitored over the next two years while business development contacts are pursued. The Port would need a fumigating facility for the bananas and refrigerated storage to handle the product until it is ready to be shipped. The Port would need space for additional parking of trucks while the ships are unloaded and the cargo is inspected and loaded on the trucks.

#### **4.4.3.3 Containers**

Container traffic has been the mainstay at the port as far back as Emerald Lines calling from Fernandina to Bermuda. Since then there have been several smaller lines calling the Port from Central and South America, but the container business at the Port of Fernandina has been very cyclical due to market fluctuations. The shipping industry has changed over the years whereby a port the size of Fernandina can play an important role in the movement of freight. With the completion of the Panama Canal widening in 2015, the Port of Fernandina can offer a gateway to the Midwestern states. The transit time from the Port of Freeport Bahamas is ideal for a shuttle operation. Access to the port could afford a carrier access around the clock via barge, as well as, ships. The proposed 600 foot wharf extension for a barge operation would provide the ability of the port to work two modes of transportation at the same time which would be desirable for carriers.

In addition, the Port has always been able to handle general cargo from the medium-size vessels but a concerted effort must be made to take advantage of the Port's physical attributes.

The Fernandina Rayonier plant delivers approximately 2,434 Asian bound containers each year that are currently being shipped out of other competing ports. These could efficiently be converted to the adjacent Port of Fernandina by participating in the feeder to Caribbean hub to Panama Canal Post-Panamax Shuttle program.

Several national furniture retailers have distribution centers in the region. While researching this submarket, discussions with Michael's and Rooms-to-Go representatives revealed that they are two of the largest importers of furniture in the U.S. Collectively they will import 1.7 million containers into the U.S. in 2013. These two companies will also import 106,700 containers to two distribution centers located in Jacksonville and Eustis, Florida.

In researching their growth opportunities, both companies expressed the willingness to use the Port of Fernandina under the right conditions, that being cost effectiveness and timely customer service. The upside of adding an additional port of call at Fernandina gives them a second logistic resource to insure timely freight flow. After further conversation Rooms to Go stated they could commit 20% of their imports and Michael's stated they could commit 15% of their imports to the Port of Fernandina. The OHPA Board should insure that an immediate effort is made to secure this business through Kinder Morgan or other acceptable Port representation.

#### **4.5 Summary of Market Capture**

The feedback from direct industry representatives and potential customers indicate that there is a definite opportunity for cargo growth at the Port and surrounding identified intermodal sites. The Market Capture and Cargo Throughput Projections summarized below will likely exceed the capacity of the Port of Fernandina by itself, and this potential growth will support the expansion and development of both local and regional intermodal facilities in the Nassau County and southern Georgia area.

**Table 4.5-1. OHPA Projected Market Capture Summary**

	2014-2015	2016-2018	2019-2023
<b>Container-Rail</b>		145,930	61,200
<b>Container-Truck</b>	42,010	218,894	291,600
<b>Containers-Barge</b>			1,141
<b>Bulk-Rail</b>			239,108
<b>Bulk-Truck</b>			42,276
<b>Bulk-Barge</b>			n/a
<b>Breakbulk-Barge</b>	100	150	250
<b>Ro-Ro</b>			n/a

Notes: All volume state in TEU

Projections by Marshal Strain Enterprises & Genesis Group 2013

Values do not include existing port freight business volumes projected beyond 2013

Values are not cumulative across time periods

**Table 4.5-2. Cargo Throughput Projections 2010 to 2023**

Cargo Summary	2010	2011	2012	2015	2018	2023
<b>Containers</b>						
<b>Containers (boxes)</b>	20,540	16,330	11,312	18,002	74,180	139,324
<b>Containers (tons)</b>	146,652	102,969	60,384	113,032	547,855	1,348,657
<b>TEUs</b>	32,113	22,005	14,018	23,327	100,515	203,376
<b>Breakbulk Cargo (tons)</b>						
<b>Kraft Liner Board (KLB)</b>	221,186	207,543	149,770	125,000	87,500	75,000
<b>Lumber</b>	2,966	8,530	16	3,500	3,500	3,500
<b>Rebar</b>	106,136	112,430	51,284	74,000	85,750	96,500
<b>Steel</b>	142,576	207,416	94,501	100,000	135,750	158,000
<b>Woodpulp</b>	7,714	4,970	8,054	9,000	6,912	11,500
<b>Misc. General Cargo</b>	1,611	3,216	20,388	22,500	27,313	30,000
<b>Bulk Cargo</b>	0	0	345	845	1,095	1,250
<b>Total General Tons</b>	482,189	544,105	324,358	334,845	347,820	375,750
<b>Total Tons</b>	628,841	647,074	384,742	447,877	895,675	1,724,407

Projections by Marshal Strain Enterprises & Genesis Group 2013

#### 4.5.1 Business Development Recommendations

- The OHPA will have to begin an aggressive marketing program by hiring a Port Executive or Senior Marketer with a marketing/sales support staff or an Executive that can serve in both rolls. Kinder Morgan would remain in the capacity of operator of the terminal. The Port Executive or Senior Marketer would have the responsibility of contacting all the customers that will use the port and its facilities.
- Ensure that the U.S. Customs could and will have the manpower to handle the increase in freight to the port.
- The extension of the wharf must be completed in order for the port to handle additional ship and barge cargoes from the Bahamian shuttle or the numerous other shuttles that are being planned in the Caribbean.
- If the port can add additional land adjacent to the existing Port property, it would provide more flexibility and capacity.

#### **4.5.2 Other Assets and Equipment Needed to Improve Port Functionality**

- On Dock Storage – Need to add a cold storage for fruits/vegetables
- Fumigation facilities for bananas
- Special handling equipment as needed
- Yard cranes to work barges

#### **4.5.3 Development of Marketing Plan**

A Business development Plan should be developed to promote the Port by the Port Executive or Senior Marketer. The marketing plan should include the following:

- Develop literature that highlights all of the positive traits of the port
  - Water Depth
  - Distance and time from ocean channel to Port
  - Storage Space (both covered and open)
  - Equipment on hand
  - Specialized Facilities
  - Cranes
  - Types of Rolling Stock
- Make a key customer list of targeted corporations, products and ocean carriers
- Have port partners provide a representative with information they provide to/from the port
- Develop arguments for a customer to choose the Port of Fernandina
- Make a schedule of targeted accounts and call on them regularly

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