OSCEOLA COUNTY
FREIGHT & LOGISTICS OVERVIEW

FLORIDA DEPARTMENT OF TRANSPORTATION

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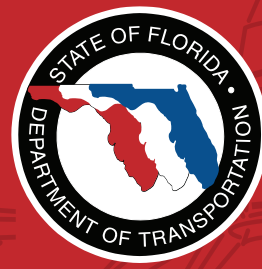
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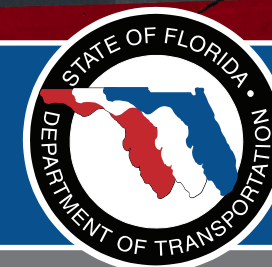
FDOT MISSION:
THE DEPARTMENT WILL PROVIDE A SAFE TRANSPORTATION SYSTEM THAT ENSURES THE MOBILITY OF PEOPLE AND GOODS, ENHANCES ECONOMIC PROSPERITY AND PRESERVES THE QUALITY OF OUR ENVIRONMENT AND COMMUNITIES.

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**.

January 2013

Osceola County
FREIGHT & LOGISTICS OVERVIEW

COUNTY SEAT	LARGEST CITY	AREA	POPULATION	POPULATION GROWTH RATE
Kissimmee, FL	Kissimmee, FL	1507 square miles	268,685	55.8% (2000-2010)

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

- Created in 1887, Osceola County is 1507 square miles and serves as the southern boundary of the Central Florida Region and the Greater Orlando Metropolitan Area. The City of Kissimmee, the county seat, is 18 miles south of Orlando.
- Osceola's economic base is dominated by tourism, serving as a "gateway" to Disney World and other Central Florida attractions.
- Osceola's historical investments in ranching and citrus are still very strong, while light industry and service enterprises are growing due to the transportation advantages and proximity of the Orlando area.

Top 5 Growing Industries

| INDUSTRY	NET JOB CREATION
1. Retail Trade	531
2. Educational Services	490
3. Professional, Scientific, and Technical Services	165
4. Construction	138
5. Administrative, Support, Waste, and Remediation	134

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	25.4%
2. Trade, Transportation, and Utilities	20.9%
3. Education and Health Services	13.7%

Source: Enterprise Florida
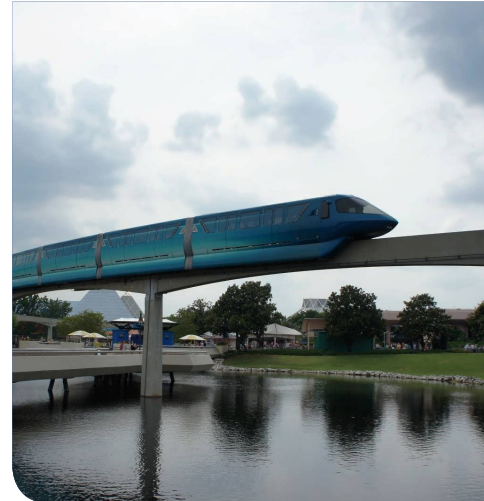
Major Private Sector Employers

EMPLOYER	BUSINESS LINE	NUMBER OF EMPLOYEES
1. Walt Disney World	Entertainment	4,150
2. Wal-Mart Stores Inc.	Retail	2,388
3. Florida Hospital-Kissimmee & Celebration	Healthcare Provider	1,500
4. Gaylord Palms Resort & Convention Center	Resort & Hotel	1,468
5. Publix Supermarkets, Inc.	Grocery Stores	1,350

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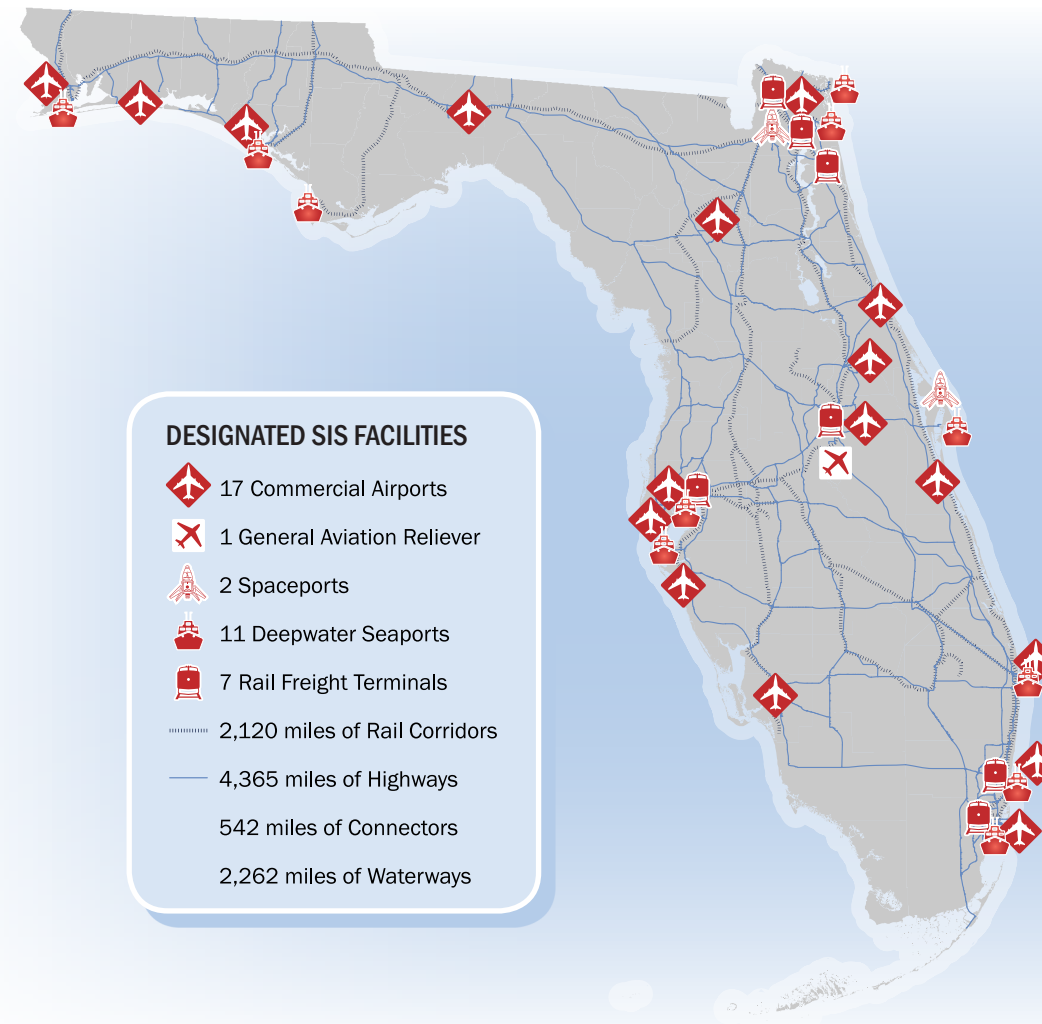
Florida has over 2,700 miles of rail lines, which move over 98 million tons of freight annually.

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

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**
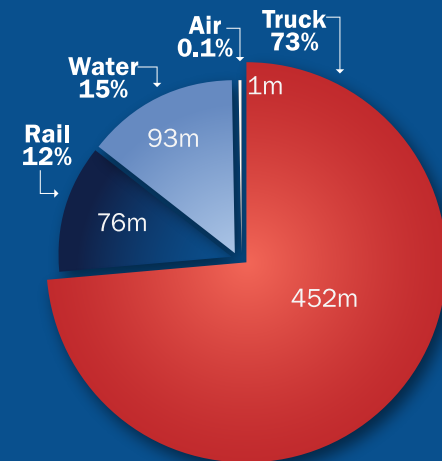
Top Employment Sectors

(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
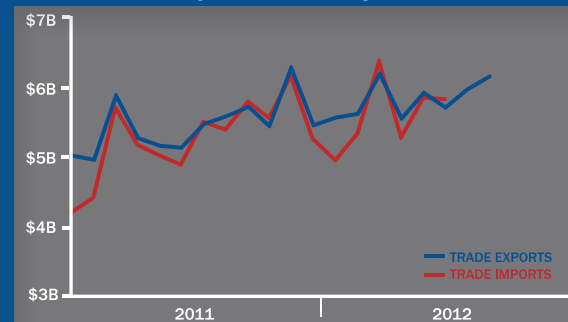
Source: Florida Chamber of Commerce
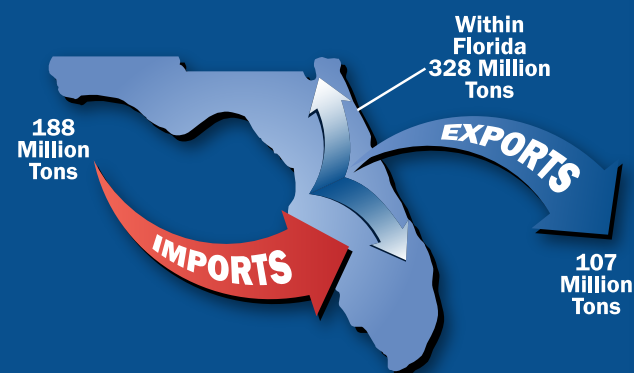
Top International Trade Partners

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

EXPORTS	IMPORTS
1. Switzerland	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)

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-4, Florida's Turnpike, SR 417
SIS RAILROADS		FDOT/SunRail
SIS AIRPORTS		Kissimmee Gateway, Orlando International
SEAPORTS		Canaveral Port Authority
NON SIS STATE HIGHWAYS		US 192, US 441, US 17-92
GENERAL AVIATION AIRPORTS		Kissimmee Gateway Airport
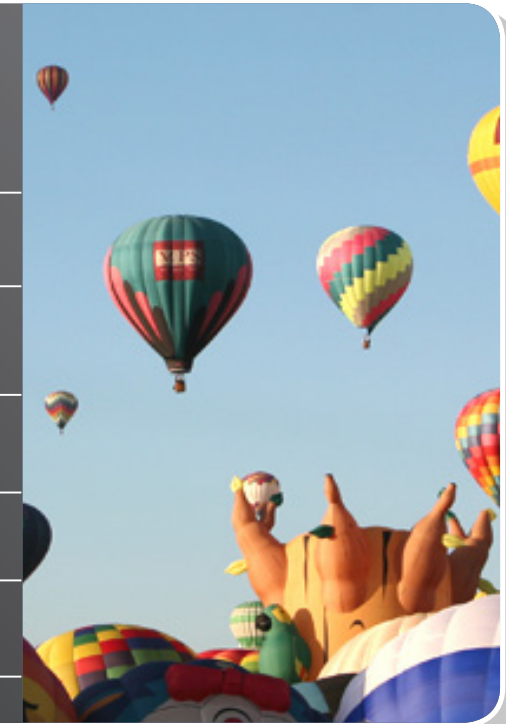
Top Imports

INBOUND FREIGHT	TRUCK TONNAGE
1. Bulk Movement in Boxcars	1,855,308
2. Nonmetallic Minerals	877,121
3. Clay, Concrete, Glass or Stone	386,812
4. Petroleum or Coal Products	200,721
5. Food or Kindred Products	189,069

Source: IHS Global Inc.'s Transearch, 2011

Top Exports

OUTBOUND FREIGHT	TRUCK TONNAGE
1. Clay, Concrete, Glass or Stone	399,378
2. Food or Kindred Products	317,825
3. Farm Products	178,102
4. Lumber or Wood Products	45,096
5. Bulk Movement in Boxcars	19,249

Source: IHS Global Inc.'s Transearch, 2011

Osceola County
EXPORTS
IMPORTS

Top Trading Partners

IMPORTS	TRUCK TONNAGE
Polk County, FL	347,464
Miami-Dade County, FL	156,374
Hillsborough County, FL	117,754
Broward County, FL	99,811
Orange County, FL	92,964

Source: IHS Global Inc.'s Transearch, 2011

Top Trading Partners

EXPORTS	TRUCK TONNAGE
Miami-Dade County, FL	171,572
Broward County, FL	79,557
Hillsborough County, FL	66,435
Orange County, FL	55,717
Pinellas County, FL	52,216

Source: IHS Global Inc.'s Transearch, 2011

Osceola County
FREIGHT INFRASTRUCTURE

LAKE

ORANGE

Orlando International Airport

Kennedy Space Center
Port Canaveral

429

417

27

Florida Hospital
Celebration Health

Gaylord Palms Resort
& Convention Center

Disney
Walt Disney Company

KISSIMMEE

FDOT/SunRail

4

17

Kissimmee
Gateway
Airport

Cingular

Walmart

ST. CLOUD

Atlantic Ocean

192

FEC

95

Melbourne
International
Airport

CSX

441

BREVARD

FLORIDA'S TURNPIKE

POLK

60

27

INDIAN RIVER

CSX

Avon Park Air Force Range

HARDEE

HIGHLANDS

OKEECHOBEE

64

LEGEND

Strategic Intermodal System (SIS) Highways

Rail Lines

Other State Highways

Gaylord Largest Employers by Number of Employees

SIS Airports

Seaports

Military Installations

Freight Distribution Centers

Airports - General Aviation