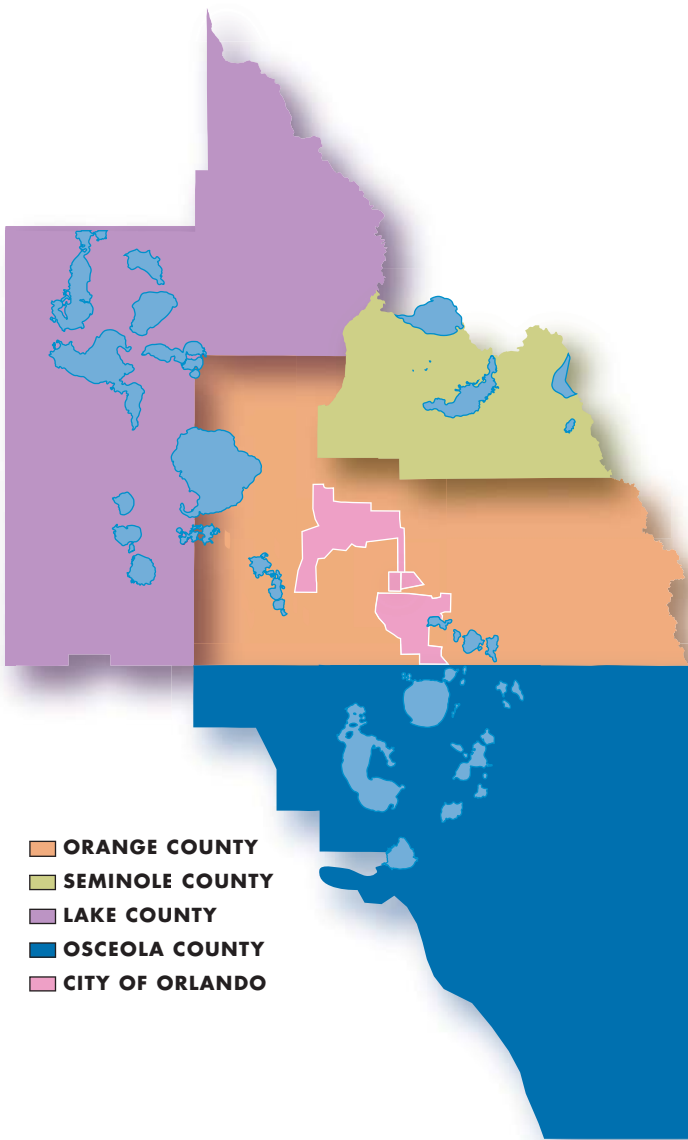




METRO ORLANDO



DEMOGRAPHICS

Population Trends

	1990	2000	2011	2016
Orange County	677,491	896,344	1,183,903	1,335,879
Seminole County	287,529	365,196	429,169	454,641
Lake County	152,104	210,528	296,681	295,263
Osceola County	107,728	172,493	275,010	300,350
City of Orlando	158,847	185,951	222,603	253,157
Metro Orlando*	1,224,852	1,644,561	2,184,231	2,385,543

*Four county total. City of Orlando is included in Orange County.
Source: Decision Data Resources - 2011 estimates

Population By Ethnicity*

White	69.9%
Black	16.2%
American Indian	0.4%
Asian or Pacific Islander	4.1%
Other	5.9%
Hispanic	26.4%

*Note: Hispanic is not a race, thus are delineated separately.
Source: Decision Data Resources - 2011 estimates

Male/Female Population Statistics

Male	1,080,786	49.5%
Female	1,103,445	50.5%

Source: Decision Data Resources - 2011 estimates

Population By Age

	MSA	Orange	Seminole	Lake	Osceola
0-14	20.1%	21.1%	19.0%	16.5%	21.6%
15-24	13.3%	13.8%	13.7%	9.9%	14.5%
25-44	29.2%	31.9%	28.3%	20.9%	28.2%
45-64	24.3%	23.4%	27.2%	24.3%	23.7%
65-84	11.2%	8.4%	10.0%	24.4%	10.6%
85+	1.8%	1.4%	1.8%	4.0%	1.5%

Source: Decision Data Resources - 2011 estimates

301 EAST PINE STREET, SUITE 900 • ORLANDO, FLORIDA 32801
407.422.7159 • 407.425.6428 FAX • WWW.ORLANDOEDC.COM • E-MAIL: INFO@ORLANDOEDC.COM

LABOR*

Labor Force	1,116,486
"Right-to-Work" State	Yes
Wage and/or Labor Survey Available	Yes
National Unemployment Rate	8.2%
Florida Unemployment Rate	9.8%
Metro Orlando Unemployment Rate	9.7%

*Note: Data is compiled monthly, not seasonally adjusted.

Source: Florida Department of Economic Opportunity, Local Area Unemployment Statistics (LAUS) - Nov. 2011

EDUCATION

Number of Schools/Enrollment

	Orange	Seminole	Lake	Osceola
Elementary	129/83,530	41/28,438	28/19,916	26/24,700
Middle	36/39,587	12/14,995	10/9,292	8/12,413
High Schools	54/52,869	14/20,795	12/11,902	19/16,353

Source: Florida Dept. of Education - 2010-2011 School Year

SAT Scores*

	Orange	Seminole	Lake	Osceola
Mean Score	1433	1540	1432	1375

*Note: Scores include three sections including new writing section.

Source: Florida Dept. of Education, 2011

ACT Scores

	Orange	Seminole	Lake	Osceola
Composite Score	18.8	21.3	19.3	18

Source: Florida Dept. of Education, 2011

Colleges and Universities (Fall 2010)

University of Central Florida	56,337 (public state university)
Full Sail University	14,500 (private 4-year school)
Rollins College	3,226 (private liberal arts college)

State/Community Colleges (Fall 2010)

Valencia College	41,517
Seminole State College of Florida	21,557
Lake-Sumter Community College	4,929

Education Profile

Grade K-8	65,999	4.5%
Grade 9-12 (no diploma)	104,370	7.2%
High School Graduate	434,180	29.9%
Some College (no degree)	287,909	19.8%
Associate's Degree	148,288	10.2%
Bachelor's Degree	281,844	19.4%
Graduate Degree	130,748	9.0%
Total Population Age 25+	1,453,338	

Source: Decision Data Resources - 2011 estimates

FACILITIES

Total Industrial Market Summary

Total existing industrial space	180.1 million sq. ft.
Under construction	17,610 sq. ft.
Current vacancy rate	12.0%
Lease rate	\$5.36/sq. ft.
Net Absorption (YTD)	1,363,932

Source: CoStar, 3rd Quarter 2011

Total Office Market Summary

Total existing office space	99.8 million sq. ft.
Under construction	480,044 sq. ft.
Current vacancy rate	13.7%
Lease rate	\$18.58/sq. ft.
Net Absorption (YTD)	970,770 sq. ft.

Source: CoStar, 3rd Quarter 2011

Central Business District Office Market Summary

Total existing CBD office space	10.8 million sq. ft.
Current vacancy rate	16.1%
Lease rate (Class A)	\$20.77/sq. ft.

Source: CoStar, 3rd Quarter 2011

HOUSEHOLD INCOME

Median Household	\$52,693
Per Capita	\$27,346

Source: Decision Data Resources - 2011 estimates

HOUSING*

	Metro Orlando	National
Median Home Price	\$127,800	\$169,500

Source: National Association of Realtors, 3rd Quarter 2011

BUSINESS START-UPS*

	2006	2007	2008	2009
Orange County	14,295	13,884	12,753	12,437
Seminole County	4,646	4,527	4,222	3,831
Lake County	2,732	2,404	2,031	2,262
Osceola County	2,817	2,812	2,876	2,600
TOTAL	24,490	23,627	21,882	21,130

*Note: Does not include home-based businesses.

Source: www.MarketForceCorporation.com - latest data available



Thao Ngo for Seminole Community College



PROPERTY TAXES*

Orange County

Apopka	17.2022	Oakland	20.4358
Bay Lake	14.9302	Ocoee	19.5318-19.6368
Belle Isle	18.0876-18.4983	Orlando	19.3358-20.5446
Eatonville	20.5898	Windermere	17.5804-17.8332
Edgewood	18.3858-19.3858	Winter Garden	17.9358
Lake Buena Vista	14.9894	Winter Park	17.7276
Maitland	17.6910	Unincorporated	17.7338-21.1161

Seminole County

Altamonte Springs	18.3183	Oviedo	18.2681
Casselberry	18.5484	Sanford	19.9234
Lake Mary	16.7339	Winter Springs	17.9883
Longwood	18.0884	Unincorporated	15.5390

Lake County

Astatula	21.0143	Mascotte	23.6068
Clermont	17.1341	Minneola	20.5637
Eustis	20.4353	Montverde	16.8221
Fruitland Park	18.5205	Mount Dora	19.5812
Groveland	19.5921	Tavares	21.0821
Howey-in-the-Hills	22.5143	Umatilla	21.8340
Lady Lake	17.4729-17.7951	Unincorporated	15.0127
Leesburg	18.5100		

Osceola County

Kissimmee	19.8335	Unincorporated	19.8335
St. Cloud	20.1210		

*Note: Real property is assessed at 100% of value. Florida has a \$50,000 homestead exemption with 3% cap. Figures represent dollars per \$1,000 of assessed value. Personal property (excluding personal household items) is assessed at "just value" according to schedules established by owner and tax assessor.

Source: County Tax Collectors

Other Taxes

	State	County	City
Inventory	None	None	None
Sales	6.00%	0% - 1.0%	None
Gasoline	\$.267	\$.021 - \$.031	None
Corporate Income	5.50%	None	None
Personal Income	None	None	None
Unemployment	2.7%-5.4%		

Source: Dept. of Revenue - 2009

TRANSPORTATION

Air

Orlando International Airport

Serves Metro Orlando with full custom services and a designated Foreign Trade Zone.

- 3rd largest airport in the nation for domestic origin and destination
- 4th best airport in the world for customer service
- 11th fastest-growing major airport in the world
- 2nd busiest airport in Florida; 13th in the nation; 29th in the world
- 17th largest port of entry for international visitors in the Continental U.S.
- More than 980 arrivals and departures daily
- Domestic passengers (2011) - 31,923,422
- International passengers (2011) - 3,502,584
- Cargo tonnage (2011) - 187,095
- Foreign Trade Zone No. 42

Orlando Sanford International Airport

Serves Metro Orlando with full custom services and a designated Foreign Trade Zone.

- 3rd most active international airport in Florida; 13th in the nation
- Domestic passengers (2011) - 1,129,496
- International passengers (2011) - 440,989
- Cargo tonnage (2011) - 3,022
- 395-acre Sanford Airport Commerce Park
- 13,500 sq. ft. incubator, the Airport Enterprise Center
- 50,000 sq. ft. cargo building
- Foreign Trade Zone No. 250

General Aviation

	Runway Length
Orlando Executive Airport	6,000 ft.
Kissimmee Gateway Airport	6,000 ft.
Leesburg International Airport	5,000 ft.
Mid-Florida Airport	3,000 ft.

Highways

Interstate 4 • Florida's Turnpike • S.R. 417 (Greenway)
 S.R. 408 (East-West Expressway) • S.R. 528 (Beachline Expressway)
 S.R. 429 (Western Beltway) • S.R. 414 Apopka Expressway)
 U.S. 17/92 • U.S. 192 • U.S. 27 • U.S. 441

Bus Service

Commercial: Greyhound • Regional: Lynx

Railroads

Commercial: Amtrak
 Cargo: CSX Transportation (CSXT)
 Florida Central Railroad (FCEN)

CSXT Facilities in Metro Orlando:

Locomotive servicing facilities • Car repair shops CSX intermodal terminals • Rail-to-truck TRANSFLO transloading facilities • Finished Automobile Distribution Centers (TDSI)

Waterways

Distance from Orlando/Channel Depth

Sanford	20 miles / 12 feet
Port Canaveral	50 miles / 35 feet
Tampa	84 miles / 34 feet
Jacksonville	139 miles / 38 feet



ESTABLISHMENT ACTIVITY

Recent Expansions to Metro Orlando

Company	Industry
AcAe	Information Technology
ACD Search Optimization	Business Services
Advanced Solar Photonics LLC	Manufacturing
Blue Earth Solutions	Clean Tech
Calvert Manufacturing, Inc.	Manufacturing
Digital Risk, LLC	Business Services
The DiSTI Corporation	Modeling, Simulation & Training
Dunkin' Brands, Inc.	Distribution
EZ Yield Global, LLC	Business Services
Fiserv	Information Technology
Industrial Lighting Products	Manufacturing
Innovative Medical Device Solutions (IMDS)	Life Sciences
JHT, Inc.	Modeling, Simulation & Training
Millenium Luxury Coaches	Manufacturing
MYMIC LLC	Modeling, Simulation & Training
NIIT Healthcare Technologies	Life Sciences
Rapter Technology Group	Energy
Team Cymru Inc.	Information Technology
Tecport Optics, Inc.	Optics & Photonics
TravelCLICK	Business Services
SAIC	Modeling, Simulation & Training
ZeeGee Games	Digital Media

MAJOR GOVERNMENT EMPLOYERS

Orange County Public Schools	21,349
Orange County Government	7,818
Seminole County Public Schools	7,983
Osceola County Public Schools	6,250
Lake County Public Schools	5,100
United States Postal Service	4,000
City of Orlando	2,995
Osceola County Government	1,715
Orange County Corrections Department	1,673
Seminole County Government	1,446
Naval Air Warfare Center - TSD	1,053
Lake County Government	690

Source: Lexis Nexis, Harris InfoSource, Direct Company Contact & OBJ Book of Lists 2011



MAJOR EMPLOYERS

Walt Disney World Company	58,000
Publix Super Markets Inc.	17,521
Adventist Health System (Florida Hospital)	16,700
Orlando Health	14,000
Universal Orlando Resort	13,000
Lockheed Martin Corporation	13,000
SeaWorld Parks & Entertainment	7,000
Marriott International Inc.	6,312
Starwood Hotels & Resorts Worldwide Inc.	5,369
Walgreen Co.	5,004
Darden Restaurants Inc.	4,800
Central Florida Investments (Westgate Resorts)	3,861
Siemens	3,500
AT&T Corp.	3,210
FedEx Corp.	3,000
Space Gateway Support	2,886
Lowes Cos. Inc.	2,872
Wyndham Worldwide Corp.	2,790
Mears Transportation Group	2,776
Wachovia Corp.	2,765
Northrop Grumman Corp.	2,746
Rosen Hotels and Resorts	2,667
SunTrust Banks Inc.	2,644
CVS Corp.	2,500
Orange Lake Resort & Country Club	2,500

Source: Lexis Nexis, Harris InfoSource, Direct Company Contact, OBJ book of Lists 2011 & Orlando Sentinel

CORPORATE HEADQUARTERS

A. Duda & Sons Inc.	Jardon & Howard Tech. Inc.
ABC Fine Wine & Spirits	Keene Construction Co.
Acuosti Engineering Co. of Florida	Orlando Regional Healthcare
Adventist Health System	Priority Healthcare Corp.
AAA	Recreational Factory Whse.
Attorneys' Title Insurance Fund Inc.	Regal Marine Industries Inc.
Bairnco Corp.	RKC Construction Inc.
Cambridge Homes	Rosen Hotels & Resorts Inc.
Central Florida Investments	Rotech Healthcare Inc.
Coleman Technologies Inc.	Ruth's Chris Steakhouse
Color Wheel Paint Manufacturing Co.	Schenck Co.
Commercial Net Lease Realty Inc.	Smart City Holdings
ContraVest Construction Co.	Sonny's Franchise Co.
Darden Restaurants Inc.	Sunniland Corp.
Dynetech Corp.	Terry's Electric Inc.
Epoch Properties Inc.	Tri-City Electrical Contractors Inc.
FARO Technologies Inc.	Tupperware Brands Corp.
FDN Communications	United Medical Corp.
Florida Extruders Int'l Inc.	Villages of Lake-Sumter Inc.
Florida Irrigation Supply Inc.	Walker & Co. Construction Inc.
Global Travel International Inc.	WELBRO Group of Companies
H.J. High Construction Co.	Wiginton Corp.
Hammond Electronics Inc.	Williams Co.
Heller Bros. Packing Corp.	Winter Park Construction Co.

Source: Lexis Nexis, Harris InfoSource & Direct Company Contact

COST OF LIVING

ACCRA, the professional association of community researchers, conducts a quarterly survey that assesses living costs in hundreds of cities nation-wide. The resulting index measures relative price levels for consumer goods and services in participating cities and compares them to the national average - the index number 100 - for all cities.

	Composite Index	Grocery	Housing
Atlanta, GA	98.8	106.1	89.2
Austin, TX	93.3	88.7	84.4
Denver, CO	105.3	102.6	114.2
Miami, FL	108.3	107.7	114.0
New York, NY	223.9	148.9	426.5
ORLANDO, FL	97.2	102.7	80.1
Raleigh, NC	93.3	100.9	75.0
Richmond, VA	99.2	103.0	89.3
Seattle, WA	115.2	109.0	126.9

Source: C2ER The Council for Community of Economic Research (formerly ACCRA) - 3rd Quarter 2011



RECREATION/CULTURE

Boating & sailing	2,000+ fresh water lakes
Camping	3,000 acres of public parks
Golf	176 courses
Tennis	800+ outdoor & indoor courts

Other Recreation and Cultural Activities

AFL (Orlando Predators)	NBA (Orlando Magic)
Atlanta Braves Spring Training	Orlando Ballet
Broadway Theatre	Orlando Museum of Art
Capital One Bowl/Champs Bowl	Orlando Philharmonic Orchestra
Civic and Dinner Theatres	Orlando Science Center
Central Florida Zoo	SeaWorld Orlando
Dog Racing	Silver Spurs Rodeo
ECHL (Orlando Solar Bears)	UCF Division 1 Football
Harness Racing	Universal Orlando
Houston Astros Spring Training	USL (Orlando City Soccer)
Jai-Alai	Walt Disney World Resort

MEDICAL

Hospitals/beds	25/5,372
Doctors of medicine/Osteopaths	4,999/481
Dentists/Hygienists	1,207/1,320
Nurses	26,604
Nursing homes	291

Source: Florida Department of Health - 2011

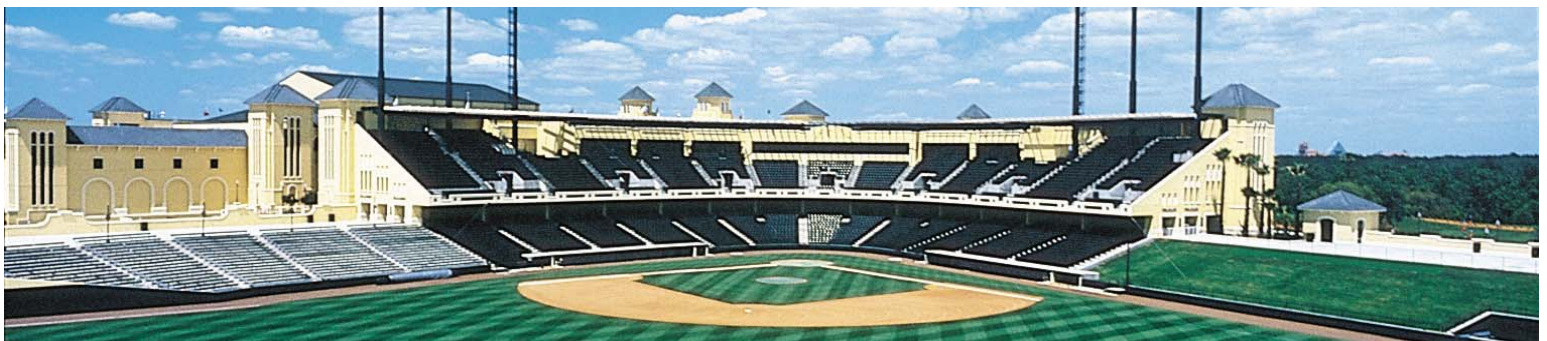
GATHERING PLACES

Hotels & Motels/rooms	449/115,199
Restaurants/seating capacity	4,154/599,405
Major shopping centers and regional malls	68
Libraries	53

CLIMATE

Temperature:	Annual average	84.4
	Average high	83.5
	Average low	63.3
	Annual total rainfall (inches)	56.88
	Annual total snowfall	0

Source: National Climate Data Center, NOAA - 2011 data



ECONOMIC INCENTIVES

State Tax Incentives

- No state personal income tax
- No sales tax on food and medicine
- No state-level ad valorem tax
- No inventory tax
- No ad valorem tax on goods-in-transit
- Exemptions from sales tax on manufacturing machinery and equipment used in production
- Exemptions from sales tax on purchases of research and development equipment
- Exemptions from sales tax on electricity, steam and natural gas used in the manufacturing process
- Sales and use tax exemptions for research/development costs
- No sales tax on containers/packaging/materials incorporated into a final product
- No sales tax on boiler fuels
- Up front sales tax exemption for the motion picture, television and recording industries
- Tax refunds up to \$3,000 per job created for qualified target industries

State Financing Incentives

- Industrial Development Revenue Bonds (IDRB) tax-exempt bond financing, offering below prime rates, for industrial and non-profit organizations with projects requiring \$1.25 to \$10 million in bonds, provided that the total of all of the borrower's capital expenditures during the period beginning three years prior to the issuance of the bonds and ending three years after the issuance of the bonds with respect to the borrower's facilities within the local jurisdiction, plus the amount of the bonds, will not exceed \$20 million. No limit for tax-exempt organizations.
- Enterprise Bonds provide tax-exempt bond financing at attractive rates for small to medium manufacturers requiring \$800,000 up to \$2 million.
- Enterprise Florida provides capital for start-ups, expansions, technology-transfer and businesses seeking to export goods and services.
- Florida First Capital Finance Corporation is a non-profit corporation certified to issue SBA debentures.
- International transactions are exempt from documentary stamp tax; international banking transactions are exempt from intangible tax.
- Florida Black Business Investment Board provides financing for black-owned businesses.



Updated 0412

Local Incentives

On a case-by-case basis, local jurisdictions are prepared to offer inducements to companies that will have an impact on the community. This may include items such as tax abatements, fee abatements, relocation costs and infrastructure enhancements.

Location

- Instant access to a computerized directory of available industrial and office buildings and sites in Metro Orlando.
- Complete professional assistance in site selection.
- Comparison of taxes and location factors for Florida and all other states.
- Fully permitted and developed industrial/office parks and sites available.
- Foreign trade zone designation.
- 90-day permitting for targeted projects.
- Rapid local permitting for approved projects.

Human Resources

- Florida is a "Right to Work" state.
- Training programs tailored to meet the company's needs.
- Assistance with recruiting, testing and screening employees at no cost to the employer.



Research and Development

- One of the nation's finest university-related research and development parks, where firms may locate facilities to access university resources and expertise.
- Southern Technology Applications Center provides online research University of Central Florida's Institute for Simulation and Training (IST), Center for Research and Education in Optics and Lasers (CREOL) and materials Characterization Facility (MCF) provide advanced high tech education and research.
- Internationally renowned engineering and computer science programs at the University of Central Florida.

Transportation

- Deregulated trucking industry.
- State grants authorized to build or improve roads for new and expanding industry.
- Lower transportation rates because of backhaul advantage.

Founded in 1977, the EDC is a not-for-profit, public/private partnership serving Orange, Seminole, Lake and Osceola counties and the City of Orlando. For more information about the Metro Orlando Economic Development Commission visit our website at www.OrlandoEDC.com or call 407.422.7159.

"Putting imagination to work" is a registered service mark of the Metro Orlando Economic Development Commission.