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

SEMINOLE COUNTY FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

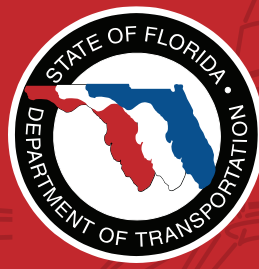
FDOT CONTACTS

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Federal Legislative Contacts

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United States Senate
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Phone (202) 224-3041

US House of Representatives
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US House of Representatives
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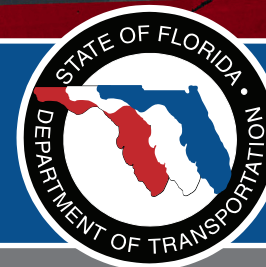
State Legislative Contacts:

Florida Senate
District 10, David Simmons
Phone (850) 487-5010

Florida House of Representatives
District 28, Jason T. Brodeur
Phone (850) 717-502

Florida House of Representatives
District 29, Michael Phillip Clelland
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Florida House of Representatives
District 30, Karen Castor Dentel
Phone (850) 717-5030



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).

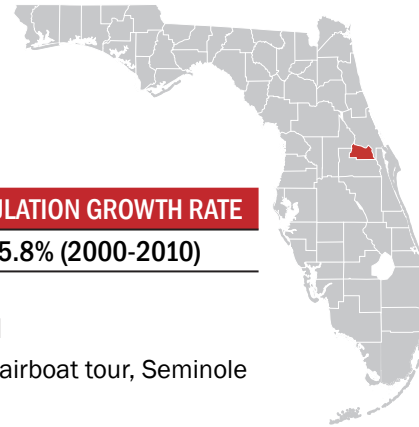
HB599 requires FDOT to lead the development of a plan to "enhance the integration and connectivity of the transportation system across and between transportation modes throughout the state." For this reason, Florida is already on schedule to meet MAP-21 guidelines and has become a leader in freight issues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



January 2013

Seminole County

FREIGHT & LOGISTICS OVERVIEW



COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Sanford, FL	Sanford, FL	345 square miles	422,718	15.8% (2000-2010)

Primary Economic Development Contact:

<http://www.orlandoedc.com/About-Metro-Orlando/Regional-Overview/seminolecounty.shtml>

- From enjoying the Great Florida Birding Trail, to canoeing wild rivers, to spotting gators on an airboat tour, Seminole County puts nature nearer.
- One can explore numerous museums that paint a remarkable picture of Seminole County's colorful past, which has been carefully preserved in exhibits highlighting the area's wilderness beginnings, prehistoric Native American culture, early speculators and settlers, Civil War citizens, and its heyday as a bustling rail and steamboat hub.



Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Professional Scientific and Technical Services	975
2. Accommodation and Food Services	701
3. Health Care and Social Assistance	619
4. Finance and Insurance	603
5. Other Services (except Public Administration)	282

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	22.4%
2. Professional and Business Services	17.7%
3. Education and Health Services	11.7%

Source: Enterprise Florida



Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Cingular Wireless LLC	Customer Care/ Receivable Management	2,500
2. Hilton Hotels	Hotel Accommodations	2,100
3. Florida Hospital	Healthcare	1,530
4. Convergys Corporation	Financial Technology/ Software Development	1,355
5. Orlando Health	Healthcare	1,072

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.

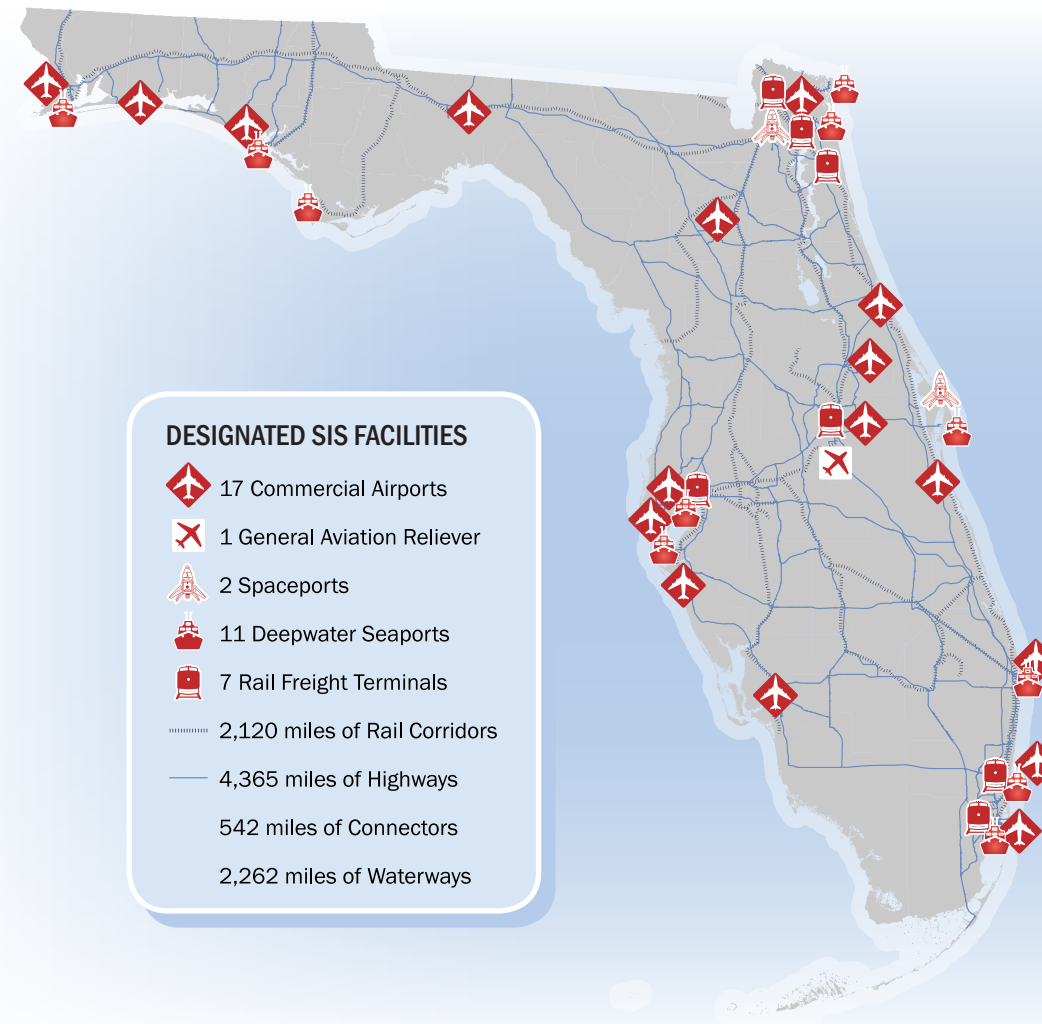
Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

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

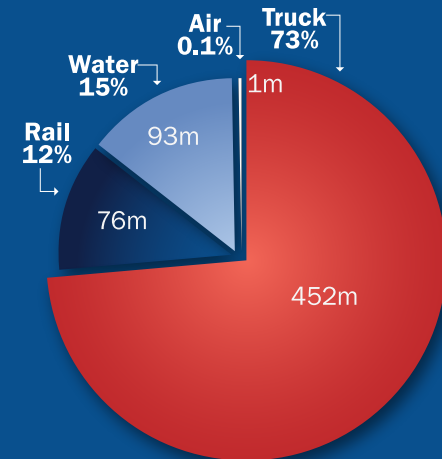
(Nonagricultural Business Groups by Industry)

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)



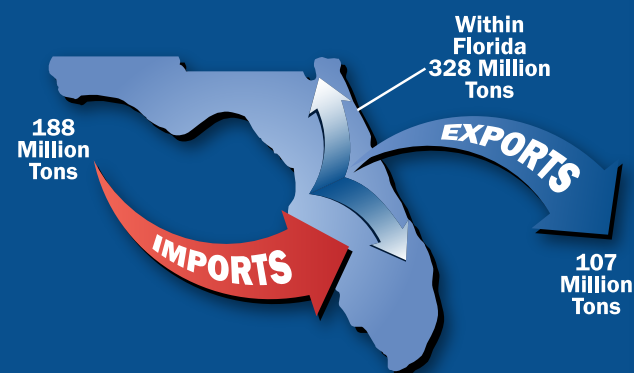
Source: Trade & Logistics Study, Florida Chamber 2009

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

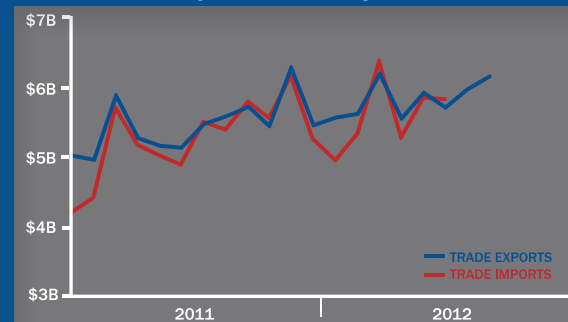
Top International Trade Partners

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-4, SR 417, Wekiva Parkway
SIS RAILROADS		FDOT/SunRail
SIS AIRPORTS		Orlando Sanford International Airport
SEAPORTS		Canaveral Port Authority
NON SIS STATE HIGHWAYS		US 17, SR 434, SR 46, SR 415
GENERAL AVIATION AIRPORTS		Orlando Executive Airport



Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	1,308,936
2. Nonmetallic Minerals	778,432
3. Clay, Concrete, Glass or Stone	676,517
4. Petroleum or Coal Products	496,993
5. Waste or Scrap Materials	210,102

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Clay, Concrete, Glass or Stone	327,069
2. Nonmetallic Minerals	165,738
3. Food or Kindred Products	87,873
4. Fabricated Metal Products	80,602
5. Petroleum or Coal Products	58,792

Source: IHS Global Inc.'s Transearch, 2011



Top Trading Partners

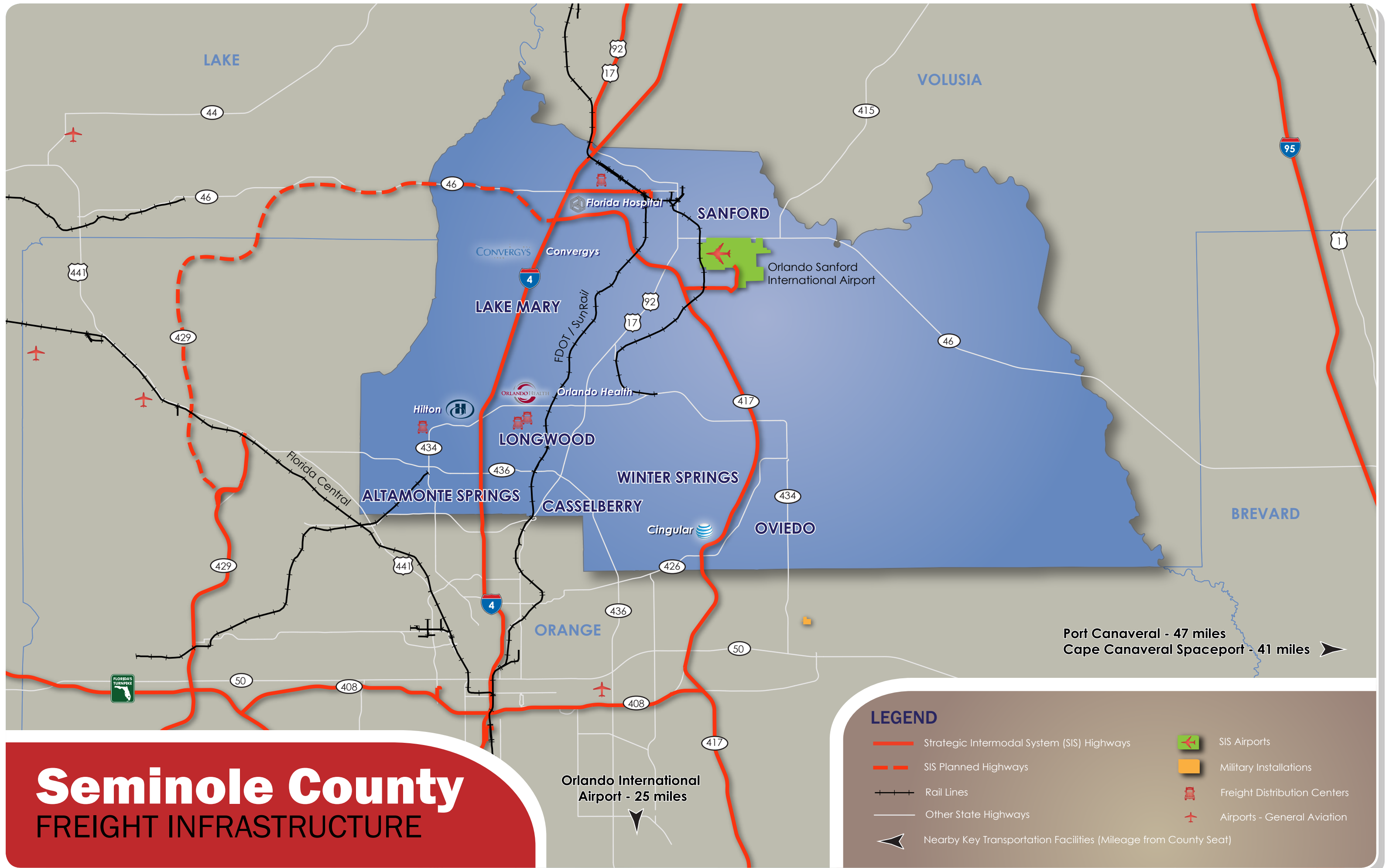
IMPORTS	TRUCK TONNAGE
Lake County, FL	561,752
Miami-Dade County, FL	477,083
Orange County, FL	449,236
Hillsborough County, FL	327,717
Polk County, FL	281,088

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

EXPORTS	TRUCK TONNAGE
Orange County, FL	208,053
Miami-Dade County, FL	130,650
Hillsborough County, FL	130,451
Volusia County, FL	67,703
Broward County, FL	47,605

Source: IHS Global Inc.'s Transearch, 2011



Seminole County

FREIGHT INFRASTRUCTURE

LEGEND

- Strategic Intermodal System (SIS) Highways
- - - SIS Planned Highways
- Rail Lines
- Other State Highways
- ▶ Nearby Key Transportation Facilities (Mileage from County Seat)
- ✈ SIS Airports
- 🏠 Military Installations
- 🚚 Freight Distribution Centers
- ✈ Airports - General Aviation

Port Canaveral - 47 miles
 Cape Canaveral Spaceport - 41 miles

Orlando International Airport - 25 miles