ORANGE COUNTY
FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

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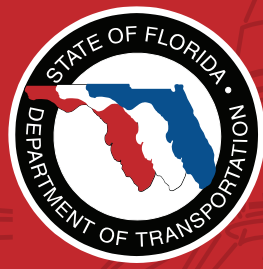
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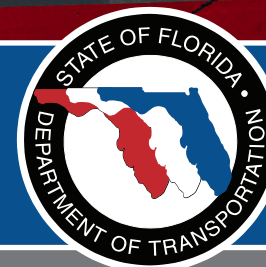
FDOT MISSION:
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.

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

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

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
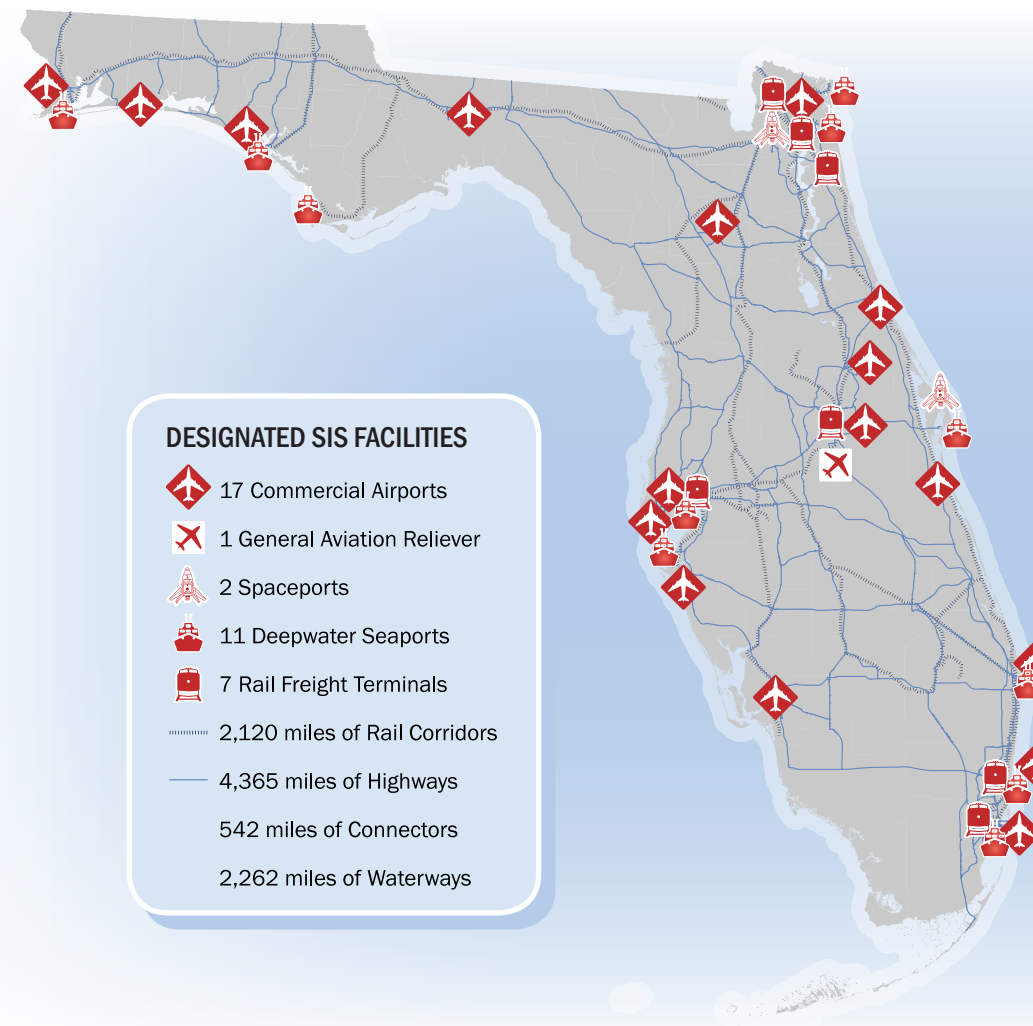
Florida has 784 aviation facilities, 129 public use, and 19 have commercial service.

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.

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
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)

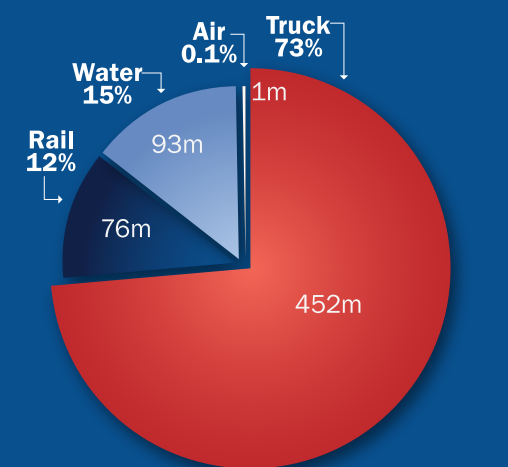Chamber of Commerce website: **http://www.flchamber.org**

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
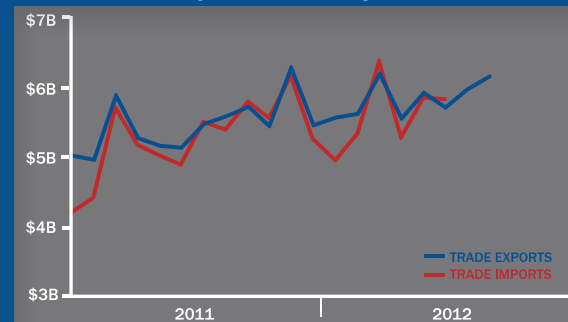6. Financial/ Professional Services

Source: Florida Chamber of Commerce
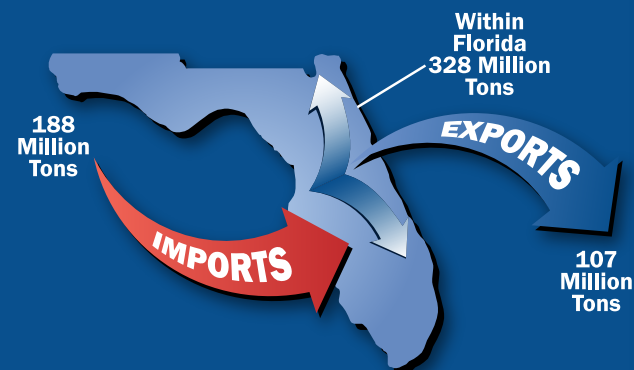
Top International Trade Partners

The state of Florida is a major international hub accounting for approximately $149 billion in international trade activity in 2011.

EXPORTS	IMPORTS
1. Switzerland	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

DOMESTIC AND INTERNATIONAL MODAL MIX
(millions of tons)

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

Source: Trade & Logistics Study, Florida Chamber 2009

TOTAL FREIGHT FLOWS

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

Source: Trade & Logistics Study, Florida Chamber 2009

FLORIDA TRADE ACTIVITY

(Line chart, $3B–$7B, years 2011–2012)

- TRADE EXPORTS
- TRADE IMPORTS

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	FL	US 1, US 441, SR 50, SR 520
GENERAL AVIATION AIRPORTS	✈	Bob White Field, Orlando Apopka Airport, Orlando Executive Airport
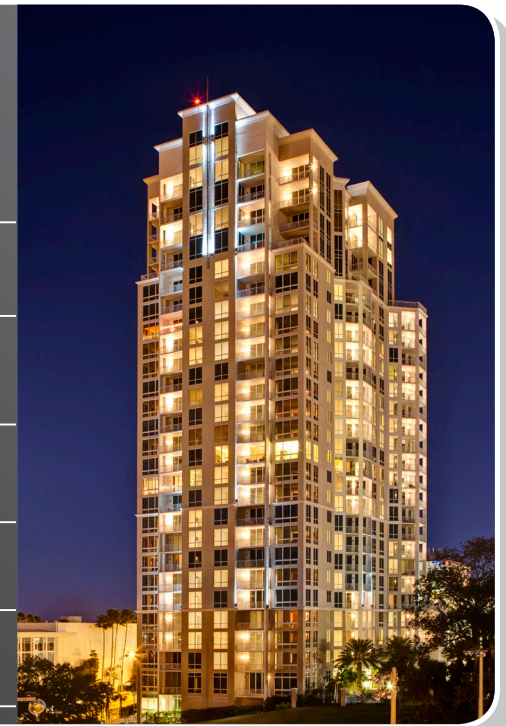
Top Imports

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

EXPORTS
Orange County
IMPORTS

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

VOLUSIA

LAKE

SEMINOLE

BREVARD

POLK

OSCEOLA

LEGEND

Strategic Intermodal System (SIS) Highways		SIS Airports	
SIS Planned Highways		SIS Rail Freight Terminals	
Rail Lines		Military Installations	
Other State Highways		Freight Distribution Centers	
Disney Largest Employers by Number of Employees		Airports - General Aviation	
Nearby Key Transportation Facilities (Mileage from County Seat)			

APOPKA

Bob White Field

Orlando Apopka Airport

Florida Central

OAKLAND

OCOEE
WINTER GARDEN

MAITLAND

EATONVILLE
WINTER PARK

Team Orlando

FLORIDA'S TURNPIKE

Orlando Executive Airport

ORLANDO

Adventist Health Systems

ORLANDO HEALTH *Orlando Health*

WINDERMERE

Universal Orlando

UNIVERSAL Orlando

EDGEWOOD

BELLE ISLE

WALT DISNEY World
Walt Disney World

SeaWorld
SeaWorld Parks & Entertainment

CSX Terminal

Orlando International Airport

FLORIDA'S TURNPIKE

LAKE BUENA VISTA

BAY LAKE

Orlando Sanford International Airport

CSX/Sun Rail

Cape Canaveral Spaceport
Port Canaveral - 54 miles