

Florida Logistics & Distribution Industry



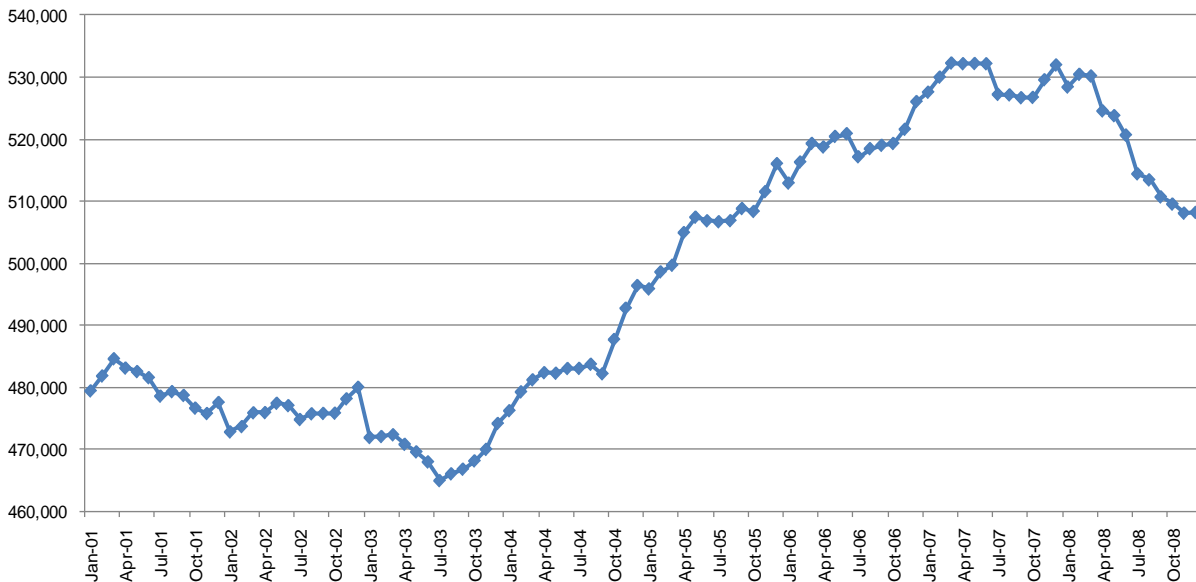
Florida Logistics and Distribution

Florida has often been called “The Gateway to the Americas” and our geographic location and multi-modal transportation system position us ideally as a hub of commerce to all parts of the world. Florida’s transportation infrastructure includes a 12,066-mile State Highway System, 14 deepwater seaports, 2,796 miles of main route rail lines, 19 commercial airports, and two of only eight commercially licensed spaceports in the United States.

Florida’s transportation and logistics industries include transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset.

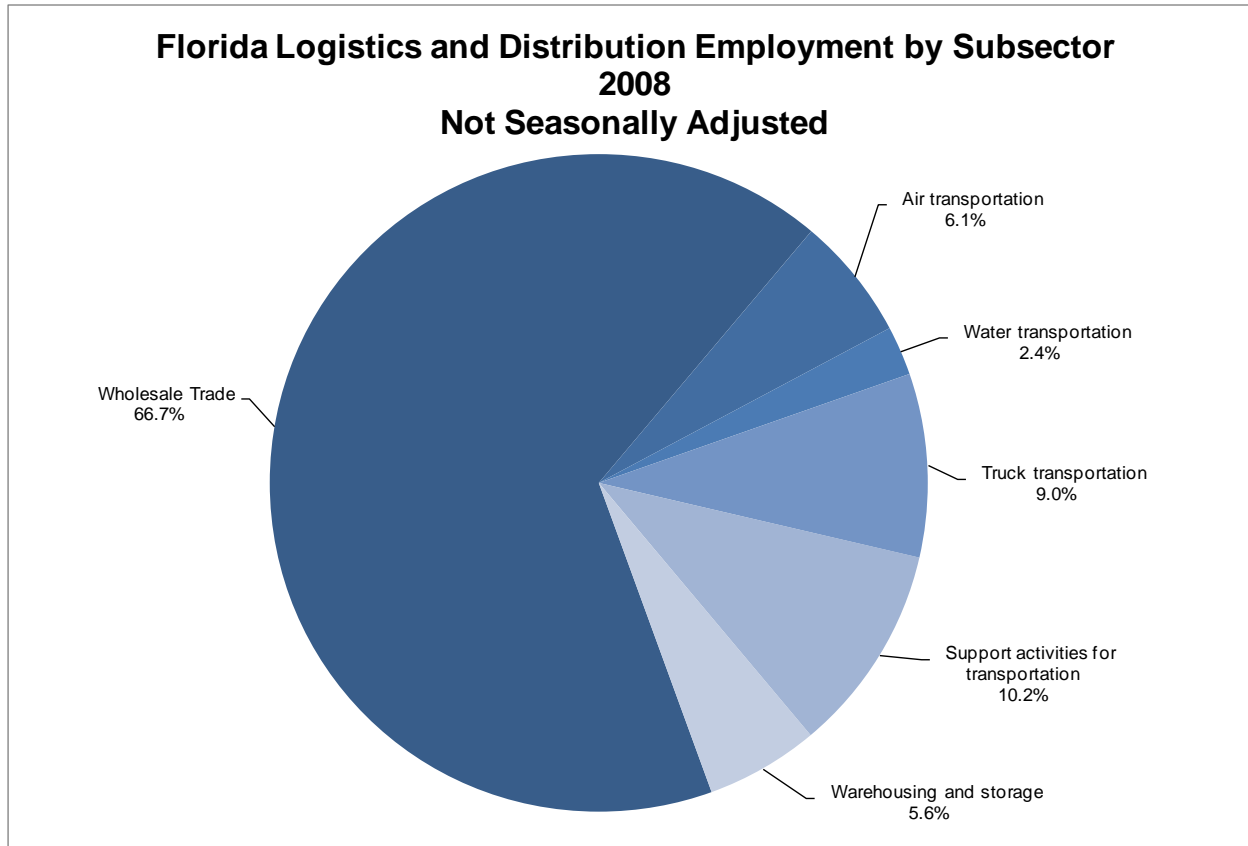
- The logistics and distribution industry includes the following sectors: wholesale trade, air transportation, rail transportation, water transportation, truck transportation, support activities for transportation, and warehousing and storage.
- The logistics and distribution industry sector had 54,753 establishments in 2008 with employment of 518,525, down 11,097 jobs (-2.1 percent) from 2007.

Florida Logistics and Distribution Employment 2001 - 2008 Not Seasonally Adjusted



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program (QCEW), prepared April 2010.

- The largest industries in logistics and distribution in 2008 were wholesale trade (345,877 jobs); support activities for transportation (53,132 jobs); and truck transportation (46,773 jobs). These three industries make up 86.0 percent of the logistics and distribution employment. Wholesale trade alone makes up 66.7 percent of logistics and distribution employment.



Note: Percentages may not add up to total due to rounding and omission of rail transportation.

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program (QCEW), prepared April 2010.

A separate subsector for support activities is established in the sector because support activities for transportation are inherently multimodal, such as freight transportation arrangement, or have multimodal aspects. Also, the support activity subsectors have similarities in their production process that tend to link them together.

- Support activities for transportation (+1,488 jobs, +2.9 percent) gained the most jobs over the year, followed by air transportation (+338 jobs, +1.1 percent), warehousing and storage (+227 jobs, +0.8 percent), and water transportation (+215 jobs, +1.7 percent). The two industry groups losing jobs over the year were wholesale trade (-11,301 jobs, -3.2 percent), and truck transportation (-2,065 jobs, -4.2 percent).

- Occupations with the most employment in the logistics and distribution industry are: nontechnical sales representatives (wholesale and manufacturing); heavy and tractor-trailer truck drivers; hand laborers and freight, stock, and material movers; and technical sales representatives (wholesale and manufacturing). Together, these four occupations account for approximately 31 percent of the employment in this industry.
- The fifteen largest occupations listed in the table below represent approximately 59 percent of the jobs in the logistics and distribution industry.

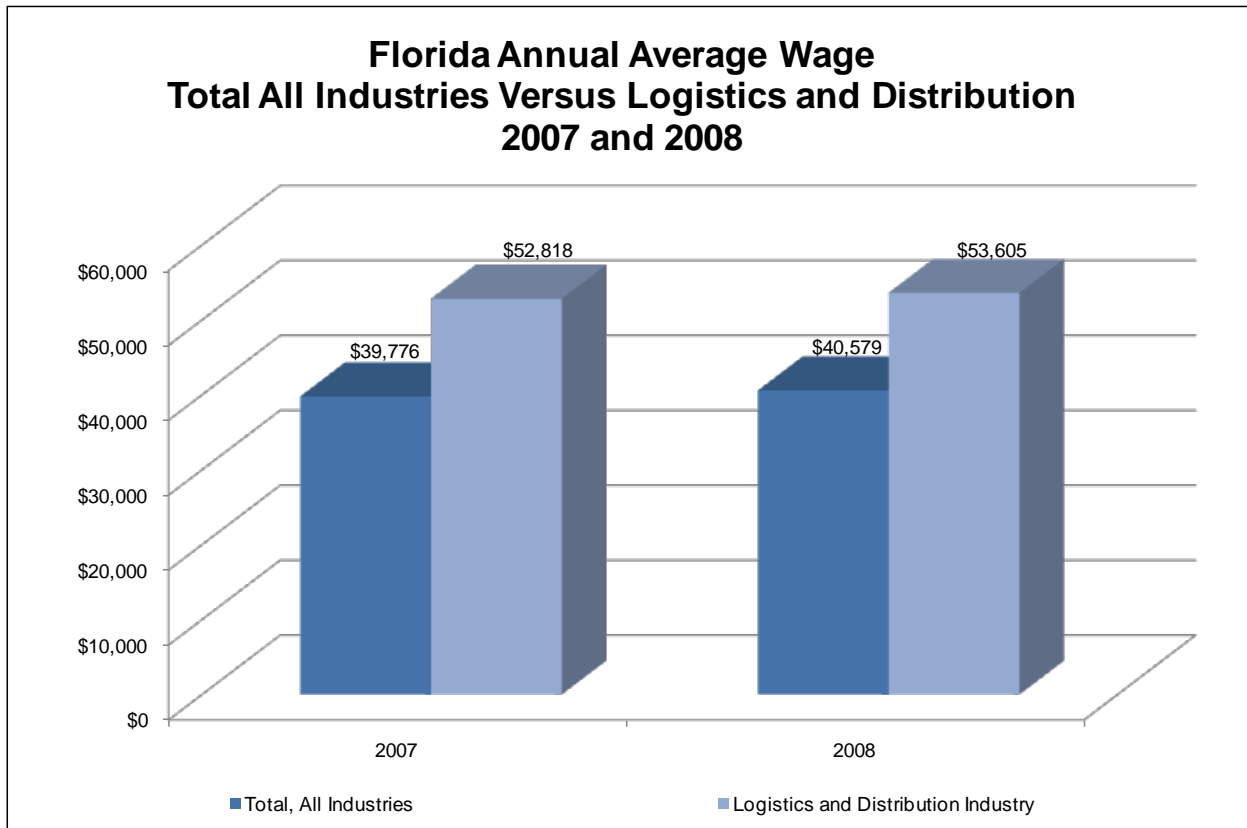
Top Occupations in Logistics & Distribution Industry							
Occupation Title	Employment		Annual Change		% of Industry	2009 Average Hourly Wage	Training Requirement
	2009	2017	Total	Percent	Total		
Total, All Occupations	500,858	557,482	7,078	1.41			
Sales Reps., Wholesale and Manufacturing, Nontechnical	68,184	77,447	1,158	1.70	13.61	27.24	PSAV Certificate
Truck Drivers, Heavy and Tractor-Trailer	39,820	45,994	772	1.94	7.95	17.25	PSAV Certificate
Laborers and Freight, Stock, and Material Movers, Hand	28,978	31,114	267	0.92	5.79	11.49	Less Than High School
Sales Reps., Wholesale and Manufacturing, Technical	20,744	23,921	397	1.91	4.14	34.59	PSAV Certificate
Office Clerks, General	18,260	20,578	290	1.59	3.65	12.11	High School
Customer Service Representatives	17,752	21,745	499	2.81	3.54	14.36	PSAV Certificate
Stock Clerks and Order Fillers	17,506	17,875	46	0.26	3.50	10.67	High School
Truck Drivers, Light or Delivery Services	15,309	17,521	277	1.81	3.06	13.97	PSAV Certificate
Shipping, Receiving, and Traffic Clerks	14,240	15,990	219	1.54	2.84	13.10	PSAV Certificate
Ticket Agents and Travel Clerks	11,442	10,633	-101	-0.88	2.28	15.61	High School
Bookkeeping, Accounting, and Auditing Clerks	10,358	11,778	178	1.71	2.07	15.79	Associate's Degree
Industrial Truck and Tractor Operators	9,297	10,209	114	1.23	1.86	13.70	PSAV Certificate
First-Line Supervisors of Non-Retail Sales Workers	8,112	8,991	110	1.35	1.62	37.68	Associate's Degree
Order Clerks	8,058	6,516	-193	-2.39	1.61	13.08	High School
Cargo and Freight Agents	7,333	7,995	83	1.13	1.46	15.92	PSAV Certificate

* Post Secondary Adult Vocational Certificate

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Long Term Projections Program, Forecast to 2017, assumes economic recovery.

- Nontechnical sales representatives (wholesale and manufacturing) has the most employment of the occupations within the logistics and distribution industry with estimated 68,184 jobs in 2009.
- Within the 15 largest logistics and distribution occupations, the fastest growing is customer service representatives (+2.8 percent, +499 jobs annually), while the occupation with the steepest decline is order clerks (-2.4 percent, -193 jobs annually).

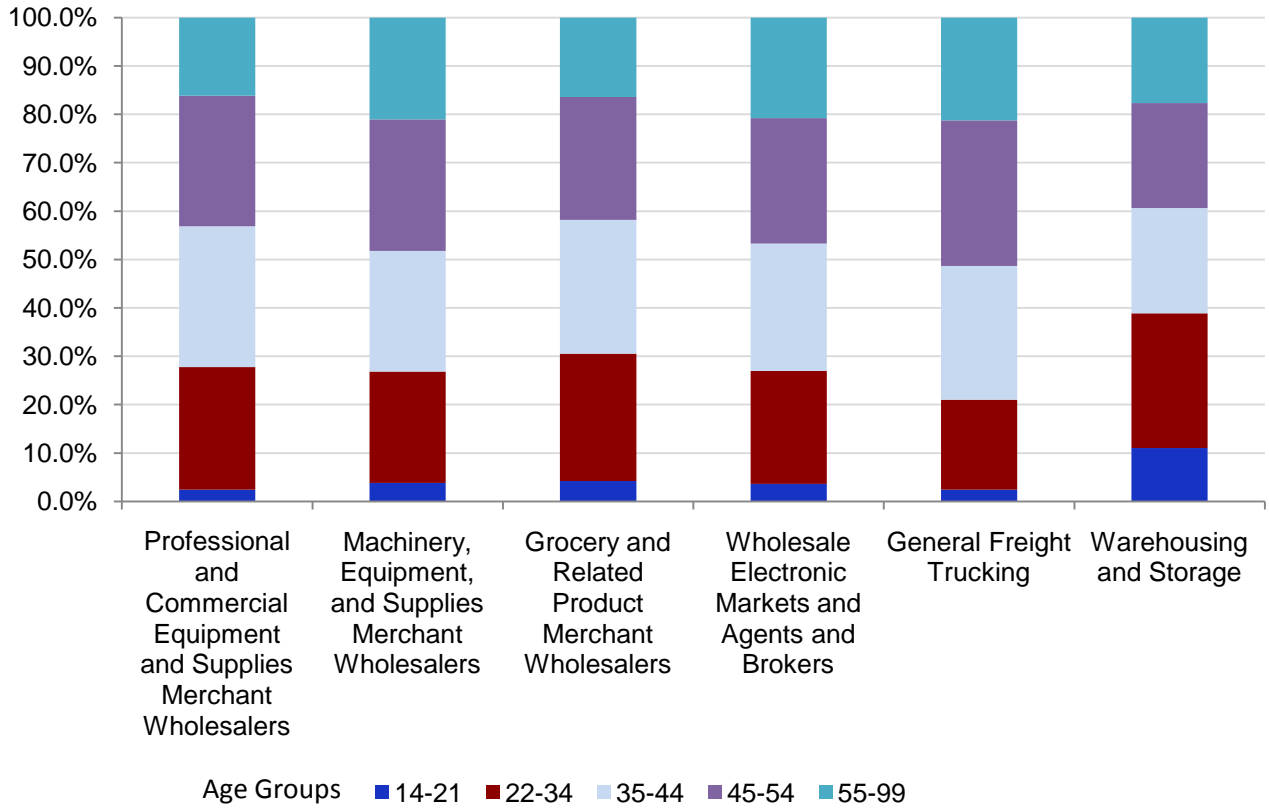
- Average hourly wages among the fifteen largest logistics and distribution industry occupations range from a high of \$37.68 for first line supervisors/managers (\$78,374 annually) to a low of \$10.67 for stock clerks and order fillers (\$22,194 annually).
- Higher wages are found in occupations with greater training requirements. Ten of the fifteen largest logistics and distribution occupations require additional certification beyond a high school diploma, such as postsecondary adult vocational certificate or an associate's degree.
- The 2008 annual average wage for workers in the logistics and distribution industry was \$53,605, exceeding the state's total annual average wage of \$40,579 by 32.1 percent. Water transportation had an annual average wage of \$64,098, the highest in logistics and 58.0 percent higher than the state wage.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program (QCEW), prepared April 2010.

- Of the available logistics and distribution industries in the U.S. Census Bureau's Local Employment Dynamics Program (LED), warehousing and storage had the largest percentage of youth employment (age 14 – 21) in 2008, with 11 percent.
- The logistics and distribution industry with the highest share of older workers (55 and older) in 2008 was general freight trucking with 21.3 percent.

Florida Average 2008 Share of Industry Employment by Age Group for Select Logistics Industries

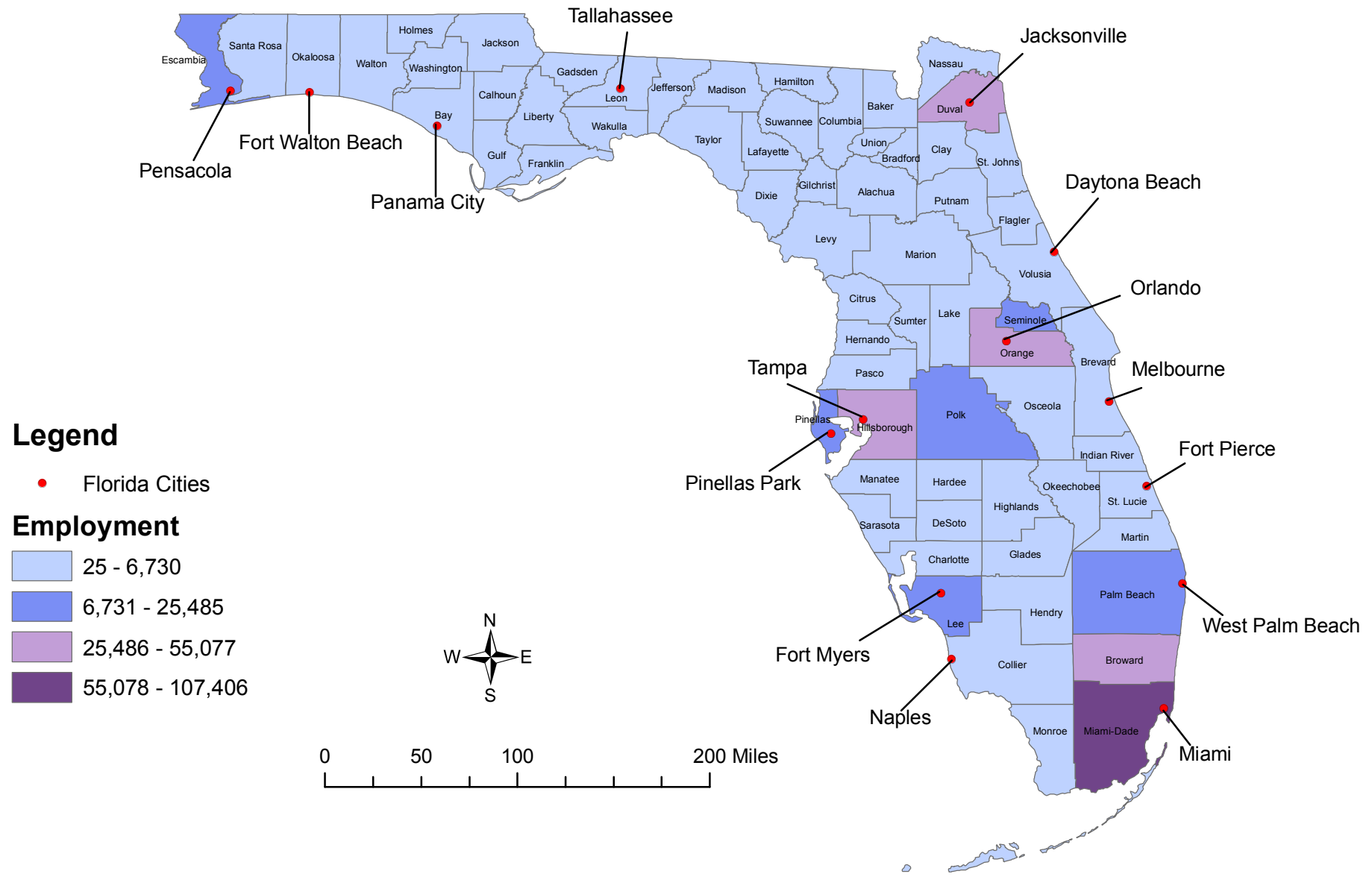


Source: U.S. Census Bureau, Local Employment Dynamics Program (LED).

Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics Center, prepared April 2010.

- Employment in the logistics and distribution industry is concentrated in the southeast, central, and northeast parts of the state. These counties include: Miami-Dade, Broward, Orange, Hillsborough, Duval, Palm Beach, Polk, and Pinellas.
- Florida employers in logistics and distribution occupations are concentrated along the coast and central parts of the state.

Concentration of Logistics and Distribution Employment



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages, 2009, Q1. Prepared May 2010.

Concentration of Logistics and Distribution Establishments by Location

