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

FLAGLER COUNTY FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

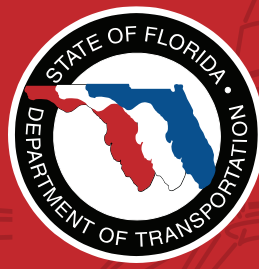
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Federal Legislative Contacts

United States Senate
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Phone (202) 224-5274

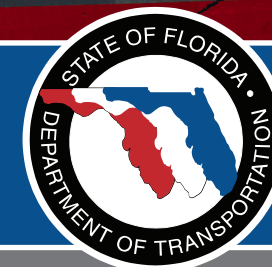
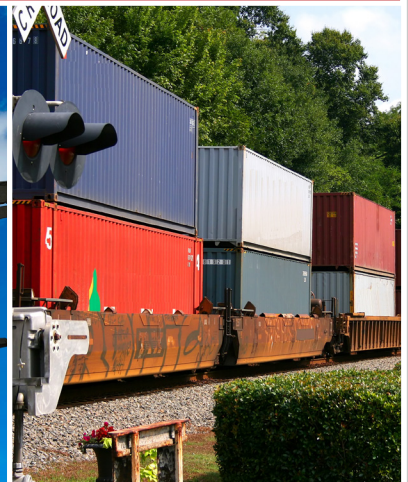
United States Senate
Marco Rubio
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US House of Representatives
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State Legislative Contacts:

Florida Senate
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Florida House of Representatives
District 24, Travis Hutson
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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.



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).

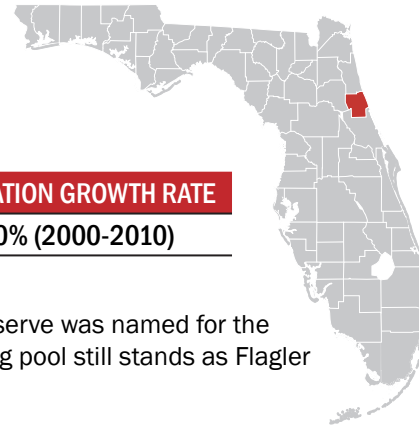
HB599 requires FDOT to lead the development of a plan to "enhance the integration and connectivity of the transportation system across and between transportation modes throughout the state." For this reason, Florida is already on schedule to meet MAP-21 guidelines and has become a leader in freight issues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



January 2013

Flagler County

FREIGHT & LOGISTICS OVERVIEW



COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Bunnell, FL	Palm Coast, FL	571 square miles	95,696	92.0% (2000-2010)

Primary Economic Development Contact: <http://www.enterpriseflagler.org>

- Princess Place Preserve is the crown jewel of Flagler County's preserves. This 1500 acre preserve was named for the wife of an exiled Russian prince. The original lodge and Florida's very first in-ground swimming pool still stands as Flagler County's oldest.
- The county was formed out of Volusia and St. Johns counties in 1917.
- Flagler County has a diverse business and industrial community offering an assortment of career paths. Flagler businesses employ over 18,200 individuals.



Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Retail Trade	234
2. Accommodation and Food Services	186
3. Administrative, Support, Waste Management and Remediation Services	150
4. Healthcare and Social Assistance	142
5. Manufacturing	106

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. Education and Health Services	13.4%
3. Leisure and Hospitality	13.0%

Source: Enterprise Florida



Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Palm Coast Data	Magazine Fulfillment House/ Process Subscriptions	500
2. Florida Hospital Flagler	Hospital	410
3. Publix	Retail Grocery	145
4. Hammock Beach Resort	Club	140
5. Wal-Mart	Retail	125

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.

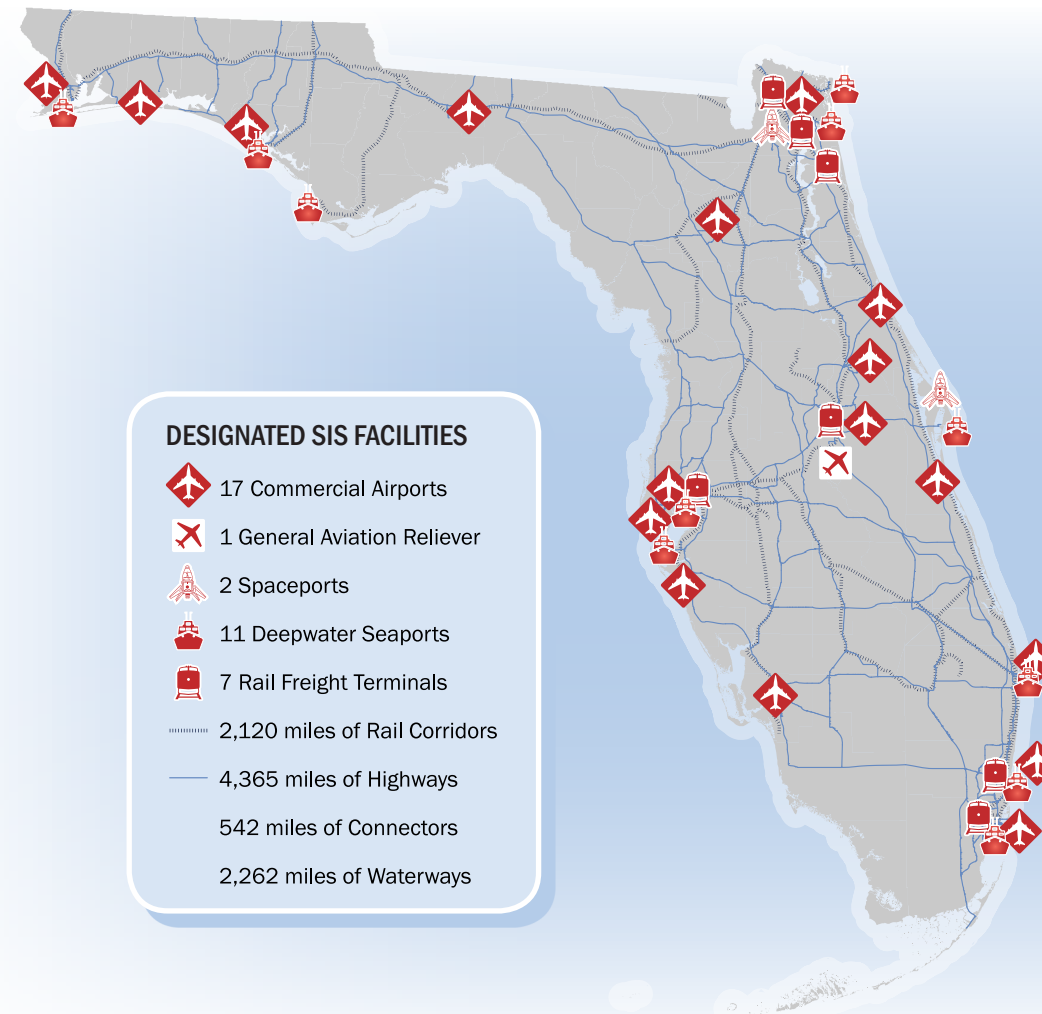
Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

Florida'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



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

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)

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

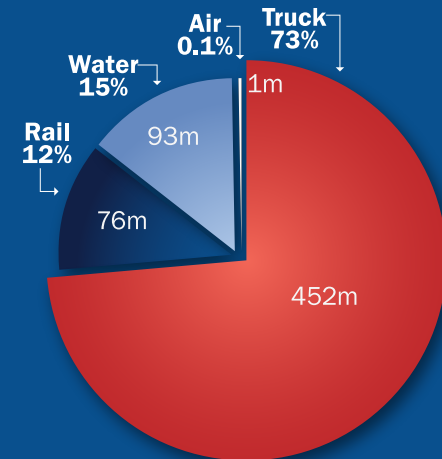
Top International Trade Partners

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	

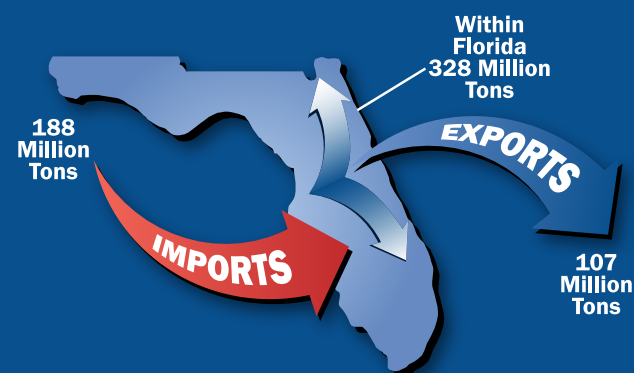
Source: Trade & Logistics Study, Florida Chamber 2009

DOMESTIC AND INTERNATIONAL MODAL MIX (millions of tons)



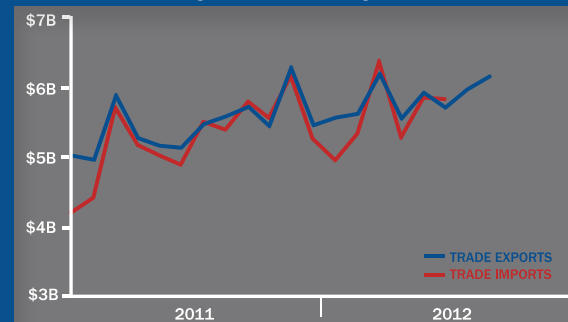
Source: Trade & Logistics Study, Florida Chamber 2009

TOTAL FREIGHT FLOWS



Source: Trade & Logistics Study, Florida Chamber 2009

FLORIDA TRADE ACTIVITY



Key Transportation and Freight Facilities

STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS		I-95, SR 20, SR 100
SIS RAILROADS		FEC
SIS AIRPORTS		Daytona Beach International Airport
SEAPORTS		Port of Jacksonville
NON SIS STATE HIGHWAYS		US 1, SR A1A
GENERAL AVIATION AIRPORTS		Flagler County Airport, Ormond Beach Municipal Airport



Top Imports

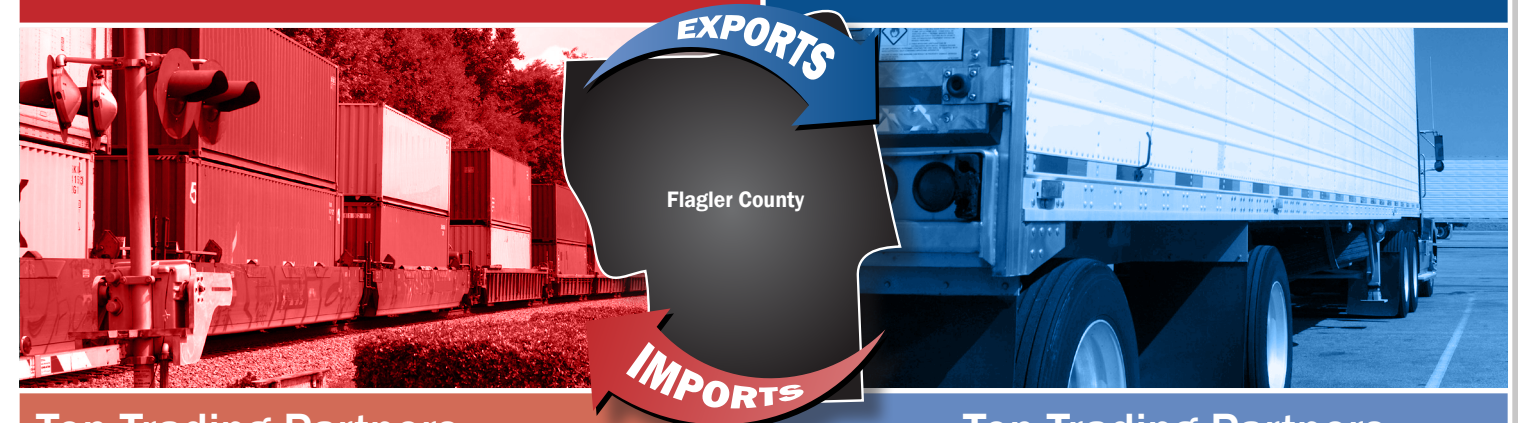
INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	181,671
2. Clay, Concrete, Glass or Stone	93,665
3. Nonmetallic Minerals	70,792
4. Petroleum or Coal Products	50,796
5. Food or Kindred Products	40,806

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Clay, Concrete, Glass or Stone	172,173
2. Farm Products	120,137
3. Bulk Movement in Boxcars	30,864
4. Lumber or Wood Products	15,596
5. Nonmetallic Minerals	11,291

Source: IHS Global Inc.'s Transearch, 2011



Top Trading Partners

IMPORTS	TRUCK TONNAGE
Duval County, FL	86,661
Miami-Dade County, FL	72,320
Putnam County, FL	38,437
Orange County, FL	27,398
Chatham County, GA	26,730

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners







EXPORTS	TRUCK TONNAGE
Duval County, FL	97,981
Orange County, FL	63,660
Seminole County, FL	28,440
Brevard County, FL	21,437
Volusia County, FL	14,709

Source: IHS Global Inc.'s Transearch, 2011

Flagler County

FREIGHT INFRASTRUCTURE

LEGEND

-  Strategic Intermodal System (SIS) Highways
-  Rail Lines
-  Other State Highways
-  Largest Employers by Number of Employees
-  SIS Airports
-  Airports - General Aviation

