

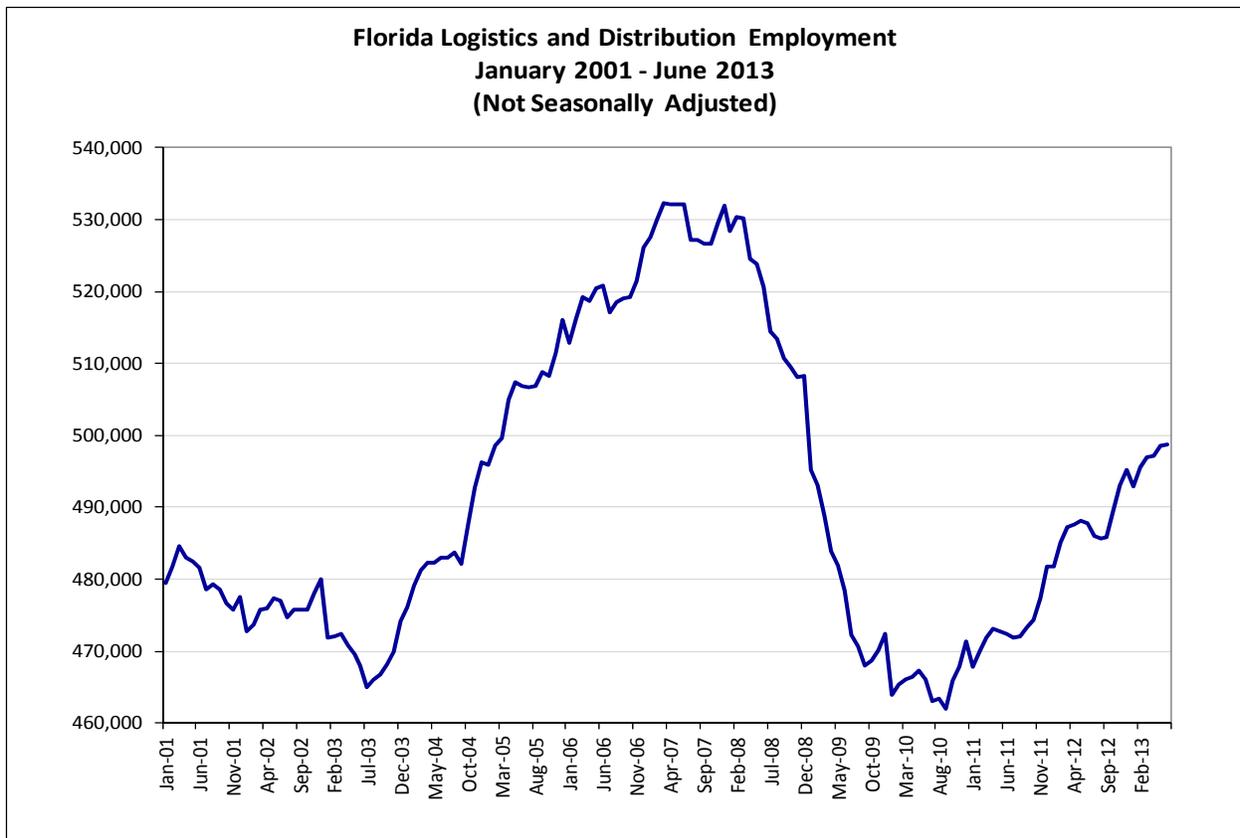
Florida Logistics & Distribution Industry



Florida Logistics and Distribution

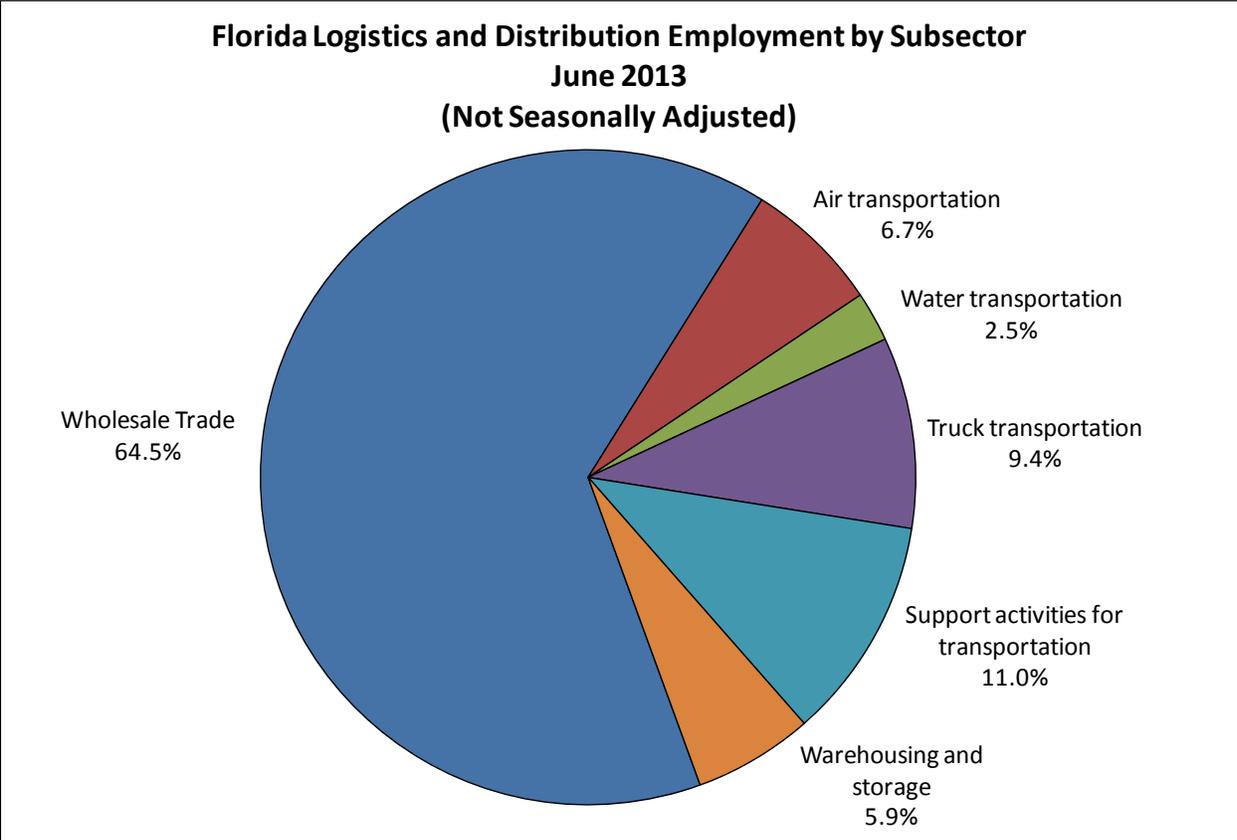
Florida has been called “The Gateway to the Americas” because the geographic location positions the state ideally as a hub of commerce to all parts of the world. The state has one of the world’s most extensive multi-modal transportation systems, featuring international airports, deep-water shipping ports, and extensive highway and rail networks. Florida’s transportation infrastructure includes a 12,079-mile State Highway System, 15 deepwater seaports, 2,793 miles of main route rail lines, 779 aviation facilities, and two of only eight commercially licensed spaceports in the United States.

- The logistics and distribution industry cluster includes the following industry subsectors: wholesale trade; air transportation; water transportation; truck transportation; support activities for transportation; and warehousing and storage.
- The logistics and distribution industry cluster had 54,514 establishments in June 2013, with employment of 498,652. Employment was up 10,847 jobs (+2.2 percent) from June 2012.



Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

- Logistics and distribution employment peaked with 532,232 jobs in March 2007. After March 2008, employment began declining and reached a low of 461,960 jobs in September 2010. Employment has been on an upward trend since September 2010, increasing to 498,652 jobs in June 2013.
- The largest subsectors in logistics and distribution in June 2013 were wholesale trade (321,404 jobs), support activities for transportation (55,014 jobs), and truck transportation (47,038 jobs). These three subsectors make up 84.9 percent of logistics and distribution employment. Wholesale trade alone makes up 64.5 percent of logistics and distribution employment.



Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

- Four out of six subsectors gained jobs from June 2012 to June 2013. Wholesale trade (+4,037 jobs, +1.3 percent) was the subsector gaining the most jobs over the year, followed by support activities for transportation (+2,825 jobs, +5.4 percent); truck transportation (+2,146 jobs, +4.8 percent); and warehousing and storage (+2,093 jobs, +7.6 percent). The two industry subsectors losing jobs over the year were water transportation (-47 jobs, -0.4 percent) and air transportation (-207, -0.6 percent).



Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

- The 2012 average annual wage for workers in the logistics and distribution industry was \$59,257, exceeding the average annual wage for all industries (\$43,213) by 37.1 percent. This gap has widened since 2011, when the logistics and distribution average annual wage exceeded the average annual wage for all industries by 36.2 percent.
- Logistics and distribution's average annual wage increased by more and grew faster than the average annual wage for all industries from 2011 to 2012. The average annual wage increased by \$1,625 (+2.8 percent), while for all industries it grew by \$901 (+2.1 percent).
- The water transportation subsector had an average annual wage of \$72,123 in 2012, the highest in logistics and distribution and 66.9 percent higher than the average wage for all industries. Truck transportation had the lowest average annual wage with \$40,781 in 2012. Four out of six logistics and distribution subsectors had average annual wages that exceeded the wage for all industries (\$43,213). Three subsectors had annual wages greater than \$60,000 in 2012. Compared to the average annual wage for all industries in 2012, half of the six logistics and distribution subsectors had relatively high average annual wages.

All Education and Training Levels

Top Occupations in the Logistics and Distribution Industry Cluster For All Training Levels							
Occupation Title	Employment		Change		% of Industry Total	2013 Average Hourly Wage	Training Requirement
	2013	2021	Total	Percent			
Total, All Logistics and Distribution Occupations	490,630	537,405	46,775	9.53			
Sales Representatives, Wholesale and Manufacturing, Except Technical	65,803	74,200	8,397	12.76	13.41	\$28.81	PSAV Certificate
Truck Drivers, Heavy and Tractor-Trailer	42,018	45,598	3,580	8.52	8.56	\$17.96	PSAV Certificate
Laborers and Freight, Stock, and Material Movers, Hand	35,164	38,480	3,316	9.43	7.17	\$12.29	Less than high school
Sales Representatives, Wholesale and Manufacturing, Technical and Sc	21,385	24,391	3,006	14.06	4.36	\$40.55	PSAV Certificate
Stock Clerks and Order Fillers	15,839	16,172	333	2.10	3.23	\$11.54	High school
Shipping, Receiving, and Traffic Clerks	12,549	12,877	328	2.61	2.56	\$13.68	PSAV Certificate
Truck Drivers, Light or Delivery Services	10,760	11,641	881	8.19	2.19	\$16.25	PSAV Certificate
Industrial Truck and Tractor Operators	9,621	10,375	754	7.84	1.96	\$15.29	PSAV Certificate
First-Line Supervisors/Managers of Non-Retail Sales Workers	9,127	10,154	1,027	11.25	1.86	\$42.57	Associate degree
Cargo and Freight Agents	8,189	9,693	1,504	18.37	1.67	\$20.78	PSAV Certificate
Packers and Packagers, Hand	8,186	8,954	768	9.38	1.67	\$9.77	Less than high school
Aircraft Mechanics and Service Technicians	6,088	6,329	241	3.96	1.24	\$25.51	PSAV Certificate
Driver/Sales Workers	5,845	6,599	754	12.90	1.19	\$13.29	High school
General and Operations Managers	5,635	5,674	39	0.69	1.15	\$54.84	Associate degree
Accountants and Auditors	5,558	6,087	529	9.52	1.13	\$32.41	Bachelor's degree

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Long Term Projections Program, forecast to 2021. Forecasts to the year 2021 assume continued economic recovery.

- The 15 largest occupations specific to logistics and distribution make up 53.4 percent of the total employment in the industry cluster.
- The largest logistics and distribution-specific occupation in 2013 was nontechnical sales representatives (wholesale and manufacturing), which has an average hourly wage of \$28.81.
- Among the fifteen largest industry-specific occupations, hourly wages range from a high of \$54.84 for general and operations managers to a low of \$9.77 for hand packers and packagers.
- Seven out of the 15 largest occupations have an average wage greater than \$20.00 per hour.
- All of the 15 largest occupations are projected to increase in employment through 2021.
- Nontechnical sales representatives (wholesale and manufacturing) are expected to gain the most jobs of all of the top 15 logistics and distribution-specific occupations from 2013 to 2021 (+8,397 jobs). Cargo and freight agents are expected to grow the fastest (+18.37 percent). General and operation managers are expected to gain the fewest jobs (+39 jobs) and grow the slowest (+0.69 percent) of all of the top 15 occupations from 2013 to 2021.

- Eleven of the top 15 industry-specific occupations require training beyond high school, but only one requires a bachelor's degree. Higher wages are found in occupations with greater training requirements.

Bachelor's Degrees

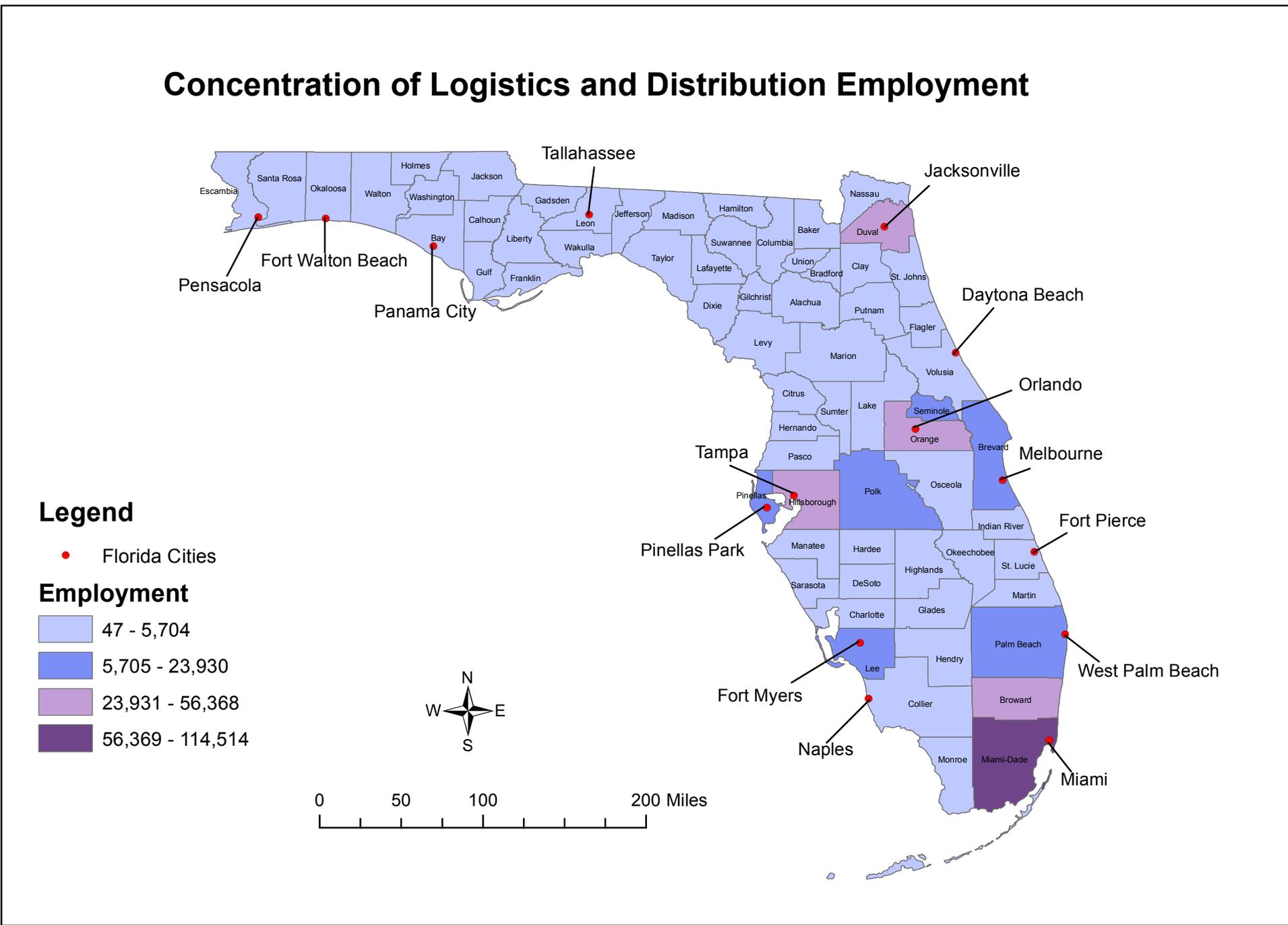
Top Occupations in the Logistics and Distribution Industry Cluster That Require 4-Year Degree or Higher							
Occupation Title	Employment		Change		% of Industry Total	2013 Average Hourly Wage	Training Requirement
	2013	2021	Total	Percent			
Total, All Logistics and Distribution Occupations	490,630	537,405	46,775	9.53			
Accountants and Auditors	5,558	6,087	529	9.52	1.13	\$32.41	Bachelor's degree
Sales Managers	3,150	3,500	350	11.11	0.64	\$62.75	Bachelor's degree
Market Research Analysts and Marketing Specialists	1,832	2,348	516	28.17	0.37	\$28.45	Bachelor's degree
Software Developers, Systems Software	1,377	1,536	159	11.55	0.28	\$45.21	Bachelor's degree
Management Analysts	1,123	1,211	88	7.84	0.23	\$37.43	Bachelor's degree
Chief Executives	951	962	11	1.16	0.19	\$95.77	Bachelor's degree
Financial Managers	799	867	68	8.51	0.16	\$61.23	Bachelor's degree
Training and Development Specialists	692	817	125	18.06	0.14	\$26.75	Bachelor's degree
Sales Engineers	616	609	-7	-1.14	0.13	\$56.77	Bachelor's degree
Computer and Information Systems Managers	593	646	53	8.94	0.12	\$64.20	Bachelor's degree
Marketing Managers	506	551	45	8.89	0.10	\$56.32	Bachelor's degree
Financial Analysts	486	511	25	5.14	0.10	\$35.46	Bachelor's degree
Public Relations Specialists	422	457	35	8.29	0.09	\$29.36	Bachelor's degree
Logisticians	405	505	100	24.69	0.08	\$33.65	Bachelor's degree
Electronics Engineers, Except Computer	170	177	7	4.12	0.03	\$41.75	Bachelor's degree

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Long Term Projections Program, forecast to 2021. Forecasts to the year 2021 assume continued economic recovery.

- Approximately 3.8 percent of the occupational employment in logistics and distribution is concentrated in the 15 largest high skill occupations in this industry cluster.
- Average hourly wages for the top 15 high skill occupations range from a high of \$95.77 for chief executives to a low of \$26.75 for training and development specialists.
- All of the top 15 high skill logistics and distribution occupations have an average wage greater than \$20.00 per hour.
- Fourteen of the top 15 high skill occupations are projected to gain jobs from 2013 to 2021.
- Accountants and auditors are projected to gain the most jobs (+529 jobs) among the top 15 high skill occupations from 2013 to 2021. Market research analysts and marketing specialists are expected to grow the fastest (+28.17 percent). Among the top 15 high skill logistics and distribution occupations, only sales engineers are projected to lose employment from 2013 to 2021 (-7 jobs, -1.14 percent).
- All of the top 15 high skill occupations require a bachelor's degree.

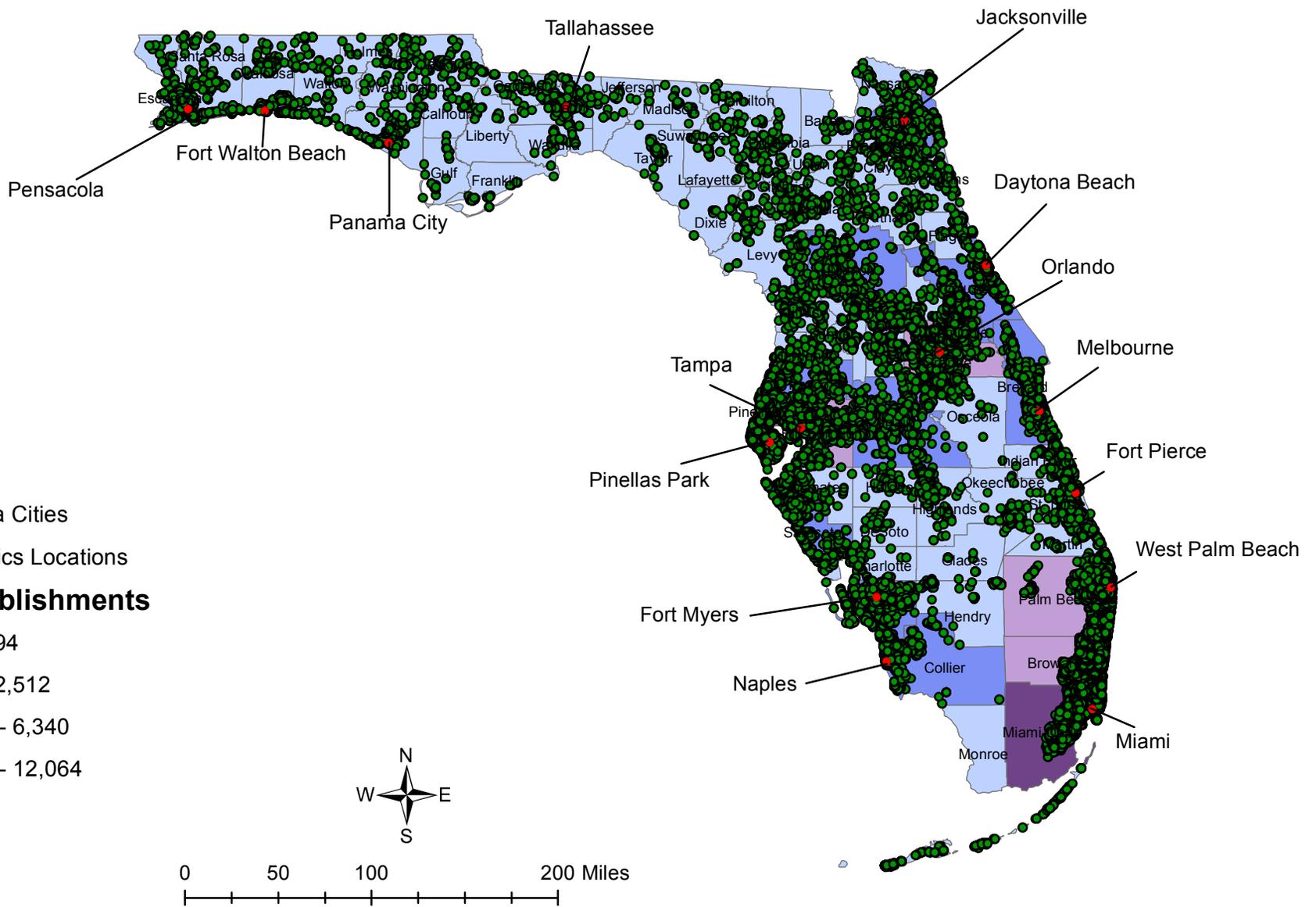
- Employment in the logistics and distribution industry is concentrated in the southeast, central, and northeast parts of the state. The largest counties by employment are: Miami-Dade, Broward, Orange, Hillsborough, and Duval.

Concentration of Logistics and Distribution Employment



Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages, 2013, Q2, February 2014.

Concentration of Logistics and Distribution Establishments by Location



Source: Infogroup Inc., Employer Database 2014-1st Edition
 Prepared by: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, February 2014.