

HILLSBOROUGH+POLK FREIGHT LOGISTICS ZONE STRATEGIC PLAN

DRAFT

EXECUTIVE SUMMARY

WHAT IS A FREIGHT LOGISTICS ZONE?

A Freight Logistics Zone (FLZ) is defined as a designated grouping of freight activity and transportation infrastructure in an area around an Intermodal Logistics Center (ILC) as defined by FDOT.



The purpose of the FLZ Strategic Plan is to identify a zone and supporting infrastructure that demonstrably serve a strategic interest in the region and the state. The Plan is a culmination of a regional collaborative effort that involves public and private stakeholders to compile, analyze and relate freight activity and needed infrastructure improvements to the FLZ. The strategic needs identified in the Plan represent the **FLZ's high priority freight infrastructure improvements crucial to the future mobility and reliability of goods movement in the region.** These improvements are prime candidates for consideration of prioritized state funding.

HILLSBOROUGH+POLK FLZ.

The Hillsborough-Polk FLZ is located in one of the most economically productive centers of freight activity in Florida, featuring an ILC, the largest seaport in the state, a major international airport, and a Foreign Trade Zone. It includes 14 logistics clusters with a variety of manufacturing, warehousing, intermodal operations, and distribution centers. The transportation infrastructure needed to provide quality access to these freight generators is critical to the continued economic prosperity of the region and the state as a whole.

**200 SQUARE MILES
OF LOGISTICS CLUSTERS**

The Hillsborough+Polk FLZ is oriented in an east/west direction, with *Port Tampa Bay* (PTB) and *Tampa International Airport* (TIA) anchoring the west side of the zone and the *Central Florida ILC* anchoring the east side. I-4 is one of the primary transportation facilities that provides freight mobility within the zone and to points east of Polk County. The I-4 corridor has evolved over the years to become a major distribution hub within the fastest growing region in the state.

FREIGHT GENERATORS.

PTB is the primary generator of freight activity in the FLZ, processing over 36 million tons of freight annually. **Approximately 85% of that tonnage moved over land is transported by truck**, with the remainder transported by rail. The vast majority of the more than 9,000 truck movements into and out of the Port are west or east bound.

**36 MILLION TONS
ANNUALLY THROUGH PORT
TAMPA BAY**

TIA is another major freight generator, specializing in relatively small but high value commodities amounting to **100,000 tons annually.** Other general aviation airports in the FLZ with air cargo or warehousing capacity include Tampa Executive, Lakeland Linder Regional, and Bartow Municipal airports.

**9,000 TRUCKS PER
DAY AT PORT TAMPA BAY**

The opening of the *Central Florida ILC* in 2014 in Polk County provided another significant freight generator in the region. The ILC features almost two miles of rail lines and three cranes with the capacity to process 300,000 containers annually. Other freight activity centers in the FLZ include 35 mini-clusters of freight activity centers that comprise the logistics clusters identified in the FLZ.

ECONOMIC DEVELOPMENT.

Growth in the Gulf-Central Florida region is facilitated by its centralized location, land availability and value, large workforce and training institutions, and business friendly development

environment. A robust program of local development incentives that include ad valorem tax and impact fee exemptions, regulatory assistance, and a variety of grant programs piques the interest of international businesses from around the world. The growth potential of the area surrounding the **ILC alone will support 8 million square feet of warehouse space and 5,000 new jobs** and has drawn interest from Brazilian, Chinese, Mexican and American businesses.

The greater Tampa metropolitan area has expanded its employment by 24 percent since 2009, and now ranks 4th in the U.S and #1 in the state of Florida for the most growth (Source: New York Times). PTB is poised for future growth with

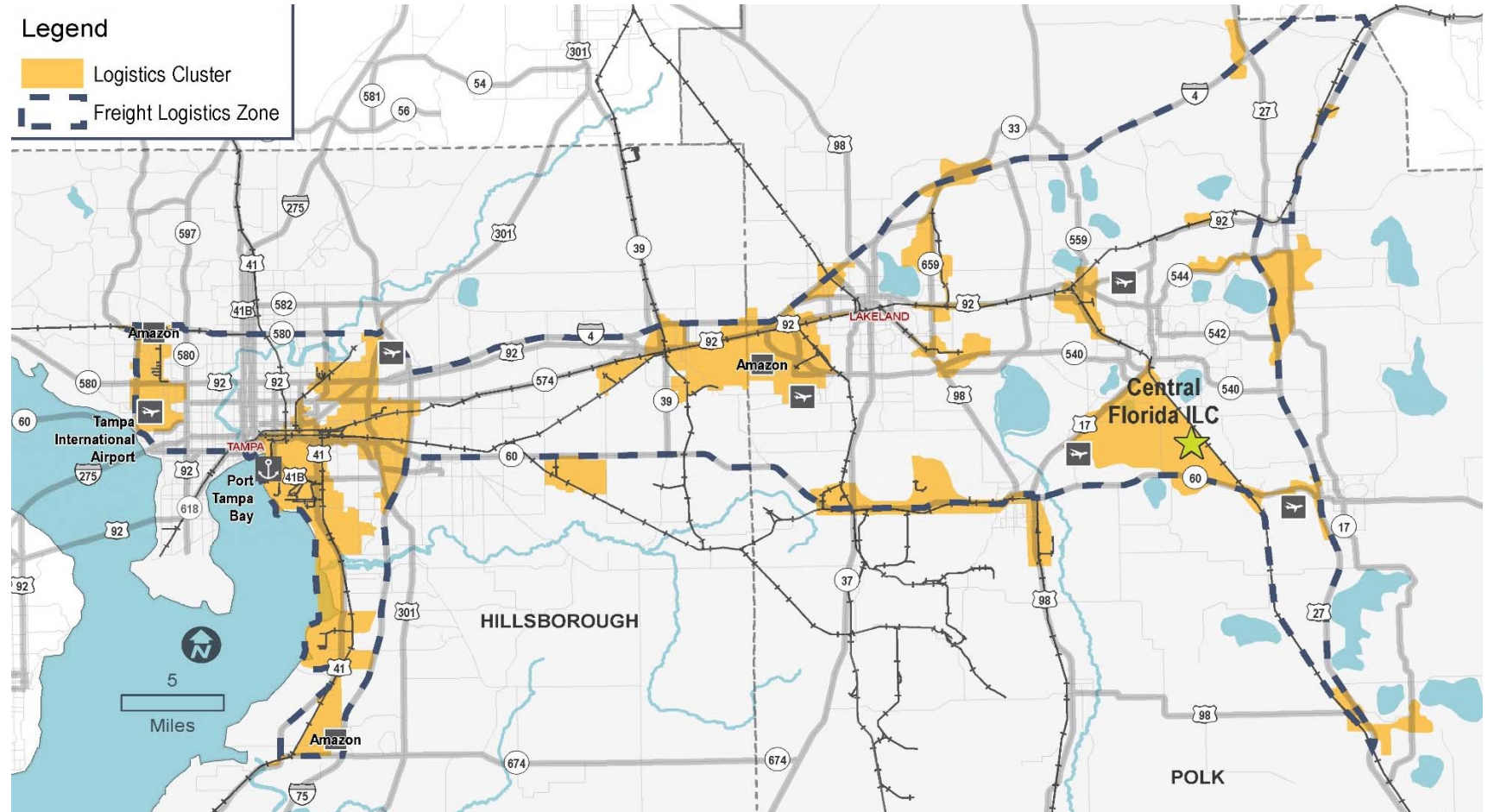
**9 OF 12 TRAINING
PROGRAMS ARE WITHIN
A LOGISTICS CLUSTER**

plans to quadruple its container storage capacity and the recent delivery of two Post-Panamax gantry cranes. **TIA also has expansion plans, with nearly \$1 billion worth of improvements** in its Master Plan that include a new 60,000 square foot multi-tenant air cargo building.

**90% OF THE REGION'S
UNEMPLOYED WORK FORCE
RESIDES WITHIN 5 MILES
OF LOGISTICS CLUSTERS**

There is an ample workforce in the region, with a variety of workforce training programs available within the FLZ. **Training capabilities in the FLZ consist of 12 various programs** including numerous heavy machinery repair, maintenance and operation programs as well as higher education supply chain logistics and command language programs.

**300,000 CONTAINER
CAPACITY AT ILC**



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STRATEGIC IMPROVEMENTS TO REGIONAL FREIGHT NETWORK

