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

MONROE COUNTY FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

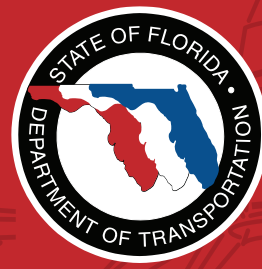
FDOT CONTACTS

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Federal Legislative Contacts

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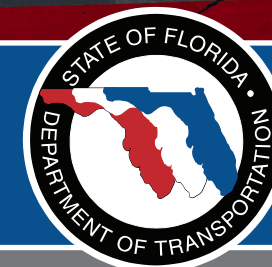
United States Senate
Marco Rubio
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US House of Representatives
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State Legislative Contacts:

Florida Senate
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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).

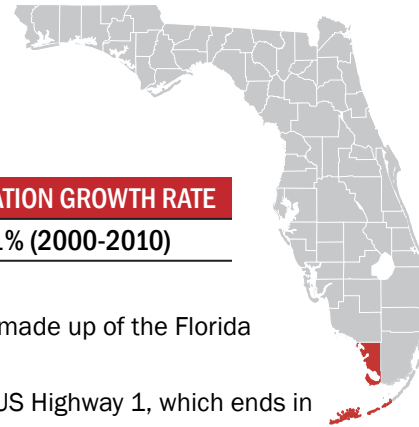
HB599 requires FDOT to lead the development of a plan to "enhance the integration and connectivity of the transportation system across and between transportation modes throughout the state." For this reason, Florida is already on schedule to meet MAP-21 guidelines and has become a leader in freight issues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



January 2013

Monroe County

FREIGHT & LOGISTICS OVERVIEW



COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Key West, FL	Key West, FL	3738 square miles	73,090	-8.1% (2000-2010)

Primary Economic Development Contact: <http://www.floridakeysmarathon.com>

- Monroe County is the southernmost county in Florida and the continental United States. It is made up of the Florida Keys, Everglades National Park, and Big Cypress National Preserve.
- The Florida Keys, are a string of low lying islands over 220 miles in length and connected by US Highway 1, which ends in Key West.
- In the 1890s, at the height of the cigar industry in Key West, there was approximately 200 cigar factories producing 100 million hand rolled cigars annually.



Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Accommodation and Food Services	1,413
2. Retail Trade	324
3. Real Estate, Rental, and Leasing	234
4. Professional, Scientific, and Technical Services	177
5. Other Services (except Public Administration)	115

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. Leisure and Hospitality	33.2%
2. Trade, Transportation, and Utilities	17.7%
3. Public Administration	8.8%

Source: Enterprise Florida



Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Kmart	Retail	750
2. HMA (Fishermen & Lower Keys Memorial)	Hospital	600
3. Baptist (Mariner's Hospital)	Hospital	500
4. Historic Tours of America (HTA)	Tourist Attraction & Retail Company	300
5. Hawks Cay Resort	Resort	295

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.

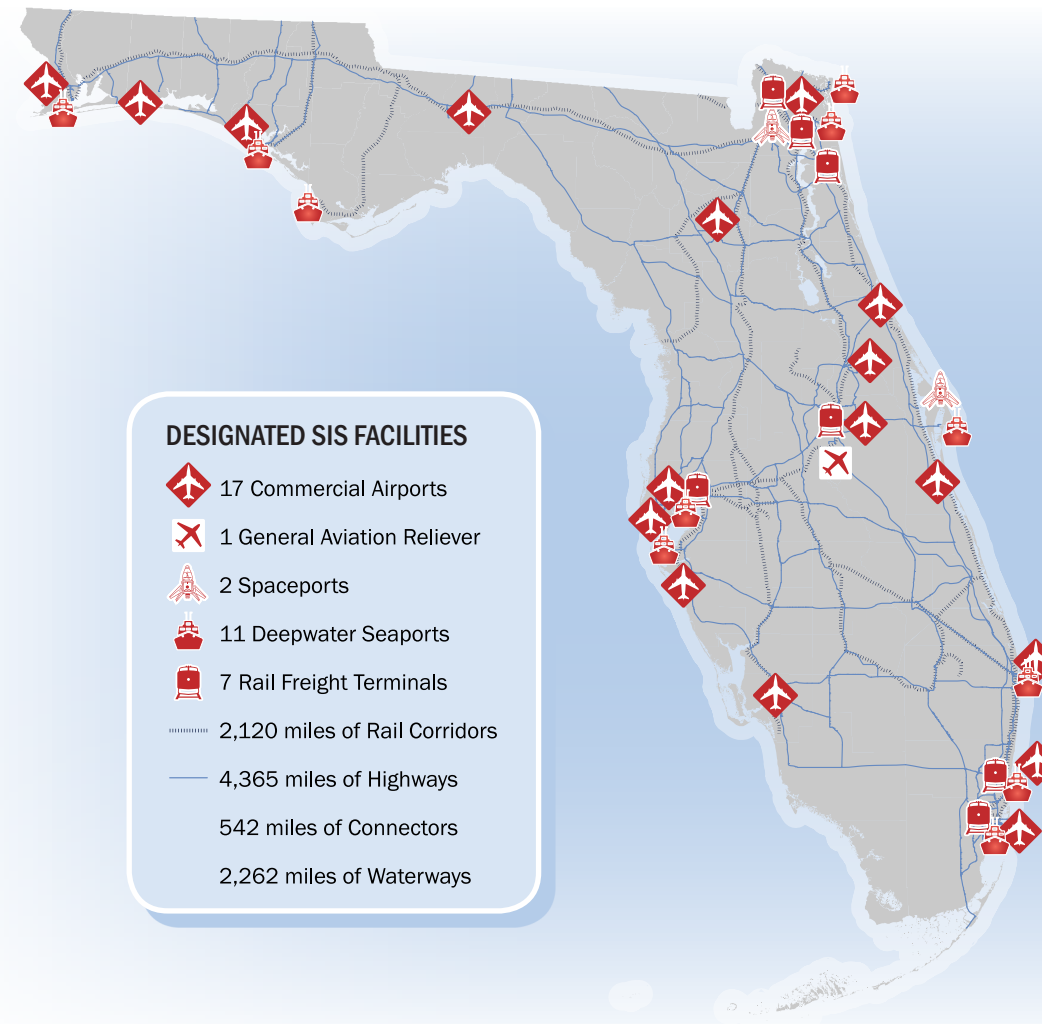
Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

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>

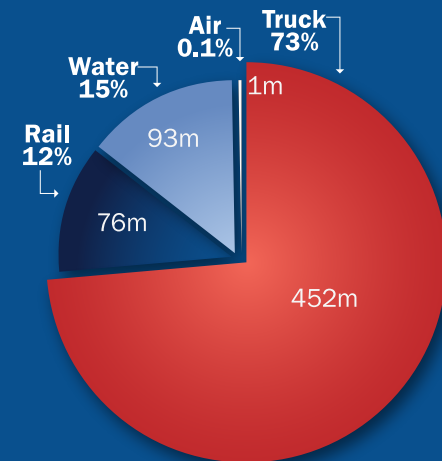
Top Employment Sectors

(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)

DOMESTIC AND INTERNATIONAL MODAL MIX (millions of tons)



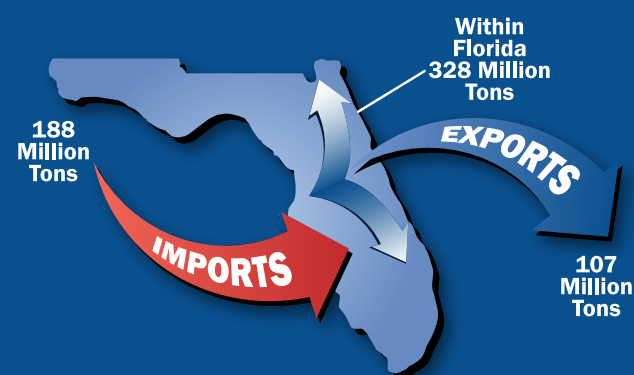
Source: Trade & Logistics Study, Florida Chamber 2009

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



Source: Trade & Logistics Study, Florida Chamber 2009

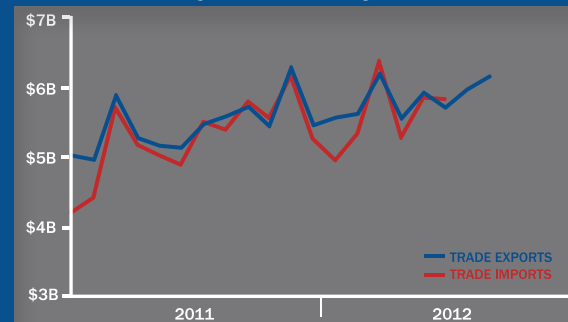
Top International Trade Partners

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	

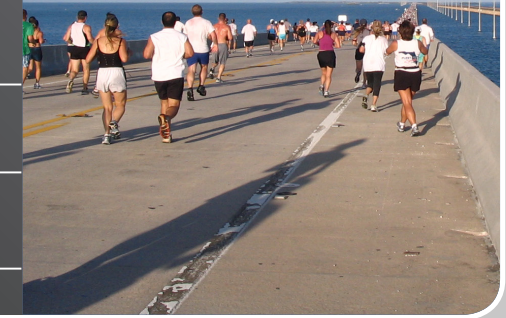
Source: Trade & Logistics Study, Florida Chamber 2009

FLORIDA TRADE ACTIVITY



Key Transportation and Freight Facilities

STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS		US 1
SIS RAILROADS		
COMMERCIAL AIRPORTS		Key West International Airport
SEAPORTS		Port of Key West
NON SIS STATE HIGHWAYS		US 1
GENERAL AVIATION AIRPORTS		The Florida Keys Marathon Airport



Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	269,746
2. Petroleum or Coal Products	89,708
3. Clay, Concrete, Glass or Stone	58,275
4. Waste or Scrap Materials	40,953
5. Food or Kindred Products	36,247

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Printed Matter	12,854
2. Clay, Concrete, Glass or Stone	4,564
3. Food or Kindred Products	4,320
4. Mail or Contract Traffic	3,512
5. Bulk Movement in Boxcars	2,606

Source: IHS Global Inc.'s Transearch, 2011



Top Trading Partners

IMPORTS	TRUCK TONNAGE
Miami-Dade County, FL	143,848
Broward County, FL	53,721
Palm Beach County, FL	30,247
Tangipahoa Parish, LA	13,532
Orange County, FL	13,035








Source: IHS Global Inc.'s Transearch, 2011

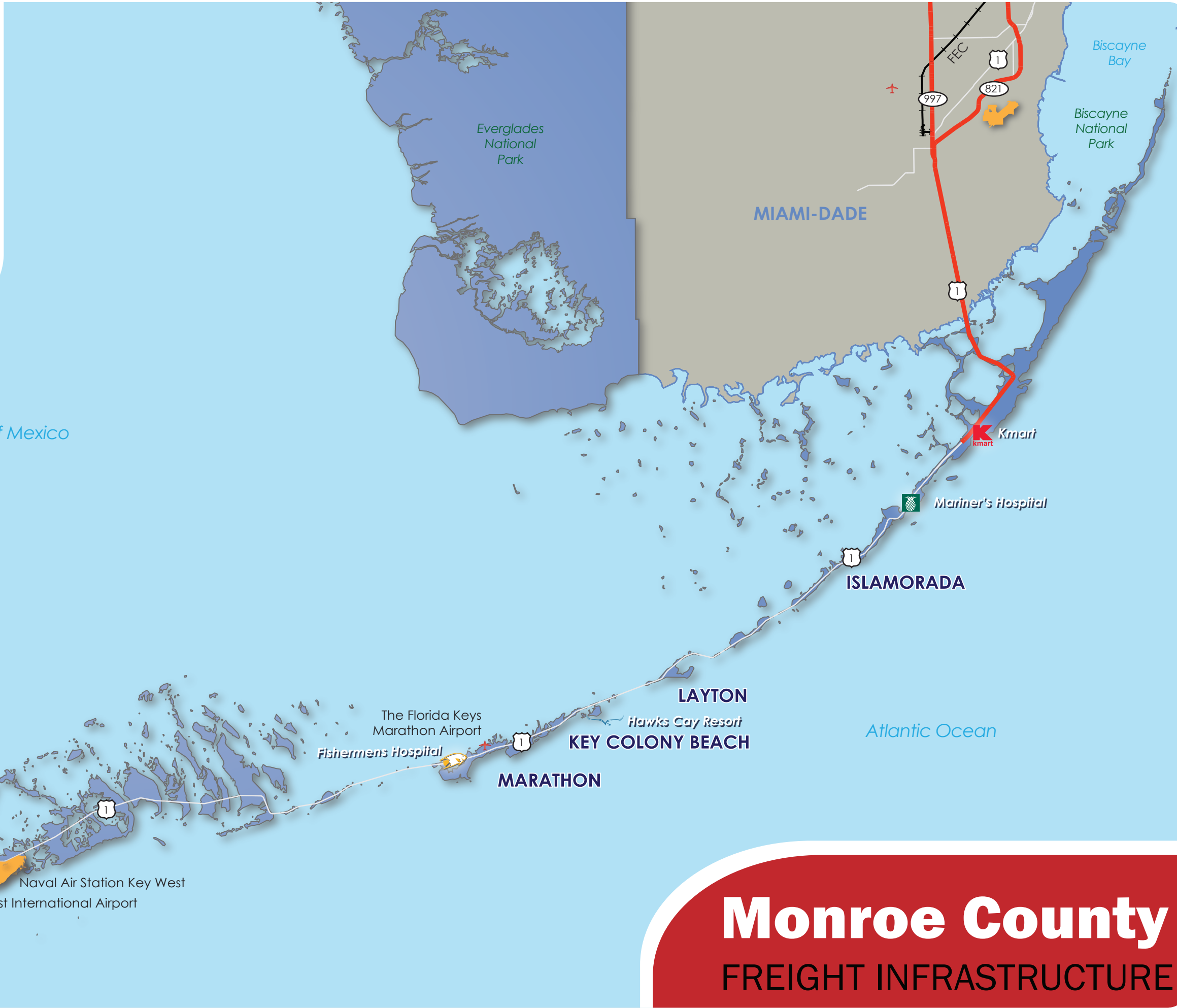
Top Trading Partners

EXPORTS	TRUCK TONNAGE
Broward County, FL	6,245
Miami-Dade County, FL	5,391
Palm Beach County, FL	3,934
Hillsborough County, FL	1,727
Lee County, FL	1,404

Source: IHS Global Inc.'s Transearch, 2011

LEGEND

-  Strategic Intermodal System (SIS) Highways
-  Rail Lines
-  Other State Highways
- Mariner's** Largest Employers by Number of Employees
 -  Airports - Commercial Service
 -  Airports - General Aviation
 -  Airports - General Aviation
 -  Military Installations



Monroe County
FREIGHT INFRASTRUCTURE