

Transportation and Logistics



8th

Largest **transportation and logistics** cluster in Florida.



2,438

Employed in the **transportation and logistics** cluster.



222

Establishments in the **transportation and logistics** cluster.



8.1%

Average annual employment growth in the **transportation and logistics** cluster.



70

Job seekers from top 10 occupations in the **transportation and logistics** cluster.

Industry Overview

The transportation and logistics cluster ranks seventh in the five-county region in Southwest Florida and eighth in the state, based on employment. Since 2009, growth in jobs in this cluster has exceeded 50 percent. The cluster is comprised of five subclusters and 17 different industries. This cluster includes jobs in air, rail, truck and bus transportation, as well as support activities such as maintenance, repairs and security. Typical occupations within this cluster include dispatchers, mechanics, logisticians, and technicians, providing opportunities for workers with high school degrees, technical and vocational school certificates, or bachelor degrees, and salaries ranging from minimum wages to higher salaries depending on education, skills, and experience. Job growth has been rapid in this region relative to the state and given the demand for transportation services of all kinds, it is not expected to abate. Logistics centers provide an advantage for transporters of products given the key location available in Southwest Florida. Currently much of the employment exists in Lee and Collier counties. However, transportation firms are realizing the benefits of locating in smaller, less congested locations of this region such as in Glades and Hendry counties.

Firms included in this cluster typically hire fewer than 50 employees. A large majority of the firms (86 percent) have fewer than 10 workers. Lee County has just six firms that employ more than 100 but fewer than 250 workers. Nevertheless, growth in employment over the 2009-2015 period has been robust in the region as compared to the state. The growing trend of in-migration into the region has and will continue to put upward pressure on demand for transportation services. This cluster is likely to benefit from this regional growth, especially as the America's Gateway and AirGlades projects develop in Glades and Hendry counties, respectively. There is already evidence of this as the smaller airports in surrounding counties are putting growth plans into place. As one of the tables below indicates, growth in employment for the air transportation subcluster has dwarfed growth in the other four subclusters. Occupations in this cluster offer higher than minimum wages for entry-level positions to employees without college degrees as well as diverse opportunities.

Economic Profile

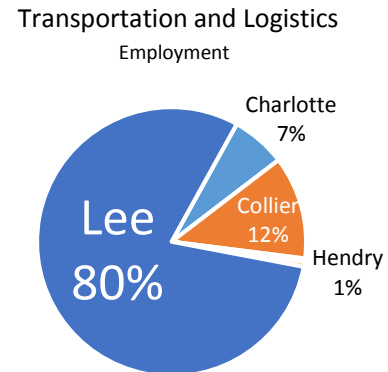
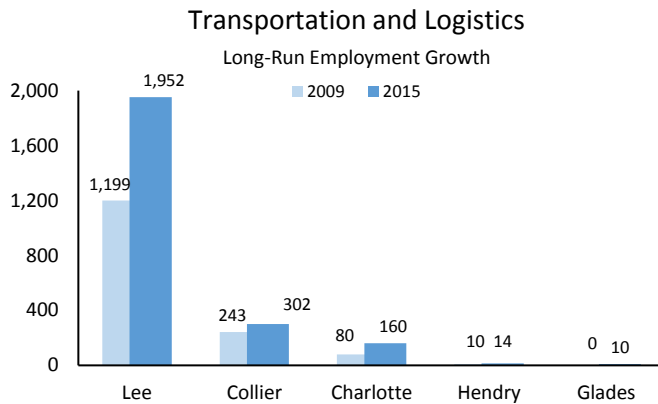
The transportation and logistics cluster consists of five subclusters and 17 six-digit North American Industry Classification System (NAICS) codes. These include companies engaged in both freight and passenger transportation by air and by land, as well as support activities such as packaging and crating. It is the seventh largest cluster in the five-county region of Southwest Florida, as measured by employment.

The five-county region ranked eighth in the state of Florida for transportation and logistics, with an employment level of 2,438 in 2015. During the six-year period from 2009 to 2015, the number of jobs in this cluster group increased by 59.1 percent, compared to only 21.8 percent for the entire state. The number of establishments in the cluster accounted for almost 4 percent of the total number of such establishments in the state. The location quotient for this cluster's employment relative to the state and the country were both less than one, indicating that the regional concentration of employment in the transportation industry is lower than the region and the state of Florida.

Transportation and Logistics Economic Profile		
	Southwest Florida	Florida
Employment, 2015	2,438	106,737
Number of Establishments, 2015	222	6,203
Short-run employment growth, 2014 to 2015	3.8%	16.7%
Long-run employment growth, 2009 to 2015	59.1%	21.8%
Average annual employment growth, 2009 to 2015	8.1%	4.0%
Workforce Region Employment Ranking, 2015	8th	--
Location Quotient, Relative to Florida, 2015	0.48	--
Location Quotient, Relative to United States, 2015	0.48	1.01

Source: County Business Patterns: 2015

Employment by County



Of the 2,438 people employed in this cluster, Lee County accounted for 80 percent, followed by Collier County at 12 percent, and Charlotte County at 7 percent. Transportation and logistics employment in Glades and Hendry counties amounted to just 1 percent of the total.

Transportation and Logistics Employment By County		
County	Employment	Percent of Total Employment
Charlotte	160	6.6%
Collier	302	12.4%
Glades	10	0.4%
Hendry	14	0.6%
Lee	1,952	80.1%
Southwest Florida	2,438	100.0%

Source: County Business Patterns: 2015

The table below shows the number of employees per establishment for the transportation and logistics cluster. Ninety-three percent of the firms in this cluster have less than 50 employees, and 86 percent of the firms have fewer than 10 employees. Only six firms employ more than 100 persons, all located in Lee County.

Transportation and Logistics Establishments By County										
County	Number of Employees in Establishment									Total
	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	
Charlotte	17	5	1	0	1	0	0	0	0	24
Collier	54	8	3	2	1	0	0	0	0	68
Glades	1	0	0	0	0	0	0	0	0	1
Hendry	5	0	0	0	0	0	0	0	0	5
Lee	88	12	2	9	7	6	0	0	0	124
Southwest Florida	165	25	6	11	9	6	0	0	0	222

Source: County Business Patterns: 2015

Transportation and logistics grew by 59.1 percent in Southwest Florida from 2009 to 2015. All five counties participated in this cluster's growth, with Charlotte County posting the fastest growth rate, growing by 80 employees, or 100 percent, over the six-year period. Lee County's addition of 753 marked an increase of 62.8 percent over six years. Hendry County's four employees marked a 40 percent

increase, while Collier's 59 employees marked a 24.3 percent increase. Glades saw an increase from zero to 10 employees during this time period.

Transportation and Logistics Long-Run Employment Growth				
By County				
County	Employment		Percent Change	Average Annual Percent Change
	2009	2015		
Charlotte	80	160	100.0%	12.2%
Collier	243	302	24.3%	3.7%
Glades	0	10	N/A	N/A
Hendry	10	14	40.0%	5.8%
Lee	1,199	1,952	62.8%	8.5%
Southwest Florida	1,532	2,438	59.1%	8.1%

Source: County Business Patterns: 2015

Employment by Subcluster

The table below shows the composition of the transportation and logistics cluster. The highest employment occurs in the air transportation subclusters, representing nearly 58 percent of the cluster. Ground transportation, consisting of trucking, bus service, and ground support activities represents just over 42 percent.

Transportation and Logistics Employment		
By Subcluster		
Subcluster	Employment	Percent of Total Employment
Air Transportation	1,344	55.1%
Ground Transportation Support Activities	589	24.2%
Trucking	352	14.4%
Bus Transportation	88	3.6%
Specialty Air Transportation	65	2.7%
Total	2,438	100.0%

Source: County Business Patterns: 2015

Of the 222 establishments that comprise this cluster, 85 percent employ fewer than 10 employees. The trucking subcluster's contribution of 79 employees makes up 36 percent of the total cluster. It is followed by ground transportation support activities (74 employees, 33 percent), air transportation (45 employees, 20 percent), and specialty air transportation (18 employees, 8 percent). Only six firms in this list employ 100 or more workers, four of which are in the air transportation subcluster.

Transportation and Logistics Establishments										
By Subcluster										
Subcluster	Number of Employees in Establishment									Total
	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 to 999	1000+	
Trucking	70	5	0	2	1	1	0	0	0	79
Ground Transportation Support Activities	59	7	3	3	1	1	0	0	0	74
Air Transportation	17	10	2	6	6	4	0	0	0	45
Specialty Air Transportation	14	3	1	0	0	0	0	0	0	18
Bus Transportation	5	0	0	0	1	0	0	0	0	6
Total	165	25	6	11	9	6	0	0	0	222

Source: County Business Patterns: 2015

The transportation and logistics cluster experienced tremendous growth over the six-year period ending in 2015, growing some 59.1 percent during that period, or 8.1 percent on an annualized basis. All of the subclusters experienced employee growth over the six-year period. The fastest growing subcluster was bus transportation, where employment increased by 193.3 percent over the six year period. The largest employee increases occurred in air transportation (377 new jobs) and ground transportation support activities (324 additional jobs).

Transportation and Logistics Long-Run Employment Growth				
By Subcluster				
Subcluster	Employment		Percent Change	Average Annual Percent Change
	2009	2015		
Bus Transportation	30	88	193.3%	19.6%
Ground Transportation Support Activities	265	589	122.3%	14.2%
Trucking	220	352	60.0%	8.1%
Air Transportation	967	1,344	39.0%	5.6%
Specialty Air Transportation	50	65	30.0%	4.5%
Total	1,532	2,438	59.1%	8.1%

Source: County Business Patterns: 2015

Workforce Ranking

In 2015, the five counties of the Southwest Florida region ranked eighth among all other regions in the state for employment in the transportation and logistics cluster. The employment in the cluster represented a little over 2 percent of the state's total employment of 109,495 for this cluster.

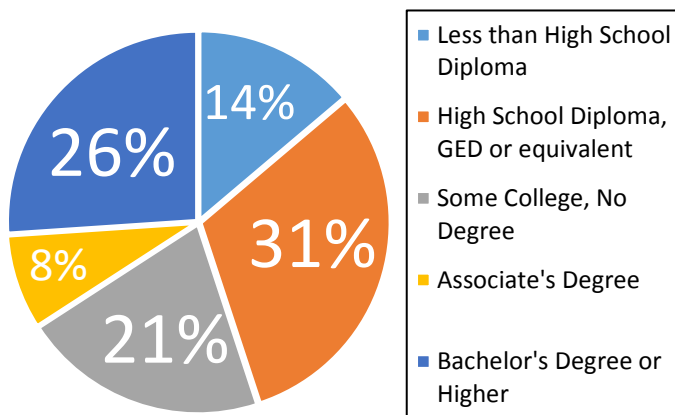
Transportation and Logistics Workforce Rankings		
Rank	Workforce Region	Employment Level
1	South Florida	36,538
2	Central Florida	17,375
3	Broward	11,826
4	Northeast Florida	11,613
5	Tampa Bay	6,606
6	Palm Beach County	5,066
7	Polk	3,178
8	Southwest Florida	2,438
9	Research Coast	1,862
10	Pinellas	1,664
11	Brevard	1,535
12	Citrus Levy Marion	1,510
13	Florida Crown	1,191
	Escarosa	1,130
15	Okaloosa Walton	989
16	Suncoast	971
17	North Central Florida	826
18	Flagler Volusia	643
19	Pasco Hernando	627
20	Gulf Coast	486
21	Capital Region	481
22	North Florida	394
23	Chipola	304
24	Heartland	242

Source: County Business Patterns: 2015

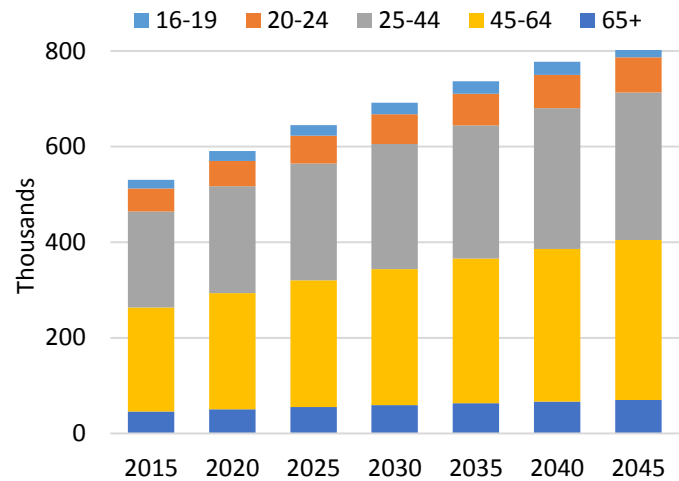
Workforce Profile

Many companies choose to operate in Southwest Florida due to its workforce. Of the region's adult population, 26 percent have a Bachelor's Degree or higher, while 86 percent have at least a high school diploma. Florida Gulf Coast University conferred 2,331 Bachelor's Degrees to students during the 2015-2016 academic year, while Florida Southwestern State College, with its four campuses throughout the region, conferred 1,942 Associate's Degrees and 341 Bachelor's Degrees during the 2014-2015 academic year. Other educational institutions serving the area include Hodges University in Naples and Kaiser University in Fort Myers. Meanwhile, regional training programs, such as CareerSource Florida, provide training programs and certificates in numerous areas. Furthermore, the composition of the workforce is expected to change as the population grows over the next 25 years. Southwest Florida's population is expected to grow 50 percent by 2045, expanding the region's customer base while increasing its labor force by 54 percent.

Educational Attainment



Projected Labor Force



Transportation and Logistics Occupations

By Total Employed

Occupation	Total Working Across All Industries	Number of Available Applicants	Number of Graduates	Entry Wage	Median Wage	Experienced Wage	Education Level
Dispatchers, Except Police, Fire, and Ambulance	555	9	0	\$11.34	\$15.49	\$18.21	High School/GED
Bus and Truck Mechanics and Diesel Engine Specialists	498	8	0	\$14.98	\$19.66	\$22.62	PSAV
Mobile Heavy Equipment Mechanics, Except Engines	234	4	0	\$15.38	\$18.94	\$22.21	PSAV
Aircraft Mechanics and Service Technicians	193	9	0	\$23.32	\$32.84	\$38.82	PSAV
Logisticians	192	4	258	\$16.99	\$21.49	\$28.45	Bachelor's Degree
Cargo and Freight Agents	184	20	0	\$11.25	\$18.67	\$24.46	PSAV
Electrical and Electronics Engineering Technicians	184	7	12	\$18.39	\$23.97	\$27.87	Some College
Transportation, Storage, and Distribution Managers	95	7	23	\$31.14	\$43.40	\$52.88	Some College
Avionics Technicians	38	2	0	\$15.67	\$26.48	\$28.71	PSAV
Rail Car Repairers	5	0	0	N/R	N/R	N/R	PSAV

Source: Florida Department of Economic Opportunity, Occupational Supply/Demand Report

Cluster Highlights

KEY COMPANY ANNOUNCEMENTS

- Dolphin Transportation announced the addition of nine top-of-the-line buses in May 2017.
- Southwest Florida International Airport reached 8.6 million passengers in 2016, marking a 14.5 percent increase in traffic since 2010.
- Airglades Airport in Clewiston plans to build a 1 million square foot handling facility that would bring 1000 jobs to this airport in Hendry County. The airport would be home to cargo flights containing perishable goods. No commercial airlines at this airport provide it with an efficiency advantage. Financing the project that is expected to cost \$200 million dollars would come from tax exempt revenue bonds and federal dollars helping to fund some of the runway construction.
- Punta Gorda airport in Charlotte county has begun expanding by diverting several Frontier airline flights from Fort Myers as growth is expected at this small airport.
- Americas Gateway Logistics has opened a new logistics center in Moore Haven, Glades County, offering a multi-modal rail-serviced industrial park, providing fast access to highways, rail, seaports and airports for distribution, warehousing, storage and transportation markets. The area is planned for over 700 acres that would include transportation infrastructure servicing major rail, air and trucking routes.

EVENTS, AWARDS AND RECOGNITIONS

- AAA Cooper Transportation earned the Great West Safety Award in May 2017, and was honored by Wreaths Across America in 2016.
- Florida SouthWestern State College graduated its first class of 14 graduates of the Transportation Security Administration Associates Program, in January 2017. FSW is the only entity in Southwest Florida to offer the program, designed to prepare transportation security officers, supervisors, and managers for future promotions.
- Averitt Express received the Nasstrac Carrier of the Year Award in May 2016, and the National Customer.
- Southeastern Freightlines received Lowe's Top Carrier Award and its Platinum Service Award for 2016.

Companies

- A & S Transportation
www.aandstransportation.com
- AAA Cooper Transportation
www.aaacooper.com
- ABC Transfer Inc
www.abctransferinc.com
- Accel Aviation
www.accelaviation.com
- Airport Terminal Svc Inc
www.atsstl.com
- Angel Airport Transportation
- Apg Avionics
www.avionics.com
- Averitt Express
www.averittpress.com
- Future Aviation Inc
www.heico.com
- Gator Freightways Inc
www.rlcarriers.com
- Island Express
www.islandexpress.com
- McGaughey Busses Inc
www.mbicharterbus.com
- Merchant Transport
www.huntermerchant.com
- Naples Jet Ctr
www.naplesjetcenter.com
- Page Field-FMY
www.flylcpa.com/fmy
- Party Bus Naples LLC
www.napleselitetransportation.com

- C & L Packing Corp
- Coral Aviation Group
www.coralaviationgroup.com
- D & L Transport LLC
www.dandltrans.com
- Data2 Logistics LLC
www.data2logistics.com
- Dolphin Transportation
www.dolphinnaples.com
- First & 10 Charters Inc
- Privatesky Aviation Svc
www.privatesky.net
- Servisair
- Southeastern Freightlines
www.sefl.com
- Timo Brothers Inc
www.timobrothers.com
- TJ & I Harvesting Inc
- UPS Freight
www.upsfreight.com

Education & Training

Florida's system of higher and post-secondary education provides hundreds of training programs generating advanced degrees and occupational certificates that prepare students for productive careers in our region. The state university system includes 13 institutions, while community colleges number 28. Furthermore, there are 84 private universities and occupational and technical schools in the state. A list of the top educational institutions producing graduates that work in the transportation and logistics cluster would include the following:

- Florida Gulf Coast University
www.fgcu.edu
- Rasmussen College
www.rasmussen.edu
- Broward College
www.broward.edu
- University of Miami
www.miami.edu
- Florida State University
www.fsu.edu
- University of Central Florida
www.ucf.edu
- University of South Florida
www.usf.edu
- Florida SouthWestern State College
www.fsw.edu
- Keiser University
www.keiseruniversity.edu
- Florida Atlantic University
www.fau.edu
- Florida International University
www.fiu.edu
- Miami-Dade College
www.mdc.edu
- University of Florida
www.ufl.edu

Cluster Definition

The transportation and logistics cluster consists of 17 six-digit North American Industry Classification System (NAICS) codes that define the five subclusters. A list of subclusters and 6-digit NAICS code is shown in the table below.

Transportation and Logistics Breakdown of Subclusters	
Subcluster/NAICS Description	6-Digit NAICS Code
<i>Air Transportation</i>	
Scheduled Passenger Air Transportation	481111
Scheduled Freight Air Transportation	481112
Nonscheduled Chartered Freight Air Transportation	481212
Air Traffic Control	488111
Other Airport Operations	488119
Other Support Activities for Air Transportation	488190
<i>Specialty Air Transportation</i>	
Nonscheduled Chartered Passenger Air Transportation	481211
Other Nonscheduled Air Transportation	481219
<i>Ground Transportation Support Activities</i>	
Support Activities for Rail Transportation	488210
Other Support Activities for Road Transportation	488490
Freight Transportation Arrangement	488510
Packing and Crating	488991
All Other Support Activities for Transportation	488999
<i>Trucking</i>	
General Freight Trucking, Long-Distance, Truckload	484121
Specialized Freight (except Used Goods) Trucking, Long-Distance	484230
<i>Bus Transportation</i>	
Interurban and Rural Bus Transportation	485210
Charter Bus Industry	485510

Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School