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

HIGHLANDS COUNTY FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

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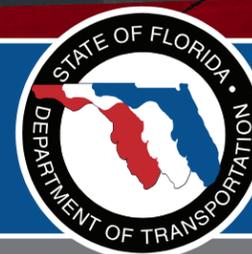
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FDOT MISSION:

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.



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

Highlands County

FREIGHT & LOGISTICS OVERVIEW



COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Sebring, FL	Avon Park, FL	1106 square miles	98,786	13.1% (2000-2010)

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

- Highlands County is centrally located and is nearly equidistant to the metropolitan hubs of Tampa, Orlando, Sarasota, Ft. Myers, Naples, and West Palm Beach.
- Over two-thirds of the land area in the county is involved in some type of agricultural production. Nearly one-third of the roughly 41,000 jobs are held within agriculturally related professions.



Top 5 Growing Industries

INDUSTRY	NET JOB CREATION
1. Administrative, Support, Waste Management, and Remediation Services	627
2. Health Care and Social Assistance	112
3. Manufacturing	95
4. Retail Trade	15
5. Utilities	9

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. Education and Health Services	20.2%
2. Trade, Transportation, and Utilities	18.7%
3. Leisure and Hospitality	14.2%

Source: Enterprise Florida



Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Florida Hospital Heartland Division	Healthcare	1,300
2. Highlands Regional Medical Center	Healthcare	500
3. Cross Country Automotive Services	Roadside Assistance Call Center	500
4. Medical Data Systems	Collection Assistance	350
5. Delray Plants/ Highlands Greenhouse	Ornamental Plants	350

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.

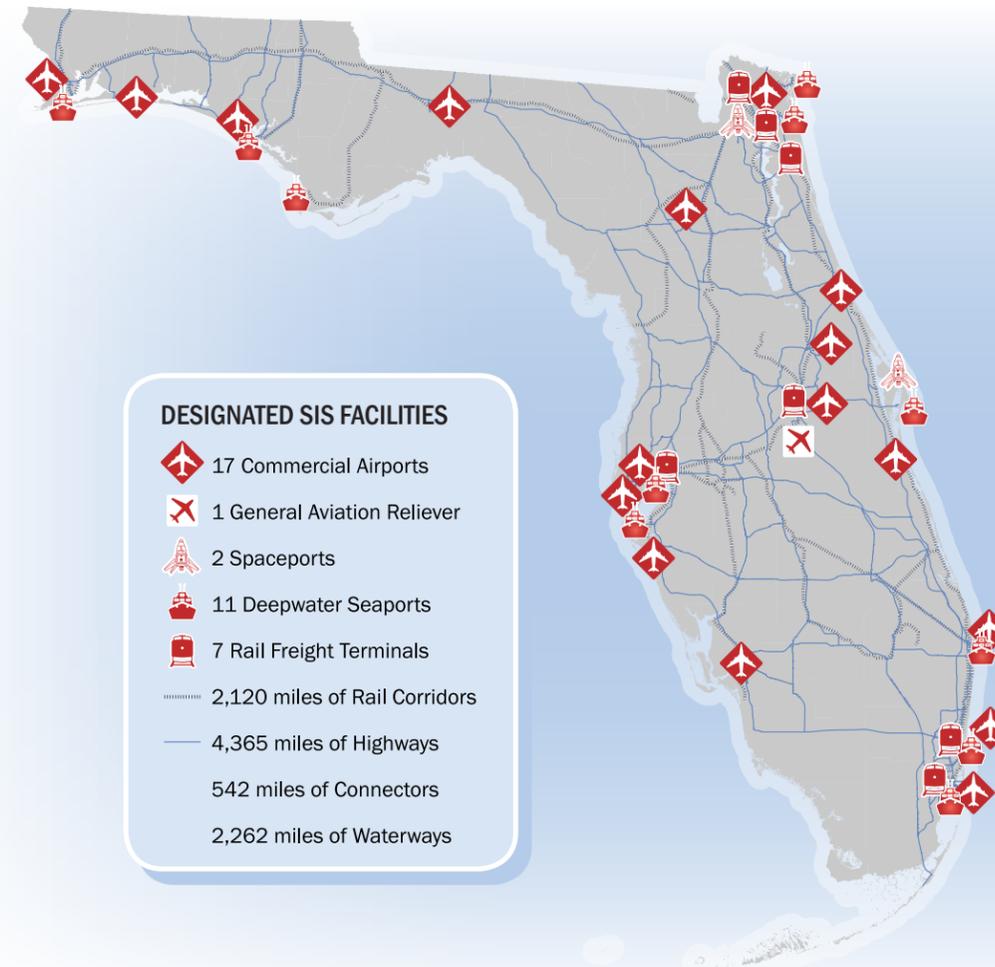
The state boasts 2 spaceports and 5 active launch facilities.

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

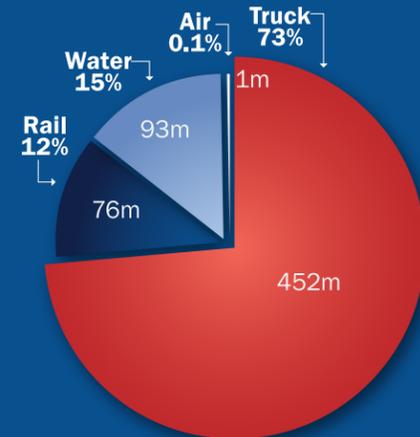
(Nonagricultural Business Groups by Industry)

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

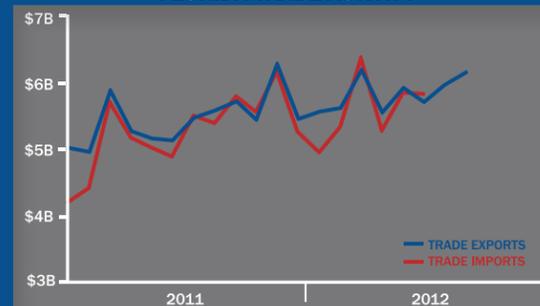
Top International Trade Partners

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		US 27, US 98, SR 70
SIS RAILROADS		CSX, South Central Florida Express
SIS AIRPORTS		Sarasota Bradenton International Airport
SEAPORTS		Port Manatee
NON SIS STATE HIGHWAYS		SR 17, SR 66
GENERAL AVIATION AIRPORTS		Sebring Regional Airport, Avon Park Executive Airport



Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	213,226
2. Food or Kindred Products	140,583
3. Nonmetallic Minerals	140,542
4. Clay, Concrete, Glass or Stone	103,273
5. Chemicals or Allied Products	62,403

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Farm Products	918,542
2. Clay, Concrete, Glass or Stone	485,437
3. Food or Kindred Products	21,444
4. Nonmetallic Minerals	13,290
5. Waste or Scrap Materials	10,331

Source: IHS Global Inc.'s Transearch, 2011



Top Trading Partners

IMPORTS	TRUCK TONNAGE
Miami-Dade County, FL	121,101
Polk County, FL	84,366
Broward County, FL	57,676
Hillsborough County, FL	56,660
Palm Beach County, FL	42,749

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

EXPORTS	TRUCK TONNAGE
Lee County, FL	113,438
Hillsborough County, FL	84,511
Orange County, FL	62,644
Broward County, FL	56,266
Sarasota County, FL	41,468

Source: IHS Global Inc.'s Transearch, 2011



LEGEND

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

Highlands County
 FREIGHT INFRASTRUCTURE