FLORIDA CHAMBER of Commerce

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

LEE COUNTY
## FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

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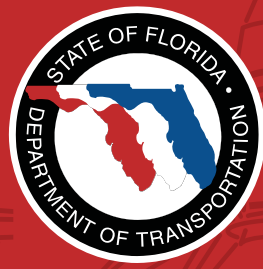
Federal Legislative Contacts

United States Senate
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United States Senate
Marco Rubio
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US House of Representatives
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US House of Representatives
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Florida Senate
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Florida House of Representatives
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Florida House of Representatives
District 78, Heather Dawes
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Florida House of Representatives
District 79, Matt Caldwell
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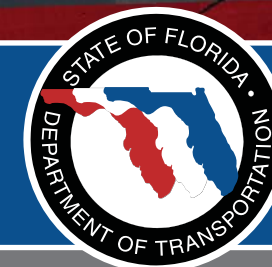
FDOT MISSION:
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES
THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND
PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.

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

Lee County
FREIGHT & LOGISTICS OVERVIEW

COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Fort Myers, FL	Cape Coral, FL	1212 square miles	618,754	40.3% (2000-2010)

Primary Economic Development Contact: http://www.fortmyersregionalpartnership.com

- Two of the most prolific innovators of American industry, Thomas Edison and Henry Ford, spent their winters in Fort Myers, and left behind the Edison and Ford Winter Estates.
- Both the Boston Red Sox and the Minnesota Twins call Lee County their Major League Baseball spring training home.
- There are over 50 miles of public accessible coastlines and beaches.

Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Administrative, Support, Waste, and Remediation	3,956
2. Wholesale Trade	3,036
3. Professional, Scientific, and Technical Services	2,900
4. Retail Trade	2,365
5. Real Estate, Rental, and Leasing	2,192

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	21.9%
2. Leisure and Hospitality	15.0%
3. Education and Health Services	12.1%

Source: Enterprise Florida

Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Publix Supermarkets	Grocer, Retail	4,215
2. Wal-Mart Super Center	General Merchandise, Retail	2,071
3. Chico's FAS, Inc.	Corporate Headquarters-Women's Clothing	1,120
4. Bonita Bay Group	Real Estate Development	700
5. Goodwill Industries	Non-Profit, Retail	615

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

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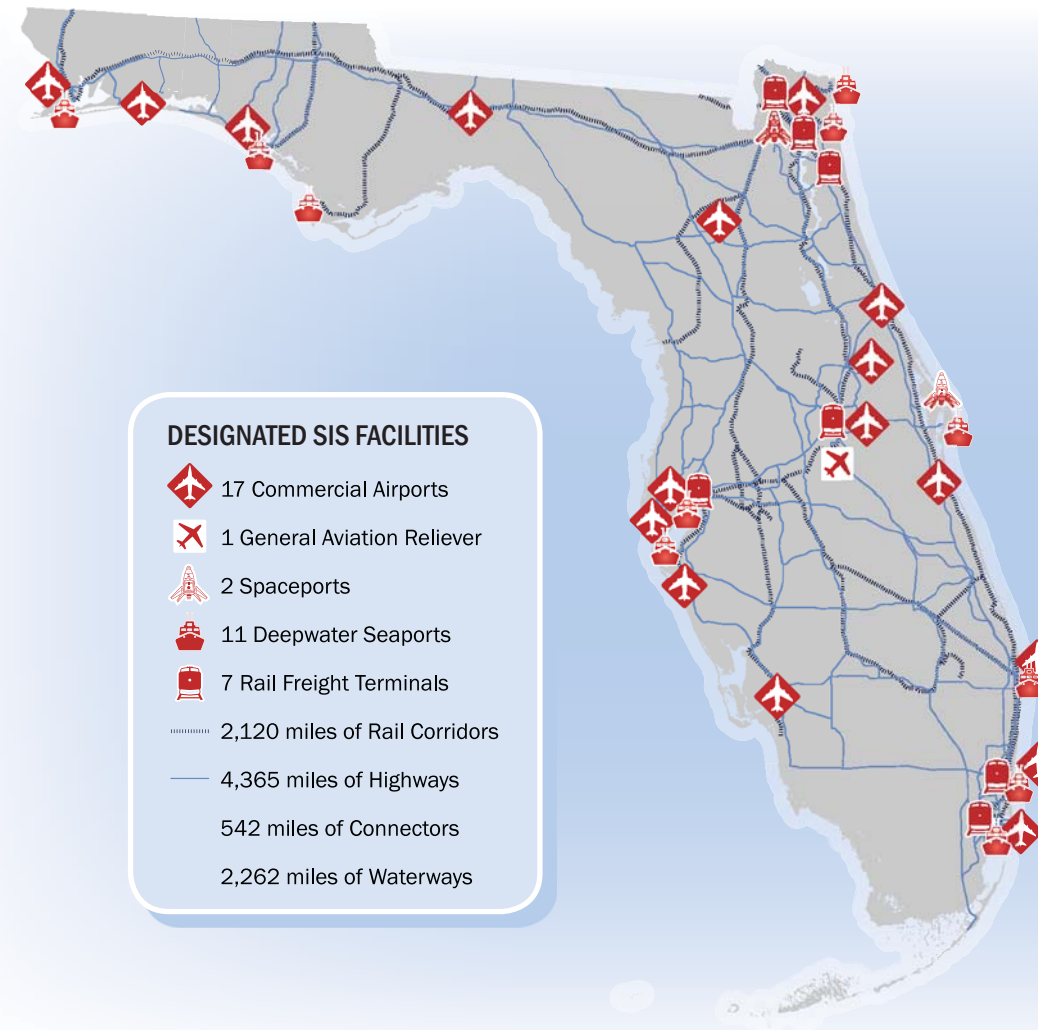
Florida has 784 aviation facilities, 129 public use, and 19 have commercial service.

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.

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

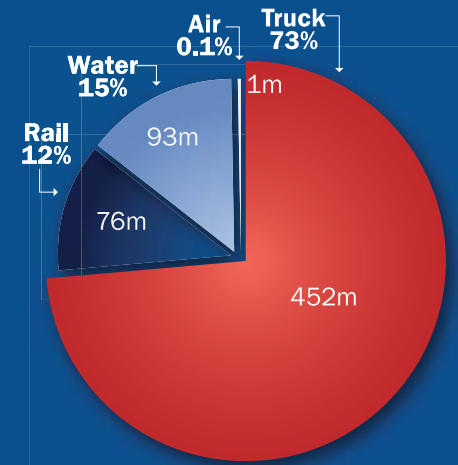Chamber of Commerce website: http://www.flchamber.org

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
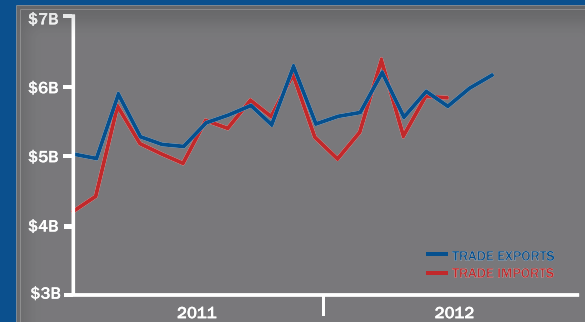
Source: Florida Chamber of Commerce
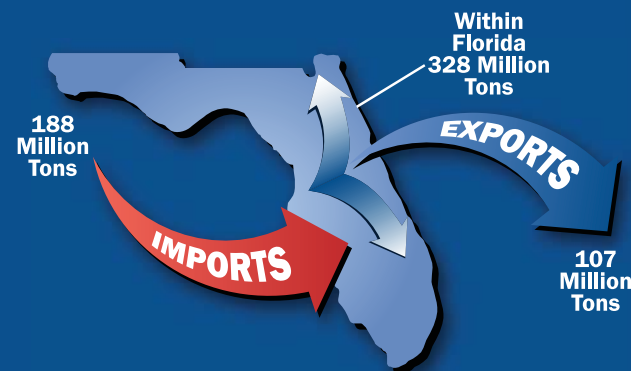
Top International Trade Partners

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

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

Source: Trade & Logistics Study, Florida Chamber 2009

DOMESTIC AND INTERNATIONAL MODAL MIX
(millions of tons)

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

Source: Trade & Logistics Study, Florida Chamber 2009

TOTAL FREIGHT FLOWS

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

Source: Trade & Logistics Study, Florida Chamber 2009

FLORIDA TRADE ACTIVITY

TRADE EXPORTS
TRADE IMPORTS

2011   2012

Key Transportation and Freight Facilities

STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS	I-75, SR 80, SR 82
SIS RAILROADS	Seminole Gulf
SIS AIRPORTS	Southwest Florida International Airport
SEAPORTS	Manatee County Port Authority
NON SIS STATE HIGHWAYS	US 41, SR 78, SR 31
GENERAL AVIATION AIRPORTS	Page Field Airport
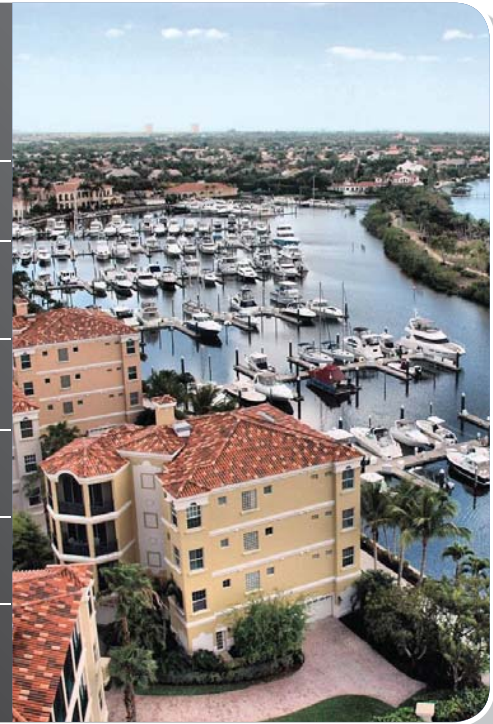
Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	1,690,889
2. Petroleum or Coal Products	1,348,770
3. Nonmetallic Minerals	1,043,203
4. Clay, Concrete, Glass or Stone	718,743
5. Food or Kindred Products	676,425

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Nonmetallic Minerals	1,405,686
2. Bulk Movement in Boxcars	916,654
3. Clay, Concrete, Glass or Stone	870,132
4. Farm Products	215,442
5. Food or Kindred Products	153,625

Source: IHS Global Inc.'s Transearch, 2011

EXPORTS
Lee County
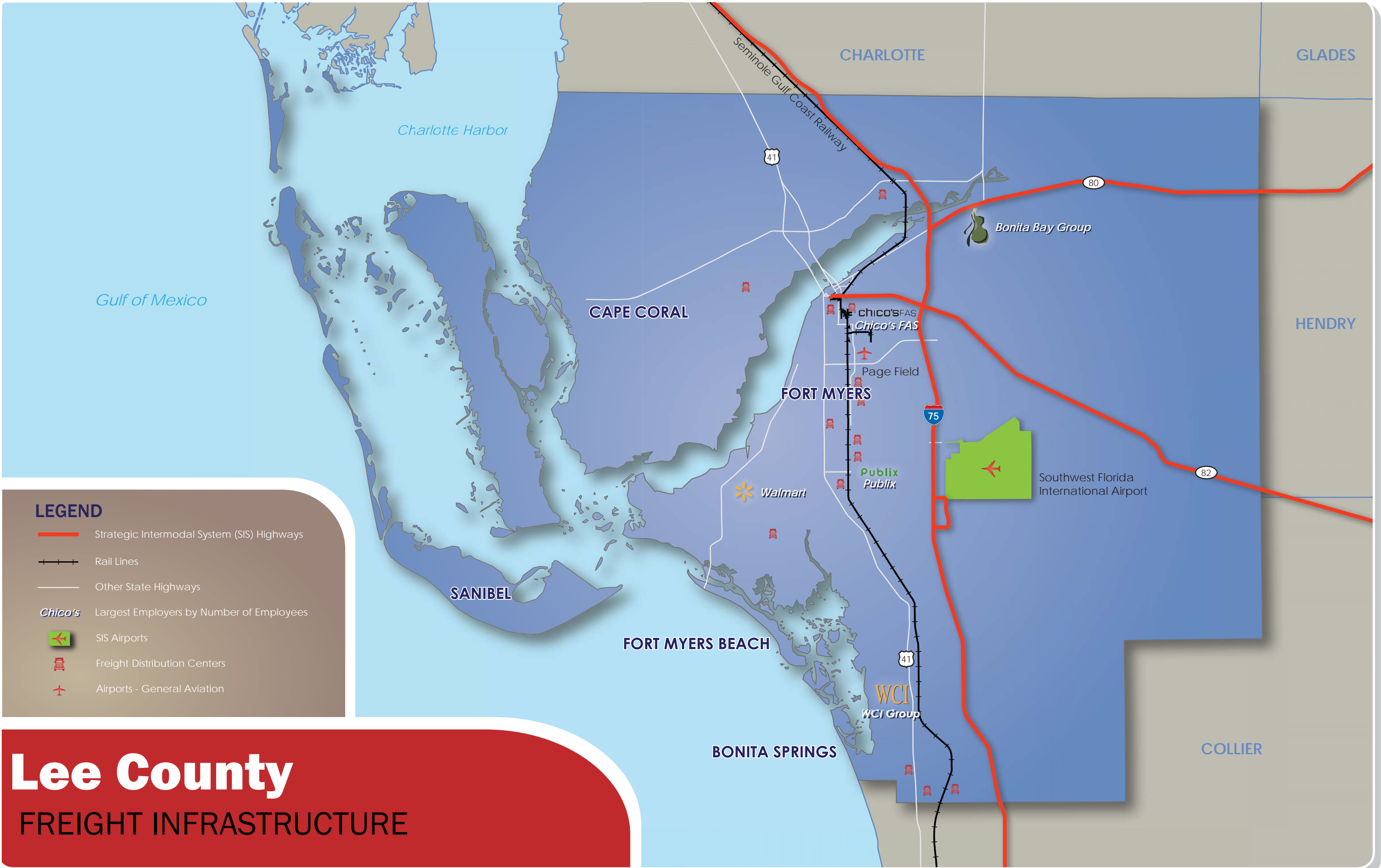IMPORTS

Top Trading Partners

IMPORTS	TRUCK TONNAGE
Miami-Dade County, FL	1,169,725
Broward County, FL	1,060,738
Charlotte County, FL	784,654
Hillsborough County, FL	377,661
Polk County, FL	321,342

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

EXPORTS	TRUCK TONNAGE
Collier County, FL	1,282,815
Miami-Dade County, FL	339,944
Charlotte County, FL	337,031
Broward County, FL	158,249
Hillsborough County, FL	149,019

Source: IHS Global Inc.'s Transearch, 2011

CHARLOTTE

GLADES

Charlotte Harbor

Seminole Gulf Coast Railway

41

80

Bonita Bay Group

Gulf of Mexico

HENDRY

CAPE CORAL

Chico's FAS
Chico's FAS

Page Field

FORT MYERS

75

Publix
Publix

Southwest Florida
International Airport

82

Walmart

LEGEND

━━━ Strategic Intermodal System (SIS) Highways

┼┼┼ Rail Lines

─── Other State Highways

Chico's   Largest Employers by Number of Employees

SIS Airports

Freight Distribution Centers

Airports - General Aviation

SANIBEL

FORT MYERS BEACH

WCI
WCI Group

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BONITA SPRINGS

COLLIER

Lee County
FREIGHT INFRASTRUCTURE