LEON COUNTY
FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

### FDOT CONTACTS

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STATE OF FLORIDA · DEPARTMENT OF TRANSPORTATION
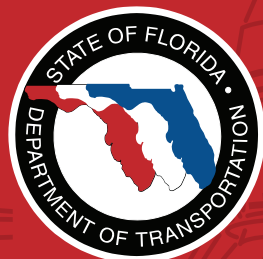
Federal Legislative Contacts

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

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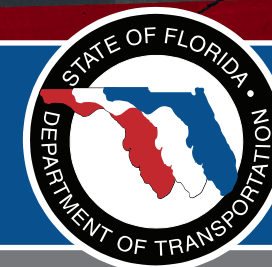Phone (202) 225-523

State Legislative Contacts:

Florida Senate
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Florida House of Representatives
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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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Workforce florida, inc.

January 2013

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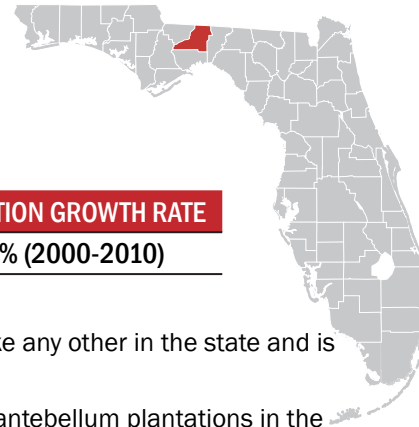
COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Tallahassee, FL	Tallahassee, FL	702 square miles	275,487	15.0% (2000-2010)

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

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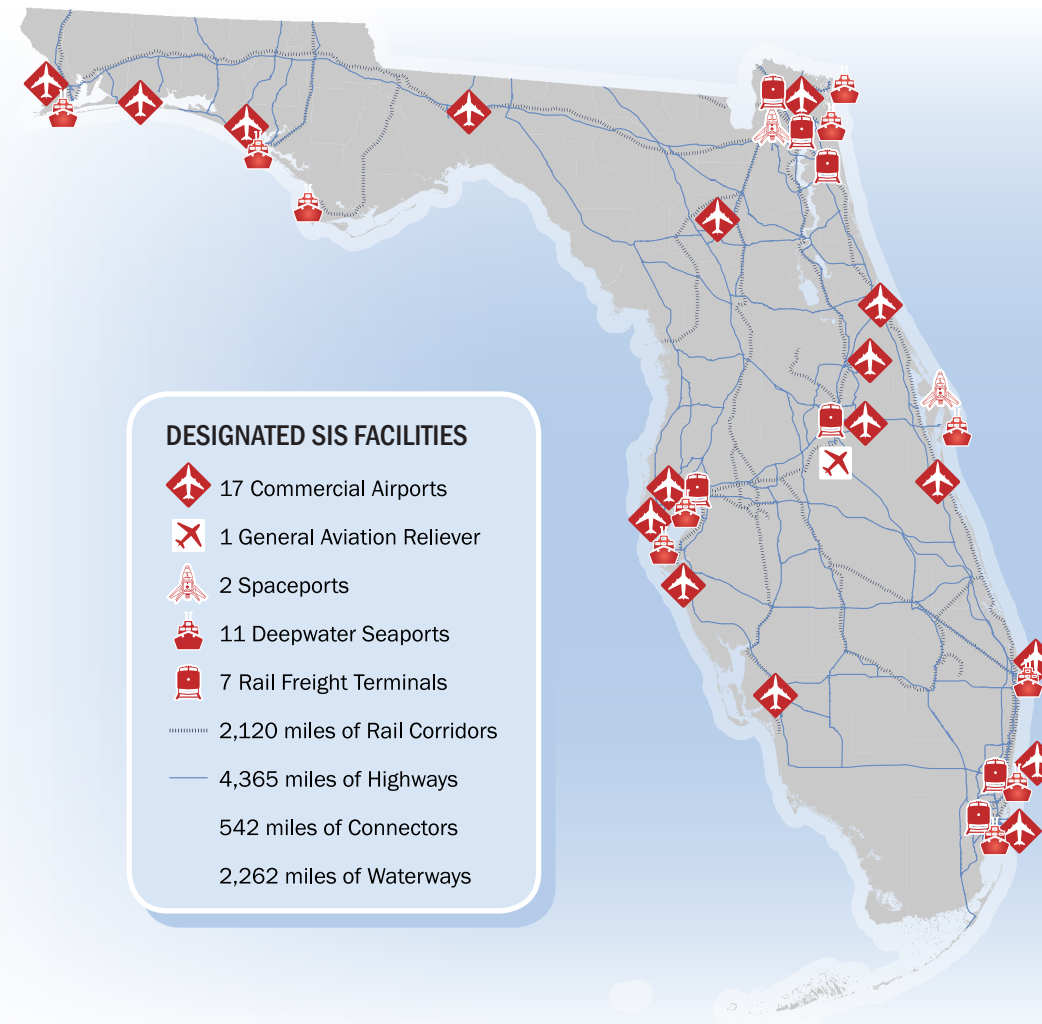- Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

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

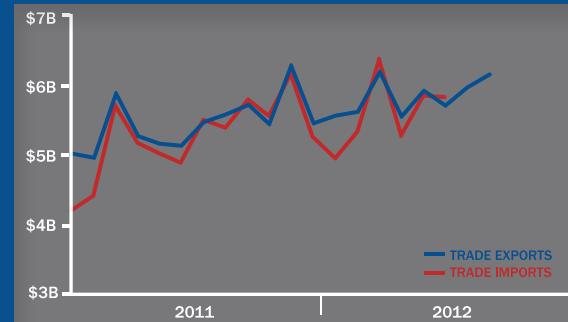### DOMESTIC AND INTERNATIONAL MODAL MIX
(millions of tons)

Air 0.1% — 1m
Truck 73% — 452m
Water 15% — 93m
Rail 12% — 76m
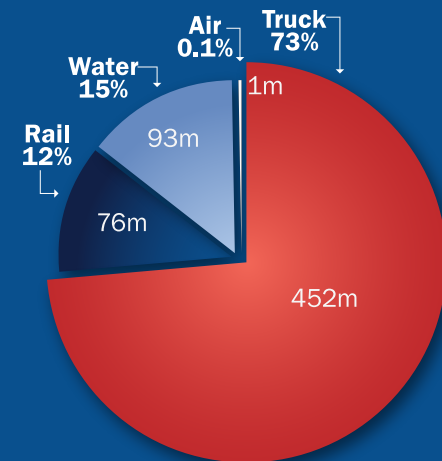
Source: Trade & Logistics Study, Florida Chamber 2009

TOTAL FREIGHT FLOWS

Within Florida 328 Million Tons
188 Million Tons — IMPORTS
EXPORTS — 107 Million Tons
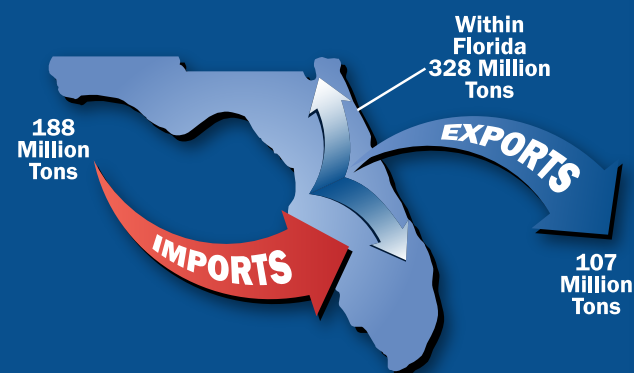
Source: Trade & Logistics Study, Florida Chamber 2009

FLORIDA TRADE ACTIVITY

$7B
$6B
$5B
$4B
$3B

2011 — 2012

TRADE EXPORTS
TRADE IMPORTS

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

Leon County
EXPORTS
IMPORTS

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

Publix Largest Employers by Number of Employees

SIS Airports

Freight Distribution Centers

Airports - General Aviation

GEORGIA

GADSDEN

CSX

90

27

CSX

10

319

Tallahassee Commercial Airport

ACS

Walmart

10

Capital Regional Medical Center

90

Tallahassee Regional Medical Center

Capital Regional Medical Center

263

20

CSX

27

319

57

TALLAHASSEE

Tallahassee Regional Airport

319

Publix Publix

JEFFERSON

LIBERTY

267

363

319

57

WAKULLA