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A message from Governor Scott on the future of Florida's Freight and Trade

COLLIER COUNTY
FREIGHT & LOGISTICS OVERVIEW

## FLORIDA DEPARTMENT OF TRANSPORTATION

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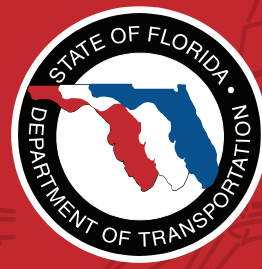
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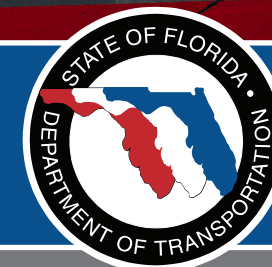
FDOT MISSION:
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES
THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND
PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.

Freight Mobility and Trade Plan

In recognition of the significant role that freight mobility plays as an economic driver for the state, an Office of Freight, Logistics and Passenger Operations has been created at FDOT. This office has been tasked with meeting the requirements of legislation in Florida House Bill 599, as well as meeting national freight guidance offered in H.R. 4348, the Moving Ahead for Progress in the 21st Century Act (MAP-21).

HB599 requires FDOT to lead the development of a plan to "enhance the integration and connectivity of the transportation system across and between transportation modes throughout the state." For this reason, Florida is already on schedule to meet MAP-21 guidelines and has become a leader in freight issues through its ongoing work in developing a Freight Mobility and Trade Plan. For more information, please see **www.freightmovesflorida.com**.

FLORIDA CHAMBER of Commerce

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January 2013

Collier County
FREIGHT & LOGISTICS OVERVIEW

COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Naples, FL	Naples, FL	2,305 Square Miles	321,520	27.9% (2000-2010)

Primary Economic Development Contact: http://www.napleschamber.org

- With nearly 90 courses in Collier County, Naples ranks at or near the top of the National Golf Foundation's Golf Holes per capita list.
- Immokalee Regional Airport became a Foreign Trade Zone in January 1997. The U.S. Department of Commerce designation allows companies that manufacture within the industrial park to import raw materials to manufacture their products and export them duty free. Foreign Trade Zone status has been obtained on 60 acres of the airport which maintains port-of-entry status for flights originating from foreign ports.

Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Accommodation and Food Services	4,268
2. Retail Trade	2,174
3. Professional, Scientific and Technical Services	1,333
4. Healthcare and Social Assistance	1,269
5. Agriculture, Forestry, Fishing and Hunting	1,129

Source: Florida Department of Economic Opportunity. Labor Market Statistics Center. LEHD State of Florida County Reports-Quarterly Workforce Indicators 2010-2011

Largest Industry Sectors by Employment

INDUSTRY SECTORS	% OF WORKFORCE
1. Trade, Transportation, and Utilities	19.2%
2. Leisure and Hospitality	18.9%
3. Education and Health Services	14.9%

Source: Enterprise Florida

Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Naples Community Hospital, Inc.	Healthcare	3,007
2. Publix Supermarket	Supermarket	2,214
3. Wal-Mart	Discount & Variety Store	1,547
4. Marriott	Hotels	743
5. Fifth Third Bank	Banking & Financial Services	733

Source: Enterprise Florida

Florida infrastructure moves 762 million tons of freight traffic annually.

The state highway system sees 195,755 million annual vehicle miles of travel.

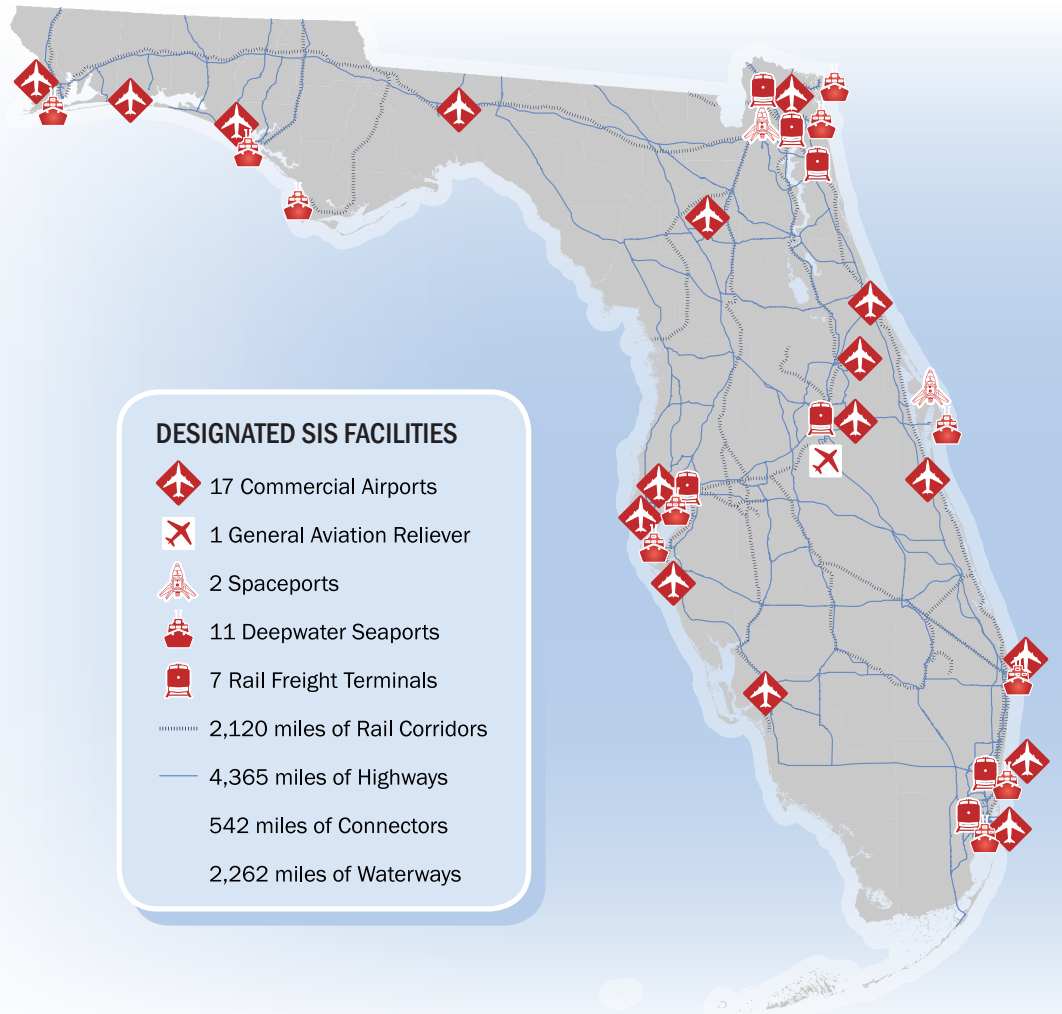**Truck travel accounted for approximately 11% of vehicle miles traveled on the SIS in 2010.**

Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

Florida has 784 aviation facilities, 129 public use, and 19 have commercial service.

The state boasts 2 spaceports and 5 active launch facilities.

Florida's 15 deepwater seaports moved 106.4 million tons of cargo and handled 2.8 million TEU's (20 foot equivalent container unit) in 2010.

Seven of the 15 seaports in Florida carried 12.7 million passengers, 12.1 million of which sailed on multi-day cruises in 2010.

100% of SIS waterborne freight in Florida is on a coastal or international shipping route.

16 Fortune 500 companies have their headquarters in Florida.

Florida's Strategic Intermodal System (SIS)

- **Strategic** – Consists of statewide and regionally significant facilities and services
- **Intermodal** – Contains all forms of transportation for moving both people and goods, including linkages for smooth and efficient transfers between modes and major facilities
- **System** – Integrates individual facilities, services, forms of transportation (modes) and linkages into a single, integrated transportation network

The SIS was established to:

- Efficiently serve the mobility needs of Florida's citizens, businesses and visitors
- Help Florida become a worldwide economic leader, enhance economic prosperity and competitiveness, enrich quality of life and reflect responsible environmental stewardship

Strategic Intermodal System

DESIGNATED SIS FACILITIES

- 17 Commercial Airports
- 1 General Aviation Reliever
- 2 Spaceports
- 11 Deepwater Seaports
- 7 Rail Freight Terminals
- 2,120 miles of Rail Corridors
- 4,365 miles of Highways
- 542 miles of Connectors
- 2,262 miles of Waterways

Florida
FREIGHT & LOGISTICS OVERVIEW

POPULATION	POPULATION RANK	AREA	AREA RANK	POPULATION GROWTH RATE
18.8 million	4th	53,625 sq. mi.	22nd	17.6% (2000-2010)

Chamber of Commerce website: **http://www.flchamber.org**

Top Employment Sectors

(Nonagricultural Business Groups by Industry)

1. Trade, Transportation, and Utilities
2. Education and Health Services
3. Government Services
4. Professional and Business Services
5. Healthcare and Social Assistance
6. Leisure and Hospitality

Source: Department of Economic Opportunity-Current Employment Statistics (2012)

DOMESTIC AND INTERNATIONAL MODAL MIX
(millions of tons)

- Truck 73% — 452m
- Air 0.1% — 1m
- Water 15% — 93m
- Rail 12% — 76m

Source: Trade & Logistics Study, Florida Chamber 2009

Top Business Sector Initiatives for Retention and Promotion

1. Clean Energy
2. Information Technology
3. Life Sciences
4. Aviation/ Aerospace
5. Homeland Security/ Defense
6. Financial/ Professional Services
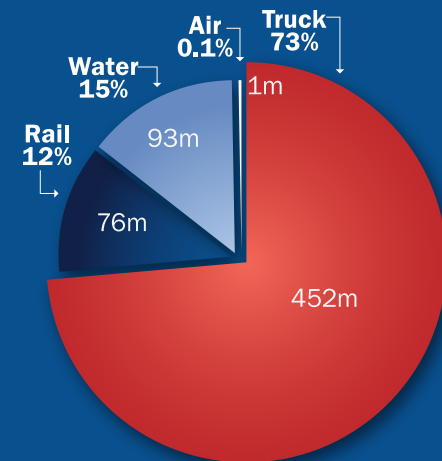
Source: Florida Chamber of Commerce

TOTAL FREIGHT FLOWS

- Within Florida 328 Million Tons
- IMPORTS 188 Million Tons
- EXPORTS 107 Million Tons

Source: Trade & Logistics Study, Florida Chamber 2009

Top International Trade Partners

The state of Florida is a major international hub accounting for approximately $149 billion in international trade activity in 2011.

EXPORTS	IMPORTS
1. Switzerland	1. China
2. Brazil	2. Mexico
3. Venezuela	3. Japan
4. Canada	4. Canada
5. Colombia	5. Colombia

Source: Trade & Logistics Study, Florida Chamber 2009

FLORIDA TRADE ACTIVITY

- TRADE EXPORTS
- TRADE IMPORTS

(Chart: $3B–$7B range, years 2011–2012)
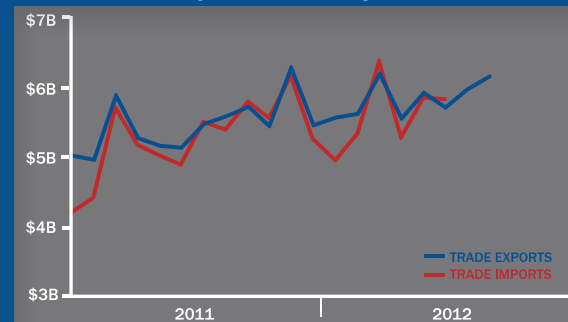
Key Transportation and Freight Facilities

| STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS	I-75, SR 29, SR 82
SIS RAILROADS	Seminole Gulf Railway
SIS AIRPORTS	Southwest Florida International Airport
SEAPORTS	Port Everglades
NON SIS STATE HIGHWAYS	US 41, SR 951
GENERAL AVIATION AIRPORTS	Naples, Immokalee Airport, Marco Island Airport, Everglades Airport, Dade-Collier Training Airport

Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	1,168,622
2. Nonmetallic Minerals	1,166,290
3. Petroleum or Coal Products	879,263
4. Food or Kindred Products	573,319
5. Clay, Concrete, Glass or Stone	337,701

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	658,875
2. Farm Products	494,181
3. Clay, Concrete, Glass or Stone	251,352
4. Nonmetallic Minerals	122,237
5. Printed Matter	57,762

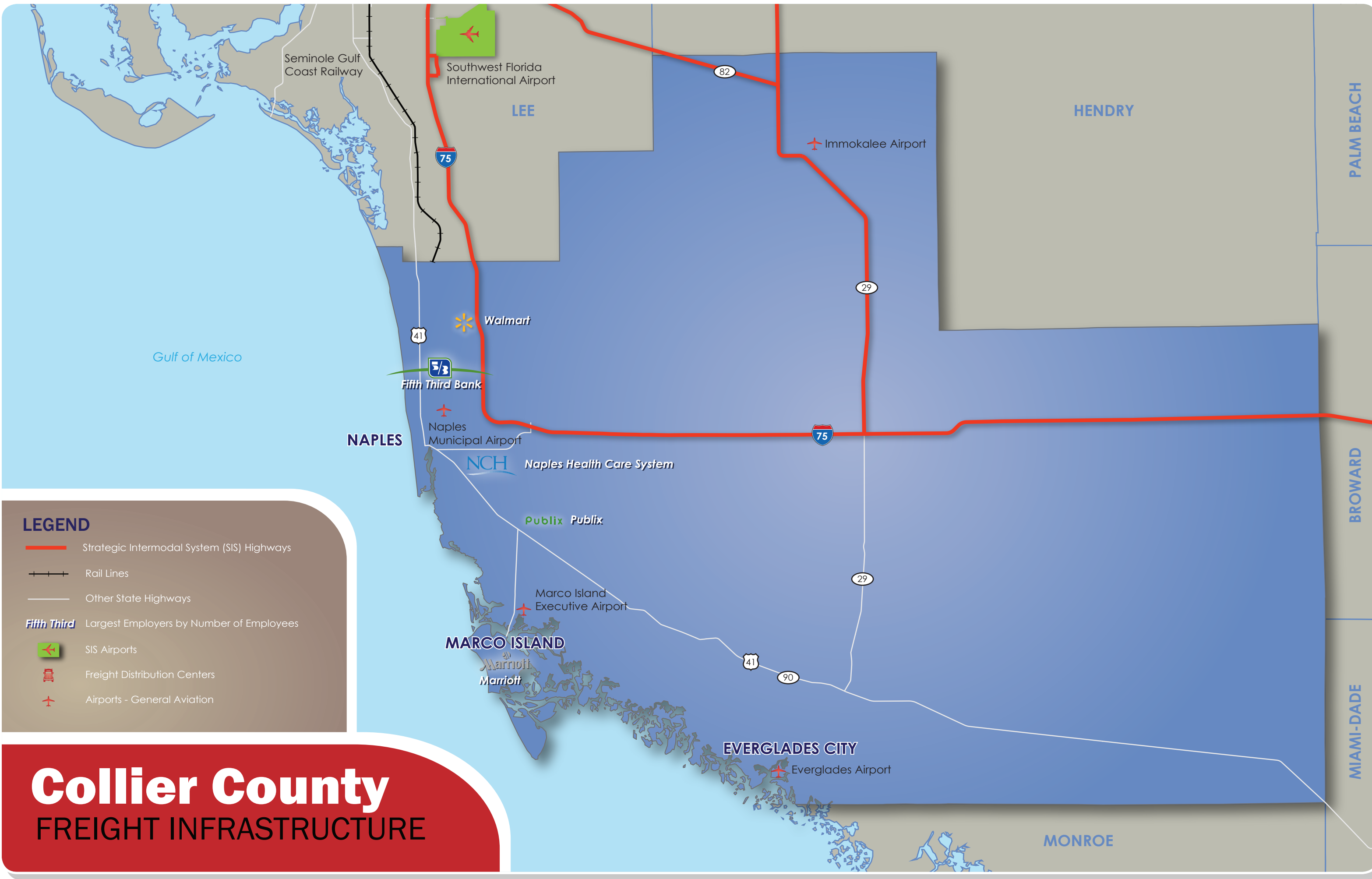*Source: IHS Global Inc.'s Transearch, 2011*

Collier County
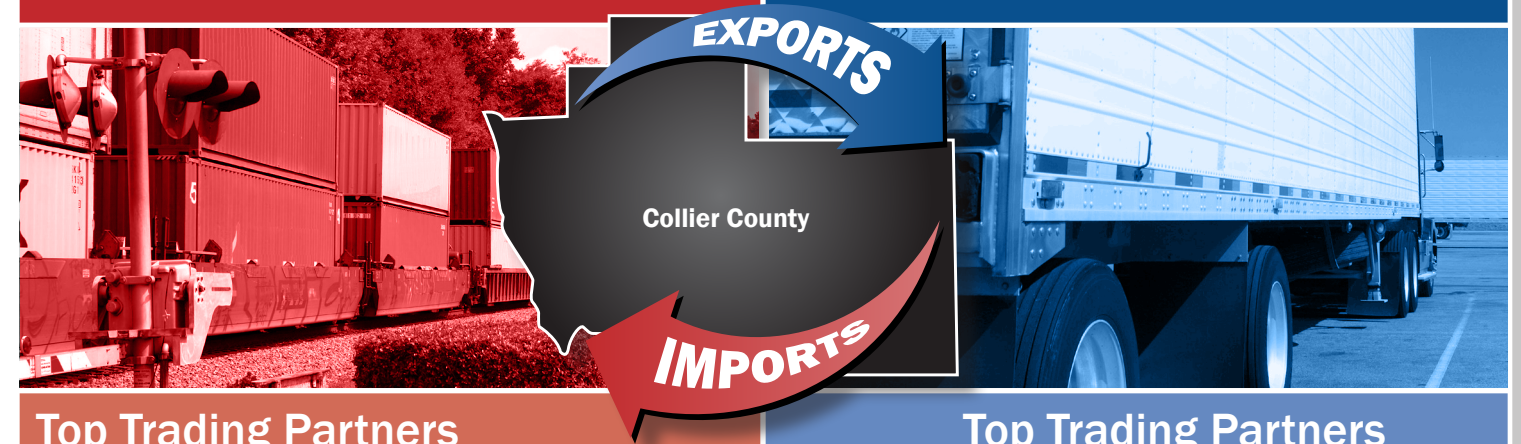
EXPORTS / IMPORTS

Top Trading Partners

IMPORTS	TRUCK TONNAGE
Lee County, FL	1,282,815
Broward County, FL	611,531
Miami-Dade County, FL	504,865
Hillsborough County, FL	320,190
Palm Beach County, FL	205,888

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

EXPORTS	TRUCK TONNAGE
Lee County, FL	233,947
Miami-Dade County, FL	190,854
Broward County, FL	112,893
Palm Beach County, FL	110,185
Hillsborough County, FL	64,765

Source: IHS Global Inc.'s Transearch, 2011

Collier County
FREIGHT INFRASTRUCTURE

Seminole Gulf Coast Railway

Southwest Florida International Airport

LEE

HENDRY

PALM BEACH

82

Immokalee Airport

29

Gulf of Mexico

41

Walmart

Fifth Third Bank

75

Naples Municipal Airport

NAPLES

NCH Naples Health Care System

Publix Publix

29

BROWARD

Marco Island Executive Airport

MARCO ISLAND

Marriott

41

90

MIAMI-DADE

EVERGLADES CITY

Everglades Airport

MONROE

LEGEND

— Strategic Intermodal System (SIS) Highways

┼┼┼ Rail Lines

— Other State Highways

Fifth Third Largest Employers by Number of Employees

✈ SIS Airports

🚚 Freight Distribution Centers

✈ Airports - General Aviation