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

BAY COUNTY
FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

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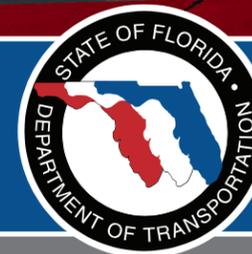
FDOT MISSION:
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.

Freight Mobility and Trade Plan

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**.

FLORIDA CHAMBER of Commerce

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January 2013

Bay County
FREIGHT & LOGISTICS OVERVIEW

COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Panama City, FL	Panama City, FL	1,033 Square Miles	168,852	13.9% (2000-2010)

Primary Economic Development Contact: http://www.bayeda.com

- The Port of Panama City is a growing deep-water port and international gateway that plans on increasing cargo capacity over the next five years to an annual level of 2.4 million tons a year through the investment of $35 million in improvements.
- Bay County is home to Naval Support Activity Panama City, Tyndall Air Force Base, and U.S. Coast Guard Station Panama City. Approximately 60 defense contractors have a presence in Bay County.
- The West Bay Sector Plan is a 75,000 acre multi-use master planned development anchored by the Northwest Florida Beaches International Airport. Venture Crossings Enterprise Centre is the first phase of development, accommodating industrial, commercial and retail space.

Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Retail Trade	725
2. Other Services (except Public Administration)	321
3. Transportation and Warehousing	273
4. Professional, Scientific, and Technical Services	269
5. Educational Services	179

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	17.3%
2. Leisure and Hospitality	16.9%
3. Education and Health Services	11.6%

Source: Enterprise Florida

Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Bay Medical Center	Healthcare	2,000
2. Wal-Mart	Retail	1,250
3. Eastern	Ship Building	850
4. Gulf Coast Medical Center	Healthcare	800
5. Smurfit-Stone Container Corporation	Kraft Linerboard	600

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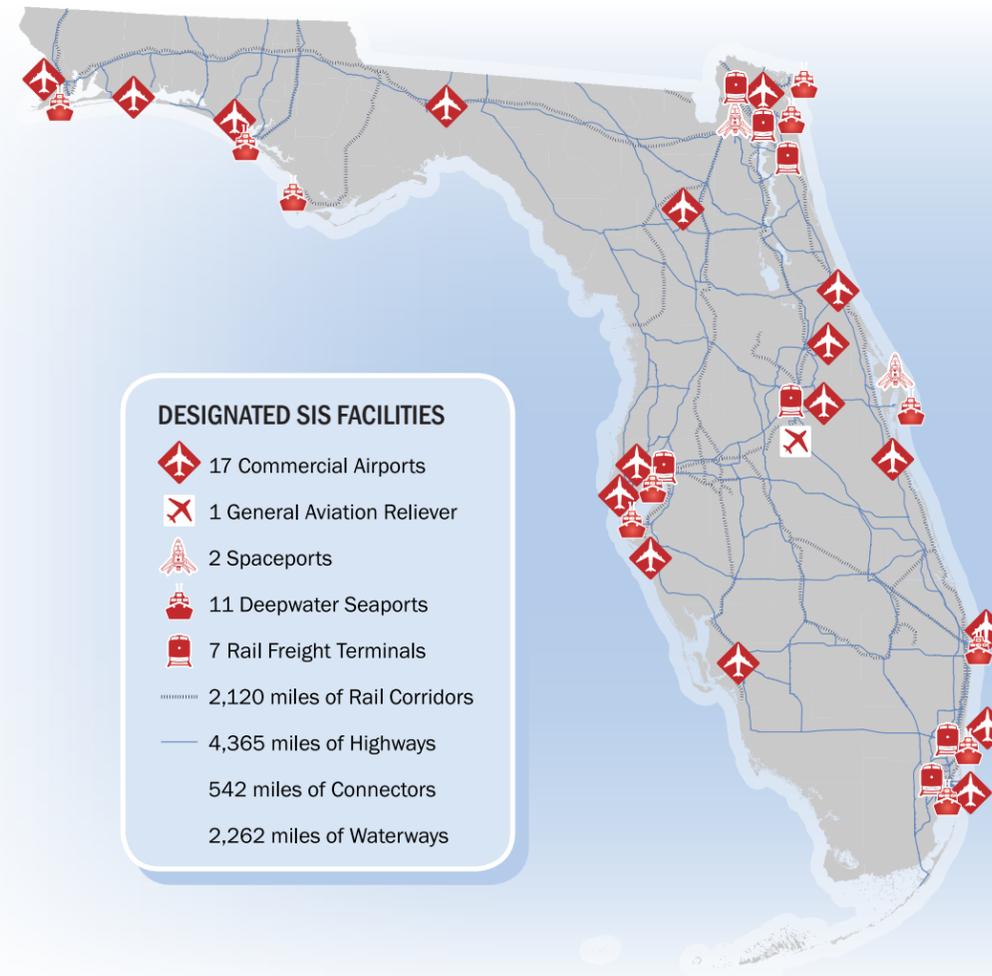
Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

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

Strategic Intermodal System

DESIGNATED SIS FACILITIES

- 17 Commercial Airports
- 1 General Aviation Reliever
- 2 Spaceports
- 11 Deepwater Seaports
- 7 Rail Freight Terminals
- 2,120 miles of Rail Corridors
- 4,365 miles of Highways
- 542 miles of Connectors
- 2,262 miles of Waterways

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**
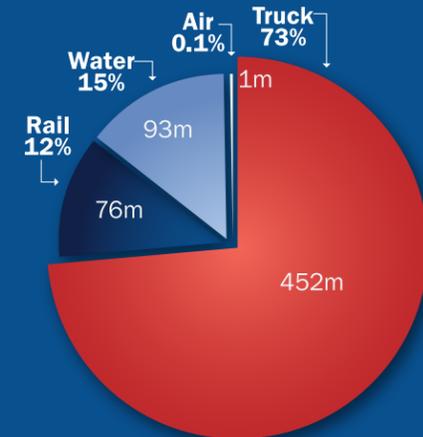
Top Employment Sectors

(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)

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
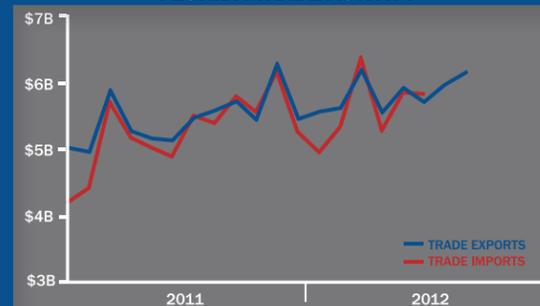
Source: Florida Chamber of Commerce

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	China
2.	Brazil	Mexico
3.	Venezuela	Japan
4.	Canada	Canada
5.	Colombia	Colombia

Source: Trade & Logistics Study, Florida Chamber 2009

DOMESTIC AND INTERNATIONAL MODAL MIX
(millions of tons)

Air 0.1% 1m
Truck 73% 452m
Water 15% 93m
Rail 12% 76m

Source: Trade & Logistics Study, Florida Chamber 2009

TOTAL FREIGHT FLOWS

Within Florida 328 Million Tons
188 Million Tons — IMPORTS
EXPORTS — 107 Million Tons

Source: Trade & Logistics Study, Florida Chamber 2009

FLORIDA TRADE ACTIVITY

Trade Exports / Trade Imports
$7B, $6B, $5B, $4B, $3B — 2011, 2012

Key Transportation and Freight Facilities

STRATEGIC INTERMODAL SYSTEM (SIS) HIGHWAYS		US 231, SR 77, SR 79, SR 368, SR 390
SIS RAILROADS		Bayline
SIS AIRPORTS		Northwest Florida Beaches International Airport
SEAPORTS		Port of Panama City
NON SIS STATE HIGHWAYS		US 98, SR 20, SR 22
GENERAL AVIATION AIRPORTS		Calhoun County Airport
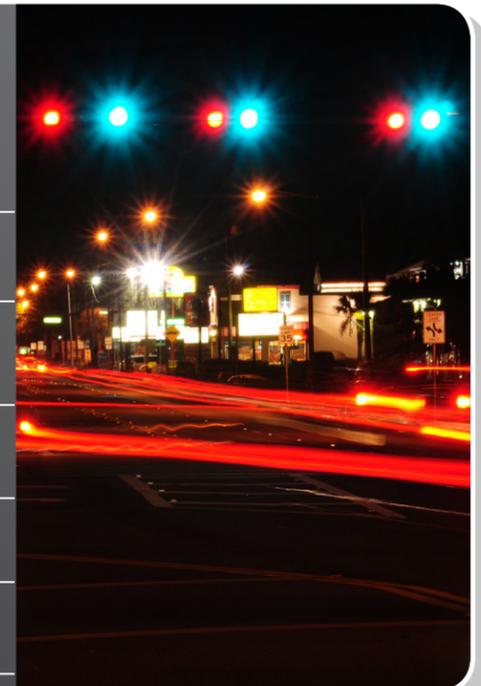
Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Petroleum or Coal Products	910,155
2. Coal	519,249
3. Bulk Movement in Boxcars	490,806
4. Food or Kindred Products	467,275
5. Clay, Concrete, Glass or Stone	290,799

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	1,019,690
2. Lumber or Wood Products	369,646
3. Primary Metal Products	235,456
4. Waste or Scrap Materials	166,243
5. Clay, Concrete, Glass or Stone	78,172

Source: IHS Global Inc.'s Transearch, 2011

EXPORTS
Bay County
IMPORTS

Top Trading Partners

IMPORTS	TRUCK TONNAGE
Mobile County, AL	544,308
Jackson County, MS	182,611
Miami-Dade County, FL	173,779
Walton County, FL	165,758
Gadsden County, FL	109,993

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

EXPORTS	TRUCK TONNAGE
Miami-Dade County, FL	126,337
Okaloosa County, FL	117,187
Broward County, FL	110,729
Palm Beach County, FL	93,639
Hillsborough County, FL	91,212

Source: IHS Global Inc.'s Transearch, 2011

Bay County
FREIGHT INFRASTRUCTURE

WASHINGTON

WALTON

CALHOUN

GULF

Northwest Florida Beaches
International Airport

North Bay

Bayline

LYNN HAVEN

PANAMA CITY BEACH

Port of
Panama City

Gulf Coast Medical Center

Walmart

Naval Support Activity

PANAMA CITY
SPRINGFIELD

Bay Medical Center

Smurfit-Stone

CALLAWAY

PARKER

East Bay

Gulf of Mexico

Eastern
Shipbuilding
Group

Tyndall Air Force Base

MEXICO BEACH

331
98
79
77
20
231
390
368
98
231
22
98

LEGEND

Strategic Intermodal System (SIS) Highways

Rail Lines

Other State Highways

Gulf Coast Largest Employers by Number of Employees

SIS Airports

Seaports

Military Installations

Freight Distribution Centers