Chapter 4
Florida Air Cargo Traffic and Trade Lanes

Chapter Two provides an overview of the air cargo industry while Chapter Three provides an overview of international air cargo trade as it relates to Florida airports. This chapter identifies recent historic (2000 to 2005) air cargo activity at Florida SIS and Tier Two Airports. It also identifies where air cargo trade lanes or markets in which air cargo is originating and destined for. These trade lanes are significant since they provide connectivity between Florida and the global economy. For example, air cargo traffic between Miami and Bogotá comprises an important trade lane since large volumes of perishable goods arrive from Bogotá into the U.S. via Miami. Historic air cargo tonnages as well as scheduled air cargo routes are identified in this chapter to gain a better understanding of the amount of cargo accommodated at Florida's airports and highway system since large amounts of air cargo are trucked on a scheduled basis. In addition, this chapter provides an understanding on how much aircraft and truck "lift" capacity is available in Florida's air cargo industry. This chapter presents the following:

- Historic air cargo traffic at Florida SIS and Tier Two Airports
- Air cargo lift capacity and trade lanes at Florida SIS and Tier Two Airports

INTRODUCTION

Florida air cargo lift is reviewed in two categories: Strategic Intermodal System (SIS) Airports and Tier Two Airports.[1] According to 2005 U.S. DOT O&D Survey data, Florida SIS Airports accommodated 92 percent of all inbound and outbound passenger traffic.[2] As a group, these airports processed 2,560,672 tons of air cargo during 2005; more than all Tier Two Airports combined.[3] The seven SIS Airports are listed below:

- Ft. Lauderdale International Airport(FLL)
- Jacksonville International Airport(JAX)
- Miami International Airport(MIA)
- Orlando International Airport (MCO)
- Palm Beach International Airport (PBI)
- Southwest Florida International (RSW)
- Tampa International (TPA)

Location is a key factor supporting air cargo activity. Proximity to major cities and consequently to large corporations drives cargo demand at SIS Airports. The infrastructure at SIS Airports is also more supportive of air cargo activity. As an example, Miami International operates a 09/27 runway measuring 13,000 feet in length and 150 feet wide. This runway can accommodate next generation large aircraft such as the Airbus A380, Boeing 747, and large air freighters. Tier Two Airports such as Pensacola and Panama City do not have the runway length to support these large cargo aircraft. With locations along the Gulf Coast and away from major markets, air cargo demand is also subdued.

[1] Tier Two Airports are comprised of Emerging SIS Airports and other airports in the State with scheduled air cargo traffic.
2 U.S. DOT O&D Survey, reconciled to Schedules T-100 and 298C T-1
3 Airport Management Records

Each of the seven Florida SIS Airports support scheduled flights with air cargo capacity. These flights are operated by a combination of integrated express carriers (DHL, FedEx, and UPS), all cargo airlines (Arrow, Atlas, and Tampa Air), and passenger airlines (American Airlines, British Airways, and Delta). For this analysis, cargo capacity offered on passenger airlines is provided in terms of wide-body aircraft which utilize belly containers for cargo. Regarding Florida Tier Two Airports, 75 percent offer scheduled air cargo lift. Air cargo lift is also available throughout the State on commercial passenger carriers. When utilizing SIS and Tier Two Airports, both integrated express carriers and all cargo airlines can load air cargo onto the main aircraft decks. This cargo is containerized, palletized, or even bulk loaded depending on the aircraft type. Passenger carriers cannot load air cargo on the main aircraft deck, but can use the lower deck (belly) for either containerized or bulk loaded material depending on the aircraft configuration. One advantage of using lower deck containers on commercial passenger aircraft is reduced transfer time for moving material to connecting flights. For example, if one lower deck LD-3[4] container of air cargo with final destination of London, England (LHR) arrives in Miami, Florida, this container can be transferred onto a daily Boeing 777 Miami-London flight operated by American Airlines. This container compatibility eliminates time otherwise spent unloading the material in Miami and reloading a different sized container. Integrated express and all cargo carriers also contract with commercial airlines to transport freight. This is a cost-effective option when a carrier does not have consistent cargo volume on a given lane to support dedicating an aircraft to service the route.

The quantity of air cargo moving between origin and destination points, and also the amount of cargo transferring via an airport, is closely related to airport infrastructure capacity. Florida SIS Airports are located near major metropolitan areas that produce air cargo traffic. Consequently, these facilities must be able to support large aircraft capable of accommodating market demand. The Tier Two Airports, located near smaller metro areas and with infrastructure capable of supporting smaller-scale operations, can be used to move traffic to larger SIS airports. Hence, although smaller, these Tier Two airports are critical for maintaining connectivity, particularly for the integrated express operators. In order to better understand the relationship of cargo demand and airport infrastructure, an analysis of available cargo capacity (or lift) on scheduled flights is warranted.

AIR CARGO AND RFS CAPACITY AT FLORIDA AIRPORTS

Air Cargo Capacity

In total, Florida airports offer a total of 9.7 million pounds of air cargo lift capacity on a typical Wednesday, the busiest day in the air cargo industry workweek. The leader in terms of air cargo capacity is Miami International. Miami International provides more than 6.2 million pounds of air cargo capacity. This represents 64 percent of the total air cargo capacity available at all Florida SIS and Tier Two airports. Orlando International with 1.2 million pounds and Ft. Lauderdale International with just over 630,000 pounds of available capacity rank second and third respectively. Florida Tier Two airports contribute nearly 490,000 pounds of air cargo capacity on a typical Wednesday. **Exhibit**

[4] LD-3 containers are contoured and half the width of a standard AAA Unit Load Device (ULD). See Exhibit 2.2.

4.1 below provides the air cargo capacity offered at Florida SIS and Tier Two airports on a typical Wednesday.

Exhibit 4.1
Air Cargo Tonnage
Capacity at Florida Airports

Airport	Aircraft Capacity in Lbs	% of Total
Miami International	6,213,589	64%
Orlando International	1,240,585	13%
Ft. Lauderdale International	631,801	6%
Jacksonville International	393,448	4%
Tampa International	332,924	3%
Southwest Florida International	265,896	3%
Palm Beach International	154,792	2%
St. Petersburg/Clearwater	268,016	3%
Tallahassee Regional	63,920	1%
Orlando Sanford International	52,280	1%
Pensacola Regional	35,711	0%
Panama City-Bay County International	32,144	0%
Craig Municipal	12,008	0%
Key West International	8,480	0%
Ft. Lauderdale Executive	4,976	0%
Gainesville Regional	4,400	0%
Marathon	3,616	0%
Page Field-Ft. Meyers	3,327	0%
Total	**9,721,913**	**100%**

Sources: OAG and IFR,
Wilbur Smith Associates August 2006

Road Feeder Service (RFS) Capacity

On average, Florida airports offer more than one million pounds of scheduled RFS cargo capacity each day. The category leader is Miami International with an average of 348,000 pounds of RFS capacity available. Orlando International ranks second in the category with 309,000 pounds available. Tampa International provides 18 percent of the total RFS cargo capacity offered in the State of Florida. On an average day, a total of 189,000 pounds of RFS capacity are available at Tampa International. **Exhibit 4.2** provides the RFS lift capacity available at Florida airports.

Exhibit 4.2
RFS Cargo Tonnage
Capacity at Florida Airports

Airport	RFS Capacity in Lbs	% of Total
Miami International	348,000	33%
Orlando International	309,000	29%
Tampa International	189,000	18%
Jacksonville International	90,000	9%
Ft. Lauderdale International	54,000	5%
Pensacola Regional	45,000	4%
Palm Beach International	15,000	1%
Total	**1,050,000**	**100%**

Sources: OAG,
Wilbur Smith Associates August 2006

In total, aircraft and RFS service provides nearly 10.8 million pounds of cargo lift capacity related to Florida's airports. In terms of composition, 90 percent of the total lift capacity is offered on cargo aircraft. The other 10 percent is provided on scheduled RFS carriers.

AIR CARGO TONNAGE ACTIVITY AT FLORIDA SIS AIRPORTS

In the early 1990s, the amount of air cargo traffic moving on passenger aircraft versus all cargo aircraft in Florida was split almost evenly, with freighters holding a slight majority over passenger aircraft. By decade's end, air cargo aircraft transported 68 percent of all Florida air cargo traffic. Consequently, the market share held by passenger aircraft fell from 47 percent in 1990 to 32 percent in 1999. Between 2001 and 2004, the highest estimated ratio of air cargo traffic moving via passenger aircraft was 25 percent.

Security policies implemented in response to the September 11, 2001 attack on the U.S. have added complexity to routing shipments on passenger aircraft. This along with higher fuel prices and changes in supply chain management practices have contributed to a modal shift with less cargo moving via air and more traveling on the ground. In addition, increased utilization of regional jets has also impacted the amount of space available to transport cargo in the lower deck and belly compartments of passenger airplanes. Many leading U.S. carriers have reduced their flight schedules in terms of both frequency and aircraft size in the interest of cost savings. This smaller pool of capacity combined with an increase in the number and size of freighter aircraft in operation supports this trend. **Exhibit 4.3** provides the total tons of cargo processed at each Florida SIS airport between 1999 and 2005.

Exhibit 4.3
Florida Air Cargo Tonnage at SIS Airports
1999-2005

Year	MIA	MCO	FLL	TPA	JAX	PBI	RSW	Total
1999	1,820,394	287,819	250,695	121,892	73,773	25,503	16,528	**2,596,604**
2000	1,811,184	299,192	260,932	113,340	67,193	23,120	17,421	**2,592,382**
2001	1,798,065	246,459	199,316	87,885	67,025	22,715	17,519	**2,438,984**
2002	1,790,785	218,619	181,967	100,830	75,974	19,980	17,389	**2,405,544**
2003	1,805,158	212,836	172,520	102,802	77,891	20,177	17,256	**2,408,640**
2004	1,961,303	224,417	179,608	100,115	79,721	20,256	18,542	**2,583,962**
2005	1,934,545	225,928	175,533	100,228	83,975	19,315	21,148	**2,560,672**

Source: Estimated from USDOT and Airport Records, Wilbur Smith Associates August 2006

In 2005, 36 percent of the cargo processed at Florida SIS Airports moved via passenger aircraft. The other 64 percent moved via all cargo aircraft. **Exhibit 4.4** provides the 2005 air cargo tonnage moved by each airport and the respective ratio flown on passenger and freighter aircraft.

Exhibit 4.4
2005 Florida Air Cargo Tonnage by Aircraft Type

Code	Total 2005 Cargo Tons	Percent Passenger	Percent Freighter	Tons Moved Via Passenger Lift	Tons Moved Via Freighter Lift	Percent of Total Cargo
MIA	1,934,545	41%	59%	783,584	1,150,961	76%
MCO	225,928	17%	83%	39,311	186,617	9%
FLL	175,533	19%	81%	33,878	141,655	7%
TPA	100,228	15%	85%	15,034	85,194	4%
JAX	83,975	52%	48%	43,667	40,308	3%
RSW	21,148	22%	78%	4,674	16,474	1%
PBI[1]	19,315	40%	60%	7,726	11,589	1%
Total	**2,560,672**	**36%**	**64%**	**927,874**	**1,632,798**	**100%**

1.) Estimated percent of traffic carried by Passenger versus Freighter Aircraft
Source: Airport Records, Wilbur Smith Associates

ORIGIN/DESTINATION VERSUS TRANSLOAD AIR CARGO

As part of this study, airport management personnel at Florida's SIS and Tier Two Airports were surveyed regarding the portion of air cargo traffic that originates at their respective facilities versus cargo which is "transloaded" between aircraft. In the latter case, airports function as "hubs" for moving air cargo between aircraft. Most smaller airports typically do not function as transfer points for air cargo. Hence, the portion of originating air cargo at these airports where air cargo activity occurs is usually near 100 percent. Relevant examples among the Tier Two Airports include Pensacola, Panama City, and Orlando-Sanford that all report 100 percent of air cargo activity originates at their facilities.

Conversely, the larger Florida SIS SIS airports process a smaller share of originating air cargo traffic. Miami International and Orlando International represent this scenario. These two airports have air cargo lift provided on integrated express carriers, all cargo carriers, and wide-body passenger airlines. As a result, there are extensive connectivity options offered at these airports that do not exist at the smaller Tier Two Airports. The robust schedules flown by carriers operating at SIS Tier One Airports support more opportunities to transfer cargo between flights. Air cargo enplaned at Miami International or Orlando International can be transferred off of incoming flights for connection to a final destination elsewhere in North America. For Orlando International, the estimated percent of all enplaned air cargo activity that originates at Orlando is 99 percent. Miami International's vast air network fosters opportunities for air cargo originating outside of the local Miami market to enplane at the airport. Approximately 15 percent of Miami's cargo activity originates outside of the local market while 23 percent originates in Miami for a total of 38 percent of air cargo originating off airport. (See **Exhibit 1A** in **Appendix A**) The supporting Road Feeder Service (RFS) networks feeding Orlando and Miami also facilitate transport of air cargo originating outside of these cities to board aircraft at these International airports.

HISTORIC AIR CARGO TONNAGE AT FLORIDA AIRPORTS

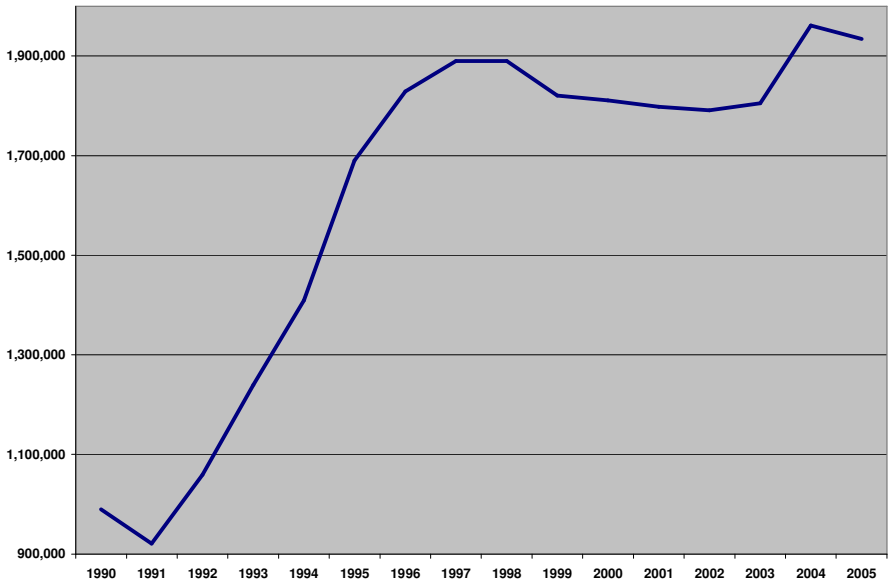
Airport personnel at each Florida airport in the study scope were asked to report total tonnage processed in each year from 2000 through 2005. In addition, air cargo tonnage data was collected in the 2001 FDOT Aviation System Plan. When these two historic streams of data are combined a 15 year trend for each airport can be presented. Enplaned and deplaned tons of freight and mail were reported to quantify the total cargo processed at each facility. Observed air cargo volume trends at Florida SIS Airports are evaluated below. **Exhibit 4.5** summarizes historic air cargo tonnages processed through Florida airports from 1990 to 2005. These tonnages are illustrated in **Exhibits 4.6 through 4.9.** Air cargo activity had a significant increase at Florida airports between 1990 and 2000. Air cargo activity has since leveled off or in some instances decreased. Miami International Airport saw a significant increase in air cargo tonnage then a decrease with a slight increase in 2004. When combining all tonnage together for SIS and Tier Two airports, and excluding Miami International, air cargo activity increased to a peak of over 800,000 annual tons in 1999 and 2000 followed by a precipitous decrease in 2001 due to the 9/11 terrorist attacks and an economic recession. From 2002 to 2005 air cargo activity in the State at airports other than Miami International has remained level at around 675,000 tons annually.

Exhibit 4.5
Historic Air Cargo Tonnages at Florida Airports
1990-2005

Code	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	Change 1990-2005
APF[1]	0	0	0	0	0	2	0	0	2	18	18	18	18	18	18	18	100.00%
DAB	711	708	718	663	539	534	535	323	360	315	228	194	136	132	192	193	-72.90%
EYW[1]	216	180	212	272	324	422	442	446	440	460	460	460	460	460	460	460	112.96%
FLL	59,666	67,728	69,631	100,632	124,495	152,371	172,581	186,186	207,277	250,695	260,932	199,316	181,967	172,520	179,608	175,533	194.19%
GNV	89	137	262	278	290	409	419	389	111	220	95	263	249	260	267	272	205.47%
JAX	42,775	40,980	48,375	47,985	51,484	52,764	57,855	61,361	72,831	73,773	67,193	67,025	75,974	77,891	79,721	83,975	96.32%
MCO	137,094	153,814	185,679	211,104	233,081	242,783	234,519	242,808	262,365	287,819	299,192	246,459	218,619	212,836	224,417	225,928	64.80%
MIA	989,956	920,785	1,059,278	1,239,601	1,409,139	1,690,527	1,829,109	1,889,937	1,889,734	1,820,394	1,811,184	1,798,065	1,790,785	1,805,158	1,961,303	1,934,545	95.42%
MLB	274	250	365	502	477	361	345	330	286	278	1,646	1,605	738	491	502	328	19.71%
MTH[1]	0	0	0	48	166	138	188	194	180	192	192	192	192	192	192	192	100.00%
PBI	15,034	16,509	19,049	20,556	24,311	29,050	30,701	33,861	25,914	25,503	23,120	22,715	19,980	20,177	20,256	19,315	28.48%
PFN	4	793	1,794	2,380	2,245	2,216	1,273	1,150	1,505	1,457	1,829	919	1,010	1,242	858	831	20675.00%
PIE	5,636	7,356	8,036	9,527	11,703	12,750	13,716	14,814	15,295	17,596	19,774	18,633	17,269	18,426	19,645	23,200	311.64%
PNS	3,183	3,750	3,837	3,737	6,039	7,048	7,320	7,844	6,650	6,364	6,518	5,980	4,941	4,981	4,851	3,667	15.20%
RSW	8,527	9,089	10,366	11,802	13,760	14,014	16,777	17,003	16,365	16,528	17,421	17,519	17,389	17,256	18,542	21,148	148.01%
SFB	0	0	0	0	0	0	6,483	15,737	14,568	10,365	11,143	8,589	7,129	6,838	7,698	7,833	100.00%
SRQ	975	804	919	947	1,339	1,881	2,452	2,144	785	719	562	406	333	324	188	156	-84.05%
TLH	4,358	3,598	4,322	5,166	5,884	5,470	9,380	8,884	7,894	9,936	3,326	10,113	9,934	10,071	10,993	12,981	197.86%
TPA	97,200	97,400	105,400	110,700	119,300	125,400	136,100	138,400	128,300	121,892	113,340	87,885	100,830	102,802	100,115	100,228	3.12%
VPS	117	86	200	167	163	88	115	101	65	69	103	51	50	44	65	67	-42.74%
Total	**1,365,815**	**1,323,967**	**1,518,443**	**1,766,067**	**2,004,739**	**2,338,228**	**2,520,310**	**2,621,912**	**2,650,927**	**2,644,593**	**2,638,276**	**2,486,407**	**2,448,003**	**2,452,119**	**2,629,891**	**2,610,870**	**91.16%**

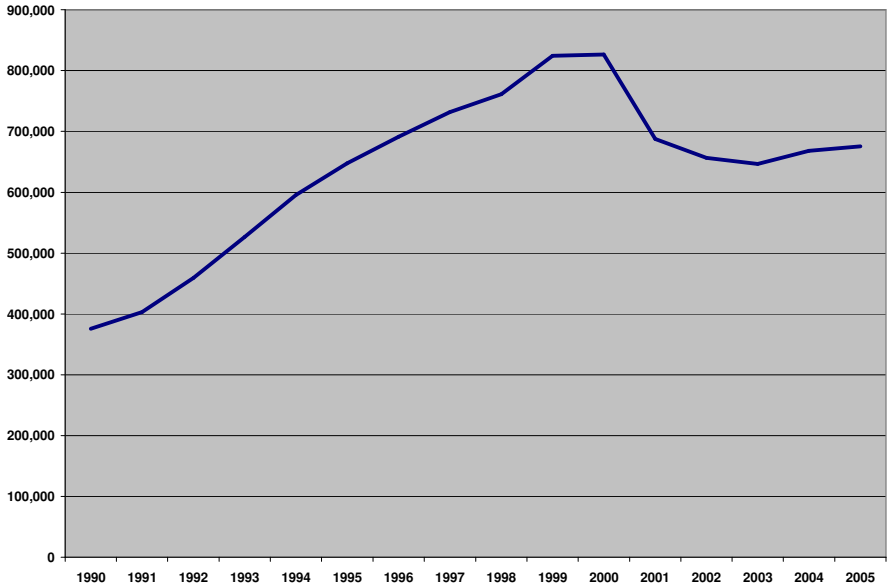
1.) Air cargo tonnages for 2000-2005 are estimates.
Source: Airport Records, Florida Aviation System Plan 2001, Wilbur Smith Associates August 2006

Exhibit 4.6
Historic Air Cargo Tonnages at Miami International Airport
1990-2005



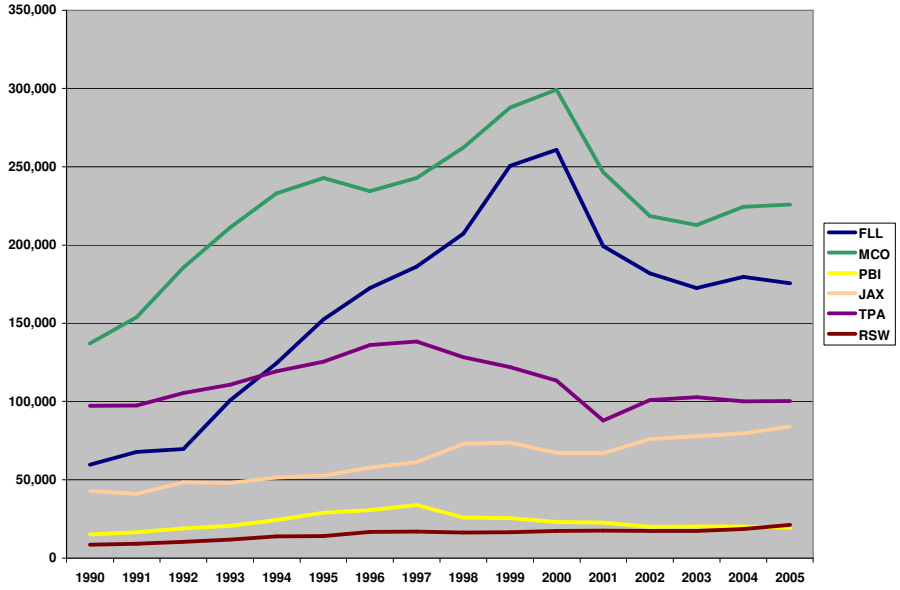
Source: 2001 FDOT Aviation System Plan, Airport Records, Wilbur Smith Associates August 2006

Exhibit 4.7
Historic Air Cargo Tonnages at all Florida Airports
(Excluding Miami International)
1990-2005



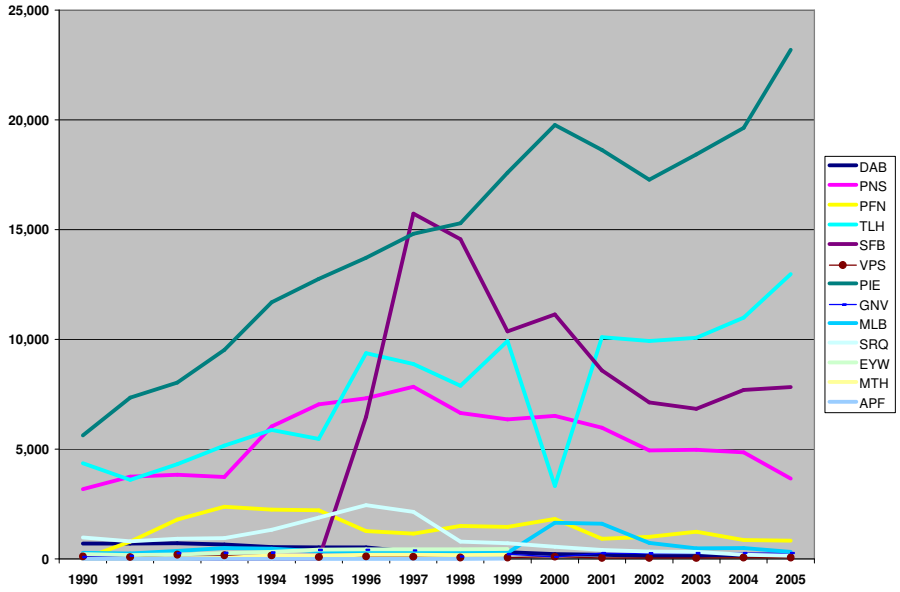
Source: 2001 FDOT Aviation System Plan, Airport Records, Wilbur Smith Associates August 2006

Exhibit 4.8
Historic Air Cargo Tonnages at All Other Florida SIS Airports
1990-2005



Source: 2001 FDOT Aviation System Plan, Airport Records, Wilbur Smith Associates August 2006

Exhibit 4.9
Historic Air Cargo Tonnages at Florida Tier Two Airports
1990-2005



Source: 2001 FDOT Aviation System Plan, Airport Records, Wilbur Smith Associates August 2006

Ft. Lauderdale-Hollywood International Airport (FLL)

Air cargo activity at the Ft. Lauderdale-Hollywood International Airport has declined over the past five years. Between 2000 and 2005, total air cargo decreased from nearly 261,000 annual tons to just over 175,500 tons enplaned and deplaned on an annual basis. This represents an air cargo activity decrease of nearly 33 percent. **Exhibit 4.10** identifies the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.10
Historic Air Cargo Tonnage at Ft. Lauderdale-Hollywood International Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	133,804	100,209	95,630	92,396	95,899	94,088
Deplaned Cargo	127,128	99,107	86,337	80,124	83,709	81,445
Total Cargo	**260,932**	**199,316**	**181,967**	**172,520**	**179,608**	**175,533**

Source: Airport Records, Wilbur Smith Associates August 2006

Ft. Lauderdale-Hollywood International Airport supports the three main U.S. integrated express carriers: DHL Express, FedEx, and UPS. Of these, FedEx had the overwhelming majority of the air cargo market share holding just over 64 percent in 2005. DHL Express flew nearly seven percent of the market's air cargo in 2005. UPS provided air lift for just over 6 percent of the total traffic in 2005. **Exhibit 4.11** describes the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.11
2005 Air Cargo Market Share at
Ft. Lauderdale-Hollywood International Airport

Airline	Market Share in Percent
FedEx	64.2%
Delta Air Lines	6.7%
Southwest Airlines	5.5%
DHL Express	6.7%
UPS Supply Chain Solutions (Formerly Menlo)	4.6%
Air Transport Int'l, d/b/a Burlington	3.2%
Continental Airlines	1.6%
United Parcel Service	1.6%
JetBlue Airways	1.4%
American Airlines	1.2%
US Airways	0.7%
Spirit Airlines	0.7%
Mountain Air Cargo	0.4%
AirTran Airways	0.3%
United Airlines	0.3%
Others	0.9%

Source: Airport Records, Wilbur Smith Associates

As presented in **Exhibit 4.12**, the overwhelming majority of air cargo activity that occurs at the Ft. Lauderdale-Hollywood International Airport is related to domestic air cargo transportation. The total portion of this Airport's air cargo that originates in the local market is estimated at 100 percent.

Exhibit 4.12
2005 Domestic and International Cargo Tonnage at Ft. Lauderdale-Hollywood International Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	93,705	81,002	174,707	99.5%
International	384	442	826	0.5%

Source: Airport Records, Wilbur Smith Associates August 2006

Jacksonville International Airport (JAX)

Another Florida SIS Tier One Airport, Jacksonville International has experienced double-digit air cargo growth over the past five years. Between 2000 and 2005, total air cargo activity at Jacksonville International increased from just over 67 thousand tons per year to nearly 84 thousand tons per year. **Exhibit 4.13** identifies the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.13
Historic Air Cargo Tonnage at Jacksonville International Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	29,435	29,948	31,413	32,089	32,589	34,907
Deplaned Cargo	37,758	37,077	44,561	45,802	47,132	49,068
Total Cargo	**67,193**	**67,025**	**75,974**	**77,891**	**79,721**	**83,975**

Source: Airport Records, Wilbur Smith Associates August 2006

Similar to Ft. Lauderdale-Hollywood International Airport, Jacksonville International is also served by integrated express carriers DHL Express, FedEx, and UPS. In total, these three carriers transported 48 percent of the total air cargo enplaned and deplaned at Jacksonville International. Of these three, FedEx held the highest market share concentration moving 35 percent of air cargo traffic in 2005. UPS flew 11 percent of the total traffic, less than one-third of that moved by rival integrated express carrier FedEx. DHL Express also operates at Jacksonville International and transported a small portion, two percent, of the market's air cargo traffic in 2005. **Exhibit 4.14** identifies the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.14
2005 Air Cargo Market Share at Jacksonville International Airport

Airline	Market Share in Percent
FedEx	35%
Southwest	17%
Delta	12%
UPS	11%
AirTran Airways	8%
US Airways	8%
Continental	4%
American	3%
DHL Express	2%

Source: Airport Records,
Wilbur Smith Associates August 2006

As presented in **Exhibit 4.15**, the majority of air cargo activity that occurs at the Jacksonville International Airport is related to domestic air cargo transportation. The total portion of this Airport's air cargo that originates in the local market was not available from airport management.

Exhibit 4.15
2005 Domestic and International Cargo Tonnage at Jacksonville International Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	34,907	49,068	83,975	100%
International	0	0	0	0%

Source: Airport Records, Wilbur Smith Associates August 2006

Miami International Airport (MIA)

Miami International Airport is the leading Florida gateway for international traffic. Enplaned cargo remained flat between 2000 and 2005. The total change in activity for these years is a one-tenth of one percent decrease. During the same time, deplaned air cargo increased more than 12 percent. In 2005, nearly 1.1 million tons of air cargo deplaned in MIA. Miami International is predominately used as a gateway for international air cargo. In 2005, domestic air cargo traffic accounted for less than 20 percent of the total enplaned and deplaned cargo processed at MIA.[5] **Exhibit 4.16** provides the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.16
Historic Air Cargo Tonnage at Miami International Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	841,692	789,539	731,020	734,967	832,105	840,844
Deplaned Cargo	969,492	1,008,526	1,059,765	1,070,191	1,129,198	1,093,701
Total Cargo	**1,811,184**	**1,798,065**	**1,790,785**	**1,805,158**	**1,961,303**	**1,934,545**

Source: Airport Records, Wilbur Smith Associates August 2006

[5] Miami International Airport

Ten operators moved nearly 75 percent of Miami International's total air cargo product in 2005. Only one of these, LAN Airlines, has a double-digit market share at MIA. In total, 11 percent of all cargo processed at Miami International moved on a LAN affiliate. In terms of integrated express carriers, UPS provides service for just over nine percent of Miami International's air cargo. FedEx and DHL Express also base aircraft at Miami International. FedEx moved just over 6 percent of the total air cargo enplaned and deplaned at Miami International. DHL Express and its Americas affiliate, DHL Aero Expreso, moved just under three percent of the total traffic. **Exhibit 4.17** describes the 2005 air cargo market share profile as reported by airport management.

As presented in **Exhibit 4.18**, the majority of air cargo activity that occurs at Miami International Airport is related to international air cargo transportation. In 2005, 83 percent of all air cargo activity was international product. The total portion of this Airport's air cargo that originates in the local market was not available from airport management.

Exhibit 4.17
2005 Air Cargo Market Share at Miami International Airport

Airline	Market Share in Percent
LAN Airlines	11.0%
American Airlines	9.4%
Ceilos Del Peru	9.2%
UPS	9.2%
Tampa Airlines	9.0%
Arrow Air	7.4%
FedEx	6.2%
Amerijet International	4.9%
Centurion Air Cargo	4.9%
Florida West International Airways	3.3%
Tradewinds Airlines Inc	3.0%
Gemini Air Cargo	3.0%
ABX Air (DHL contractor)	1.9%
DHL Express	1.6%
Polar Air Cargo	1.6%
China Air Lines	1.4%
DHL Aero Expreso	1.3%
Martinair Holland	1.0%
TAM-Transportes Aereos Meridionais	1.0%
Kitty Hawk Air Cargo	0.8%
Lan Peru Airlirnes	0.8%
British Airways	0.8%
Capital Cargo Intl Airlines Inc	0.6%
VARIG-Viacao Aerea Reio Grandense	0.5%
Delta Air Lines Inc	0.5%
Virgin Atlantic Airways Ltd	0.4%
Lufthansa Airlines	0.4%
Air France	0.4%
Air Jamaica	0.4%

Exhibit 4.17, Continued
2005 Air Cargo Market Share at Miami International Airport

Airline	Market Share in Percent
LAN Ecuador	0.3%
Alitalia, Linee Aeree Itiane, S.P.A.	0.3%
Estafeta Carga Aerea SA de SA	0.3%
Swiss International Airlines	0.3%
Atlas Air Inc	0.3%
Iberia Lineas Aereas De Espana SA	0.3%
Cayman Airways, Ltd.	0.3%
LAB-Lloyd Aereo Boliviano	0.2%
Continental Airlines	0.2%
Aerolineas Argentinas	0.2%
Others	1.7%

Source: Airport Records, Wilbur Smith Associates August 2006

Exhibit 4.18
2005 Domestic and International Cargo Tonnage at Miami International Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	151,613	182,739	334,352	17%
International	689,231	910,963	1,600,194	83%

Source: Airport Records, Wilbur Smith Associates August 2006

Orlando International Airport (MCO)

Orlando International Airport experienced a decrease in total air cargo traffic from 2000 to 2005. Both enplaned and deplaned cargo decreased more than 20 percent in the past five years. The larger traffic loss occurred in deplaned cargo with a realized 27 percent decline between 2000 and 2005. Enplaned cargo is down nearly 21 percent. These decreases in both enplaned and deplaned air cargo traffic at Orlando International Airport reduced total cargo tonnage 25 percent between 2000 and 2005. **Exhibit 4.19** provides the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.19
Historic Air Cargo Tonnage at Orlando International Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	132,716	110,365	99,432	103,043	103,605	104,959
Deplaned Cargo	166,476	136,094	119,187	109,793	120,812	120,969
Total Cargo	**299,192**	**246,459**	**218,619**	**212,836**	**224,417**	**225,928**

Source: Airport Records, Wilbur Smith Associates August 2006

In terms of market share, DHL Express, FedEx, and UPS moved 78 percent of the air cargo traffic enplaned and deplaned at Orlando International Airport in 2005. The leading carrier in the market, FedEx, moved just over 45 percent of the market's total air cargo tonnage. The second leading integrated express carrier at Orlando International, UPS, transported just over 22 percent of the total air cargo moved via MCO. DHL Express also operates scheduled air routes and flew just over 10 percent of the market's cargo volume in 2005. **Exhibit 4.20** summarizes the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.20
2005 Air Cargo Market Share at Orlando International Airport

Airline	Market Share in Percent
FedEX	45.4%
UPS	19.0%
ABX Air/DHL	10.3%
Emery/Menlo/UPS	3.3%
Delta Air Lines Inc (pre-bankruptcy)	2.8%
Southwest Airlines	2.7%
Virgin Atlantic Airways Ltd.	2.4%
Air Transport International	2.2%
British Airways	2.0%
Kitty Hawk Air Cargo	1.8%
American Airlines Inc.	1.5%
DHL	1.5%
Continental Airlines Inc.	1.2%
Delta Airlines Inc. (post bankruptcy Sig)	1.1%
United Airlines Inc.	0.8%
Martinair Holland	0.6%
Mountain Air Cargo	0.4%
America West Airlines Inc.	0.3%
US Airways	0.2%
Condor Flugdienst GmbH	0.2%
Northwest Airlines Inc. (pre-bankruptcy)	0.2%
Spirit Airlines	0.2%
Air Canada	0.2%
Others	1.2%

Source: Airport Records, Wilbur Smith Associates August 2006

As presented in **Exhibit 4.21**, the majority of air cargo activity that occurs at Orlando International Airport is related to domestic air cargo transportation. In 2005, 94 percent of all air cargo activity was domestic product. The total portion of this Airport's air cargo that originates in the local market is estimated at 98 percent of the total per airport management.

Exhibit 4.21
2005 Domestic and International Cargo Tonnage at Orlando International Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	98,578	114,332	212,910	94%
International	6,381	6,637	13,018	6%

Source: Airport Records, Wilbur Smith Associates August 2006

Palm Beach International Airport (PBI)

Palm Beach International Airport is used for domestic air cargo activity. Over the past five years, a negative growth trend has occurred. In total, air cargo activity is down more than 16 percent from its 2000 level. Enplaned air cargo is down nearly 20 percent with deplaned air cargo registering close to a 15 percent drop between 2000 and 2005. **Exhibit 4.22** summarizes the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.22
Historic Air Cargo Tonnage at Palm Beach International Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	8,852	8,318	8,368	8,237	7,427	7,135
Deplaned Cargo	14,268	14,397	1,162	11,940	12,829	12,180
Total Cargo	**23,120**	**22,715**	**19,980**	**20,177**	**20,256**	**19,315**

Source: Airport Records, Wilbur Smith Associates August 2006

The market shares by carrier for Palm Beach International are estimated using the total capacity provided by each carrier. Of the integrated express carriers, UPS is the only one operating at Palm Beach International Airport. **Exhibit 4.23** provides the estimated market shares for air carriers with scheduled wide-body aircraft operations at Palm Beach International Airport.

Exhibit 4.23
2005 Airlines Supporting Air Cargo at Palm Beach International Airport

Airline	Market Share in Percent
UPS	87.0%
Delta Air Lines	11.4%
Other	1.6%

Source: Airport Records, Wilbur Smith Associates August 2006

As presented in **Exhibit 4.24**, all of the air cargo activity that occurs at Palm Beach International Airport is related to domestic air cargo transportation. In 2005, 100 percent of all air cargo activity was domestic product.

Exhibit 4.24
2005 Domestic and International Cargo Tonnage at Palm Beach International Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	7,135	12,180	19,315	100%
International	0	0	0	0%

Source: Airport Records, Wilbur Smith Associates August 2006

Southwest Florida International Airport (RSW)

Southwest Florida International Airport in Fort Myers experienced an increase in total air cargo traffic from 2000 to 2005. In total, the air cargo volume observed in 2005 exceeded 2000 levels by 21 percent. The larger traffic gain occurred in deplaned cargo with a realized 25 percent increase between 2000 and 2005. Enplaned cargo traffic increased 17 percent. **Exhibit 4.25** provides the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.25
Historic Air Cargo Tonnage at Southwest Florida International Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	7,301	7,360	7,522	7,196	7,592	8,535
Deplaned Cargo	10,120	10,159	9,867	10,060	10,950	12,613
Total Cargo	**17,421**	**17,519**	**17,389**	**17,256**	**18,542**	**21,148**

Source: Airport Records, Wilbur Smith Associates August 2006

In terms of market share, DHL, FedEx, and UPS moved 78 percent of the air cargo traffic enplaned and deplaned at Southwest Florida International Airport in 2005. The leading carrier in the market, FedEx, moved 47 percent of the market's total air cargo tonnage. The second leading integrated express carrier at the Airport, UPS, transported 21 percent of the total air cargo moved via RSW. DHL Express also operates scheduled air routes and flew just over 10 percent of the market's cargo volume in 2005. German passenger carrier LTU transported seven percent of the total cargo moving through the Southwest Florida International Airport. **Exhibit 4.26** summarizes the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.26
2005 Air Cargo Market Share at
Southwest Florida International Airport

Airline	Market Share in Percent
FedEx	47%
UPS	21%
DHL	10%
LTU Airlines	7%
Delta Air Lines	5%
Continental Airlines	2%
US Airways	2%
United Airlines	2%
AirTran Airlines	2%
Spirit Airlines	1%
American Airlines	1%
American Trans Air	1%
Northwest Airlines	1%

Source: Airport Records, Wilbur Smith Associates 8-2006

As presented in **Exhibit 4.27**, the majority of air cargo activity that occurs at Southwest Florida International Airport is related to domestic air cargo transportation. In 2005, 94 percent of all air cargo activity was domestic product. All of this air cargo activity originates in the local market.

Exhibit 4.27
2005 Domestic and International Cargo Tonnage at Orlando International Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	7,932	12,035	19,967	94%
International	603	578	1,181	6%

Source: Airport Records, Wilbur Smith Associates August 2006

Tampa International Airport (TPA)

Tampa International Airport is used predominately for domestic air cargo. In 2005, this facility had just over 100,000 tons of enplaned and deplaned air cargo. Enplaned air cargo in recent years decreased significantly versus the 2000 level. The reported 2005 enplaned tonnage of 43,220 represents nearly 13,000 fewer tons compared to the 56,000 tons of air cargo enplaned in 2000. Deplaned air cargo has also decreased over the past five years, though at a much slower pace. The total decrease in activity registers just under one percent. **Exhibit 4.28** identifies the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.28
Historic Air Cargo Tonnage at Tampa International Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	55,992	42,429	42,900	44,157	45,086	43,220
Deplaned Cargo	57,347	45,455	57,930	58,644	55,030	57,008
Total Cargo	**113,340**	**87,885**	**100,830**	**102,802**	**100,115**	**100,228**

Source: Airport Records, Wilbur Smith Associates August 2006

Two of the integrated express carriers, DHL Express and FedEx, operate at Tampa International Airport. FedEx maintains more market share at Tampa International than any other carrier operating in the market. In 2005, 80 percent of all air cargo traffic moved via Tampa International flew on FedEx. No other carrier in the market holds more than five percent of the total air cargo market share. Five percent of Tampa's air cargo traffic flew on the other integrated express operator, DHL Express, during 2005. British Airways flew four percent of Tampa International's air cargo traffic. **Exhibit 4.29** summarizes the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.29
2005 Air Cargo Market Share at
Tampa International Airport

Airline	Market Share in Percent
FedEx	80%
DHL	5%
Other	5%
British Airways	4%
Delta Air Lines	3%
Southwest	3%

Source: Airport Records, Wilbur Smith Associates
August 2006

As presented in **Exhibit 4.30**, nearly 95 percent of all 2005 air cargo activity at Tampa International Airport was domestic product. Airport management reports that the total portion of this Airport's air cargo that originates in the local market is 100 percent.

Exhibit 4.30
2005 Domestic and International Cargo Tonnage at Tampa International Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	41,059	54,158	95,217	95.0%
International	2,161	2,850	5,011	5.0%

Source: Airport Records, Wilbur Smith Associates August 2006

Summary

In total, air cargo activity at Florida SIS Airports has decreased between 2000 and 2005. In 2000, 2,592,382 tons of cargo were enplaned and deplaned at Florida SIS Airports. By 2005, total cargo volume decreased just over 1.2 percent to 2,560,672 tons. In contrast, air cargo activity at Miami International increased 6.8 percent between 2000 and 2005. Integrated express carrier FedEx holds a majority of the market share at Ft. Lauderdale-Hollywood International Airport, Jacksonville International Airport, Orlando International Airport, Southwest Florida International Airport, and Tampa International Airport. UPS, the only integrated express carrier operating at Palm Beach International Airport, is the market share leader there and accommodated 87 percent of all cargo processed at the airport in 2005. Miami International Airport's position as a gateway to the Americas is reflected in its product composition. In 2005, 83 percent of the cargo processed at Miami International was related to international operations. With the exception of this gateway airport, the vast majority of air cargo traffic processed at Florida SIS Airports originates in the local market.

AIR CARGO TONNAGE INVENTORY AT TIER TWO AIRPORTS

Gainesville Regional Airport (GNV)

Air cargo activity at Gainesville Regional Airport has grown steadily since 2000. In total, air cargo traffic has nearly tripled. The overwhelming majority of this growth has been in deplaned cargo. **Exhibit 4.31** identifies the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.31
Historic Air Cargo Tonnage at Gainesville Regional Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	52	94	69	83	75	61
Deplaned Cargo	42	169	181	178	192	211
Total Cargo	**95**	**263**	**249**	**260**	**267**	**272**

Source: Airport Records, Wilbur Smith Associates August 2006

In terms of market share, integrated express carrier FedEx transported nearly 80 percent of the air cargo traffic enplaned and deplaned at Gainesville Regional Airport in 2005. Passenger carriers Delta, US Airways, and Northwest also maintain scheduled flights supporting air cargo activity at Gainesville Regional Airport. **Exhibit 4.32** provides the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.32
2005 Air Cargo Market Share at Gainesville Regional Airport

Airline	Market Share in Percent
FedEx	79.7%
Delta	16.5%
US Airways	3.7%
Northwest	0.1%

Source: Airport Records, Wilbur Smith Associates August 2006

It is estimated that 100 percent of air cargo activity is domestic in nature and that Gainesville is a pure origin and destination market with minimal cargo traffic transferred between airplanes at the Airport.

Panama City-Bay County Airport (PFN)

Panama City-Bay County Airport has experienced a steep decline in air cargo activity over the past five years. In total, air cargo traffic has fallen nearly 55 percent. The rate of decline for deplaned cargo has slightly outpaced enplaned cargo tonnages. **Exhibit 4.33** summarizes the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.33
Historic Air Cargo Tonnage at Panama City-Bay County Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	717	383	457	543	355	351
Deplaned Cargo	1,111	536	553	699	503	479
Total Cargo	**1,829**	**919**	**1,010**	**1,242**	**858**	**831**

Source: Airport Records, Wilbur Smith Associates August 2006

Approximately 96 percent of the freight moved through the Panama City-Bay County Airport is transported by integrated express carriers UPS and DHL. The remaining four percent of the air cargo traffic is belly-freight handled by Delta/ASA and Northwest Airlink. FedEx serves the Panama City-Bay County Airport via surface transport. Both UPS and DHL use contracted feeder aircraft to serve the Airport.

The Airport's two Fixed Base Operators[6] (FBOs) report significant Federal Reserve traffic (check haulers); they report as many as eight flights per day, though the specific number could not be confirmed. These aircraft make very brief stops at the FBO and deposit their cargo in a secured through-the-fence lockbox. Local couriers come to the Airport and transport this cargo traffic. Though operations are frequent, total volume is minimal and this air cargo traffic is not reported to the Airport. **Exhibit 4.34** identifies the 2005 air cargo market share profile as reported by airport management.

[6] Fixed Base Operators (FBOs) located on airport property commonly provide services such as aircraft fueling and parking,

Exhibit 4.34
2005 Air Cargo Market Share at
Panama City-Bay County Airport

Airline	Market Share in Percent
DHL	73.6%
UPS	14.8%
Delta/ASA	2.3%
Northwest Airlink	1.8%

Source: Airport Records, Wilbur Smith Associates August 2006

As presented in **Exhibit 4.35**, all of the air cargo activity that occurs at Panama City-Bay County Airport is domestic. Management staff at this Airport report that 100 percent of this traffic originated in the local market.

Exhibit 4.35
2005 Domestic and International Cargo Tonnage at Panama City-Bay County Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	351	479	831	100%
International	0	0	0	0%

Source: Airport Records, Wilbur Smith Associates August 2006

Pensacola Regional Airport (PNS)

Pensacola Regional Airport has also experienced a steep decline in air cargo activity over the past five years. In total, air cargo traffic has fallen nearly 44 percent. The rate of decline for enplaned cargo has slightly outpaced deplaned cargo tonnages. **Exhibit 4.36** provides the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.36
Historic Air Cargo Tonnage at Pensacola Regional Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	2,375	2,348	1,881	2,042	2,030	1,275
Deplaned Cargo	4,143	3,631	3,060	2,939	2,821	2,392
Total Cargo	**6,518**	**5,980**	**4,941**	**4,981**	**4,851**	**3,667**

Source: Airport Records, Wilbur Smith Associates August 2006

DHL is the only integrated express carrier that operates from the Airport. One DC9 flight operates daily from Pensacola to the Wilmington, Ohio hub. UPS and FedEx serve the Pensacola market via surface transport from Mobile, Alabama. DHL accounts for 98 percent of the Airport's reported cargo volume. Passenger carriers Delta and US Airways transport the remaining two percent of Pensacola's cargo traffic in the belly compartments of their scheduled passenger aircraft. Federal Reserve check hauler flights operated by Flight Express and Ram Air also operate at the Pensacola Regional Airport. **Exhibit 4.37** provides the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.37
2005 Air Cargo Market Share at Pensacola Regional Airport

Airline	Market Share in Percent
DHL	98%
Delta	1%
US Airways	1%

Source: Airport Records, Wilbur Smith Associates August 2006

As presented in **Exhibit 4.38**, all of air cargo activity that occurs at the Pensacola Regional Airport is domestic. Management at this airport reported that 100 percent of this traffic originated in the local market.

Exhibit 4.38
2005 Domestic and International Cargo Tonnage at Pensacola Regional Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	1,275	2,392	3,667	100%
International	0	0	0	0%

Source: Airport Records, Wilbur Smith Associates August 2006

Sarasota Bradenton Airport (SRQ)

The Sarasota Bradenton Airport has experienced a steep decline in air cargo activity since the year 2000. In total, air cargo traffic has fallen more than 72 percent. The rate of decline for enplaned cargo has outpaced the decline in deplaned tonnages. **Exhibit 4.39** identifies the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.39
Historic Air Cargo Tonnage at Sarasota Bradenton Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	300	211	178	171	66	47
Deplaned Cargo	262	196	155	154	122	109
Total Cargo	**562**	**406**	**333**	**324**	**188**	**156**

Source: Airport Records, Wilbur Smith Associates August 2006

In terms of market share, there are no scheduled integrated express operations at the Sarasota-Bradenton Airport. Integrated express operators truck to Tampa from Sarasota. The majority of the air cargo traffic handled at the Sarasota Bradenton Airport moves on Delta. The ratio of originating versus connecting air cargo was not available from airport management.

St. Petersburg-Clearwater (PIE)

Air cargo traffic at the St. Petersburg-Clearwater Airport has grown over 17 percent in the past six years. Deplaned cargo accounts for the majority of this growth. In 2005, deplaned cargo was 27 percent higher versus 2000 and enplaned cargo was 7 percent above the year 2000 level. **Exhibit 4.40** identifies the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.40
Historic Air Cargo Tonnage at St. Petersburg-Clearwater Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	9,689	8,910	7,864	8,383	8,434	10,368
Deplaned Cargo	10,085	9,723	9,405	10,043	11,211	12,832
Total Cargo	**19,774**	**18,633**	**17,269**	**18,426**	**19,645**	**23,200**

Source: Airport Records, Wilbur Smith Associates August 2006

Two integrated express carriers, DHL and UPS, transported all air cargo related to the St. Petersburg-Clearwater Airport in 2005. In terms of market share, UPS transported 82 percent of all air cargo and DHL transported 18 percent. **Exhibit 4.41** describes the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.41
2005 Air Cargo Market Share at
St. Petersburg-Clearwater Airport

Airline	Market Share in Percent
UPS	82%
DHL	18%

Source: Airport Records,
Wilbur Smith Associates August 2006

In 2005, 99 percent of all air cargo processed at the St. Petersburg-Clearwater Airport was domestic (See **Exhibit 4.42**). Management at this airport reported that 97 percent of all air cargo traffic originated in the local market.

Exhibit 4.42
2005 Domestic and International Cargo Tonnage at St. Petersburg-Clearwater Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	10,270	12,653	22,923	98.8%
International	98	179	277	1.2%

Source: Airport Records, Wilbur Smith Associates August 2006

Tallahassee Regional (TLH)

Similar to Gainesville Regional Airport, air cargo traffic at the Tallahassee Regional Airport is significantly above levels recorded in the year 2000. Overall, the total of enplaned and deplaned air cargo was nearly 400 percent higher in 2005 versus 2000. However, in 1999, Tallahassee Regional Airport processed 9,936 tons of air cargo. Hence, the percentage increase for 2005 versus 1999 is only 31 percent. **Exhibit 4.43** provides the enplaned and deplaned cargo activity as reported by airport management.

Exhibit 4.43
Historic Air Cargo Tonnage at Tallahassee Regional Airport

Direction	2000	2001	2002	2003	2004	2005
Enplaned Cargo	1,564	4,317	4,505	4,539	4,811	6,229
Deplaned Cargo	1,761	5,796	5,429	5,532	6,182	6,752
Total Cargo	**3,326**	**10,113**	**9,934**	**10,071**	**10,993**	**12,981**

Source: Airport Records, Wilbur Smith Associates August 2006

In 2005, integrated express carrier FedEx transported more than 77 percent of all air cargo processed at the Tallahassee Regional Airport. Passenger carrier Delta supported nearly 11 percent of air cargo activity. Mountain Air Cargo and DHL captured the majority of the remaining market share. **Exhibit 4.44** summarizes the 2005 air cargo market share profile as reported by airport management.

Exhibit 4.44
2005 Air Cargo Market Share at Tallahassee Regional Airport

Airline	Market Share in Percent
FedEx	77.3%
Delta	10.7%
Mountain Air Cargo	7.0%
DHL	4.7%
Other	0.3%

Source: Airport Records, Wilbur Smith Associates August 2006

In 2005, all air cargo activity at the Tallahassee Regional Airport was domestic. Management at this airport reported that 100 percent of this traffic originated in the local market (see **Exhibit 4.45**).

Exhibit 4.45
2005 Domestic and International Cargo Tonnage at Tallahassee Regional Airport

Cargo Type	Enplaned	Deplaned	Total	Percent of Total
Domestic	6,229	6,752	12,981	100%
International	0	0	0	0%

Source: Airport Records, Wilbur Smith Associates August 2006

AIR CARGO LIFT CAPACITY ANALYSIS

The previous section identifies annual cargo activity at Florida SIS and Tier Two Airports. The following section addresses how air cargo tonnage is transported by aircraft type, such as integrated express, all cargo freighters or passenger airlines, as well as Road Feeder Service (RFS) trucks. The goal is to identify how much aircraft and truck "lift" capacity is available in Florida's air cargo industry. In addition, an added benefit of the lift analysis is the presentation of air cargo route structures. These routes identify Florida's "trade lanes" providing connectivity to the national and global economy.

Methodology

In order to determine the air cargo lift capacity at Florida airports, three primary data sources were used.[7] The OAG Cargo Guide provides flight information for cargo flights, wide-body passenger flights, and road feeder truck schedules. Not all scheduled flights by cargo airlines are recorded in the OAG. Only airlines that volunteer the information on a monthly basis are presented. There are airports with cargo activity, such as Key West, Florida (EYW), that do not appear in the OAG Cargo Guide. Scheduled flights operated by integrated express carrier UPS are captured on a limited basis. Hence,

[7] www.oag.com. OAG, first published in 1929, stands for 'Official Aviation Guide of the Airways.

FAA instrument flight rule (IFR) data was used as another resource to ascertain landing activity by airport, carrier, and aircraft type.[8] To ensure full visibility of international flight activity, carrier timetables were also used to determine air cargo lift availability and equipment types on routes.

Air cargo schedules are calibrated by day of the week to align with guaranteed delivery times. For instance, a product shipped on Thursday afternoon from the Northeast due for Monday delivery in the Midwest can move via RFS trucks over the weekend and still make its delivery commitment. This same shipment sent on Monday afternoon sold for Wednesday delivery would need to fly at least one sector in order to reach the customer on Wednesday. Commercial passenger schedules also fluctuate by day of the week based on passenger demand. For this analysis, flight schedule activity from Wednesday is used to gain an understanding of the amount of lift capacity available at Florida's SIS and Tier Two Airports. Scheduled flights included in the air cargo lift analysis operate at least three times per week and on Wednesdays. Wednesday is selected since it is the busiest day of the week in the air cargo industry and provides a "snapshot" of air cargo activity.

Total air cargo capacity provided by integrated express carriers, wide-body passenger aircraft, and all cargo carriers is quantified in this section. Domestic connections from Florida airports to destinations within the U.S. are presented along with air cargo lift available between Florida and international points. It is important to note that cargo carried on integrated express carriers between points in the U.S. may include international air cargo volume as well. As an example, a MIA-MEM FedEx MD-11 may contain international imported at MIA that will be sorted in Memphis and then transported to final destination via air or surface connections. Since aircraft utilization seldom reaches full 100 percent capacity due to product density characteristics and contours on Unit Load Devices[9] (ULDs), eighty percent of the maximum air cargo lift in pounds and cubic feet is assumed. In other words, full aircraft cubic utilization is usually reached before the maximum aircraft weight capacity in pounds is attained. The same methodology is applied to wide-body passenger aircraft using lower deck containers and belly compartments to move air cargo.

In evaluating trade lane capacity, it is important to note that integrated express carriers use hubs to process cargo originating from and destined to Florida. Hubs provide essential support for national and international air cargo systems. The amount of lift capacity provided via a market's mainline hub flight (i.e. FedEx's Miami to Memphis flight) must support the total amount of cargo that needs to connect with the hub to be sorted and then distributed to final destinations. Hence, the amount of traffic moving on mainline aircraft is not only the amount of local product originating from and destined to a single market; once sorted at the hub, this cargo is dispersed to many destinations via a network of trucks or aircraft.

Truck transport connections offered via scheduled Road Feeder Service (RFS) are also presented. The sole data source for this activity is the OAG Cargo Guide. Shippers near major airports can utilize robust RFS networks and move cargo on surface transport. This avoids a flight sector and saves significantly on costs. In a 53-foot trailer, each RFS connection can carry five standard Unit Load Devices (ULDs) with

[8] www.airportiq.com
[9] A Unit Load Device (ULD) is a container used for transporting cargo.

3,000 pounds of capacity per container. This equates to just over 40 percent of the main deck cubic capacity and 42 percent of the main deck weight capacity on a B727 freighter, an aircraft that is a "workhorse" in the industry.

The tables contained in appendices related to this section quantify total air cargo lift available at the seven Florida SIS Airports as well as 12 Tier Two Airports and are presented as **Exhibits 1B-31B** in **Appendix B**. Each table has nine column headings quantifying air cargo lift capacity at Florida SIS and Tier Two Airports. For each cargo type: integrated express, all cargo, and wide-body passenger, both domestic and international lift capacity is shown. The first column heading in each table displays the scheduled aircraft routing from origin to destination. The next columns indicate the carrier, scheduled aircraft type, aircraft capacity in pounds, and aircraft capacity in cubic feet.[10] The sixth column in each table indicates the total number of each aircraft type operated grouped in terms of carrier. Though usually one, some carriers operate more frequencies per day between origin and destination points with a given aircraft type. Using this aircraft count, the average daily capacity is provided in columns seven and eight. This is calculated using the 80 percent weight and cubic feet measures multiplied by the aircraft count. The final column in each table provides the trade lane lift offered by each carrier for each route. Carriers with more than one aircraft on a route, being of the same or different types, are displayed with one total number for trade lane lift. For example, DHL operates two aircraft, one A300 and one B727, from Miami International to its Wilmington, Ohio hub. The average daily trade lane lift provided by these aircraft at 80 percent utilization as shown in **Exhibit 8B** (see Appendix B) is just under 105,000 pounds. Maps were produced as well to illustrate the capacity on each trade lane, and are depicted in **Appendix C**.

SCHEDULE ANALYSIS FINDINGS

This section of Chapter Four discusses the top international and domestic markets served by Florida SIS Airports. The top domestic markets served by Florida Tier Two Airports are also provided. The RFS network operating in the State of Florida is then quantified in terms of both intrastate and interstate activity.

Florida SIS Airports

Among Florida SIS Airports, the three leaders in terms of international air cargo capacity provided are:

- Miami International
- Orlando International
- Tampa International

The top international destinations served by these airports and associated air cargo trade lane lift in pounds are provided in **Exhibit 4.46**. Nearly one million pounds of air cargo capacity is provided between Colombia and Miami International on an average Wednesday. The Orlando International and Tampa International airports each have scheduled air cargo service to London and these flights provide more than 120,000 pounds of air cargo capacity.

[10] Aircraft capacity in pounds and cubic feet at 80 percent utilization

Exhibit 4.46
Florida SIS Airport International Air Cargo Tonnage

Origin Code	Destination Code	Destination	Avg Daily Trade Lane Lift (in pounds)	Avg Daily Trade Lane Lift (in tons)
MIA	BOG	Bogota, Colombia	628,255	314
MIA	MDE	Medellin, Colombia	335,918	168
MIA	SCL	Santiago, Chile	237,415	119
MIA	SJO	San Jose, Costa Rica	227,715	114
MCO	LGW	London, England	81,888	41
MCO	MAN	Manchester, England	21,120	11
MCO	FRA	Frankfurt, Germany	17,600	9
MCO	AMS	Amsterdam, Netherlands	17,600	9
TPA	LGW	London, England	39,648	20

Source: Wilbur Smith Associates August 2006

Two Florida SIS Airports, Palm Beach International and Jacksonville International, do not support scheduled international air cargo connections.

Among Florida SIS Airports, the three leaders in terms of domestic air cargo capacity provided are:

- Miami International
- Orlando International
- Ft. Lauderdale International

The top domestic destinations served by these airports and associated air cargo tonnage moved are provided in **Exhibit 4.47**. The leading domestic destinations in terms of air cargo capacity provided include the primary U.S. hubs for integrated express carriers DHL and FedEx: Wilmington and Memphis. UPS routes cargo from Miami International to a regional hub in Columbia, South Carolina. Cargo from Miami International is also moved to the West Coast via scheduled air network connections to Los Angeles. Also classified as a domestic point, San Juan, Puerto Rico is the leader in terms of trade lane capacity provided with nearly 365,000 pounds of capacity originating from Miami International.

Exhibit 4.47
Florida SIS Airport Domestic Air Cargo Tonnage

Origin Code	Destination Code	Destination	Avg Daily Trade Lane Lift (Lbs)	Avg Daily Trade Lane Lift (Tons)
MIA	SJU	San Juan	364,205	182
MIA	MEM	Memphis	212,792	106
MIA	LAX	Los Angeles	146,194	73
MIA	CAE	Columbia, SC	111,304	56
MIA	ILN	Wilmington, OH	104,944	52
MCO	ATL	Atlanta	337,429	169
MCO	ILN	Wilmington, OH	168,848	84
MCO	MEM	Memphis	155,652	78
FLL	MEM	Memphis	126,448	63
FLL	ATL	Atlanta	123,200	62
FLL	EWR	Newark	89,600	45
FLL	AFW	Ft. Worth	89,600	45

Source: Wilbur Smith Associates August 2006

Florida Tier Two Airports

Among Florida Tier Two Airports, the leaders in terms of domestic air cargo capacity provided are:

- St. Petersburg-Clearwater International (PIE)
- Tallahassee Regional (TLH)
- Pensacola Regional (PNS)
- Panama City-Bay County (PFN)
- Craig Municipal (CRG)

Exhibit 4.48 provides the average daily domestic trade lane lift in pounds provided at Florida Tier Two Airports.

Exhibit 4.48
Average Daily Domestic Air Cargo Capacity

Origin Code	Airport Name	Avg Daily Trade Lane Lift (Lbs)	Avg Daily Trade Lane Lift (Tons)
PIE	St. Petersburg-Clearwater International	268,016	134
TLH	Tallahassee Regional	63,920	32
PNS	Pensacola Regional	35,711	18
PFN	Panama City-Bay County	32,144	16
CRG	Craig Municipal	12,008	6

Source: Wilbur Smith Associates August 2006

The leading Tier Two airport in terms of domestic trade lane lift, St. Petersburg-Clearwater International (PIE), has scheduled domestic air cargo connections per integrated express carrier UPS. In 2005, this airport processed 23,200 tons of air cargo. In order to meet the criteria for an Emerging Florida SIS Airport, PIE would need to

process 40,000 tons of cargo annually. Another requirement for Emerging SIS status is that an airport must be located more than 50 miles from a SIS commercial service airport. Given that St. Petersburg-Clearwater International Airport is located just 14 miles away from Tampa International, PIE does not meet the criteria for an Emerging SIS status.

RFS

In terms of RFS truck routes, Florida SIS and Tier Two Airports provide more than 5.25 million pounds of capacity each week. This equates to 146 Boeing 727 (B727) aircraft. Of the 5.25 million pounds of capacity provided, 25 percent remains within the State of Florida and 75 percent moves to points outside the State. In terms of B727 equivalents, 37 airplanes worth of air cargo move between points in the State of Florida and 109 airplanes worth of air cargo are transported to-and-from points outside Florida. Forward Air operates a regional hub in the Orlando market and provides scheduled surface transport connections to nine U.S. cities. **Exhibit 4.49** details the weekly RFS capacity offered from Florida to the top 10 U.S. destination cities.

Exhibit 4.49
Florida Weekly RFS Cargo Tonnage

Destination Code	Destination	Weekly Capacity (in pounds)	Weekly Capacity (in tons)
ATL	Atlanta	1,440,000	720
MIA	Miami	630,000	315
MCO	Orlando	420,000	210
JFK	New York	405,000	203
EWR	Newark	360,000	180
IAH	Houston	360,000	180
ORD	Chicago	315,000	158
LAX	Los Angeles	270,000	135
SFO	San Francisco	255,000	128
TPA	Tampa	165,000	83

Source: Wilbur Smith Associates August 2006

SCHEDULED AIR CARGO LIFT AT FLORIDA SIS AIRPORTS

Ft. Lauderdale-Hollywood International Airport (FLL)

Integrated Express Carriers

Ft. Lauderdale-Hollywood International Airport, located Broward County, is 27 miles North of Miami International Airport. Integrated express carrier DHL serves the FLL market with one dedicated DC8-73 freighter as indicated in **Exhibit 1B** (see **Appendix B**). This aircraft flies directly to the primary US hub in Wilmington, Ohio. FedEx also conducts air freight operations at FLL and there is a dedicated MD-10 aircraft serving Ft. Worth Alliance Airport in Texas where FedEx operates a regional sorting hub. Two FedEx air cargo flights also operate from FLL to Memphis, Tennessee, the primary US hub for this integrated express carrier. In total, the DHL and FedEx aircraft provide nearly 285,000 pounds per day of air cargo lift to the FLL market. UPS also maintains

operations at FLL and uses one Boeing 757 for transporting air cargo to its Louisville, Kentucky hub.

All Cargo Carriers

All cargo carrier BAX Global serves the FLL market with two dedicated aircraft. One of these airplanes, a B727 in freighter configuration operates directly to the US hub in Toledo, Ohio. Another BAX Global 727 flies from FLL to Raleigh-Durham International Airport in North Carolina. Exhibit 1 (see Appendix B) details this all cargo activity.

Wide-body Passenger Carriers

Delta Airlines provides passenger service to its primary US hub, Hartsfield-Jackson Atlanta International Airport with a total of seven Boeing 767-300 aircraft per day. These wide-body aircraft, each offering just under 18,000 pounds of air cargo lift, provide an average daily uplift of 123,200 pounds from FLL to Atlanta. Exhibit 1B (see Appendix B) details this wide-body passenger activity. The corresponding domestic integrated express, all cargo carrier, and wide-body passenger route maps are located in **Exhibit 1C** (see Appendix C).

Direct international connectivity from FLL to Canada is offered via Air Canada. This passenger airline moves air cargo in the lower deck and belly compartments of a Boeing 767-200. Average daily air cargo weight capacity in pounds associated with this aircraft is just under 16,000. Domestic and international wide-body passenger routes are provided in Exhibit 1 (see Appendix B). The corresponding map is located in Exhibit 1C (see Appendix C).

Road Feeder Service

Ft. Lauderdale International Airport also has Road Feeder Service (RFS) truck transport connections as identified in **Exhibit 2B** (see Appendix B). The RFS product is offered to and from nearby Miami International a total of 10 times per week. Cargo is moved on dedicated 53-foot linehauls operated by Continental Airlines and US Airways. These RFS rotations enable imported and exported cargo to connect from MIA to FLL and vice versa. FLL also has connections to the West Coast via surface transport to SFO and LAX. The value in these connections is that they provide enhanced connectivity to Asia at lower costs to shippers. Some products with less critical delivery requirements can use a combination of surface and air transport and still meet the delivery requirements as sold to the customer. For instance, a shipment originating in Latin America can fly to MIA and then truck to FLL to connect with a scheduled RFS move to SFO or LAX. Once it reaches the West Coast, this shipment may be delivered locally or exported to Asia via the SFO or LAX gateways. If transit time permits, there is a cost savings realized from using surface transport from FLL to the West Coast versus flying the shipment on this sector. Maps identifying these truck routes for FLL are presented in **Exhibit 2C** (see Appendix C).

Jacksonville International Airport (JAX)

Integrated Express Carriers

Each of the three primary integrated express carriers: UPS, FedEx, and DHL serve Jacksonville International Airport with direct flights to points in the US. On a typical Wednesday, these three carriers provide more than 360,000 pounds of capacity for air cargo traffic originating in the Jacksonville area. Of these carriers, FedEx operates the largest scheduled aircraft in the market. An MD-10 providing nearly 90,000 pounds of air cargo uplift each day flies to the carrier's Memphis, Tennessee hub. UPS serves JAX with a dedicated A300. This plane routes directly to Miami International Airport and provides approximately 66,000 pounds of capacity. UPS has four scheduled aircraft originating at Jacksonville. Airbus A306 aircraft are used to serve the Louisville, Kentucky hub, San Juan, Puerto Rico, and Greenville-Spartanburg International Airport in South Carolina. UPS also flies one Boeing 757 to its regional hub in Columbia, South Carolina. The smallest cargo aircraft, a DC9 operated for DHL, links this market the firm's primary hub in Wilmington, Ohio.

Several smaller integrated express operators also serve Jacksonville International. Airnet Systems, BankAir, and Mountain Air Cargo all operate flights to and from JAX. In terms of air lift capacity, the smallest plane operating is flown by Airnet Systems. This carrier uses a Beechcraft 58 to connect material between JAX and Ft. Lauderdale Executive Airport. Airnet also operates Learjet aircraft from JAX to Charlotte, North Carolina and Columbus, Ohio. Mountain Air Cargo, a FedEx contractor, operates a Cessna 208 from JAX to Gainesville (GNV). This is the largest aircraft in terms of lift capacity flown by these three carriers at JAX and offers 2,800 pounds on a typical Wednesday. BankAir operates flights from JAX to connect checks to Federal Reserve Banks in Cincinnati, Ohio and Atlanta, Georgia. The carrier also operates one Learjet 35 aircraft to Opalocka, Florida. In total, BankAir flights provide just over 6,500 pounds of air cargo capacity to and from JAX. The integrated express routes operating at JAX are found in **Exhibit 3B** (see Appendix B).

All Cargo Carriers

There are no all cargo carriers operating at the Jacksonville International Airport.

Wide-body Passenger Carriers

Air cargo also moves to and from Jacksonville on a wide-body passenger flight operated by Delta Airlines. One Boeing 767-300 aircraft providing nearly 18,000 pounds of cargo air lift capacity operates to Delta's hub in Atlanta, Georgia. The wide-body passenger route lines at JAX are located in Exhibit 3B (see Appendix B). A map depicting the scheduled domestic integrated express and wide-body passenger routes at the Jacksonville International Airport is provided in **Exhibit 3C** (see Appendix C).

Road Feeder Service

Scheduled Road Feeder Service (RFS) truck connections link cargo between Jacksonville three major US gateway cities: New York, Chicago, and San Francisco. Connection to two other leading cities, Newark and Orlando, is also provided via dedicated ground linehauls. In terms of weekly rotations, Orlando has twice the number

versus the other four cities offering linehaul connections to and from JAX. Each week, 10 RFS linehauls operate between JAX and MCO. Five weekly rotations occur between JAX and JFK, EWR, ORD, and SFO. With 15,000 pounds of capacity provided per 53 foot trailer[11], a total of 150,000 pounds of material cargo can be transported between JAX and MCO each week. Five weekly rotations occur between the other four points supporting 75,000 pounds of cargo capacity. The RFS route lines at JAX and corresponding map are located in **Exhibit 4B** and **Exhibit 4C** (see Appendix B and C).

Miami International (MIA)

Integrated Express Carriers

The three primary US integrated express carriers: DHL, FedEx, and UPS all operate scheduled domestic flights to and from Miami International (MIA) per **Exhibit 5B** (see Appendix B). DHL has one A300 and one B727 that fly round trip to the Wilmington, Ohio hub. For international flights, the DHL Latin America air network uses MIA as a domestic consolidation point. The primary aircraft type in this network is the B727 freighter. The B727-100 offers 11 main deck ULD positions each with 420 cubic feet. One additional main deck ULD is provided on the B727-200 freighter since its airframe is longer. The DHL Latin America hub, Panama City, Panama (PTY), is served directly from MIA via a B727. Another key city in the DHL Latin America network, Caracas, Venezuela, receives a B727 from Miami International. DHL also serves San Jose, Costa Rica and Guatemala City, Guatemala with dedicated B727 aircraft. Bogota, Columbia is served with a B727 from the Panama City hub. Caracas, Venezuala, San Jose, Costa Rica, and Guatemala City, Guatemala each support dedicated flight rotations from Panama City. An ATR-43 flies Ecuador origin and destination traffic and operates into the Latin America hub terminating in Guayaquil. This aircraft provides nearly 10,000 pounds of air cargo capacity at eighty percent utilization. These international integrated express routes are identified in **Exhibit 6B** (see Appendix B). The corresponding route maps for domestic and international integrated express activity are presented in **Exhibit 5C** and **Exhibit 6C** (see Appendix C).

FedEx operates its primary domestic hub at Memphis International Airport. Similar to UPS, FedEx also uses MIA as a regional hub facility. However, FedEx provides significantly more cargo air lift from MIA to its primary hub versus UPS. Three aircraft: one Mc Donnell Douglas DC-10, one Mc Donnell Douglas DC-11, and one B727 freighter all operate scheduled rotations MIA-MEM. FedEx's second largest domestic hub sorting facility is located in Indianapolis, Indiana. One Airbus A310 aircraft retains a scheduled route MIA-IND. Two Florida cities receive direct FedEx air cargo flights from MIA. Southwest Florida International Airport, located in Ft. Myers, Florida, has a scheduled B727 freighter from Miami International. Tampa International Airport also receives a B727 flight from MIA. One international connection offered by FedEx out of Miami is to Valencia, Venezuela which continues on to Bogota, Colombia and Panama City, Panama. A DC10 is scheduled between these points offering close to 95,000 pounds of air cargo lift capacity.

UPS operates its primary domestic hub at Standiford Field Airport (SDF) located in Louisville, Kentucky. This integrated express carrier operates a scheduled domestic flight from MIA to the SDF hub using a Boeing 767-300. A UPS regional hub facility in

[11] Assuming trailer is loaded with five 3,000 pound ULD containers.

Columbia, South Carolina (CAE) is served with two Boeing aircraft: a 767-300 and a 757-200 from Miami International. These two planes provide over 110,000 pounds of cargo lift capacity MIA-CAE. UPS connects MIA to the Northeast via a scheduled B757-200 flight MIA-Philadelphia. The UPS hub operation at Miami International provides air cargo trade lane lift to several points in the Caribbean, Central America, and South America. Serving the Dominican Republic, UPS has one scheduled Boeing 757 routing to Santo Domingo. Guatemala City, Guatemala and San Pedro Sula, Honduras are also served with dedicated Boeing 757s. In addition, UPS offers service to Caracas, Venezuela with a Boeing 757. Two Boeing 767 aircraft: one routing to San Jose, Costa Rica and the other to Bogota, Colombia also rotate to and from Miami International for UPS. In total, the UPS aircraft based at Miami International provide over 300,000 pounds of air cargo capacity to International destinations.

All Cargo Carriers

Tampa Cargo - In 2005, this all cargo carrier was the largest perishable cargo handler.[12] This carrier offers air service to several major Latin America cities via direct flights from MIA. Bogota, Colombia is served six times per week with a combination of B767 and DC8 freighter aircraft. Also in Colombia, Barranquilla, Cali, and Medellin all have direct flights from MIA. Lima, Peru, Caracas, Venezuela, and Quito, Ecuador are also served. In total, this carrier provides over 735,000 pounds of daily capacity on lanes between MIA and the Americas. **Exhibits 7B** and **8B** in Appendix B identify the all cargo carrier activity at MIA. The corresponding routes maps are presented in **Exhibits 7C** and **8C** (see Appendix C).

Kitty Hawk - Kitty Hawk operates a fleet of B727 and newly acquired B737 aircraft in freighter configuration. The firm specializes in moving shipments weighing more than 150 pounds and just over one-fifth of its total traffic is from the auto industry.[13] This carrier connects MIA to its domestic 240,000 square foot sorting hub in Ft. Wayne, Indiana with a B727 freighter. Kitty Hawk also uses a B727 freighter to fly air cargo between San Juan, Puerto Rico and MIA.

IBC Airways - IBC Airways flies air cargo with a fleet of Metro and Shorts aircraft. These planes are non-containerized and cargo is loose loaded onto the main deck and into belly compartments. The carrier's 11 airplanes provide service from Miami International to Nassau and Freeport in the Bahamas, Grand Cayman in the West Indies, Kingston and Montego Bay in Jamaica, Port Au Prince in Haiti, and also to Key West, Florida. To serve the Turks and Caicos Islands, one Metro aircraft operates between Miami International and Providenciales International. IBC typically contracts with integrated express carriers such as UPS and also transports banking material.

Florida West International Airways – FWIA operates Boeing 767-300 and McDonnell Douglas DC-10 aircraft in freighter configuration. This all cargo carrier provides air service to Bogota, Colombia six days per week with a Boeing 747. Quito, Ecuado receives material from Miami International five days per week on a Boeing 767. Another Boeing 767 operates from MIA to San Jose, Costa Rica and terminates in Guatemala City, Guatemala six times each week. On a typical Wednesday, this carrier provides more than 285,000 pounds of air cargo lift southbound from MIA.

[12] Miami Dade Aviation Department
[13] Kitty Hawk, Inc.

Polar Air Cargo – Polar Air Cargo, formed in 1993, operates a fleet of Boeing 747 freighter aircraft. From MIA, regularly scheduled service is provided to Santiago, Chile three times per week and Viracopos, Brazil five times per week.

Amerijet International – AI, headquartered in Ft. Lauderdale, Florida, provides regular service to Latin and Central America with flights to Lima, Merida, and San Pedro Sula. This carrier uses a fleet of six B727 aircraft in freighter configuration and uses Miami International Airport as a primary hub. Sorting operations occur in a 210,000 square foot air cargo handling and hub facility located at MIA.

Arrow Air Cargo – Arrow Air provides air cargo service to South and Central America out of MIA. These flights use a combination of DC-8 and DC-10-30 series aircraft. South America cities served on Wednesdays and with at least three weekly rotations are Bogota, Colombia and Quito, Ecuador. In Central America, San Jose, Costa Rica, San Salvador, El Salvador, Guatemala City, Guatemala, Managua, Nicaragua, and Panama City, Panama all have air service.

Tradewinds – This carrier operates primarily as an Aircraft Crew Maintenance and Insurance (ACMI) carrier, maintains a fleet of A300 and Boeing 747-200 aircraft. A typical ACMI contract requires the Company to supply, at a specific rate per block hour, the aircraft, crew, maintenance and insurance for specified cargo operations. The customer is responsible for other aircraft operating expenses, including fuel, landing fees, parking fees and ground and cargo handling expenses.[14] This all-cargo carrier has been in service for 37 years and operates out of MIA to San Juan, Puerto Rico with an A300. In freighter configuration, this aircraft provides 10,047 main deck cubic feet and 3,301 lower deck cubic feet yielding a total of 13,348 cubic feet of cargo air lift. Integrated express carrier DHL occasionally contracts with Tradewinds to transport air cargo.

LAN Cargo – LAN operates four aircraft out of Miami International Airport with at least three weekly rotations. This all cargo carrier has operated since 1929 and maintains a fleet of Airbus, Boeing, and Mc Donnell Douglas aircraft. One of these, a Boeing 767, operates to Frankfurt, Germany providing air cargo capacity from Florida to Europe. The other three aircraft that LAN Cargo launches from Miami International all provide southbound air lift. One McDonnell Douglas DC-10 rotates to Quito, Ecuador. Santiago, Chile and Buenos Aires, Argentina are served with Boeing 767 freighter aircraft.[15]

Korean Air – Cargo carrier Korean Air is expanding its air network with new service between Seoul and Miami. Boeing 747-400 freighter aircraft will fly this route twice each week beginning in late August 2006. Trade activity between Miami and Asia continues to increase and Miami will serve as a major distribution point for the Carrier's Latin America markets. According to Korean Air, most Asian cargo destined for Miami or Latin America is transported by air to New York, Chicago, or Atlanta. It is then moved via surface transport or flown on other air carrier to reach final destination. Commodities expected to move on this Seoul to Miami route are: cell phones and communications equipment, electronic appliances, automobile spare parts, textiles, and perishables.[16]

[14] ABX Air Company Profile, Reuters
[15] LAN Cargo Timetable
[16] Miami International Airport

Passenger Carriers

The Miami International airport provides commercial passenger service on sixteen domestic airlines and international commercial service on 31 airlines.[17] According to US Census Data released in 2005, 53 percent of people living in the US who were not born in the States are from Latin America.[18] Given that Florida is geographically closer to the Americas versus California and New York, for example, the State is a natural gateway for passenger traffic to the region. American Airlines, including American Eagle and Executive Air, uses MIA as a hub.[19] Wide-body aircraft provide air cargo lift both in containerized lower deck space and in bulk-loaded belly compartments. In addition to these domestic flights, eleven air carriers operate wide-body aircraft on international routes. The destinations served include Amsterdam, Paris, Frankfurt, London, Madrid, Milan, Taipei, Toronto, and Zurich. Wide-body passenger flights to the Americas also originate at the Miami International Airport. Destinations served include Bogota, Caracas, Rio de Janeiro, Sao Paulo, Guayaquil, and Santiago. **Exhibits 9B** and **10B** identify the domestic and international wide-body passenger activity at MIA. These routes are illustrated in **Exhibits 9C** and **10C** (see Appendix C).

LTU, a German passenger airline, operates a fleet of A320-200 and A330-300 aircraft. Non-stop service is provided to Munich, Germany (MUC) on an A330. This passenger flight carries air cargo to and from MIA in the lower deck compartments, Iberia, a passenger airline based in Spain, also provides air cargo lift eastbound out of MIA. Traffic destined for Madrid can move on Iberia in an Airbus A340-300 wide-body.

Road Feeder Service

In addition to air cargo capacity provided on scheduled flights, Road Feeder Service (RFS) trucks operate from Atlanta, Newark, Ft. Lauderdale, Dulles, Houston, New York, Los Angeles, Orlando, New Orleans, Chicago, and San Francisco to feed Miami International. In total, there are 116 scheduled RFS routes per week into MIA from these points. The majority of the trips originate in Atlanta where Forward Air operates 21 of the 47 weekly ATL-MIA RFS frequencies. Using five AAA containers per vehicle, a total of 580 ULDs can be moved from ATL to MIA each week. This equates to 48 B727 freighter aircraft. The total distance from ATL to MIA is 662 miles. Hence, at 48 miles per hour[20], total transit time is nearly fourteen hours. All cargo carrier Kitty Hawk also provides connection from ATL to MIA via a regional Less-Than-Truckload (LTL) ground hub. This facility, opened in February 2006, also provides connectivity for Orlando and Tampa. As indicated in **Exhibit 11B** (see Appendix B), there are two cross-country RFS routes from Los Angeles to Miami with 10 total operations per week and three cross-country operations from San Francisco to Miami as well. Nine weekly rotations from both Houston and Newark are scheduled. Eight weekly rotations originate in Chicago and seven trips per week operate from both Orlando and Dulles. New York has dedicated RFS service to Miami six times per week from John F. Kennedy International. Freight forwarders in Ft. Lauderdale and New Orleans operate five weekly trips to Miami.

[17] Miami International Airport
[18] US Census Bureau, September 2005
[19] Due to bilateral agreements, transport of cargo between two U.S. points by a foreign carrier is not permitted. For example, Varig cannot transport cargo originating in LAX and destined for MIA. Of the international passenger airlines with widebody operations at MIA, four carriers: American Airlines, China Airlines, Delta Air Lines, and Varig operate domestic flights to-and-from Miami.
[20] Industry average traveling speed

UPS provides RFS service to and from Miami International in order to connect material to Central and Latin America. Seven US cities: Atlanta, Chicago, Dallas, Houston, Los Angeles, New York, and Washington, D.C. all have UPS RFS connections to MIA.[21] Within the State of Florida, Forward Air operates RFS routes from both Jacksonville and Tampa to Miami. Material tendered to Forward Air by 21:00 in Jacksonville and 21:30 in Tampa is recovered in Miami by 10:00 the next morning. This enables firms located in Northern Florida to send cargo to Europe and Latin America using Miami International as a gateway. For instance, material originating in JAX or TPA arriving on a Forward Air truck can connect to Paris on an American Airlines flight departing at 18:25. Maps detailing RFS routes at Miami are located in **Exhibit 11C** (see Appendix C).

Orlando International Airport (MCO)

Integrated Express Carriers

Orlando International Airport is served by three US integrated express carriers: DHL, FedEx, and UPS. The corresponding routes are provided in **Exhibit 12B** (see Appendix B). In terms of air cargo market share, the leading integrated express carrier is FedEx and it carries 45 percent of Orlando's total air cargo traffic. UPS places second with 19 percent and DHL Express flies 10 percent of Orlando cargo. DHL moves express air network traffic to Wilmington, Ohio on a Boeing 767 in freighter configuration. One B727 also operates to MCO on Tuesday, Wednesday, and Thursday for second day air product. This plane connects material from the Orlando regional ground hub to a daytime sort operation in Wilmington, Ohio. FedEx serves MCO with one dedicated A300. Air cargo on this aircraft moves to FedEx's secondary domestic hub operation in Indianapolis, Indiana. Total express jet air lift provided by DHL and FedEx to and from MCO is just over 132,000 pounds.

UPS also maintains a presence at Orlando International. One Airbus A300-600 flies to the Louisville, Kentucky hub and a second A306 flies to Boston. The Columbia, South Carolina UPS regional hub receives one Boeing 757 from Orlando. Philadelphia and Atlanta are also connected to Orlando with Boeing 757s. Air cargo lift is also provided on small integrated express operators: Mountain Air Cargo and Quest Diagnostics. One Cessna 208 flown by Mountain Air operates between MCO and Vero Beach Municipal Airport. Quest Diagnostics, a firm specializing in the transport of time-critical medical laboratory samples, serves Vandenberg Airport in Tampa with Beechcraft 36 and a Socata TBM 700. When combined, these two aircraft provide nearly 5,000 pounds of airlift capacity. Maps depicting the integrated express air network activity at MCO are found in **Exhibit 12C** (see Appendix C).

All Cargo Carriers

All cargo carriers Bax Global and Kitty Hawk operate scheduled flights from MCO to their respective hubs. The complete air cargo route lines are detailed in **Exhibit 13B** (see Appendix B). Bax Global operates a DC8 freighter to its Toledo, Ohio hub providing just under 68,000 pounds of air lift capacity. Kitty Hawk connects product to and from MCO with its Fort Wayne, Indiana hub using a Boeing 737 in freighter configuration. This aircraft type was added to the Kitty Hawk fleet in 2005 and is the only cargo carrier in

[21] UPS Air Cargo

Florida utilizing the B737. Both Bax Global and Kitty Hawk also operate between MCO and ATL. Kitty Hawk uses one B737 freighter to serve ATL and Bax Global operates a DC8 freighter between MCO and ATL. These two carriers offer a total average daily cargo air lift capacity of approximately 160,000 pounds to and from MCO. Nearly 70 percent of this total capacity is dedicated air lift between the MCO and ATL markets.

Wide-body Passenger Carriers

As provided in Exhibit 13B (see Appendix B), wide body domestic passenger service is provided to and from MCO on both Delta Airlines and American Airlines. American Airlines operates two A300s from MCO to its MIA hub. Air cargo is carried in the lower deck and also in the belly compartments between these points offering approximately 6,800 pound of capacity. American Airlines also flies non-stop to San Juan, Puerto Rico from MCO with three A300s. Hence, just over 10,000 pounds of air cargo lift capacity is available between MCO and SJU on American Airlines each day. Atlanta receives nine different Delta Airlines planes from MCO on a typical Wednesday. Six of these are Boeing 767-300 series aircraft and three are Boeing 767-400 series wide-body aircraft. In total, over 182,000 pounds of air cargo lift capacity are provided between MCO and Delta's primary US hub in Atlanta, Georgia.

International wide body passenger service is offered between MCO and Europe on Virgin Atlantic Airways and British Airways. Virgin Atlantic operates one Boeing 747-400 between MCO and Manchester, United Kingdom. The air cargo lift capacity offered on the flight is just over 21,000 pounds. This carrier also serves the London Gatwick airport with two Boeing 747-400 aircraft offering a combined air lift of more than 42,000 pounds. British Airways also operates to London Gatwick Airport and has a Boeing 777 scheduled between MCO and LGW. Nearly 40,000 pounds of air cargo uplift if supplied on this flight. On Wednesdays, Lufthansa operates to Duseldorf, Germany with one A300 providing nearly 3,500 pounds of air cargo capacity. Martin Air Holland, Condor Flugdienst, and American Airlines all operate international flights from MCO. Amsterdam, Netherlands is served by a Martin Air Boeing 767-300 providing nearly 18,000 pounds of air cargo lift capacity. Air cargo traveling to Frankfurt, Germany can be transported on Condor Flugdienst's Boeing 767-300 wide body passenger flight operating on Monday and Friday each week. American Airlines provides service to the Dominican Republic via Santo Domingo on an Airbus 300. In total, wide body passenger aircraft operating to and from MCO typically offer just over 145,000 pounds of air cargo uplift capacity per day. Route maps detailing scheduled domestic and international routes at Orlando International Airport are presented in **Exhibits 12C** and **13C** (see **Appendix C**).

Road Feeder Service

Road Feeder Service provider Forward Air serves several points with scheduled 53 foot vehicles to and from MCO. Connectivity to other cities within the State of Florida is offered via service to and from Jacksonville, Miami, and Tampa. All cargo carrier Kitty Hawk also operates scheduled RFS rotations between MCO and JAX. Combined with the five weekly rotations from Forward Air, a total of 10 RFS vehicles operate between MCO and JAX on an average week supplying 150,000 pounds of cargo capacity. Orlando is connected to Miami with RFS service offered by both Forward Air and Continental Airlines. Forward Air provides 15,000 pounds of capacity each day and on a weekly basis 105,000 pounds of capacity are available for shipments between MCO and

MIA on this carrier. Continental Airlines provides RFS service between MCO and MIA with six dedicated RFS vehicles each week. With 15,000 pounds of available capacity per segment, a total of 90,000 pounds of cargo can flow between MCO and MIA via Continental RFS connections each week. RFS service is also provided from Orlando to Tampa via scheduled linehaul operations on both Forward Air and on behalf of Kitty Hawk. Eleven total RFS rotations between MCO and TPA are scheduled each week. Cargo destined for the Atlanta, Georgia area or needing to make connection with a flight in ATL can move on one of 21 weekly RFS rotations. Three RFS carriers: Forward Air, British Airways, and Jet Airways provide a combined trade lane lift capacity of nearly 150,000 pounds between TPA and Atlanta. Northeast connectivity is realized via RFS service to New York, Newark, and Stewart International Airport in Newburgh, New York. Total weekly capacity provided to these markets is 240,000 pounds. Chicago O'Hare International Airport receives RFS cargo from MCO on scheduled connections from Forward Air and Jet Airways. The 11 weekly rotations from this carrier provide a total of 23,100 feet and 165,000 pounds of cargo capacity. To the West of Florida, both Houston, Texas and New Orleans, Louisiana are connected to MCO with Road Feeder Service. There are five weekly rotations to both cities. Columbus, Ohio receives cargo from and sends cargo to MCO on five scheduled linehauls operated by Forward Air each week. For West Coast cargo, MCO also five weekly RFS sectors to and from LAX and SFO. The RFS routings for MCO are provided in **Exhibit 14B** (see Appendix B). The corresponding maps identifying these truck routes for MCO is provided in **Exhibit 14C** (see Appendix C).

Palm Beach International Airport (PBI)

Integrated Express Carriers

The primary integrated express carrier at Palm Beach International Airport is UPS. Three Boeing 757 aircraft providing total air cargo lift capacity of more than 135,000 pounds are based at PBI. One of these planes operates to Southwest Florida International Airport on a scheduled basis. Another B757 moves material to the primary US air hub in Louisville, Kentucky. A third B757 routes to Miami International. Air cargo on this flight can connect to the Caribbean, Central America, and South America by way of the UPS hub facility at MIA. On a smaller scale, Flight Express provides air service at Palm Beach International with one scheduled Caravan 210 flight to and from Tampa. This aircraft provides 1,280 pounds and nearly 185 pounds of cubic capacity between the cities.

All Cargo Carriers

There are no all cargo carriers with scheduled operations at the Palm Beach International Airport.

Wide-body Passenger Carriers

Wide-body passenger service is offered on Delta Air Lines where one Boeing 767-300 aircraft operates from PBI to Delta's Atlanta hub. This aircraft continues on to SEA-TAC Airport in Washington State. Hence, cargo originating in or destined for PBI can connect to the West Coast on this flight. Cargo transported on this flight can be loaded into the 17,600 pounds of space available. The scheduled air network routes for Palm Beach

International Airport are located in **Exhibit 15B**. Corresponding route maps are presented in **Exhibit 15C** (see Appendix B and C).

Road Feeder Service

Palm Beach does have RFS connectivity to Miami, Florida as indicated in **Exhibit 16B** (see **Appendix B**). Five weekly RFS rotations, operated by Continental Airlines, facilitate cargo transport between MIA and PBI. On a typical Wednesday, 15,000 pounds of cargo can move between these points on scheduled RFS capacity. A map identifying these truck routes for PBI is presented in **Exhibit 16C** (see Appendix C).

Southwest Florida International Airport (RSW)

Integrated Express Carriers

Located in Ft. Myers, Southwest Florida International Airport is home to integrated express carriers DHL, FedEx, and UPS. **Exhibit 17B** (see Appendix B) provides the integrated express routes flown by these carriers. Of these three carriers, FedEx provides the majority of air cargo capacity. With two A300s operating to and from RSW, more than 132,000 thousand pounds of air cargo lift occupying nearly 19,000 cubic feet are in place to move traffic to and from the Ft. Myers area. One FedEx A300 provides scheduled service to the Memphis, Tennessee hub and the second A300 flies cargo directly to Miami. Integrated express carrier DHL also has an aircraft based in RSW. This DC9 stops in St. Petersburg, Florida before continuing on to the Wilmington, Ohio hub. Average daily aircraft capacity on this sector is 21,600 pounds and over 3,900 cubic feet are available for cargo. Smaller feeder aircraft are also present at RSW. From Southwest Florida International UPS operates two aircraft: one Boeing 757 and one B727. The larger of the two, the Boeing 757, flies to Palm Beach International and then continues to the Louisville, Kentucky hub. Huntsville, Alabama is also served by UPS with a B727 originating at RSW. Two planes operated by Cape Air, both Cessna 402 models, serve Key West (EYW) and Tampa directly. Each aircraft offers 1,120 pounds of capacity for cargo movement. **Exhibit 17C** (see Appendix C) map the integrated express routes for RSW.

All Cargo Carriers

There are no all cargo carriers with scheduled operations at the Southwest Florida International Airport.

Wide-body Passenger Carriers

Commercial service provider Delta Airlines has one scheduled Boeing 767-300 aircraft serving the Ft. Myers area. This plane can be used to move air cargo between RSW and Delta's Atlanta hub. Once in Atlanta, this material can be offloaded to connect to another commercial flight or recovered at the ramp and tendered to an integrated express or all cargo carrier for transport to final destination. Shipments with final destinations in the Atlanta Metro area can be moved via surface transport from the ATL airport.

As presented in Exhibit 17B (see Appendix B), two carriers offer international passenger service to and from Ft. Myers. Lufthansa operates to two German cities, Duseldorf and Munich, with scheduled A300s. The rotation to Munich operates only one day per week, on Wednesday. Passengers can fly to Duseldorf when departing from RSW on Tuesday, Thursday, or Saturday each week. Service to Frankfurt, Germany is offered on Condor Flugdienst twice each week. Condor operates one dedicated Boeing 767-300 departing from RSW on Thursday and Sunday each week. **Exhibit 18C** (see Appendix C) maps the wide-body passenger routes for RSW**.**

Road Feeder Service

There is no Road Feeder Service at Southwest Florida International Airport.

Tampa International Airport (TPA)

Integrated Express Carriers

Exhibit 18B indicates (see Appendix B), domestic integrated express service is offered at Tampa International Airport via FedEx and DHL. UPS does not maintain aircraft operations onsite. FedEx operates three planes to and from TPA: one to its primary US hub in Memphis, Tennessee, one to its secondary US hub in Indianapolis, Indiana, and a third aircraft to Newark, New Jersey. The largest trade lane of the three is between the Memphis hub and TPA where a dedicated MD-10 is available to transport nearly 90,000 pounds of product between the two points. The Indianapolis, Indiana FedEx sorting facility processes cargo off of an A300 flown in directly from Tampa. The smallest of the three FedEx aircraft at RSW, a B727 freighter, operates to Newark and can carry 12 main deck ULD containers of air cargo. At 420 cubic feet per container, each aircraft rotation provides 5,040 total cubic feet of main deck air lift. The associated weight capacity for each aircraft at 80 percent utilization is nearly 37,000 pounds. DHL processes express air cargo from Tampa through its US hub in Wilmington, Ohio. One dedicated B727 freighter is assigned to this route.

Several smaller integrated express carriers also conduct operations at the Tampa International Airport. Of these operators, Flight Express operates the most rotations and serves 10 different cities from Tampa with a combination of Cessna 210 and Beechcraft Baron 58 planes. The eight Cessna aircraft, with a combined air lift capacity of just over 10,000 pounds, fly directly to cities in the State. One Beechcraft flies to Macon, Georgia and the other operates to Sarasota. Lift capacity offered on each of these flights is 816 pounds with an associated 116 cubic feet of capacity. There are four other operators with flights to and from Tampa. The largest in terms of lift capacity is supported by Paragon Air Express who operates one Cessna 208 to and from Birmingham, Alabama. This rotation supplies 360 cubic feet of cargo capacity and an associated 2,800 pounds of air lift at 80 percent utilization. Airnet Systems flies one Learjet 35 to and from Atlanta. Total trade lane lift capacity supplied on this sector is 1,600 pounds. Cape Air operates two Cessna 402 aircraft: one with direct service to Sarasota and the other serving the Ft. Myers area surrounding the Southwest Florida International Airport. Flamingo Air operates one Piper Saratoga PA-32 aircraft connecting material between TPA and Pensacola. On a typical Wednesday, the total aggregated air lift capacity for all integrated express carriers with operations at Tampa International Airport exceeds 250,000 pounds. **Exhibit 19C** (see Appendix C) provides the integrated express route map for TPA.

All Cargo Carriers

There are no all cargo carriers with scheduled operations at the Tampa International Airport.

Wide-body Passenger Carriers

Four wide-body Boeing 767-300 and one Boeing 767-400 aircraft fly directly to Delta's Atlanta hub from Tampa. The total air cargo trade lane lift offered on these flights slightly exceeds 43,000 pounds. International passenger service is offered to and from London Gatwick Airport via British Airways. One Boeing 777 operates scheduled rotations between TPA and London. This plane can haul nearly 40,000 pounds of air cargo between Florida and Europe. Exhibit 18B (see Appendix B) identifies wide-body passenger activity at TPA. **Exhibits** 19C and **20C** (see Appendix C) contain the corresponding route maps.

Road Feeder Service

Several RFS connections to major US cities are offered at the Tampa International Airport. The leading point in terms of capacity is Atlanta, a major US logistics center and home to the UPS ground operation headquarters. This market receives RFS traffic from TPA on 18 scheduled rotations per week. The associated weight capacity offered is a minimum of 270,000 pounds per week for each direction of transit. The RFS carriers operating on this route are: British Airways with seven weekly rotations; Forward Air with six linehauls each week; and Jet Airways with five dedicated vehicles per week. In terms of rotations, Orlando is Tampa International's second largest trade lane. Eleven weekly rotations operate between these points offering 90,000 pounds of weekly capacity on Forward Air and 75,000 pounds each week on Kitty Hawk. Continental Airlines and Jet Airways each offer five weekly rotations to and from Houston. The George Bush Houston Intercontinental Airport (IAH) serves as a hub consolidation point for Continental's US operations and also provides connections to many international flights. RFS carrier Jet Airways serves the Northeast cities of Newark, New Jersey and New York, New York with five weekly rotations to each terminating in Tampa. This carrier also provides RFS service from Tampa to Chicago in the Midwest and San Francisco on the West Coast. Each market maintains five weekly rotations. Surface transport to Miami is offered via five weekly rotations operated on behalf of Continental Airlines. **Exhibit 19B** (see Appendix B) identifies the RFS activity at TPA**.** The corresponding route map for Tampa RFS activity is located in **Exhibit 21C** (see Appendix C).

SCHEDULED AIR CARGO LIFT AT TIER TWO AIRPORTS

Florida Tier Two Airports also support air cargo activity with scheduled integrated express, all cargo carrier, and wide-body passenger airlift. Some of these Tier Two Airports also have Road Feeder Service (RFS) connections available to transport cargo inbound to and outbound from these airports. A portion of the air cargo from these Tier Two Airports moves to Florida SIS Airports to connect with air and surface transport en route to final destination.

Gainesville Regional Airport (GNV)

Integrated express carriers Airnet Systems and Mountain Air Cargo serve the Gainesville Regional Airport (GNV). Service to Craig Municipal Airport (CRG) in the Jacksonville area is offered via Airnet with a Cessna 310. Located in Hernando County, the Brooksville, Florida airport connects to GNV on a Cessna 310 operated by Airnet Systems. Each of these aircraft provides 800 pounds of air cargo uplift capacity. The other integrated express feeder carrier in the market, Mountain Air Cargo, operates one Cessna 208 to Jacksonville and offers 2,800 pounds of air cargo uplift capacity. The Gainesville Regional Airport does not have scheduled integrated express, all cargo, or RFS connections. The Gainesville Regional Airport has no scheduled all cargo carrier, wide-body passenger, or Road Feeder Service. The integrated express routes for GNV and accompanying route maps are located in **Exhibit 20B** and **Exhibit 22C** (see Appendix B and C).

Key West Airport (EYW)

Three integrated express carriers provide service at Key West. Mountain Air Cargo operates the largest aircraft at Key West and provides scheduled service to Ft. Lauderdale-Hollywood International Airport with a Cessna 208. Cape Air operates one Cessna 402 aircraft to Southwest Florida International Airport. Another Cessna 402 flies between Key West and Naples. A Metroliner, operated by IBC airways, is used to transport material between Key West and Miami. The total air cargo weight capacity of this aircraft at 80 percent utilization is nearly 3,500 pounds. The Key West Airport does not support scheduled RFS connections. Nearly all these trade lanes serve as feeder aircraft for integrated express operators, Federal Reserve check flying, or scheduled charters. The Key West Airport has no scheduled all cargo carrier, wide-body passenger service, or Road Feeder Service. The integrated express routes for EYW and accompanying route maps are located in **Exhibit 21B** and **Exhibit 23C** (see Appendix B and C).

Orlando Sanford (SFB)

The Orlando Sanford Airport supports air cargo activity with wide-body passenger aircraft. The cargo traffic is largely perishables: ferns and flowers. The primary destinations served from Orlando Sanford are Manchester and Gatwick. The aircraft in the market are primarily Airbus A330 with two Boeing 767-300 operated by First Choice and Thompson Fly. There are no scheduled integrated express, all cargo carrier, or Road Feeder Service connections at SFB. The integrated express routes for SFB and accompanying route maps are located in **Exhibit 22B** and **Exhibit 24C** (see Appendix B and C).

Panama City-Bay County International Airport (PFN)

Domestic integrated express service is provided at Panama City-Bay County International Airport. Air Cargo Carriers, Flight Express, and RAM Air Freight each operate two planes into and out of PFN. The largest carrier in the market in terms of capacity is Air Cargo Carriers. This firm provides service using two Shorts 330 aircraft. One of these operates to Dothan Regional Airport in Alabama. The other Shorts 330 rotates to Pensacola Regional Airport. Each of these planes provides 5,200 pounds of air cargo uplift capacity. Integrated express feeder carrier Flight Express also operates

one aircraft to Dothan Regional and a second to Pensacola Regional. The larger of the two, a Cessna 210 offers air service to Pensacola Regional. The other plane, a Beechcraft Baron 58, serves Dothan Regional with just over 800 pounds of air lift capacity. In total, there are just under 6,500 pounds of air lift capacity in place between Panama City-Bay County International Airport and Pensacola Regional Airport. For Dothan Regional Airport, the total air lift capacity offered by Air Cargo Carriers and Flight Express is just over 6,000 pounds. Integrated express contract carrier RAM Air Freight also provides service to and from the Panama City-Bay County International Airport. Pensacola Regional Airport receives a Beechcraft Baron 58 from Panama City and a second Beechcraft Baron 58 operated by RAM Air Freight serves Craig Municipal Airport in Jacksonville. There are no scheduled all cargo carrier, wide-body passenger, or Road Feeder Service connections at PFN. The integrated express routes for PFN and accompanying route maps are located in **Exhibit 23B** and **Exhibit 25C** (see Appendix B and C).

Pensacola Regional Airport (PNS)

Integrated express carrier DHL provides air service at Pensacola Regional. One DC9 routes to the Wilmington, Ohio hub after stopping in Chattanooga Metropolitan Airport. DHL also operates a Metroliner to Dothan, Alabama. Several smaller integrated express feeder operators are also present in the market. These carriers provide connection to five cities: Crestview, Florida, Mobile, Panama City, Tallahassee, and Tampa. Crestview is served with one dedicated aircraft, a Beechcraft Baron 58 operated by Flight Express. Three carriers operate to Mobile: Airnet Systems, Paragon Air Express, and Quest Diagnostics. Each of these planes provide between 800 and 900 pounds of air lift. A Piper Navajo (PA-32) operated by Paragon Air Express, a Beechcraft Baron 58 operated by Airnet Systems, and a Cessna 310 flown by Quest Diagnostics all operate to Mobile. Total air lift capacity provided by these three aircraft is just over 2,500 pounds and just under 360 cubic feet are available. Three aircraft also rotate between Pensacola Regional and Panama City. The largest, a Shorts 330 flown by Air Cargo Carriers, provides 1,000 cubic feet and 5,200 pounds of air lift capacity. Flight Express and RAM Air Freight also serve the Pensacola market. One Cessna 210 operated by Flight Express flies from Pensacola Regional to Panama City. Ram Air Freight offers air service to Panama City with a Beechcraft Baron 58. A Beechcraft Bonanza 36 operated by Quest Diagnostics connects material from Pensacola to Tallahassee and also supports a return trip. Flamingo Air, with one dedicated Piper Navajo 32 flies, to Tampa from Pensacola.

Pensacola Regional also benefits from RFS connections to Atlanta and New York. Ten weekly rotations operate between Pensacola and Atlanta moving cargo via scheduled ground linehauls. Another five RFS rotations operate to New York each week. In total 150,000 pounds of cargo capacity are offered between Pensacola and Atlanta each week. Another 75,000 pounds of material can be moved between Pensacola and New York on scheduled RFS connections. There are no scheduled all cargo carrier or wide-body passenger connections at PNS. The integrated express and RFS routes for PFN and accompanying maps are located in **Exhibits 24B and 25B** and **Exhibits 26C and 27C** (see Appendix B and C).

St. Petersburg-Clearwater International Airport (PIE)

Integrated express carrier UPS operates several flights out of the St. Petersburg-Clearwater International Airport. The destinations served include: Miami International and Jacksonville International in Florida. Outside the State, Philadelphia, Louisville, and Columbia all connect to PIE on UPS, which uses the airport as a regional hub. Miami International is served with one UPS Boeing 757 while a UPS A300 routes to Jacksonville. Service to the primary domestic UPS hub, Louisville, is provided on one A300. Regional UPS hubs in Philadelphia and Columbia are each served with a dedicated Boeing 757. There are no scheduled all cargo carrier, wide-body passenger, or RFS connections at PIE. The integrated express routes for PIE and accompanying maps are located in **Exhibit 26B** and **Exhibit 28C** (see Appendix B and C).

Tallahassee Regional Airport (TLH)

The Tallahassee Regional Airport is served by integrated express carriers DHL and FedEx. DHL routes one DC9 from Tallahassee to Birmingham and then continues to the Wilmington, Ohio hub. A smaller feeder aircraft operated on behalf of DHL Express, a Beechcraft, connects material between Tallahassee and Orlando. FedEx routes material from Tallahassee to its Memphis hub with one dedicated B727. Flight Express also provides air service at TLH. This carrier operates a total of four aircraft: one Beechcraft Baron 58 and three Cessna 210s. The Beechcraft and one Cessna operate to Craig Municipal in the Jacksonville area. Total capacity offered on Flight Express with these two planes is almost 2,100 pounds of capacity. Macon, Georgia received one Flight Express Cessna 210 from TLH and the third Flight Express C210 provides air service to Panama City. There are no scheduled all cargo carrier, wide-body passenger, or RFS connections at the Tallahassee Regional Airport. The integrated express routes for TLH and accompanying maps are located in **Exhibit 27B** and **Exhibit 29C** (see Appendix B and C).

Other Florida Tier Two Airports

There are several Florida Tier Two Airports that do not support scheduled air cargo or RFS truck connections. Air cargo activity at these airports is limited to ad hoc air cargo charters or belly lift in narrow body aircraft related to commercial air carriers. These airports are listed below:

- Daytona Beach International Airport (DAB)
- Okaloosa Regional (VPS)
- Melbourne International Airport (MLB)
- Naples Municipal Airport (APF)

SCHEDULED AIR CARGO LIFT AT GENERAL AVIATION AIRPORTS

It is noteworthy to point out that several of Florida's general aviation airports also support scheduled air cargo activity with scheduled integrated express carriers and Federal Reserve operations. Many of these flights utilize general aviation aircraft weighing less the 12,500 pounds. Some of these flights feed into large aircraft at SIS and Tier Two Airports.

Craig Municipal Airport (CRG)

Located in Jacksonville, Florida, Craig Municipal Airport has integrated express air cargo capacity provided by several small carriers. The largest of these aircraft, a Socata TBM-700 operated by Quest Diagnostics, rotates between CRG and Gainesville Regional Airport. Flight Express operates five planes, ranging in size from a Beechcraft Baron 58 to a Cessna 210. Cessna 210 flights operate as feeder routes to Columbia, South Carolina, Opalocka, Florida, and Tampa, Florida. Beechcraft Barons serve Macon, Georgia and Pensacola, Florida. The total Flight Express air lift offered to and from Craig Municipal is nearly 5,500 pounds. AirNet Systems operates one Cessna 310 aircraft directly to Birmingham, Alabama and a second to Gainesville, Florida. Each of these planes offer approximately 800 pounds of capacity for air cargo transport. RAM Air Freight flies one Beechcraft Baron 58 aircraft between Craig Municipal and Tallahassee Regional Airport on a regularly scheduled basis. Nearly all these trade lanes serve as feeder aircraft for integrated express operators, Federal Reserve check flying, or scheduled charters. The integrated express routes for CRG and accompanying route maps are located in **Exhibit 28B** and **Exhibit 30C** (see Appendix B and C).

Florida Keys Marathon Airport (MTH)

Flight Express and Mountain Air Cargo are the two integrated express feeder carriers with service to and from the Florida Keys Marathon Airport. One Beechcraft Baron 58 aircraft serves Ft. Lauderdale Executive Airport. The other aircraft in the market, a Cessna 208 flown by Mountain Air Cargo provides service to Ft. Lauderdale International Airport. The Florida Keys Marathon Airport has no scheduled all cargo carrier service, wide-body passenger service, or Road Feeder Service. The integrated express routes for MTH and accompanying route maps are located in **Exhibit 29B** and **Exhibit 31C** (see Appendix B and C).

Ft. Lauderdale Executive Airport (FXE)

Ft. Lauderdale Executive Airport supports domestic integrated express service on two carriers: Airnet Systems and Flight Express. One Learjet 35 operates to and from Jacksonville (JAX) for Airnet. The other aircraft, a Beechcraft Baron 58 offering just over 800 pounds of air cargo capacity serves the Opalocka market. Also operating to the Opalocka (OPA) airport is a Cessna 210 flown by Airnet Systems. The second Airnet plane at FXE, also a Cessna 210, provides service to Tampa (TPA). The Ft. Lauderdale Executive Airport does not have scheduled all cargo, wide-body passenger, or RFS connections. The integrated express routes for FXE and accompanying route maps are located in **Exhibit 30B** and **Exhibit 32C** (see Appendix B and C).

Ft. Myers Page Field Airport (FMY)

Ft. Myers Page Field Airport has direct air service to three Florida airports: Opalocka, Tampa, and Sarasota. A small integrated express feeder aircraft with less than 1,000 pounds of air lift capacity travels between FMY and Sarasota carrying laboratory material for Quest Diagnostics. Another integrated express carrier, Flight Express, operates one scheduled Cessna 210 to Opalocka and another one to Tampa. The total trade lane lift offered to and from FMY by these three dedicated aircraft is just over 3,300 pounds of capacity. Nearly all these trade lanes serve as feeder aircraft for integrated express operators, Federal Reserve check flying, or scheduled charters. The Ft. Myers

Page Field Airport does not have scheduled all cargo, wide-body passenger, or RFS connections. The integrated express routes for FMY and accompanying route maps are located in **Exhibit 31B** and **Exhibit 33C** (see Appendix B and C).