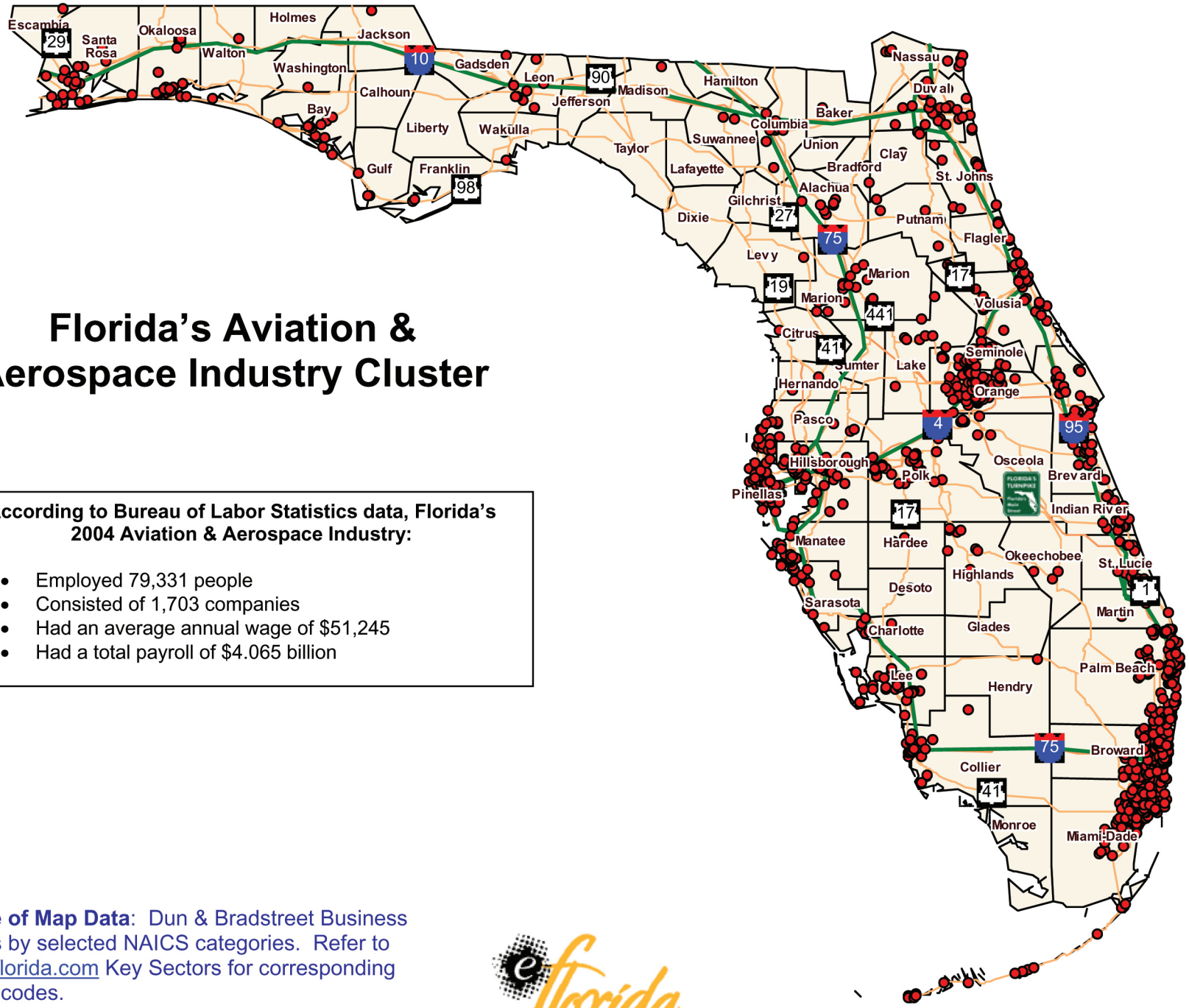
Florida's Aviation & Aerospace Industry Cluster



According to Bureau of Labor Statistics data, Florida's 2004 Aviation & Aerospace Industry:

- Employed 79,331 people
- Consisted of 1,703 companies
- Had an average annual wage of $51,245
- Had a total payroll of $4.065 billion

Source of Map Data: Dun & Bradstreet Business Listings by selected NAICS categories. Refer to www.eflorida.com Key Sectors for corresponding NAICS codes.

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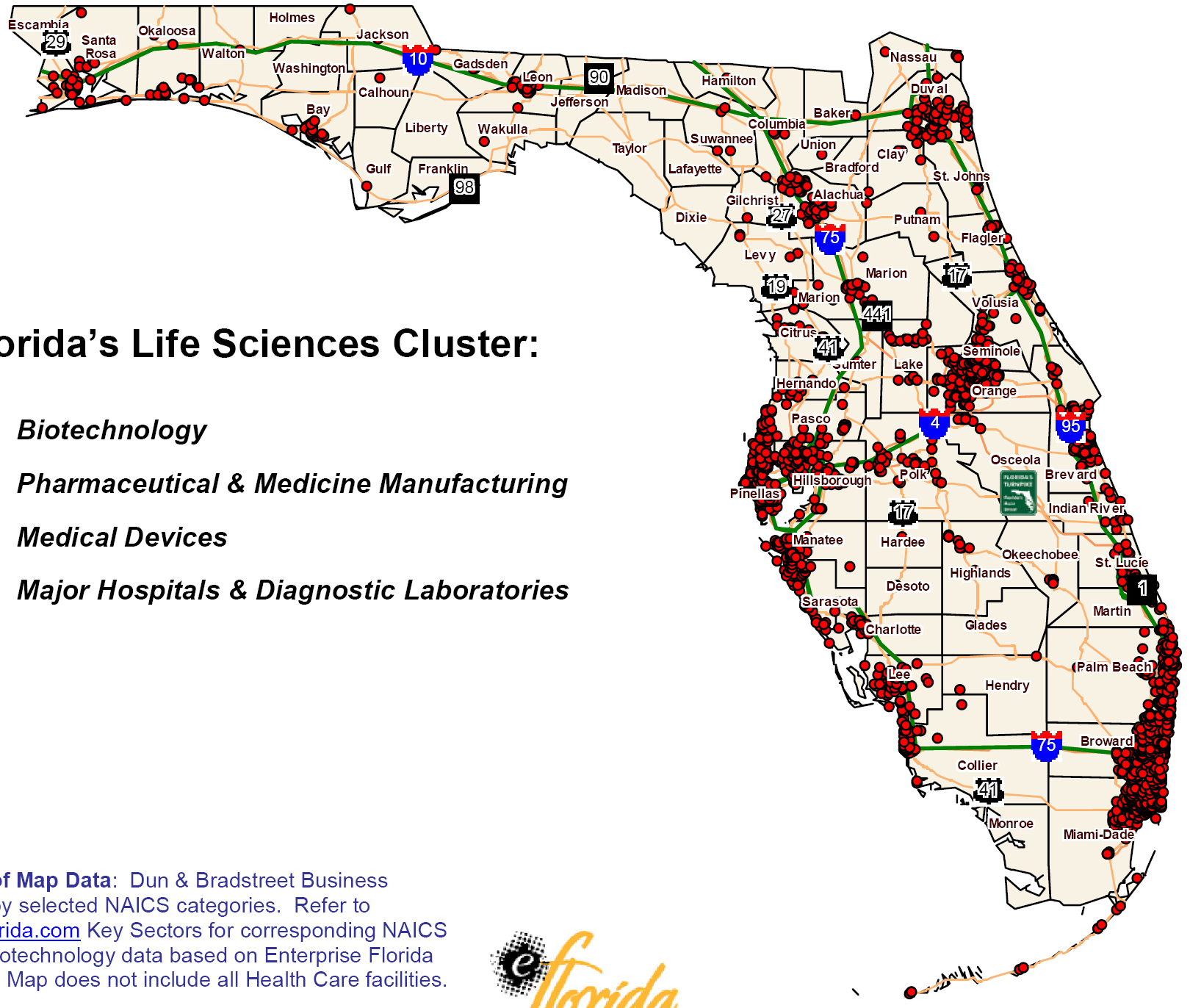
Florida's Life Sciences Cluster:

- *Biotechnology*
- *Pharmaceutical & Medicine Manufacturing*
- *Medical Devices*
- *Major Hospitals & Diagnostic Laboratories*



Source of Map Data: Dun & Bradstreet Business Listings by selected NAICS categories. Refer to www.eflorida.com Key Sectors for corresponding NAICS codes. Biotechnology data based on Enterprise Florida research. Map does not include all Health Care facilities.

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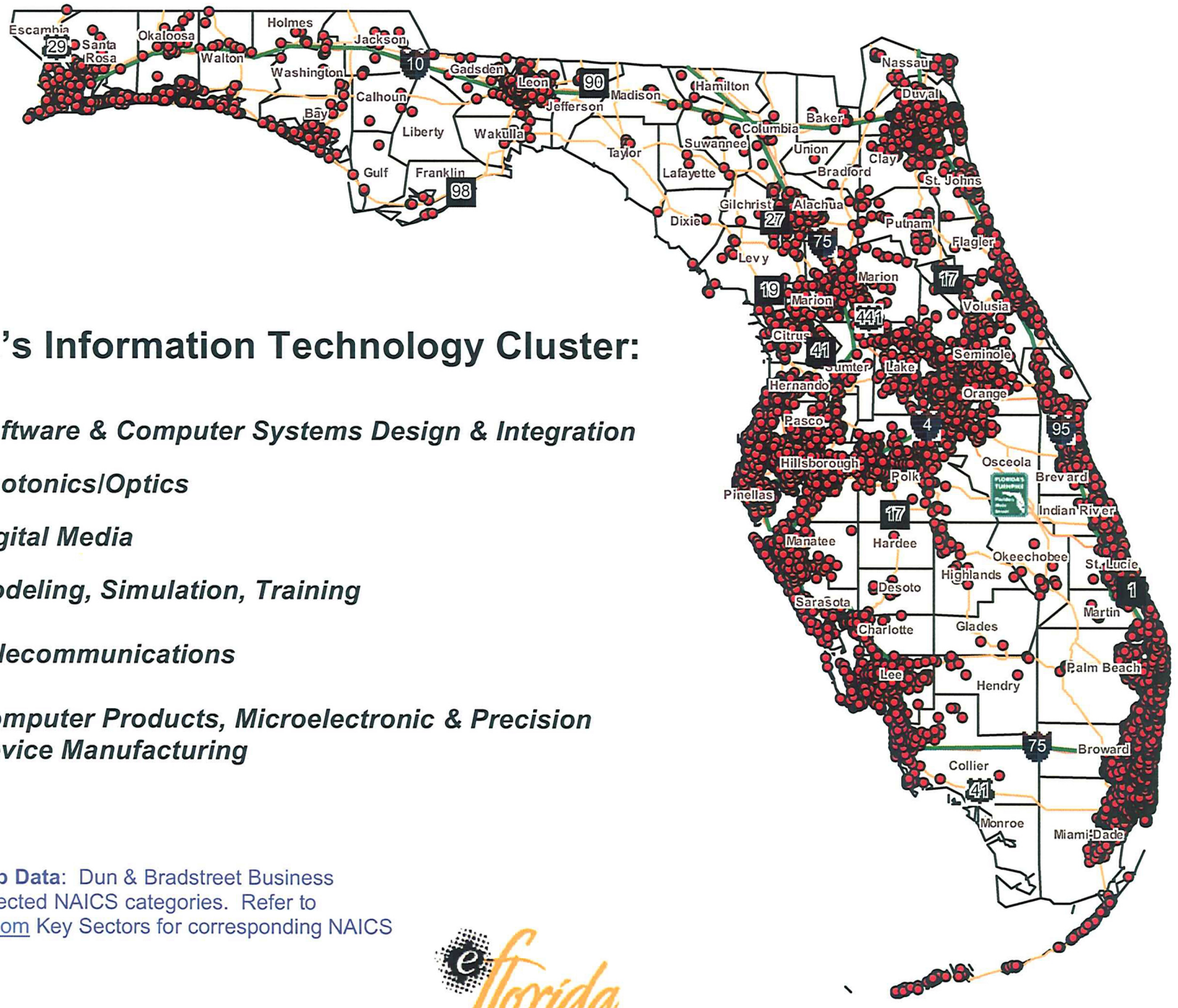
Florida's Information Technology Cluster:

- ***Software & Computer Systems Design & Integration***
- ***Photonics/Optics***
- ***Digital Media***
- ***Modeling, Simulation, Training***
- ***Telecommunications***
- ***Computer Products, Microelectronic & Precision Device Manufacturing***



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Airport Cargo Transload Analysis

Analysis of air cargo carrier schedules and interviews of airport managers and air cargo carrier staff provides insight into the amount of air cargo which arrives/departs each system airport via truck versus that which arrives/departs on air cargo aircraft and wide-body passenger aircraft. Cargo transferred between aircraft never leaves airport property and is considered "transload" cargo. For example, cargo arriving from Marathon, Florida on a Mountain Air Cargo Cessna Caravan at Fort Lauderdale-Hollywood International is transloaded onto a FedEx Boeing 727 which then forwards the cargo onto its Memphis hub. The Mountain Air Cargo aircraft is essentially a "feeder flight", as discussed in Chapter Two, to the larger B727 FedEx aircraft. Analysis indicates most of the air cargo arriving and departing Florida's SIS and Tier Two airports arrives on trucks and is transferred to aircraft. These transfers may take place in a cargo warehouse or directly from the truck to the aircraft on the air cargo tarmac. As presented in **Exhibit 1A**, air cargo at nearly all Tier Two airports arrives to/from the airport via truck. The exceptions to this trend are Pensacola Regional, St. Petersburg-Clearwater International and Tallahassee Regional airports. Approximately eight percent of Tallahassee's air cargo is tranloaded between feeder aircraft and hub bound aircraft, whereas at Pensacola 21 percent of air cargo is transloaded. As a result of UPS' regional hub operations at St. Petersburg-Clearwater International, 80 percent of air cargo is transloaded at the airport.

At Florida's SIS airports 1 to 4 percent of air cargo is transloaded between aircraft with the remainder arriving/departing on trucks. The exception to this is Miami International Airport, an air cargo gateway airport, where significant hub activity takes place. Sixty-two percent of air cargo is transloaded between all cargo aircraft and wide-body passenger aircraft. Tampa Cargo, Amerijet, American Airlines, DHL and UPS utilize the airport to varying degrees for hub activity. A significant number of air cargo feeder flights also take place at the airport by carriers such as IBC Airways.

Overall, the analysis indicates each airport relies heavily on truck transfers. This provides another measure quantifying the dependence of air cargo activity on local roadway infrastructure.

Exhibit 1A
Air Cargo Transfers By Airport

Airport Name	2005 Total Annual Tonnage	Annual Tonnage Transferred Aircraft to/from Aircraft*		Annual Tonnage Transferred Aircraft to/from Truck	
SIS Airports					
Ft. Lauderdale-Hollywood International	175,533	1%	1,755	99%	173,778
Jacksonville International	83,975	4%	3,359	96%	80,616
Miami International	1,934,545	62%	1,199,418	38%	735,127
Orlando International	225,928	1%	2,259	99%	223,669
Palm Beach International	19,315	1%	193	99%	19,122
Southwest Florida International	21,148	1%	211	99%	20,937
Tampa International	100,228	4%	4,009	96%	96,219
Tier Two					
Daytona Beach International	193	0%	0	100%	193
Florida Keys Marathon	192	0%	0	100%	192
Gainesville Regional	272	0%	0	100%	272
Key West International	460	0%	0	100%	460
Melbourne International	328	0%	0	100%	328
Naples Municipal	18	0%	0	100%	18
Okaloosa Regional	67	0%	0	100%	67
Orlando Sanford International	7,833	0%	0	100%	7,833
Panama City-Bay County International	831	0%	0	100%	831
Pensacola Regional Airport	3,667	21%	770	79%	2,897
Sarasota-Bradenton International	156	0%	0	100%	156
St. Petersburg-Clearwater International	23,200	80%	18,560	20%	4,640
Tallahassee Regional	12,981	8%	1,038	92%	11,943

Source: Wilbur Smith Associates
* Cargo transported on narrow-body passenger aircraft not included in this analysis