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

PINELLAS COUNTY FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

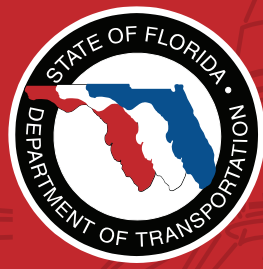
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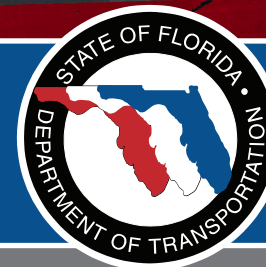
Florida House of Representatives
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FDOT MISSION:
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.



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.



Pinellas County

FREIGHT & LOGISTICS OVERVIEW



COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Clearwater, FL	St. Petersburg, FL	536 square miles	916,542	22.03% (2000-2010)

Chamber of Commerce website: <http://www.pced.org/>

- The first bridge to span Tampa Bay was the Gandy causeway in 1924, and it shortened the distance between St. Petersburg and Tampa from 43 miles to 19 miles.
- Pinellas County is home to over 40,000 businesses.
- Pinellas County is the most densely populated county in Florida with 3,339 people per square mile. The next closest county in highly concentrated populations is Broward County with 1,347 people per square mile.



Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Educational Services	18,829
2. Administrative, Support, Waste Management, and Remediation Services	6,278
3. Professional, Scientific, and Technical Services	2,475
4. Wholesale Trade	531
5. Arts, Entertainments, and Recreation	330

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. Education and Health Services	18.9%
2. Trade, Transportation and Utilities	17.8%
3. Professional and Business Services	16.8%

Source: Enterprise Florida



Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Home Shopping Network	Television Broadcasting	4,000
2. Fidelity Information Services	Data Processing & Related Services	4,000
3. Nielsen Media Research	All Other Publisher	3,000
4. Raymond James Financial	Securities Brokerage	2,600
5. Tech Data Corp.	Computer & Software Merchant	2,500

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.

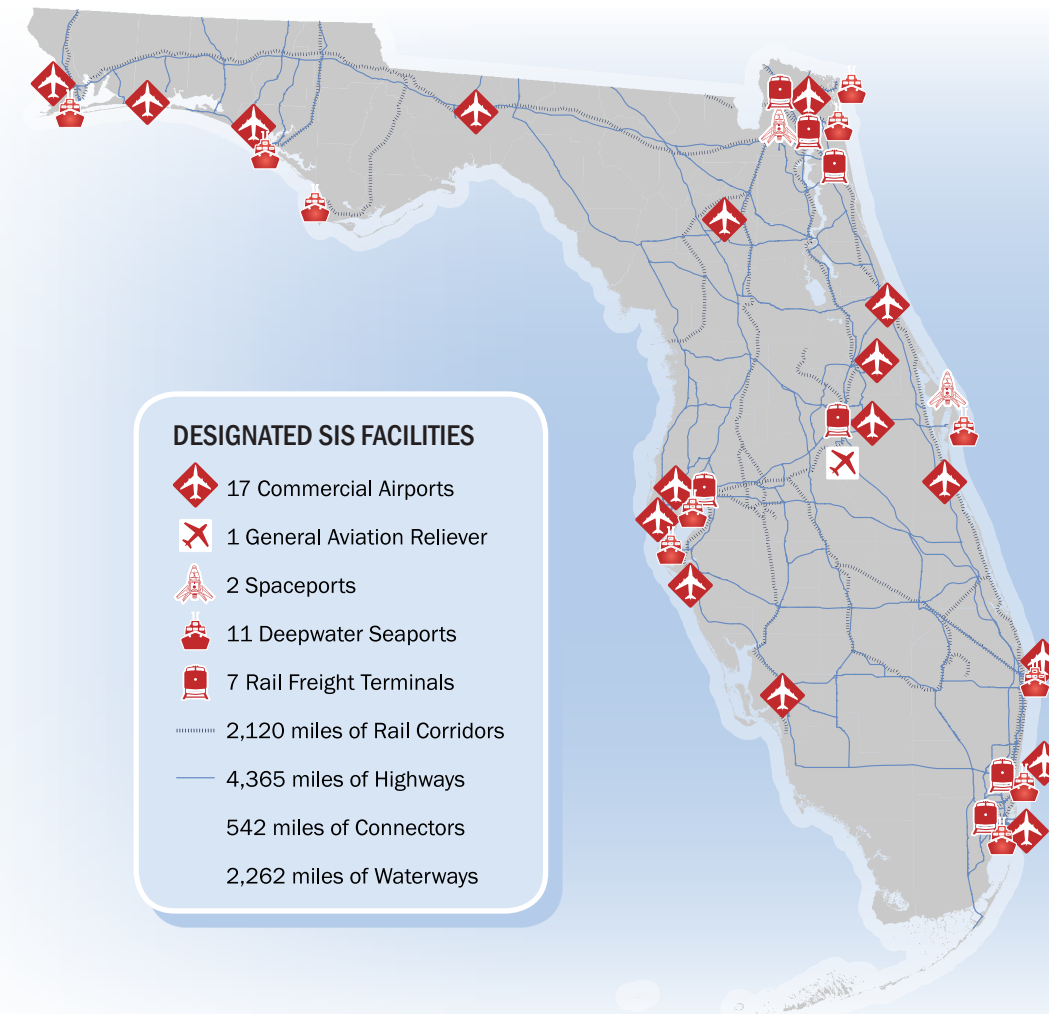
Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

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>

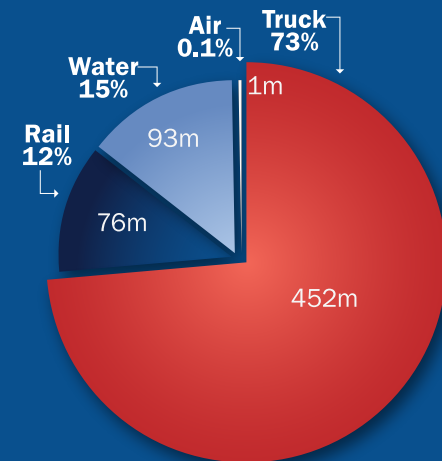
Top Employment Sectors

(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)



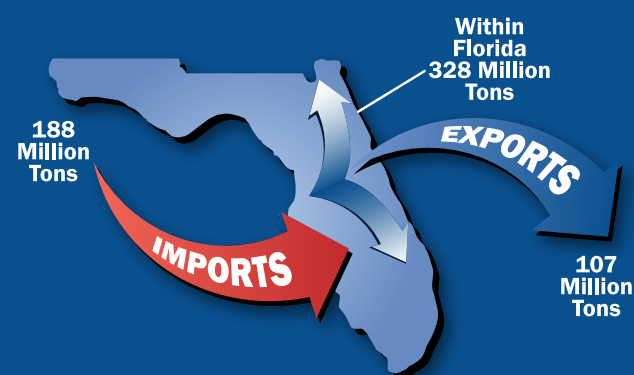
Source: Trade & Logistics Study, Florida Chamber 2009

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

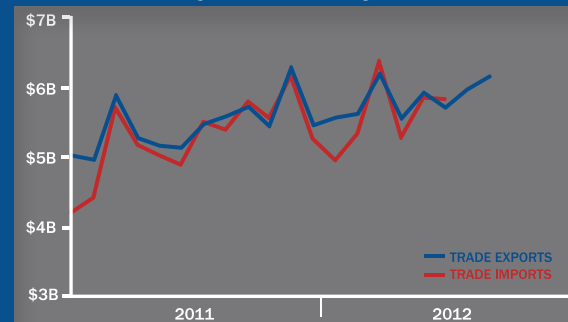
Top International Trade Partners

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		I-275, US 19, US 92
SIS RAILROADS		CSX
SIS AIRPORTS		St. Petersburg Clearwater International Airport
SEAPORTS		Port of St. Petersburg, Port of Tampa
NON SIS STATE HIGHWAYS		SR 60, SR 595
GENERAL AVIATION AIRPORTS		Albert Whitted Airport, Clearwater Air Park



Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Nonmetallic Minerals	4,404,394
2. Bulk Movement in Boxcars	2,529,441
3. Food or Kindred Products	1,105,433
4. Clay, Concrete, Glass or Stone	1,038,105
5. Petroleum or Coal Products	636,345

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	1,594,552
2. Clay, Concrete, Glass or Stone	477,774
3. Petroleum or Coal Products	335,342
4. Waste or Scrap Materials	265,117
5. Electrical Equipment	235,406

Source: IHS Global Inc.'s Transearch, 2011



Top Trading Partners

IMPORTS	TRUCK TONNAGE
Hillsborough County, FL	2,409,724
Hernando County, FL	1,858,256
Miami-Dade County, FL	1,153,777
Pasco County, FL	840,200
Polk County, FL	596,116

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners










EXPORTS	TRUCK TONNAGE
Miami-Dade County, FL	556,201
Hillsborough County, FL	505,956
Broward County, FL	353,144
Palm Beach County, FL	317,753
Sarasota County, FL	167,226

Source: IHS Global Inc.'s Transearch, 2011

Pinellas County

FREIGHT INFRASTRUCTURE

LEGEND

-  Strategic Intermodal System (SIS) Highways
 -  SIS Planned Highways
 -  Rail Lines
 -  Other State Highways
- Nielson** Largest Employers by Number of Employees
-  SIS Airports
 -  Seaports
 -  Military Installations
 -  Freight Distribution Centers
 -  Airports - General Aviation

TARPON SPRINGS

PASCO

Nielson Media
Research

DUNEDIN

OLDSMAR

SAFETY
HARBOR

BELLEAIR
CLEARWATER

Tampa International
Airport

HILLSBOROUGH

BELLEAIR BEACH
BELLEAIR SHORES
INDIAN ROCKS
BEACH

LARGO

St. Petersburg Clearwater
International Airport

INDIAN SHORES

SEMINOLE

PINELLAS PARK

REDINGTON SHORES
NORTH REDINGTON
BEACH

REDINGTON BEACH
MADEIRA BEACH

KENNETH CITY

ST. PETERSBURG

RAYMOND JAMES®
Raymond James Financial

TREASURE ISLAND

SOUTH PASADENA
GULFPORT

Albert Whitted Airport
Port of St. Petersburg

ST. PETERSBURG BEACH

MacDill Air Force Base

Tampa Bay

Gulf of Mexico

Port Manatee

Sunshine Skyway Bridge

CSX

589

275

60

275

92

75

41

275

19

CSX