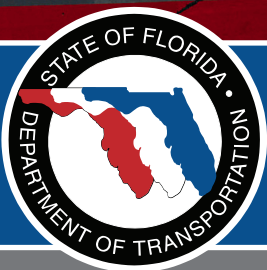
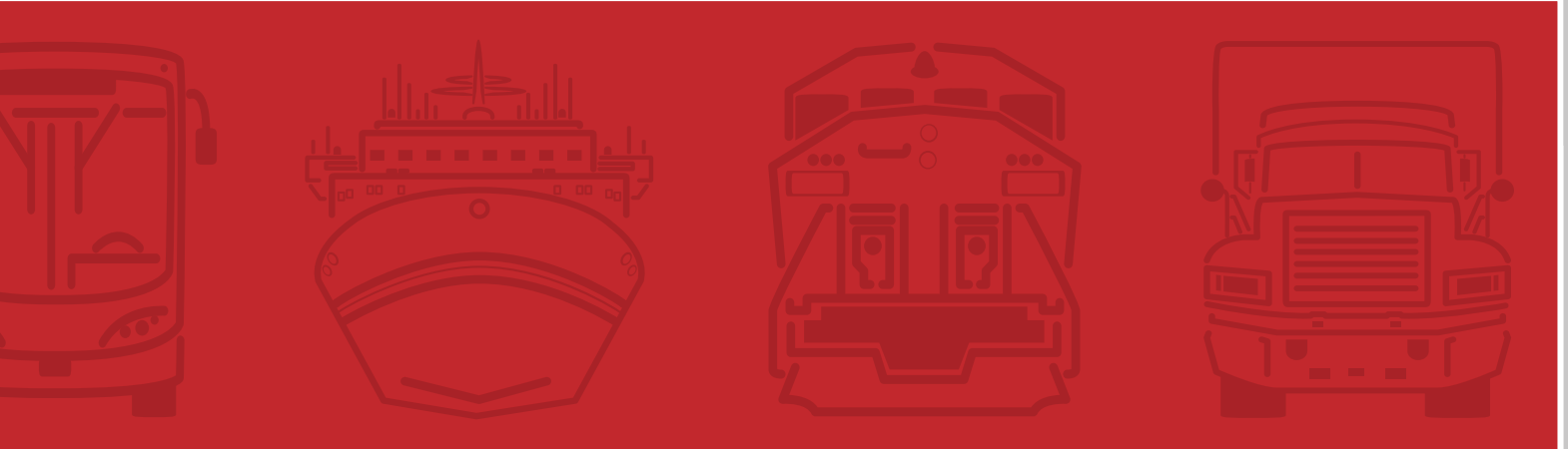


ORANGE COUNTY FREIGHT & LOGISTICS OVERVIEW

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

Orange County

FREIGHT & LOGISTICS OVERVIEW



COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Orlando, FL	Orlando, FL	1004 square miles	1,145,956	27.8% (2000-2010)

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

- Ranked by CNN in 2012 as “One of the Top World Destinations”, Orange County is home to the nation’s second largest convention center and one of the top 10 research parks in the country.
- Orlando International Airport logs the second most flights every year in Florida. It is the 13th-busiest in the nation and the 29th-busiest in the world.
- Walt Disney World is the largest single-site employer in the United States, with more than 62,000 employees, the company calls “cast members”.



Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Arts, Entertainment, and Recreation	8,006
2. Administrative, Support, Waste Management, and Remediation Services	7,144
3. Accommodation and Food Services	6,371
4. Retail Trade	5,110
5. Professional, Scientific, and Technical Services	2,267

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	23.4%
2. Trade, Transportation, and Utilities	17.9%
3. Professional and Business Services	17.4%

Source: Enterprise Florida









Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Walt Disney World	Entertainment	62,000
2. Adventist Health Systems	Healthcare	16,002
3. Universal Orlando	Entertainment	13,000
4. Orlando Healthcare	Healthcare	10,000
5. Busch Entertainment Corp. Sea World Parks	Entertainment	7,800

Source: Enterprise Florida

Key Transportation and Freight Facilities

STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS		I-4, US 27, SR 408, SR 417, SR 429, SR 528
SIS RAILROADS		Florida Central, FDOT / SunRail, CSX Terminal
SIS AIRPORTS		Orlando International Airport, Orlando Sanford International Airport
SEAPORTS		Port Canaveral
NON SIS STATE HIGHWAYS		US 1, US 441, SR 50, SR 520
GENERAL AVIATION AIRPORTS		Bob White Field, Orlando Apopka Airport, Orlando Executive Airport



Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	3,968,194
2. Nonmetallic Minerals	2,623,916
3. Petroleum or Coal Products	2,077,316
4. Clay, Concrete, Glass or Stone	1,700,075
5. Food or Kindred Products	1,539,072

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	2,674,505
2. Clay, Concrete, Glass or Stone	1,761,934
3. Food or Kindred Products	1,421,449
4. Nonmetallic Minerals	787,707
5. Waste or Scrap Materials	478,651

Source: IHS Global Inc.'s Transearch, 2011



Top Trading Partners

IMPORTS	TRUCK TONNAGE
Lake County, FL	1,851,029
Miami-Dade County, FL	1,706,713
Brevard County, FL	1,614,989
Hillsborough County, FL	963,780
Polk County, FL	699,148

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners











EXPORTS	TRUCK TONNAGE
Miami-Dade County, FL	1,488,422
Hillsborough County, FL	834,547
Broward County, FL	581,700
Brevard County, FL	577,218
Palm Beach County, FL	524,696

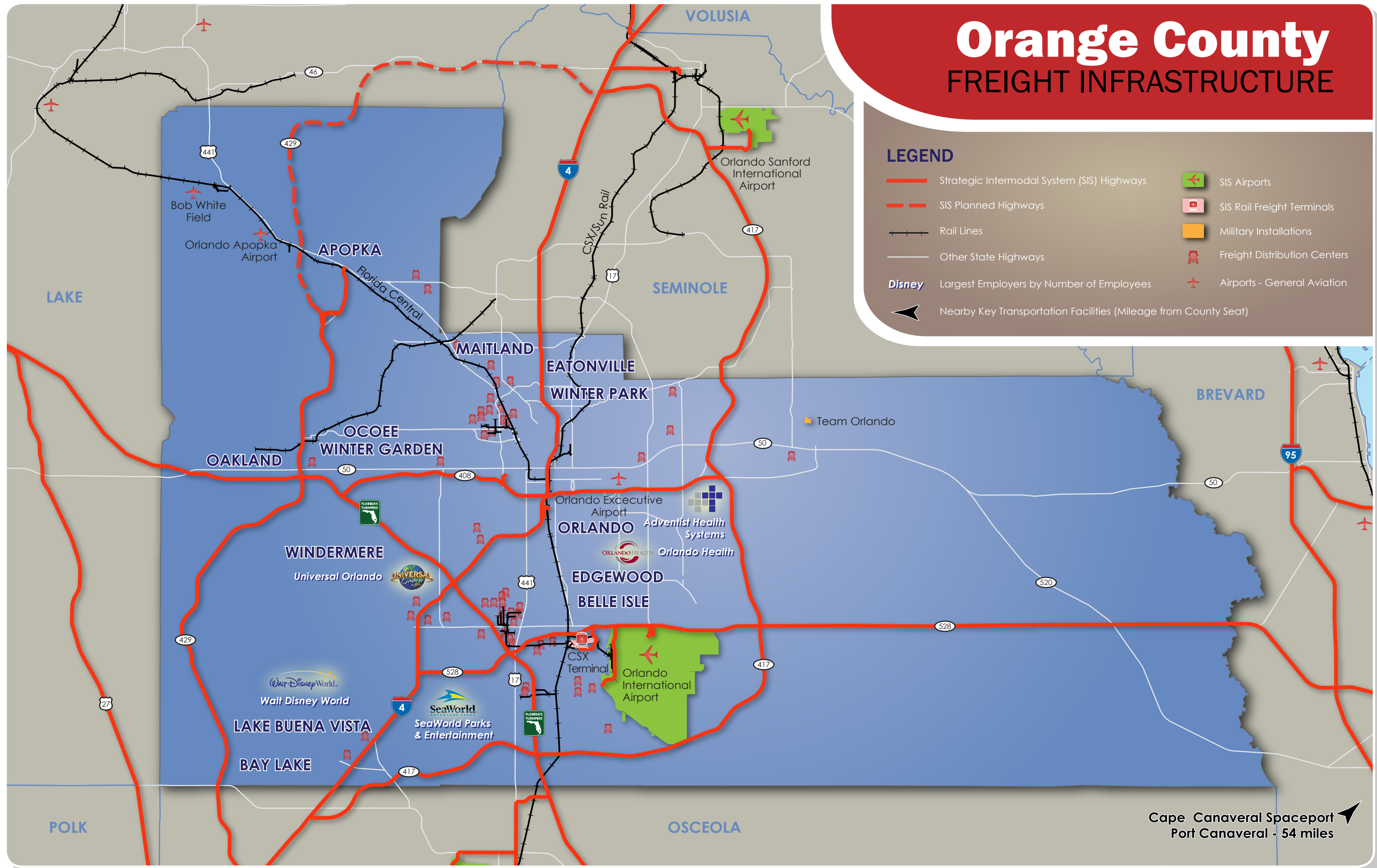
Source: IHS Global Inc.'s Transearch, 2011

Orange 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
 -  SIS Rail Freight Terminals
 -  Military Installations
 -  Freight Distribution Centers
 -  Airports - General Aviation
- Disney** Largest Employers by Number of Employees



Cape Canaveral Spaceport
Port Canaveral - 54 miles

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

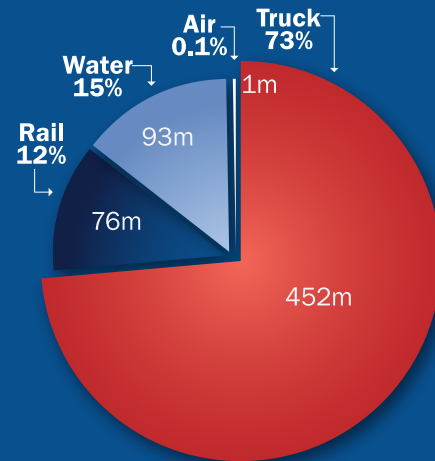
(Nonagricultural Business Groups by Industry)

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)



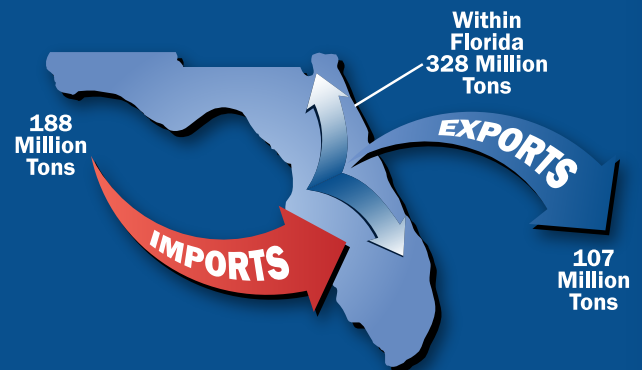
Source: Trade & Logistics Study, Florida Chamber 2009

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

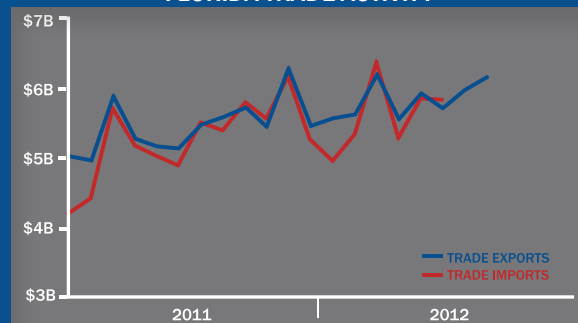
Top International Trade Partners

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.

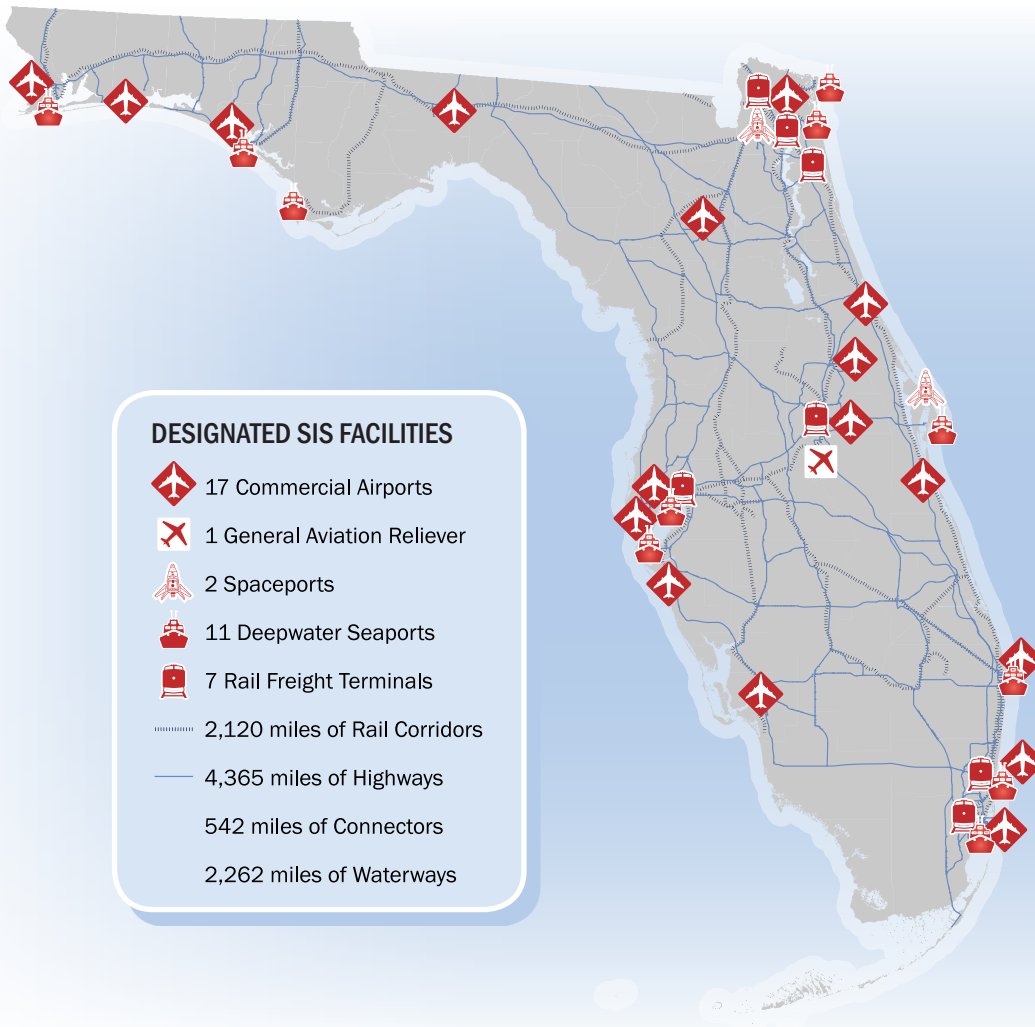
16 Fortune 500 companies have their headquarters in Florida.

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

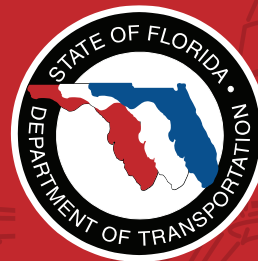
FDOT CONTACTS

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District 8, Bill Posey
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District 9, Alan Grayson
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US House of Representatives
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District 50, Tom Goodson
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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.