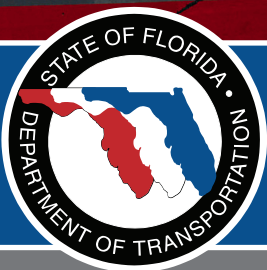
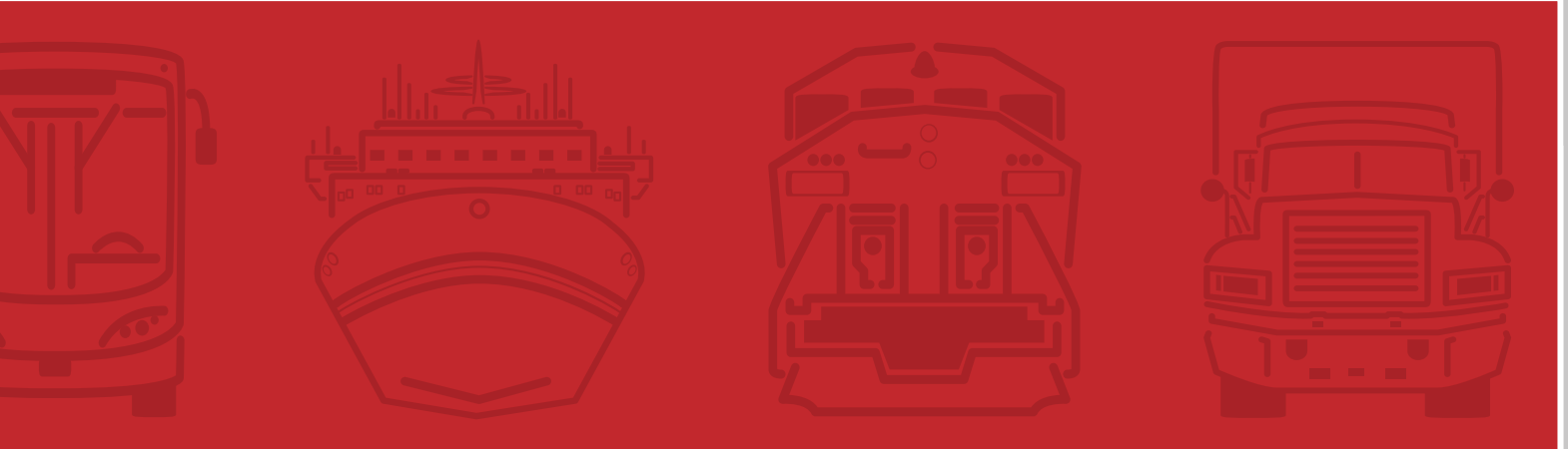


Hillsborough County

FREIGHT & LOGISTICS OVERVIEW

Florida Department of Transportation



FDOT MISSION:

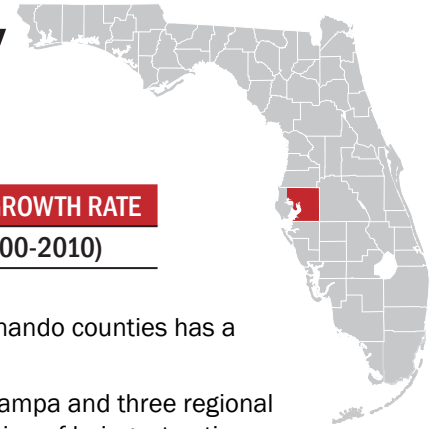
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.



January 2013

Hillsborough County

FREIGHT & LOGISTICS OVERVIEW



COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Tampa, FL	Tampa, FL	1266 square miles	1,229,226	23.1% (2000-2010)

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

- The four-county metropolitan statistical area (MSA) of Hillsborough, Pinellas, Pasco and Hernando counties has a population of 2.7 million, making it the 19th largest MSA in the U.S.
- The University of South Florida has more than 46,000 students across its main campus in Tampa and three regional locations. It has become the 9th largest public university in the nation and holds the distinction of being a top-tier research institution.
- Tampa General Hospital is the only Level 1 Trauma Center in west central Florida and also offers comprehensive burn care and adult solid-organ transplants.



Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Administrative, Support, Waste Management and Remediation	11,326
2. Professional, Scientific, and Technical Services	3,384
3. Agriculture, Forestry, Fishing, and Hunting	2,849
4. Finance and Insurance	1,980
5. Wholesale Trade	712

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	19.5%
2. Professional and Business Services	18.1%
3. Education and Health Services	10.3%

Source: Enterprise Florida









Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. JP Morgan Chase	Financial Services	4,733
2. H. Lee Moffitt Cancer Center & Research Institute	Healthcare	3,218
3. Citi	Financial Services	2,900
4. Pricewaterhouse Coopers	Financial Services	2,200
5. Progressive Insurance	Financial Services	2,200

Source: Enterprise Florida

Key Transportation and Freight Facilities

STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS		I-4, I-75, I-275, SR 60, US 92, SR 589, SR 597, SR 618
SIS RAILROADS		Amtrak, CSX Transportation
SIS AIRPORTS		Tampa International Airport
SIS SEAPORTS		Port of Tampa
NON SIS STATE HIGHWAYS		US-41, US-301, SR 39, SR 580
GENERAL AVIATION AIRPORTS		Peter O. Knight Airport, Plant City Airport, Tampa Executive Airport



Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Petroleum or Coal Products	8,581,703
2. Nonmetallic Minerals	6,293,077
3. Coal	5,730,411
4. Chemicals or Allied Products	4,306,495
5. Bulk Movement in Boxcars	4,047,540

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Nonmetallic Minerals	4,604,628
2. Chemicals or Allied Products	3,345,472
3. Clay, Concrete, Glass or Stone	2,062,736
4. Food or Kindred Products	1,865,178
5. Bulk Movement in Boxcars	1,758,859

Source: IHS Global Inc.'s Transearch, 2011



EXPORTS

Hillsborough County

IMPORTS



Top Trading Partners

IMPORTS	TRUCK TONNAGE
St. John the Baptist Parish, LA	5,310,794
Polk County, FL	2,867,689
Hernando County, FL	2,798,825
Miami-Dade County, FL	1,905,267
St. James Parish, LA	1,464,949

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

EXPORTS	TRUCK TONNAGE
Pinellas County, FL	2,409,688
Miami-Dade County, FL	2,078,871
Pasco County, FL	1,064,259
Orange County, FL	963,736
Manatee County, FL	887,304

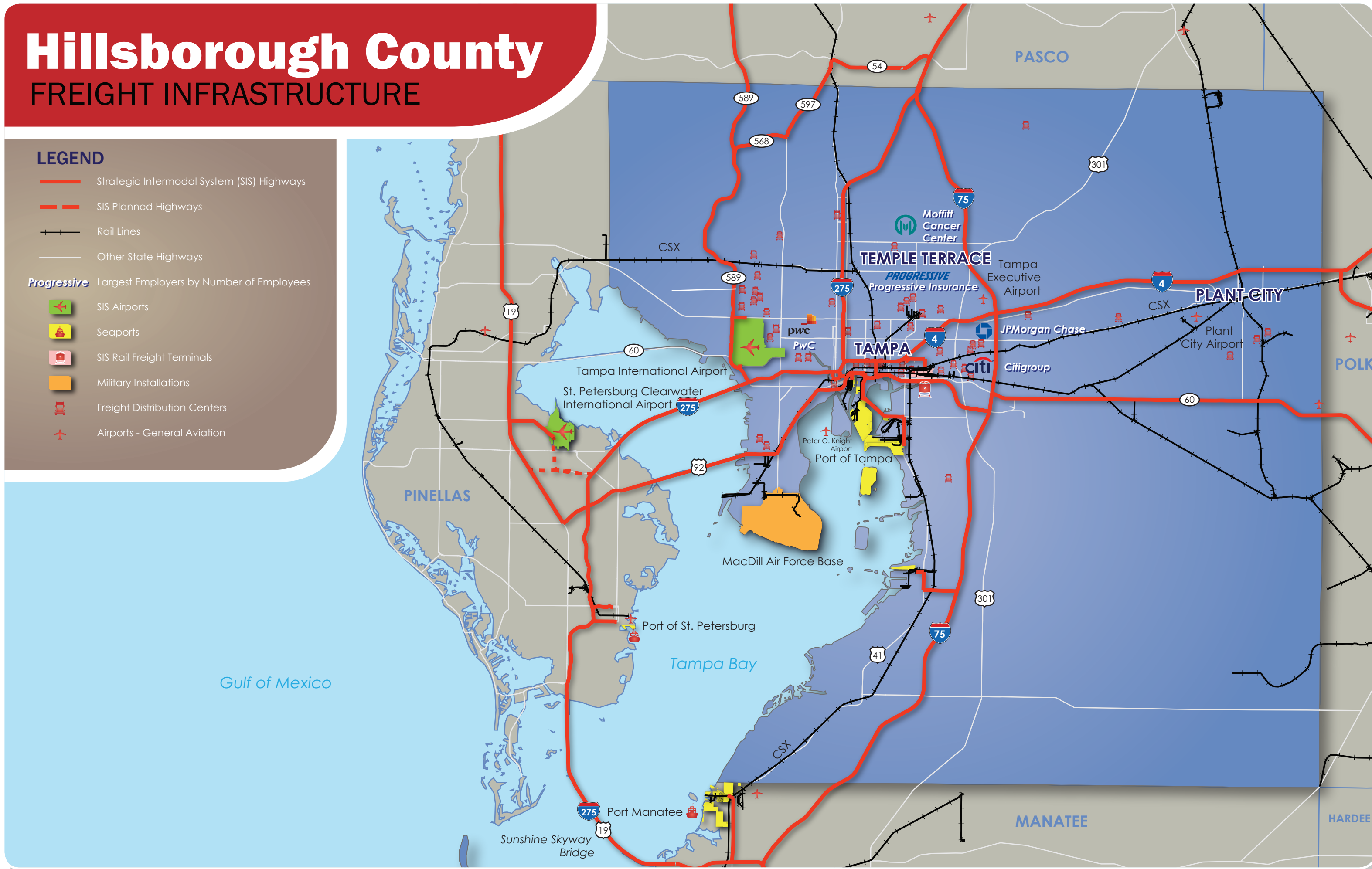
Source: IHS Global Inc.'s Transearch, 2011

Hillsborough County

FREIGHT INFRASTRUCTURE

LEGEND

- Strategic Intermodal System (SIS) Highways
 - - - SIS Planned Highways
 - +—+—+— Rail Lines
 - Other State Highways
- Progressive** Largest Employers by Number of Employees
- ✈ SIS Airports
 - ⚓ Seaports
 - 🚂 SIS Rail Freight Terminals
 - 🏠 Military Installations
 - 🚚 Freight Distribution Centers
 - ✈ Airports - General Aviation



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

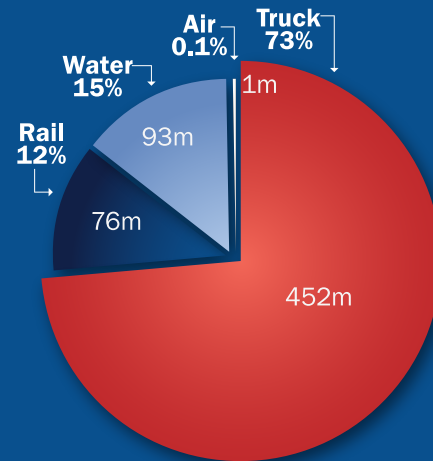
(Nonagricultural Business Groups by Industry)

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)



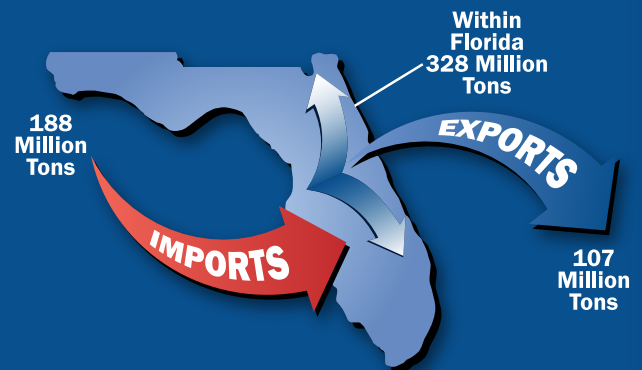
Source: Trade & Logistics Study, Florida Chamber 2009

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

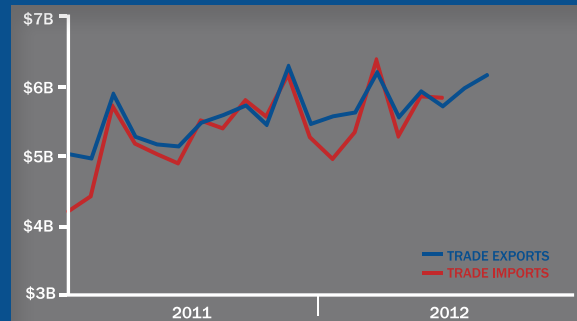
Top International Trade Partners

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



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.

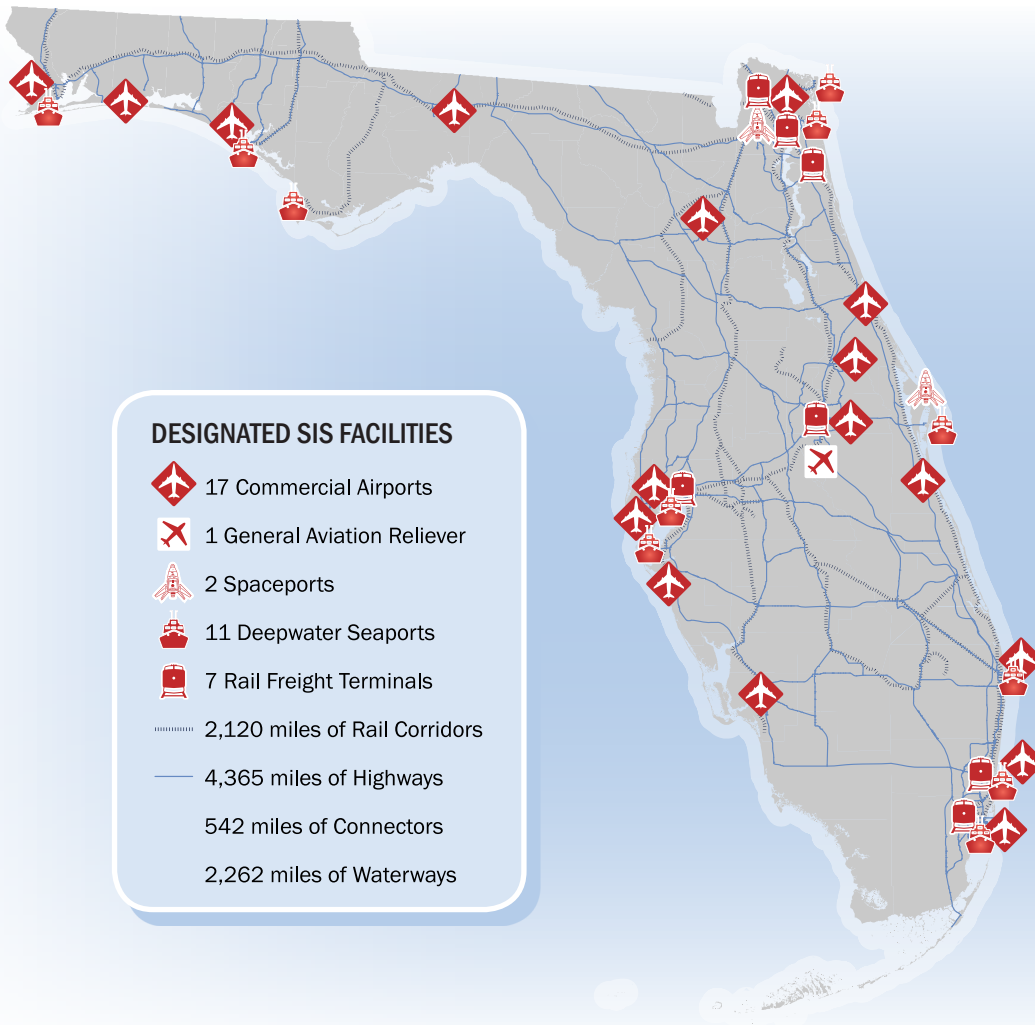
Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

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.



136 S. Bronough Street
Tallahassee, Florida 32301



800 N. Magnolia Avenue, Suite 1100
Orlando, Florida 32803
(407) 956-5600



1580 Waldo Palmer Lane, Suite 1
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(850) 921-1119



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

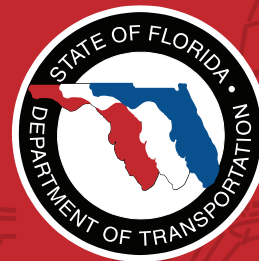
FDOT CONTACTS

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Paul Steinman, P.E.
District 7 Secretary
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Marco Rubio
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U.S. House of Representative
District 14, Kathy Castor
Phone (202) 225-3376

U.S. House of Representative
District 15, Dennis Ross
Phone (202) 225-1252

U.S. House of Representative
District 17, Thomas Rooney
Phone (202) 225-5792

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Phone (850) 487-5022

Florida Senate
District 24, Tom Lee
Phone (850) 487-5024

Florida Senate
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Florida House of Representatives
District 63, Mark Danish
Phone (850) 717-5063

Florida House of Representatives
District 64, James "J.W." Grant
Phone (850) 717-5064

Florida House of Representatives
District 65, Darryl Rouson
Phone (850) 717-5065



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.