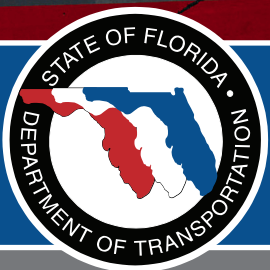


LEON COUNTY FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION



FDOT MISSION:

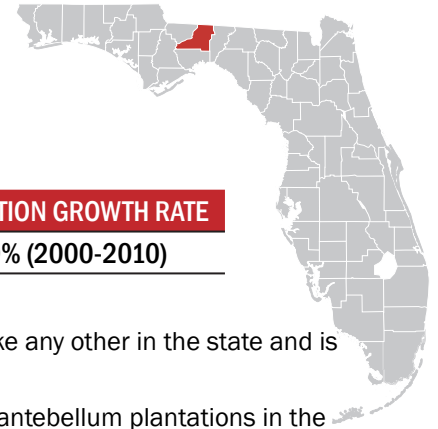
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.



January 2013

Leon County

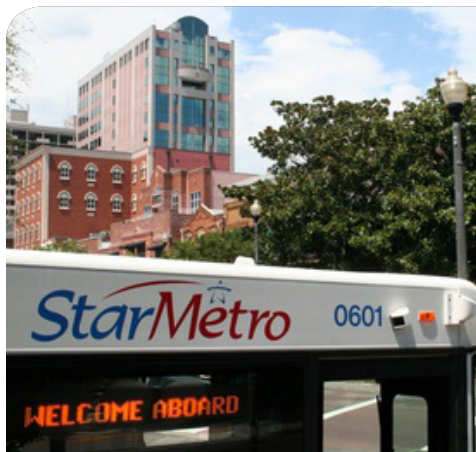
FREIGHT & LOGISTICS OVERVIEW



| COUNTY SEAT | LARGEST CITY | AREA | POPULATION | POPULATION GROWTH RATE |
|-----------------|-----------------|------------------|------------|------------------------|
| Tallahassee, FL | Tallahassee, FL | 702 square miles | 275,487 | 15.0% (2000-2010) |

Primary Economic Development Contact: <http://taledc.com>

- Nestled in the Red Hills region of the Florida Panhandle, Tallahassee boasts topography unlike any other in the state and is one of the most biologically-diverse regions in the United States.
- A plantation belt created in the early and mid-1800s still lives on as the largest collection of antebellum plantations in the country, 71 plantations and 300,000 acres, exists between Tallahassee and Thomasville, Georgia.
- Tallahassee, named Florida's capital in 1824, is midway between the then-largest cities in the state, St. Augustine and Pensacola. Florida's Capitol comes alive each spring for the legislative session, where lawmakers and Tallahassee government power brokers meet to determine the state's business agenda and budget.



Top 5 Growing Industries

| INDUSTRY | NET JOB CREATION |
|--|------------------|
| 1. Retail Trade | 1,217 |
| 2. Administrative, Support, Waste Management, and Remediation Services | 719 |
| 3. Accommodation and Food Services | 623 |
| 4. Educational Services | 445 |
| 5. Information | 160 |

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. Public Administration | 23.1% |
| 2. Education and Health Services | 13.2% |
| 3. Trade, Transportation, and Utilities | 12.8% |

Source: Enterprise Florida









Major Private Sector Employers

| EMPLOYER | BUSINESS LINE | NUMBER OF EMPLOYEES |
|------------------------------------|-------------------------|---------------------|
| 1. Tallahassee Memorial Healthcare | Not-for Profit Hospital | 3,480 |
| 2. Publix Supermarkets | Grocer | 2,000 |
| 3. Wal-Mart | Retail | 1,500 |
| 4. Capital Regional Medical Center | For-Profit Hospital | 878 |
| 5. ACS | Information Technology | 852 |

Source: Enterprise Florida

Key Transportation and Freight Facilities

| | | |
|--|---|---|
| STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS |  | I-10, US 319 |
| SIS RAILROADS |  | CSX |
| SIS AIRPORTS |  | Tallahassee Regional Airport |
| SEAPORTS |  | Port of Port St. Joe, Port of Panama City |
| NON SIS STATE HIGHWAYS |  | US 27, US 90, SR 20, SR 363 |
| GENERAL AVIATION AIRPORTS |  | Tallahassee Commercial Airport |



Top Imports

| INBOUND FREIGHT | TRUCK TONNAGE |
|-----------------------------------|---------------|
| 1. Bulk Movement in Boxcars | 750,443 |
| 2. Clay, Concrete, Glass or Stone | 398,328 |
| 3. Food or Kindred Products | 378,440 |
| 4. Petroleum or Coal Products | 267,610 |
| 5. Nonmetallic Minerals | 169,094 |

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

| OUTBOUND FREIGHT | TRUCK TONNAGE |
|-----------------------------------|---------------|
| 1. Bulk Movement in Boxcars | 721,387 |
| 2. Waste or Scrap Materials | 179,949 |
| 3. Clay, Concrete, Glass or Stone | 101,922 |
| 4. Lumber or Wood Products | 61,343 |
| 5. Printed Matter | 43,930 |

Source: IHS Global Inc.'s Transearch, 2011



Top Trading Partners

| IMPORTS | TRUCK TONNAGE |
|-----------------------|---------------|
| Miami-Dade County, FL | 191,576 |
| Duval County, FL | 153,699 |
| Tift County, GA | 92,134 |
| Lowndes County, GA | 75,686 |
| Dougherty County, GA | 64,917 |

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

| EXPORTS | TRUCK TONNAGE |
|-------------------------|---------------|
| Miami-Dade County, FL | 91,877 |
| Broward County, FL | 73,414 |
| Hillsborough County, FL | 68,001 |
| Palm Beach County, FL | 67,240 |
| Bay County, FL | 66,760 |

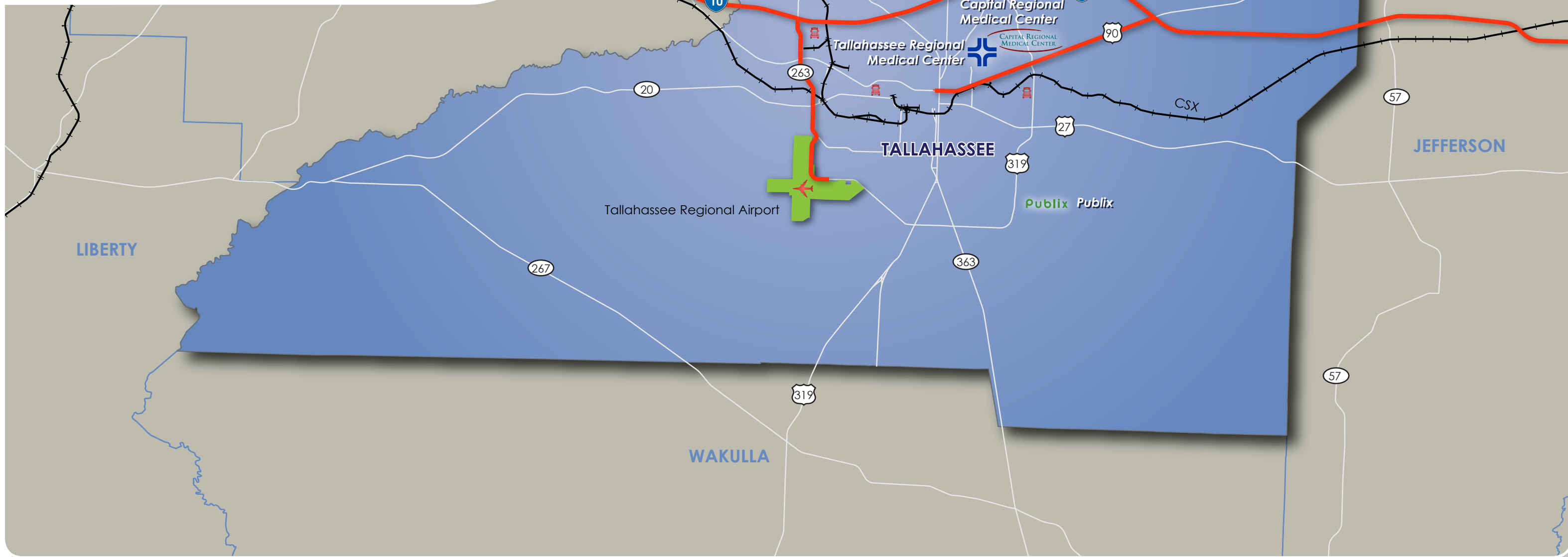
Source: IHS Global Inc.'s Transearch, 2011

Leon County

FREIGHT INFRASTRUCTURE

LEGEND

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



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

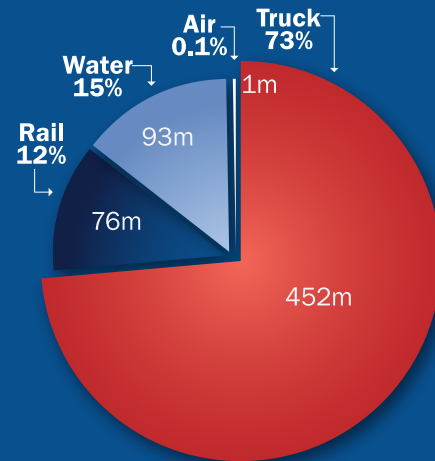
(Nonagricultural Business Groups by Industry)

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)

DOMESTIC AND INTERNATIONAL MODAL MIX

(millions of tons)



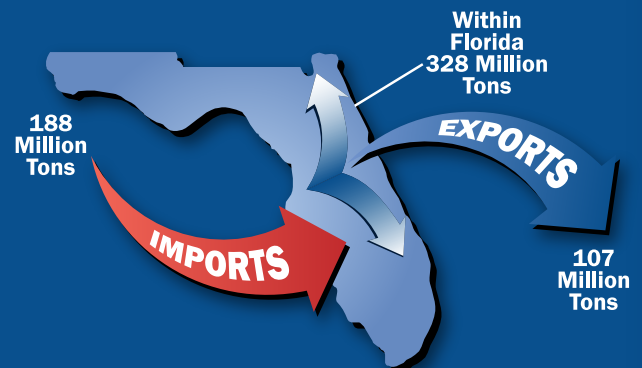
Source: Trade & Logistics Study, Florida Chamber 2009

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

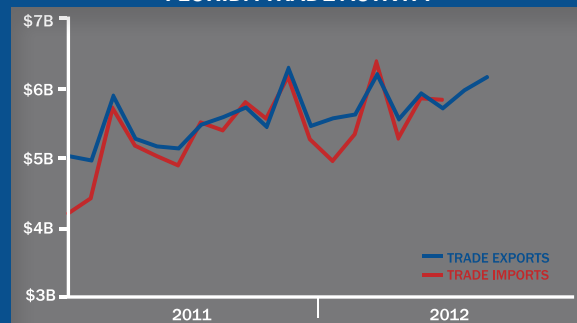
Top International Trade Partners

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 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.

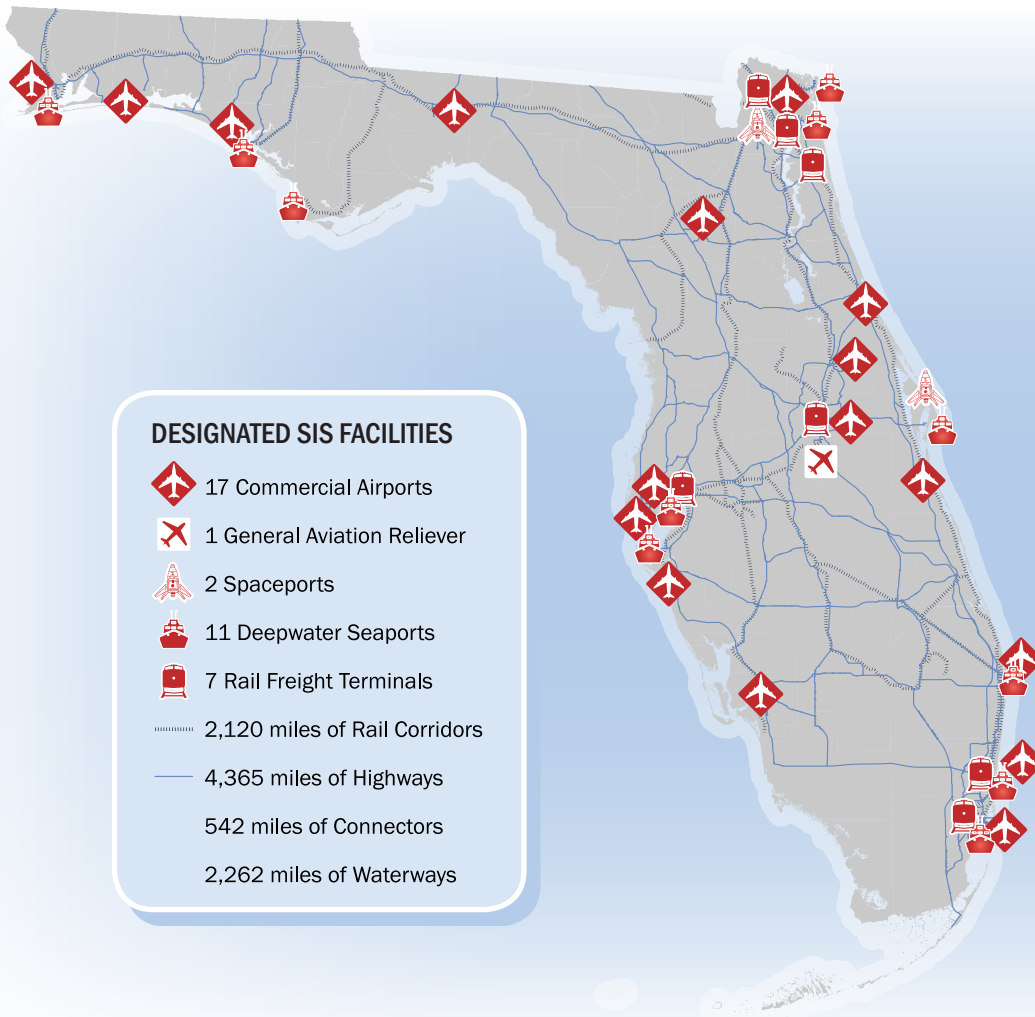
16 Fortune 500 companies have their headquarters in Florida.

Florida'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





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Tallahassee, Florida 32301



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

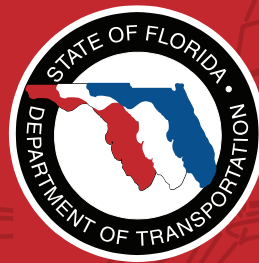
FDOT CONTACTS

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Federal Legislative Contacts

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Phone (202) 224-5274

United States Senate
Marco Rubio
Phone (202) 224-3071

US House of Representatives
District 2, Steve Southerland
Phone (202) 225-523

State Legislative Contacts:

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Phone (850) 487-5003

Florida House of Representatives
District 7, Halsey Beshears
Phone (850) 717-5007

Florida House of Representatives
District 8, Alan Williams
Phone (850) 717-5008

Florida House of Representatives
District 9, Michele Rehwinkel
Vasilinda
Phone (850) 717-5009



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.