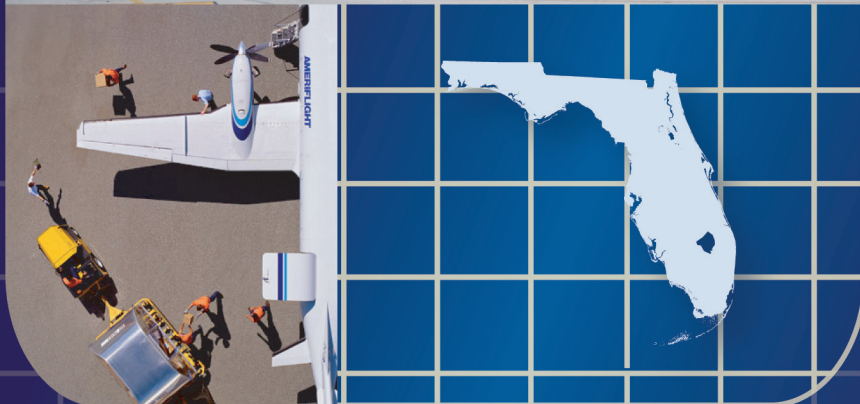


Florida Air Cargo System Plan Executive Summary



2006

Air Cargo: Vital to Florida's Economy

In today's global economy, the huge volume of time-critical, high-value products crossing national boundaries by aircraft results in markets and industries being connected together, sharing a common goal to improve and enhance the quality of life of individuals, families, businesses and societies. In addition, air cargo companies are increasingly involved in manufacturer's supply chain management.

- Florida's commercial airports enplane almost 8 percent of the nation's air cargo.
- 36 percent of Florida's international trade dollars are generated by air cargo shipments
- The largest driver of Florida's economy is international trade.
- The economic impact of air cargo produced or sold in Florida totals \$33.4 billion each year.

While many airports in Florida can accommodate air cargo activity to a certain degree, there are 18 airports in Florida which have scheduled air cargo service supporting business and industry throughout the State. For purposes of this study, these airports are divided into two categories: Strategic Intermodal System (SIS) Tier One Airports and Tier Two Airports.

SIS-Tier One Airports:

- Ft. Lauderdale-Hollywood International
- Jacksonville International
- Miami International
- Orlando International
- Palm Beach International
- Southwest Florida International
- Tampa International

Tier Two Airports:

- Daytona Beach International*
- Gainesville International*
- Key West International
- Melbourne International*
- Okaloosa Regional*
- Panama City-Bay County*
- Orlando-Sanford International*
- Pensacola Regional*
- Sarasota-Bradenton International*
- St. Petersburg-Clearwater International
- Tallahassee Regional*

In 2005, Florida's SIS Airports moved a combined 2.6 million tons of air cargo to and from destinations around the globe. Through a combination of integrated express carriers such as FedEx, UPS, and DHL, all-cargo carriers such as Polar Air Cargo and Kittyhawk, and commercial passenger carriers such as Delta, United, and British Airways, Florida's airports directly serve 57 domestic and 58 international destinations with either dedicated all-cargo or widebody passenger aircraft. In addition to scheduled service, numerous Florida airports support ad-hoc, charter air cargo operations that directly support local and statewide business needs.

International Trade

Florida's airports provide the State with a critical link to the global economy. International air trade accounts for nearly two-thirds of the State's total air cargo tonnage (1.6 million tons in 2005). Miami International Airport accounts for 97 percent of the State's export/import air cargo activity, followed by Orlando International with nearly two percent and Tampa International, Orlando-Sanford, and Southwest Florida International accounting for the majority of the remaining volume.

*Emerging SIS Airport

Latin America is Florida's top air cargo trading partner, accounting for over 87 percent of the State's total international air cargo tonnage. Perishables from Latin American top Florida's air imports, accounting for 65 percent of the State's import tonnage while Florida's air exports tend to be of higher value manufactured goods such as machinery, electronics, and optics. In terms of total tonnage, 2005 air imports are nearly double that of Florida's air exports; however in dollar terms, Florida boasts a trade surplus of \$8.25 billion, or a 79 percent advantage of exports to imports.

Airport Market Share

Florida's air cargo activity is heavily concentrated at Miami International Airport which accounts for 74 percent of the State's 2005 total air cargo volume. As illustrated below, Florida's top-five airports in terms of 2005 air cargo tonnage account for over 2.5 million tons, or 96.5 percent of the State's total air cargo.

Airport	2005 Tons	Market Share
Miami	1,934,545	74.1%
Orlando	225,928	8.7%
Ft. Lauderdale	175,533	6.7%
Tampa	100,228	3.8%
Jacksonville	83,975	3.2%
All Others	90,661	3.5%
Total	2,610,870	100.0%

Airport Facilities and Services

Florida's SIS Airports have over one million square yards of dedicated air cargo ramp space and 54 dedicated airside air cargo buildings totaling over 4.6 million square feet. Airside building occupancy rates range from 20 to 100 percent, averaging 90 percent statewide. Four airports, Miami International, Orlando International, Ft. Lauderdale-Hollywood International and Orlando-Sanford International have refrigerated perishable facilities totaling 267 thousand square feet. Miami International, driven by its high-volume perishable traffic, accounts for over 250 thousand square feet, or 94 percent, of the total. U.S. Customs service is provided at 15 of the airports studied and USDA inspection service is provided at seven.

Forecast and Capacity

Forecasts of Florida's air cargo activity based upon market specific forecast factors indicate that the State's total air cargo volume will nearly triple to 7.3 million tons by 2025. Growth in international traffic is expected to be strongest, with international traffic forecasted to account for over 70 percent of the State's air cargo tonnage by 2025. Airport capacity analysis indicates that most of Florida's SIS Airports will have sufficient capacity (building and ramp space) to accommodate forecasted demand. Analysis indicates significant new facility needs are anticipated to be limited to Miami International and Ft. Lauderdale-Hollywood International airports.



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