

L a b o r M a r k e t I n d u s t r y P r o f i l e

Florida **Logistics & Distribution Industry**

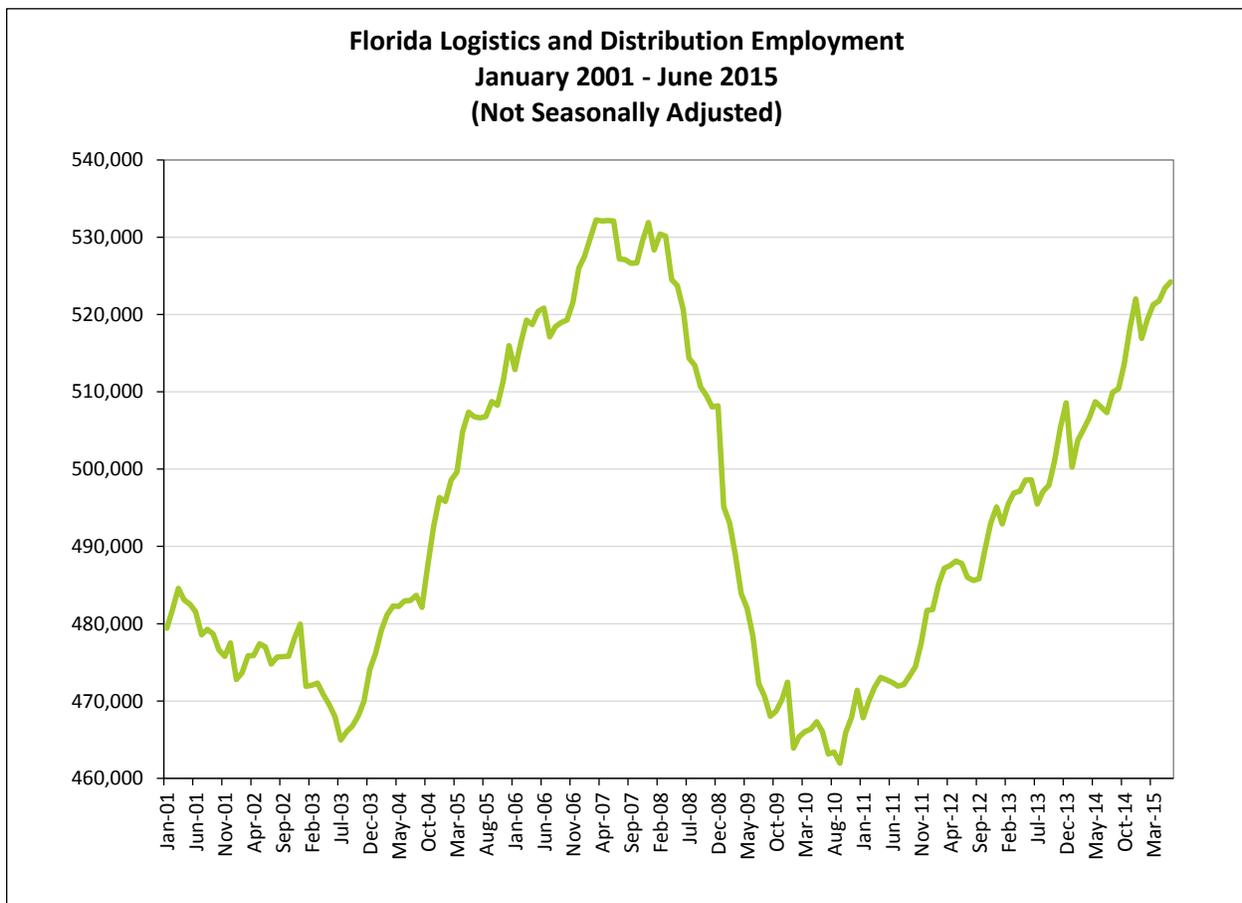
2016 Edition



Florida Logistics and Distribution

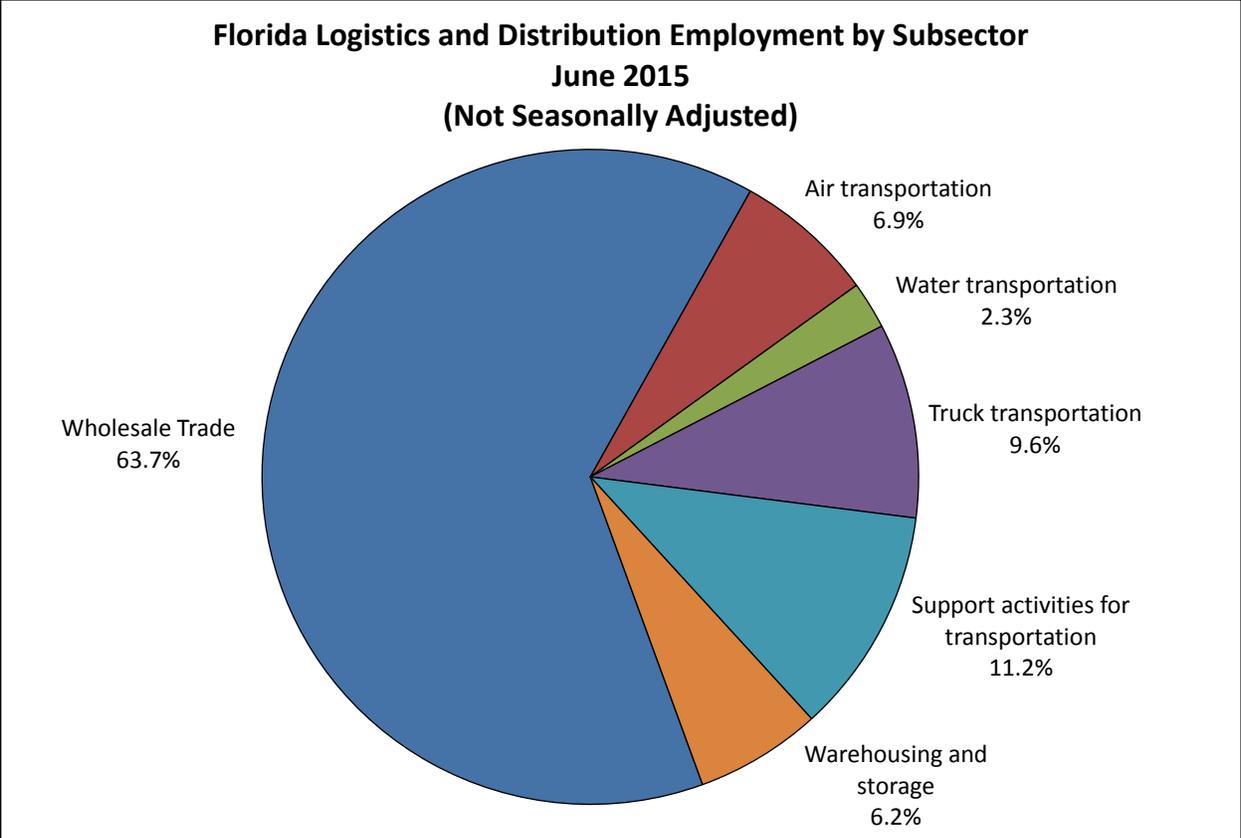
Florida has been called “The Gateway to the Americas” because the geographic location positions the state ideally as a hub of commerce to all parts of the world. The state has one of the world’s most extensive multi-modal transportation systems, featuring international airports, deep-water shipping ports, and extensive highway and rail networks. Florida’s transportation infrastructure includes a 12,115-mile State Highway System; 15 deep-water seaports; 2,786 miles of operating rail lines; 19 commercial service airports, and two commercially licensed spaceports.

- 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 51,963 establishments in June 2015, with employment of 524,231. Employment was up 16,194 jobs (+3.2 percent) from June 2014.



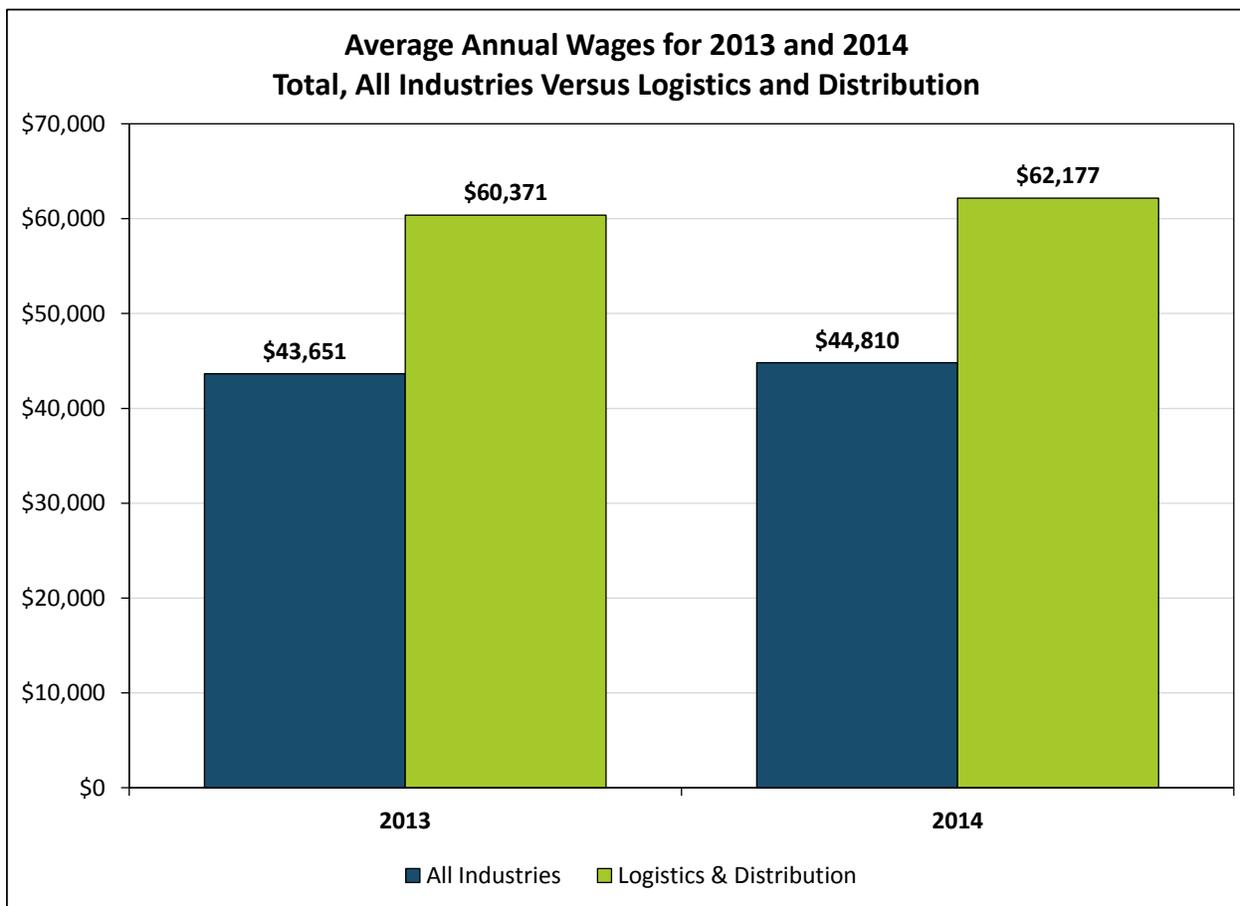
Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Quarterly Census of Employment and Wages Program (QCEW).

- Logistics and distribution employment peaked with 532,232 jobs in March 2007. After March 2008, employment began declining steadily and reached a low of 461,960 jobs in September 2010. Employment has been on an upward trend since September 2010, increasing to 524,231 jobs in June 2015.
- The largest subsectors in logistics and distribution in June 2015 were wholesale trade (333,748 jobs), support activities for transportation (58,806 jobs), and truck transportation (50,454 jobs). These three subsectors make up 84.5 percent of logistics and distribution employment. Wholesale trade alone makes up 63.7 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).

- The five largest subsectors gained jobs from June 2014 to June 2015. Wholesale trade (+7,170 jobs, +2.2 percent) was the subsector gaining the most jobs over the year, followed by air transportation (+2,893 jobs, +8.6 percent); warehousing and storage (+2,625 jobs, +8.8 percent); support activities for transportation (+2,125 jobs, +3.7 percent); and truck transportation (+1,596 jobs, +3.3 percent).
- The water transportation subsector lost jobs from June 2014 to June 2015 (-215 jobs, -1.7 percent).



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

- The 2014 average annual wage for workers in the logistics and distribution industry was \$62,177, exceeding the average annual wage for all industries (\$44,810) by 38.8 percent. This gap has widened slightly since 2013, when the logistics and distribution average annual wage exceeded the average annual wage for all industries by 38.3 percent.
- Logistics and distribution's average annual wage increased by more and grew faster than the average annual wage for all industries from 2013 to 2014. The average annual wage increased by \$1,806 (+3.0 percent), while for all industries it grew by \$1,159 (+2.7 percent).
- The water transportation subsector had an average annual wage of \$80,894 in 2014, the highest in logistics and distribution and 80.5 percent higher than the average wage for all industries. Truck transportation had the lowest average annual wage with \$42,671 in 2014. Four out of six logistics and distribution subsectors had average annual wages that exceeded the wage for all industries (\$44,810). Three subsectors had annual wages greater than \$68,000 in 2014. Compared to the average annual wage for all industries in 2014, half of the 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		2015-2023 Change		% of Industry Total	2016 Median Hourly Wage	Training Requirement
	2015	2023	Total	Percent			
Total, All Logistics and Distribution Occupations	511,142	558,201	47,059	9.21			
Sales Representatives, Wholesale and Manufacturing, Nontechnical	75,718	83,503	7,785	10.28	14.81	23.05	Postsecondary Vocational
Laborers and Freight, Stock, and Material Movers, Hand	45,779	50,102	4,323	9.44	8.96	11.24	Less Than High School
Truck Drivers, Heavy and Tractor-Trailer	45,023	50,163	5,140	11.42	8.81	17.66	Postsecondary Vocational
Sales Representatives, Wholesale & Mfg, Tech. & Sci. Prod.	13,452	14,521	1,069	7.95	2.63	33.69	Postsecondary Vocational
Shipping, Receiving, and Traffic Clerks	12,440	13,334	894	7.19	2.43	13.77	Postsecondary Vocational
Stock Clerks and Order Fillers	12,126	12,264	138	1.14	2.37	11.24	High School
Truck Drivers, Light or Delivery Services	11,567	12,712	1,145	9.90	2.26	14.08	Postsecondary Vocational
Industrial Truck and Tractor Operators	9,977	10,135	158	1.58	1.95	15.12	Postsecondary Vocational
First-Line Supervisors of Non-Retail Sales Workers	9,551	10,520	969	10.15	1.87	37.01	Associate
Bookkeeping, Accounting, and Auditing Clerks	9,333	10,269	936	10.03	1.83	17.08	Associate
Packers and Packagers, Hand	9,271	10,328	1,057	11.40	1.81	9.42	Less Than High School
Ticket Agents and Travel Clerks	8,779	8,379	-400	-4.56	1.72	15.06	High School
General and Operations Managers	8,288	9,056	768	9.27	1.62	53.07	Associate
First-Line Superv. of Office and Admin. Support Workers	7,320	7,975	655	8.95	1.43	24.43	Associate
Flight Attendants	7,168	7,495	327	4.56	1.40	25.80	High School

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Long Term Projections Program, forecast to 2023.

- The 15 largest occupations specific to logistics and distribution make up 55.9 percent of the total employment in the industry cluster.
- The largest logistics and distribution-specific occupation in 2015 was nontechnical sales representatives (wholesale and manufacturing), which has a median hourly wage of \$23.05.
- Among the fifteen largest industry-specific occupations, median hourly wages range from a high of \$53.07 for general and operations managers to a low of \$9.42 for hand packers and packagers.
- Six out of the 15 largest occupations have a median wage greater than \$20.00 per hour.
- Fourteen of the 15 largest occupations are projected to increase in employment through 2023.
- 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 2015 to 2023 (+7,785 jobs). Truck drivers are expected to grow the fastest (+11.42 percent).
- Among the top 15 logistics and distribution occupations, only ticket agents and travel clerks are projected to lose employment (-400 jobs, -4.56 percent) from 2015 to 2023.

- Ten of the top 15 industry-specific occupations require training beyond high school, but none require a bachelor's degree. Higher wages are found in occupations with greater training requirements.

Bachelor's Degree or Higher

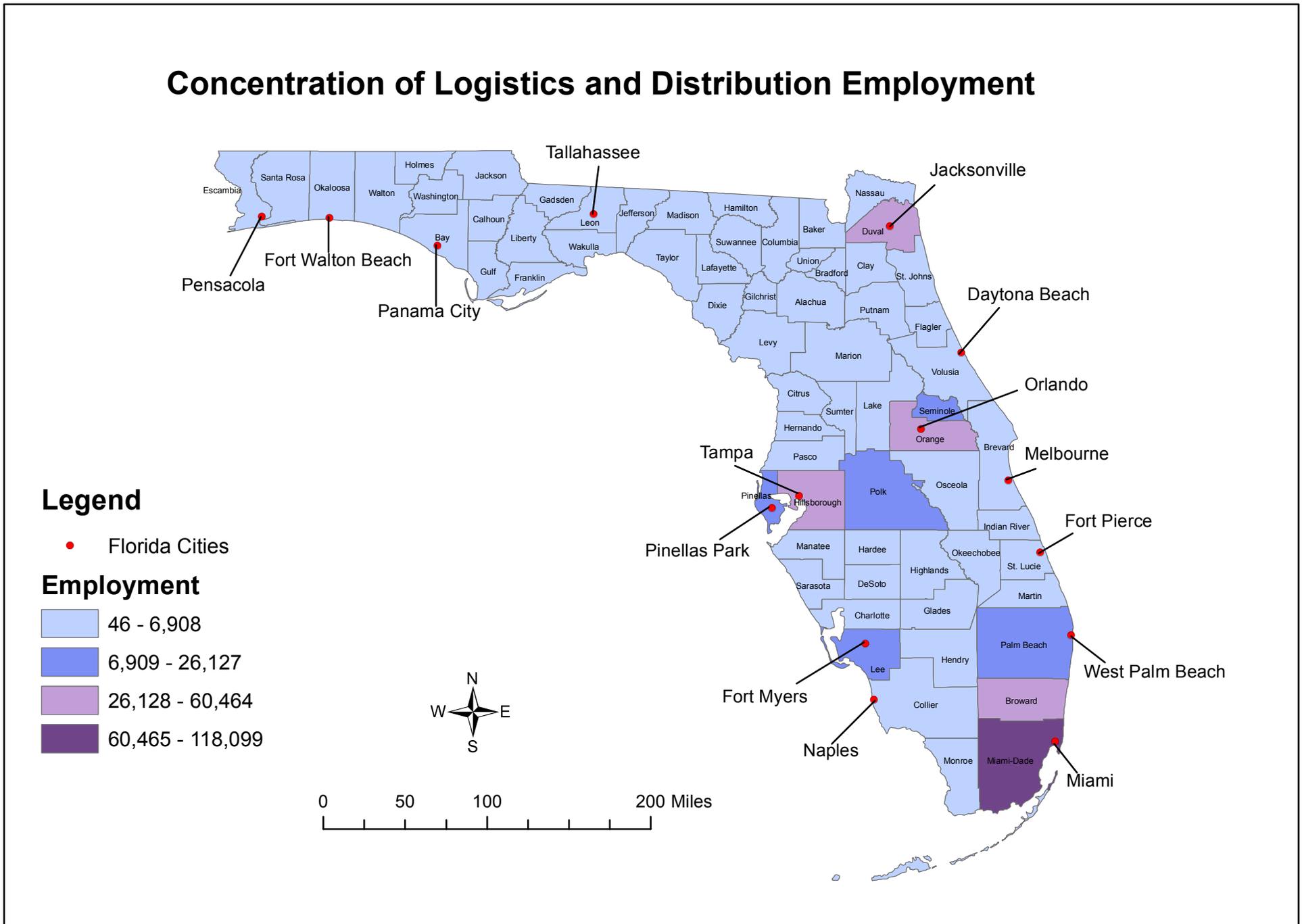
Top Occupations in the Logistics and Distribution Industry Cluster That Require a Bachelor's Degree or Higher							
Occupation Title	Employment		2015-2023 Change		% of Industry Total	2016 Median Hourly Wage	Training Requirement
	2015	2023	Total	Percent			
Total, All Logistics and Distribution Occupations	511,142	558,201	47,059	9.21			
Accountants and Auditors	5,351	5,874	523	9.77	1.05	29.93	Bachelor's Degree
Sales Managers	3,067	3,357	290	9.46	0.60	58.35	Bachelor's Degree
Market Research Analysts and Marketing Specialists	2,776	3,392	616	22.19	0.54	27.75	Bachelor's Degree
Human Resources Specialists	1,589	1,649	60	3.78	0.31	24.50	Bachelor's Degree
Training and Development Specialists	873	966	93	10.65	0.17	26.73	Bachelor's Degree
Financial Managers	846	924	78	9.22	0.17	59.09	Bachelor's Degree
Management Analysts	735	802	67	9.12	0.14	33.20	Bachelor's Degree
Computer and Information Systems Managers	675	743	68	10.07	0.13	63.01	Bachelor's Degree
Software Developers, Systems Software	654	722	68	10.40	0.13	45.55	Bachelor's Degree
Logisticians	644	797	153	23.76	0.13	32.49	Bachelor's Degree
Sales Engineers	588	619	31	5.27	0.12	51.76	Bachelor's Degree
Financial Analysts	585	641	56	9.57	0.11	34.13	Bachelor's Degree
Pharmacists	513	529	16	3.12	0.10	57.78	Master's or Higher Degree
Marketing Managers	504	546	42	8.33	0.10	53.81	Bachelor's Degree
Marine Engineers and Naval Architects	422	461	39	9.24	0.08	45.31	Bachelor's Degree

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Long Term Projections Program, forecast to 2023.

- Approximately 3.9 percent of the occupational employment in logistics and distribution is concentrated in the 15 largest high skill occupations in this industry cluster.
- Median hourly wages for the top 15 high skill occupations range from a high of \$63.01 for computer and information systems managers to a low of \$24.50 for human resources specialists.
- All of the top 15 high skill logistics and distribution occupations have a median wage greater than \$20.00 per hour.
- All of the top 15 high skill occupations are projected to gain jobs from 2015 to 2023.
- Market research analysts and marketing specialists are projected to gain the most jobs (+616 jobs) among the top 15 high skill occupations from 2015 to 2023. Logisticians are expected to grow the fastest (+23.76 percent).
- Pharmacists are expected to gain the fewest jobs (+16 jobs) and grow the slowest (+3.12 percent) of all of the top 15 occupations from 2015 to 2023.

- Fourteen of the top 15 high skill occupations require a bachelor's degree, and one occupation requires a Master's degree or higher.
- 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(QCEW), 2015q2.
 Prepared by: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, September 2016.

Concentration of Logistics and Distribution Establishments by Location

