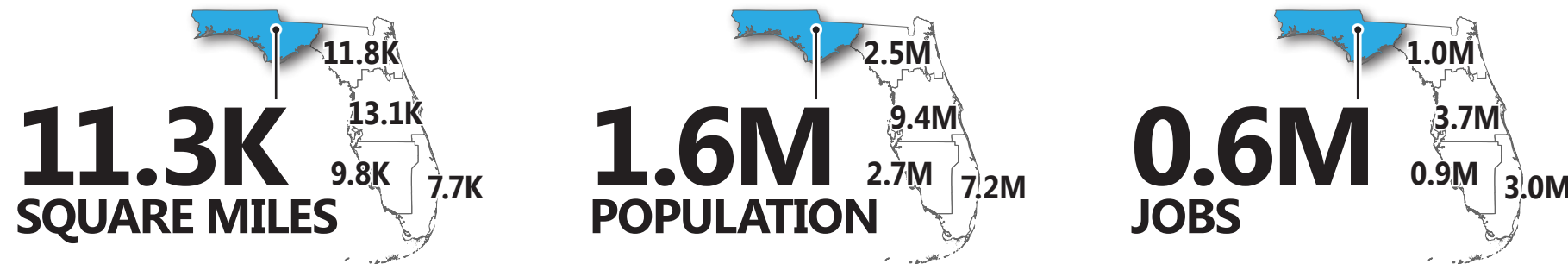


NORTHWEST FLORIDA

TRANSPORTATION TRENDS & CONDITIONS

Northwest Florida continues to experience steady economic growth, fueled by year-round tourism anchored along the Emerald Coast, rising freight and goods movement, and the strategic presence of multiple military installations throughout the region. However, exposure to coastal impacts from weather events, such as recent Hurricanes Idalia and Helene, as well as continental storm systems that sweep through the southeast, pose persistent challenges to maintenance of existing infrastructure and implementation of planned future projects. Looking ahead, regional strategies aim to balance the preservation and revitalization of the area's rural character with investments in improved infrastructure, enhanced multimodal connectivity, and a transportation system that can adapt to shifting travel demands and weather patterns.



[Statewide Transportation Trends & Conditions]



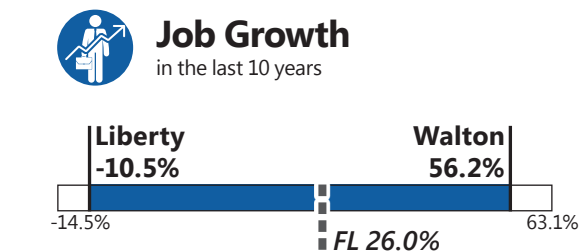
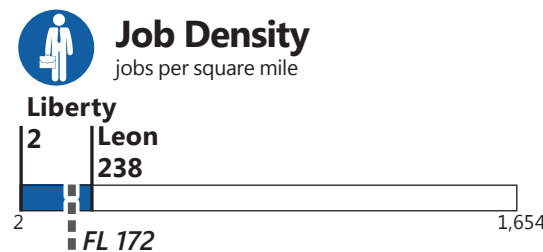
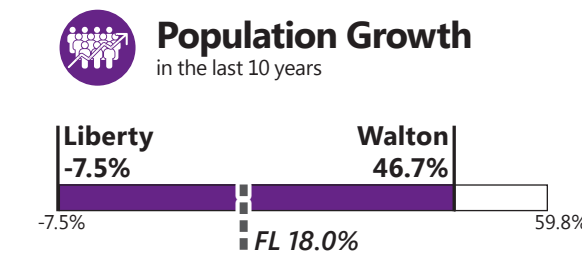
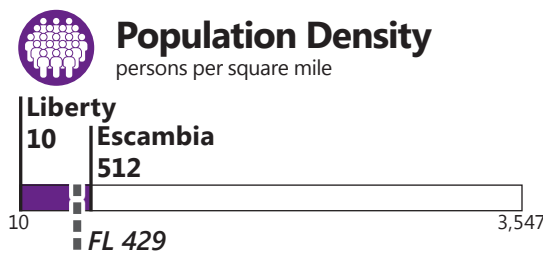
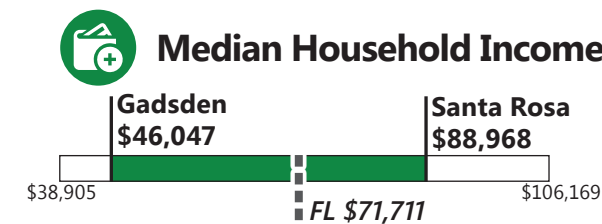
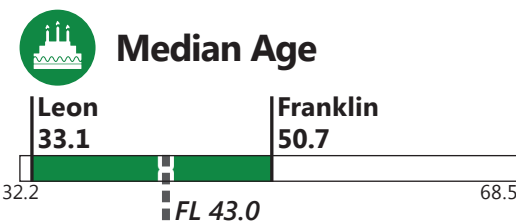
TRANSPORTATION SYSTEM HIGHLIGHTS

- 19,113** Public Road Miles
- 517** Rail Mainline Miles
- 176** Existing SUN Trail Miles
- 1,974** Highway Bridges
- 12** Transit Systems
- 4** Commercial Service Airports
- 3** Seaports
- 8** Military Installations
- 3** Spaceport Territories

[Florida Transportation Fast Facts]

DEMOGRAPHIC CHARACTERISTICS

Reference scale bars represent the statewide range, highlighting the region's highest and lowest values.



[Florida Trends & Conditions]

- Urban Area
- Airport
- Seaport
- Military Installation
- Spaceport
- Roadways

Florida (FL)
Median

[Sources]

GROWTH ALONG THE PANHANDLE

300,019 new residents
367,347 new jobs
by 2050

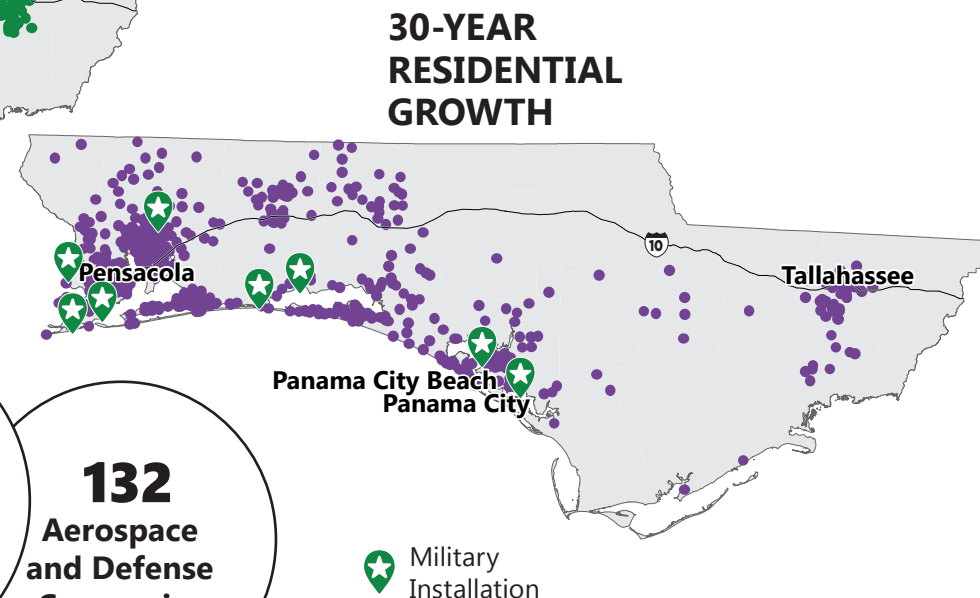
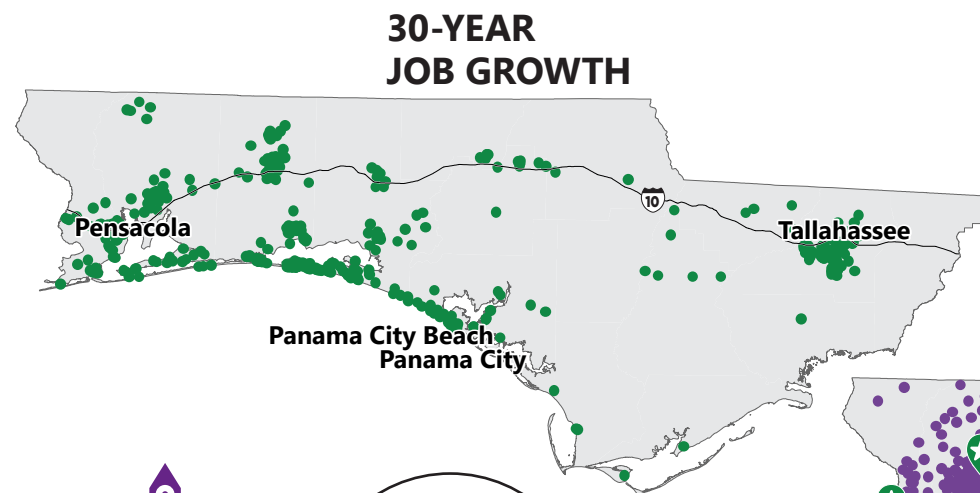
Early settlements in Florida were in the Northwest communities of Tallahassee, Pensacola, Apalachicola, and Port St. Joe. As the state developed, larger population centers moved southward and eastward, and today, large portions of the Northwest have remained relatively less developed compared to other 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, businesses, and visitors.



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.

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.



56,000+
Aviation-Focused
Military
Occupations

15
Aircraft
Manufacturers

9
Aircraft Engine,
Engine Parts
Manufacturers

132
Aerospace
and Defense
Companies

Military
Installation



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.**

The **Apalachee Regional Planning Council** and **FDOT** developed the **Regional Rural Transportation Plan**, which identified over 200 projects through 2045.

Northwest Florida Beaches International Airport ranked **#4** in USA Today's Best Resort Airports.



MILITARY INFLUENCE

8 Military Installations
in Northwest Florida

The Northwest is home to **eight 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 \$20.6 billion in 2022, accounting for 23 percent of the overall economy. Continued investments in these military assets are deemed crucial for attracting new industries and workers to the area.

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



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

- Tyndall AFB continues to rebuild after Hurricane Michael in 2018, investing \$4.7 billion to become the Air Force's 21st Century "Installation of the Future."
- The **Tyndall Flyover Project** is nearing completion and will improve the traffic flow of US-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 is designed to withstand winds up to 165 mph, or a Category 5 hurricane.



Source: US Airforce

Tyndall Flyover Project Construction

MULTIMODAL MOBILITY IMPROVEMENTS

600K VMT increase between 2023 and 2024

Northwest Florida is actively advancing mobility and connectivity initiatives to alleviate congestion driven by increased regional pass-through traffic and the growing travel between coastal and inland areas.



Improving multimodal mobility: The Apalachee Regional Planning Council (ARPC)'s Regional Rural Transportation Plan includes bicycle and pedestrian projects for Jackson, Calhoun, Liberty, Gulf, and Franklin Counties. The Emerald Coast Regional Council master plan for US-90 in Escambia, Santa Rosa, and Okaloosa Counties calls for new trails and other pedestrian and bicyclist improvements. Capital Region Transportation Planning Agency (TPA) is expanding multimodal options by planning for trails along SR-267, Thomasville Road, the Monticello Bike Trail, and through the Town of Havana.



Addressing Congestion through Increased Connectivity: Okaloosa-Walton TPO is getting underway with a plan to implement a new interchange on I-10 at Beulah Road. This project continues to develop, and will increase capacity along I-10, improve connectivity and alleviate traffic on north-south roadways such as US-29.



The **Brooks Bridge replacement** is under construction and 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.



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.

Source: US-90 Corridor Master Plan



US-90 Corridor Master Plan



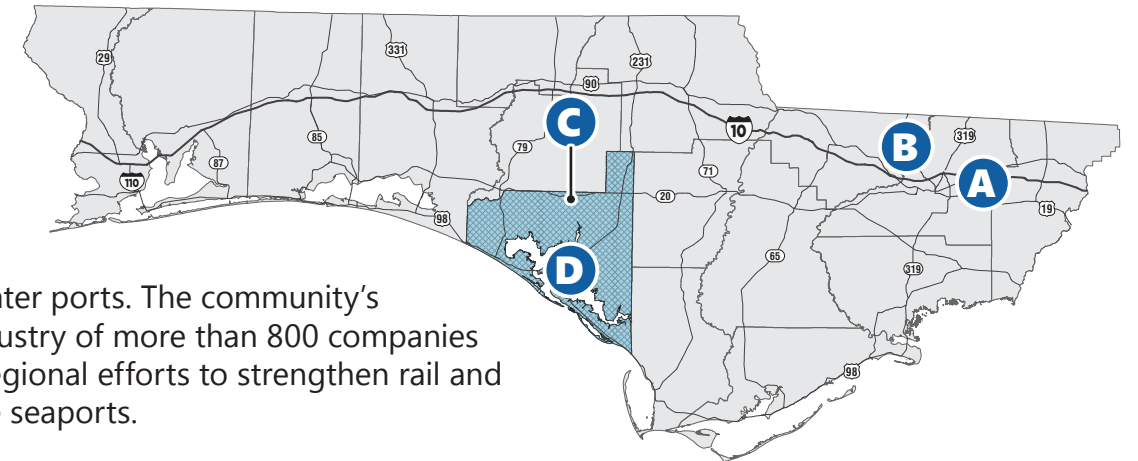
Brooks Bridge Replacement Project Rendering

Source: FDOT

A FOCUS ON COMMODITY FLOW

2.2M daily combination truck miles traveled in 2024

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 strengthen rail and roadway connectivity to the seaports.



Recent & Future Growth of Manufacturing & Shipping Industry:

- A** In 2023–2024, the Tallahassee **Amazon Fulfillment Center** ramped up to over 2,000 employees and remains one of Northwest's largest job creators. The fulfillment center now ships over 200,000 packages a day and has already invested over \$250 million in capital and \$200 million in construction wages.
- B** National chain Buc-ee's is opening a 75,000-square-foot convenience store in Tallahassee on I-10, prompting FDOT to **widen Capital Circle NW** in the area. The project is slated to generate nearly 200 new jobs and will have 120 gas pumps and 795 parking spots.

4.4M
2025 Seaport Tonnage

Investments to Facilitate Freight Movement:

- C** Bay County is prioritizing primary routes to streamline future freight flow. By 2045, **US-231 will be expanded** to accommodate increased truck traffic to and from Panama City, and to better connect to I-10 and US-98.
- D** Phase 3 of the **Philip Griffitts Sr. Parkway** is the final piece of this regionally-significant roadway. The parkway will improve regional connectivity and relieve congestion on US-98 (Panama City Beach Parkway). The improved parkway will run parallel to Panama City Beach Parkway (US-98), but on the bay side.

FDOT invested **\$4.3M** along I-10 in Okaloosa County, increasing the region's truck parking capacity to 648 spaces.

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 awarded more than \$38 million through the Florida Small Cities Community Development Block Grant (CDBG) program to support infrastructure, housing, revitalization, and economic development in 19 small and rural communities. Key awards include: \$6.4 million to Arcadia (wastewater upgrades), \$5.9 million to Florida City (wastewater improvements), \$4.5 million to Live Oak (water infrastructure and housing rehabilitation), \$1.7 million to Port St. Joe (infrastructure improvements), and \$1 million to Santa Rosa County (aviation park supporting job creation).

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 more premium services.

Multimodal Corridor Planning: The Berryhill Road Lane Widening & Safety Project will add two travel lanes, sidewalks, and a multi-use path, enhancing safety and pedestrian access. The project is being delivered in multiple phases, with Phase 1 spanning approximately 2.75 miles from Chumuckla Highway (CR-197) to Whispering Woods Drive in Pace, Florida. Phase 1 has been under construction since mid-2024.



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.

3
Northwest counties (Bay, Escambia, Santa Rosa) received RESTORE Act funding to harden coastlines and control erosion.

RESPONDING TO DISASTERS

14 hurricanes impacted Northwest Communities in the last 40 years, 9 of which made landfall

Northwest Florida has been greatly impacted by weather events in the last decades, leading to damages of over hundreds of billions of dollars and disrupting 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.



Rapid Response: During the historic snowstorm in January 2025, FDOT deployed 11 snowplows, 120 trucks equipped with de-icing spray rigs, and over 250 personnel to clear roads, especially along I-10 and I-75.



Resources for Disaster Recovery: Through the Rebuild Florida Hometown Revitalization Program, \$58 million was allocated to support projects in Bay, Calhoun, Franklin, Gadsden, Jackson, Liberty, and Washington Counties that experienced the most devastation from Hurricane Michael. Another \$187 million was awarded for communities impacted by Hurricane Sally.



Disaster Preparedness: 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, address stormwater needs, and support local economies and the region's long-term recovery.



Protecting Coastal Industries: Northwest communities are participants of the Florida Department of Environmental Protection's shorelines management program. The Apalachicola Bay (ARPC) Living Shoreline project addresses the chronic erosion that threatens a vulnerable stretch of US-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. The ARPC has added two living shorelines in Franklin County: one at Indian Creek and the other at St. George Island.



Source: NorthEscambia.com

FDOT quickly deployed snowplows to clear almost a foot of snow from I-10 and other critical corridors during the historic January 2025 snowstorm.

13
Living Shoreline projects in the Northwest



Source: Florida Living Shorelines

Reef Building at Bayou Grande Living Shoreline, Escambia County



Source: Florida Department of Environmental Protection

Apalachicola Bay Living Shoreline Project adding oyster reefs