



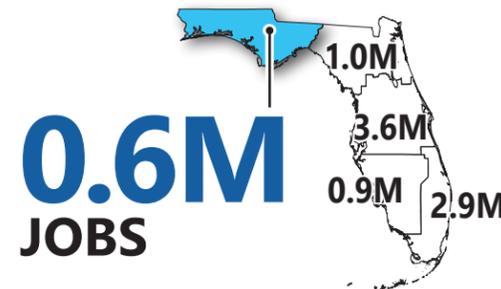
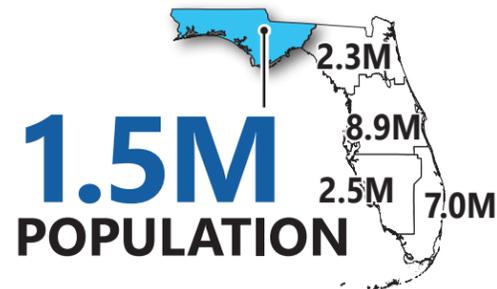
NORTHWEST FLORIDA

TRANSPORTATION TRENDS & CONDITIONS

The Northwest's strategic location requires close partnerships with neighboring states. The geography of Northwest communities also exposes them to coastal impacts from weather events, most recently from Hurricanes Sally and Michael. The area is increasingly drawing attention from tourists exploring the Emerald Coast and other historic sites all year round, contributing to a growing economy and additional challenges to the existing transportation infrastructure. While sparsely populated and predominantly rural, Northwest Florida has significant freight and goods movement, and its communities prioritize economic development, redevelopment, and support for military bases. Future plans call for preservation and revitalization of the area's rural lifestyle and small-town character, with emphases on enhancing multimodal mobility, fostering freight connection along key corridors, and upgrading the transportation system to adapt to evolving travel patterns.



[Statewide Transportation Trends & Conditions]



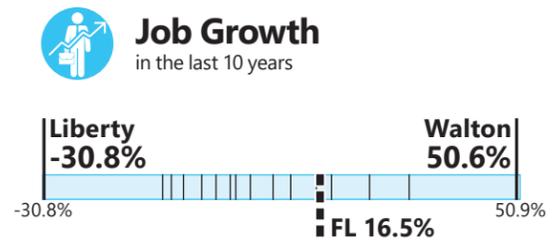
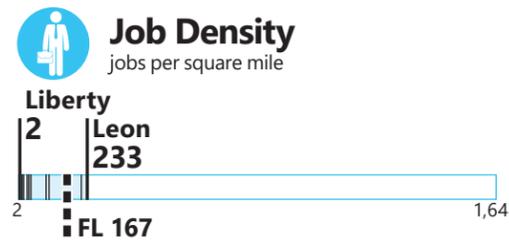
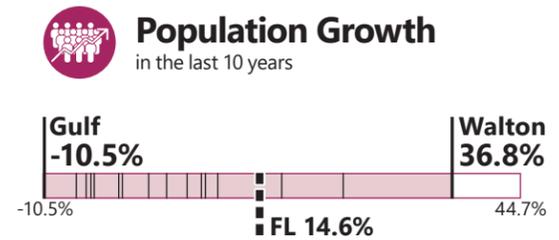
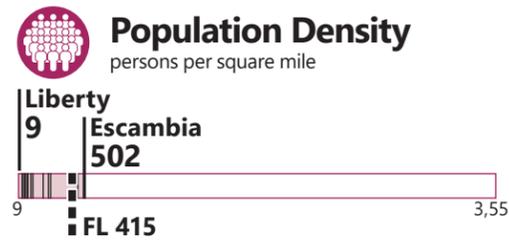
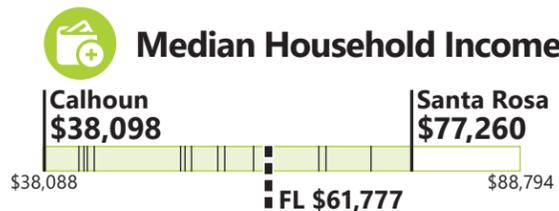
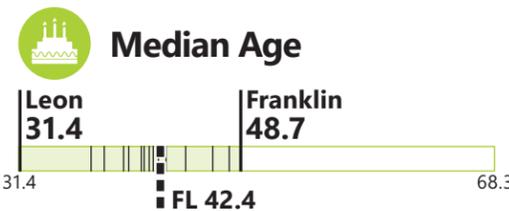
TRANSPORTATION SYSTEM HIGHLIGHTS

- 18,989** Public Road Miles
- 517** Rail Mainline Miles
- 156** Active SUN Trail Miles
- 1,962** Highway Bridges
- 11** Transit Systems
- 4** Commercial Airports
- 3** Seaports
- 6** Military Installations
- 3** Spaceport Territories

[Transportation Trends and Statistics by FDOT Districts]

DEMOGRAPHIC CHARACTERISTICS

Reference scale bars reflect the range of values for each demographic characteristic across the state. Lines within shaded areas reflect values for Northwest communities.



- Urban Area
- Airport
- Seaport Territories
- Military Installation
- Spaceport Territory
- County Boundary

Florida (FL) Median

[Florida Trends & Conditions - Northwest Communities Storymap]

[Sources]

GROWTH ALONG THE PANHANDLE

382,000 new residents
286,000 new jobs
by 2045

Early settlements in Florida were in the Northwest communities of Tallahassee, Pensacola, Apalachicola, and Port St. Joe. As the state developed, larger population centers moved southward and eastward, and today, large portions of the Northwest have remained relatively less developed compared to other areas of Florida. Despite this, the Northwest is expected to continue to grow, with its future heavily driven by developments related to freight, aerospace industry, and military activities. Regional partners have been exploring solutions to address increased multimodal travel from residents, workers, and visitors.

New and Growing Communities: The Bay-Walton Sector Plan is a 50-year plan to develop Bay and Walton Counties. The plan covers more than 125,000 acres, of which nearly half is protected under a conservancy. It is projected to add 150,000 residential dwelling units and 22 million square feet of commercial, industrial, and office uses.

Growth around Military Facilities & Beaches: Growth in jobs is forecasted along portions of the I-10 corridor and with the expansion of existing beach communities, necessitating additional mobility options and improvements in these areas. New planned developments in and near Panama City Beach include a 3,500-home development, a full-service public marina, commercial and health care uses, and a regional FedEx facility. Additionally, Navy Federal Credit Union, the biggest employer in the Pensacola area, is anticipated to add almost 2,000 jobs and to have 10,000 total employees by 2026.

Regional Planning for Rural Communities: FDOT partnered with the Emerald Coast Regional Council (ECRC) to assist rural Northwest communities in developing a process that complements the regional planning that urban areas undergo. The pilot initiative covers rural communities in Escambia, Santa Rosa, Okaloosa, Walton, Holmes, and Washington counties and has resulted in a coordinated list of priority projects across seven counties and 14 rural communities.

MILITARY INFLUENCE

6 Military Installations
in Northwest Florida

The Northwest is home to **six military installations**, more than any other region in Florida, making it a research, development, manufacturing, and assembly **hub for the aerospace, defense, communications, and tech industries**. Defense activities, which draw suppliers and innovation in the industry, totaled more than \$22 billion in 2020, accounting for 33 percent of the overall economy. Continued investments in these military assets is deemed crucial for attracting new industries and workers to the area.

Tyndall Air Force Base is a key economic driver and continues to influence the transportation landscape of the Northwest communities.

- Hurricane Michael severely impacted Tyndall in 2018. The Air Force developed a recovery plan that will “repair, reshape, and rebuild” the base to become the **“installation of the future.”** The plan aims to make Tyndall a resilient and walkable facility built around a “community commons” while providing capacity for future growth.

- The **Tyndall Flyover Project** is intended to improve the traffic flow of U.S. 98, benefiting Tyndall as well as the local community. The two flyovers will address vehicle congestion and allow base-bound traffic to travel at grade without exiting the base. The flyover’s design can withstand winds up to 165 mph or a Category 5 hurricane.

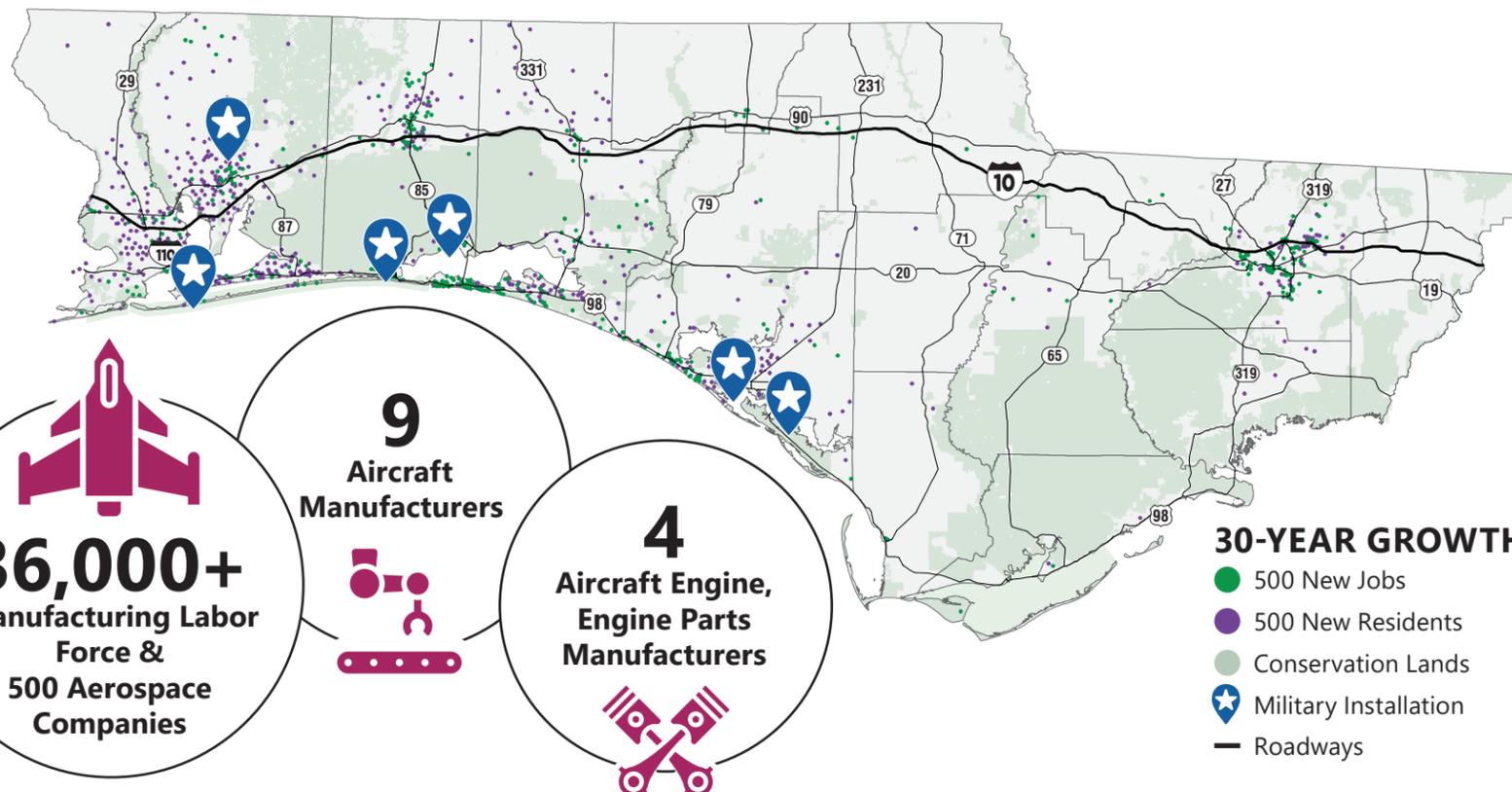
Northwest Florida has
130,000+
former military personnel
and 3,000+ active-duty military retirees each year. Veterans represent 12% of the area’s workforce, more than twice the national rate.



Tyndall Flyover Project Construction

NORTHWEST FLORIDA AEROSPACE

The panhandle is home to a concentration of military installations, as well as aerospace, aviation, and defense companies. The industry’s continued expansion attracts new businesses, providing high-wage jobs for current residents and skilled workers moving to the area.



MULTIMODAL MOBILITY IMPROVEMENTS

0.9M VMT increase between 2021 and 2022

Northwest Florida is actively pursuing various mobility and connectivity improvements to address congestion from increased regional pass-through traffic and local, coastal, and inland interactions:



Complete Streets & Multimodal Mobility:

With continued transportation demands from tourists and residents, the Emerald Coast Regional Council developed a master plan for U.S. 90 in Escambia, Santa Rosa, and Okaloosa Counties that calls for new trails and other pedestrian and bicyclist improvements. Capital Region Transportation Planning Agency (TPA) is working to expand multimodal options, including planning for trails along S.R. 267, Thomasville Road, Monticello Bike Trail, and through the Town of Havana.



U.S. 90 Corridor Master Plan



Leveraging Technology to Improve Operations: Both Capital Region TPA and Florida Alabama's TPO plan to deploy technology, including monitoring congestion and parking through smart signals and streetlights to address freight reliability. Bay County's Smart Bay project is a connected and automated vehicle initiative that covers approximately 32 miles of U.S. 98. It includes upgrading roadside infrastructure to interact with cars, transit, freight, and emergency vehicles. There are also plans to deploy autonomous shuttles to serve the area.



Addressing Congestion through Increased Connectivity:

Okaloosa Walton TPO plans to increase capacity along I-10 to address vehicle delay and expand east/west transportation options along the coast. A new interchange on I-10 at Beulah Road is planned to improve connectivity and alleviate traffic on north-south roadways such as U.S. 29.

The Brooks Bridge replacement will increase connectivity over the Santa Rosa Sound, improving access between downtown Fort Walton Beach and Okaloosa Island. It will enhance safety by adding shoulders for emergencies and disabled vehicles and 12-foot-wide shared-use paths for pedestrians and bicyclists on both bridges.



Brooks Bridge Replacement Project Rendering



Restoring Regional Transit: Amtrak, after securing a \$200 million grant, plans to reestablish the Gulf Coast Route which was closed because of Hurricane Katrina in 2005. The proposed service will link major cities like New Orleans and Jacksonville via the Panhandle.

A FOCUS ON COMMODITY FLOW

171.6M tonnage transported on state roadways in 2022

Northwest Florida is attractive to industrial manufacturers, with its vast available land, cost-efficient power, abundance of water, and access to railroads, interstate highways, and three deepwater ports. The community's dynamic manufacturing industry of more than 800 companies is supported by local and regional efforts to provide connectivity between the seaports and other rail and roadway facilities.



Recent & Future Growth of Manufacturing & Shipping Industry:

- A** In 2023, the Tallahassee **Amazon Fulfillment Center** opened and became one of Northwest's largest job creators, employing more than 1,000 workers. The fulfillment center is slated to have a total economic impact of more than \$450 million and significantly increased freight volume and traffic, especially on I-10 and U.S. 90.
- B** A **700-acre Intermodal Logistics Center (ILC)** in Gretna is being planned as part of the Gulf to Gadsden Freight Logistics Zone that will connect I-10 and the Gulf Coast's Port St. Joe via the Apalachicola Northern Railroad. The ILC is strategically primed to take advantage of existing connectivity and proximity to freight-oriented businesses and is being actively marketed to future industrial users.

During peak seasons, the Tallahassee Amazon Fulfillment Center can ship up to

1M items per day.

Investments to Facilitate Freight Movement:

- C** Bay County is prioritizing primary routes to **streamline future freight flow**. By 2045, U.S. 231 will be expanded to accommodate increased truck traffic to and from Panama City, as well as to have improved links to and along I-10 and U.S. 98.
- D** FDOT partnered with Port Panama City, investing \$4.4 million for **reconstructing and expanding a \$20 million biomass dome storage facility** to further strengthen the port's status as a hub for biomass exporting. This investment will bring more jobs in agribusiness and timber, as well as trucking and freight rail industries in Panama City and beyond.

The Northwest has

232 miles of Strategic Intermodal System (SIS) Waterway, which is 22% of the Florida SIS waterway miles.

RECOVERY AND REVITALIZATION

\$4M Total Northwest Community Redevelopment Grants

Northwest Florida has a rich history and its past is intertwined with many communities' local culture and identity. As with other areas in the state, many small towns have experienced periods of economic decline, and some were impacted by recent hurricanes. There has been growing regional and local community revitalization efforts, building on the area's heritage to boost the economy.

\$ Leveraging Grant Funding to Revitalize Communities: The Florida Department of Commerce allocated more than \$4 million in the Panhandle to infrastructure, community redevelopment, and job creation in small and rural communities. Awards include a \$3.95 million Florida Small Cities Community Development Block Grant, more than \$200,000 in Community Planning Technical Assistance program funds, and \$35,000 through the Competitive Florida Partnership. Okaloosa County is targeting funds from the U.S. Treasury RESTORE Act for the revitalization of Niceville's Historic Old Downtown.

Local Economic Revitalization Efforts: Crestview, in Okaloosa County, is redeveloping its historic district through its Community Redevelopment Agency. Panama City continues revitalization projects in its historic downtown, including streetscape improvements and stormwater treatment and retention. The Panama City Marina is also undergoing major changes to increase patronage and offer higher-end services.

A Focus on Safety: Northwest communities continue to consider safety elements as a part of their transportation future. The Capital Region TPA has plans to improve multimodal safety on U.S. 27 and safe access to school, as well as to leverage Federal Safety funds.

3
Northwest counties (Escambia, Bay, and Leon) were among the 25 counties that make up 90% of fatalities and serious injuries on state roadways.



Twelve Northwest communities have been designated "Florida Main Streets," and these communities will continue to see Florida's history preserved and celebrated as part of their economic future. The **Florida Main Street Program** is a national technical assistance program administered by the Florida Department of State.

RESPONDING TO DISASTERS

12 hurricanes impacted Northwest Communities in the last 40 years, 7 of which made landfall

Northwest Florida has been greatly impacted by hurricanes in the last decades, leading to damages of over hundreds of billions and impacting people's lives and livelihoods. FDOT and local partners have been actively involved in comprehensive recovery initiatives, including repairing highways, bridges, and other essential transportation networks, as well as creating long-term solutions to mitigate the impact of future natural disasters.

Resources for Disaster Recovery: \$58 million was allocated by the governor to support projects in Bay, Calhoun, Franklin, Gadsden, Jackson, Liberty, and Washington Counties, which are areas that experienced the most devastation from Hurricane Michael. Another \$187 Million was awarded for communities impacted by Hurricane Sally.

Rapid Response: After Hurricane Idalia in 2023, FDOT cleared and reopened a 15-mile stretch of I-10 littered with significant debris and an estimated 10,000 downed trees within 12 hours. After the emergency response, FDOT worked with local communities to quickly reinstate access to off-system roads and reinstate normalcy.

Rebuilding for Resilience: The Dupont Bridge connecting Parker and Tyndall Air Force Base is being reconstructed to include a rise of 60 feet above the water to better accommodate shipping traffic, as well as sidewalks and bicycle lanes to provide more multimodal access. The cities of Mexico Beach, Marianna, Parker, Springfield, Quincy, and Chattahoochee are working together and with FEMA as part of the Recovery and Resiliency Partnership Project to build trails to connect to parks and green spaces, increase their stormwater resilience, and support local economies and the region's long-term recovery.

Northwest communities are participants of the Florida Department of Environmental Protection's Living Shorelines, a shoreline management program. The Apalachicola Bay Living Shoreline project addresses the chronic erosion threatening a vulnerable stretch of U.S. 98. It involves a nature-based solution by establishing an intertidal marsh using oyster reefs to mitigate wave impacts. Aside from protecting critical infrastructure, the project will restore the declining oyster fishery, a vital component of the local economy and ecology.

Hurricane Michael caused at least **\$25B** in total economic impact.

11 living shoreline projects in the Northwest



Reef Building at Bayou Grande Living Shoreline, Escambia County



Apalachicola Bay Living Shoreline Project adding oyster reefs