


FLORIDA:

Your Partner in Progress

An aerial photograph of a large container ship, heavily loaded with colorful shipping containers, sailing through a wide waterway. In the background, a city skyline with numerous skyscrapers is visible across the water. The sky is blue with scattered white clouds. The ship is moving from the bottom left towards the center of the frame, leaving a white wake in the greenish-blue water.

The Sunshine State basks in its role as a logistics superstar, with hot transportation connections via water, air, road and rail. You'll also warm up to its great quality of life, abundant qualified labor pool, and oceans of experience in keeping your products safe for the long haul.

They call it the Sunshine State, and for good reason. Yes, the sunny weather alone is enough to swell the population with human snowbirds as weather-weary warriors from the north flock to Florida every winter, along with the robins and blue jays. But many factors other than perfect temperatures make the state's business climate warm and the future bright.



"Florida remains one of the most desirable and affordable places to live," says Paul Marttila, senior vice president of business development for Enterprise Florida, the state's principal economic development organization. "In many ways, Florida's cost of living is below that of other states with similar economic growth and in-migration rates. Our state and local governments are committed to keeping Florida's low tax environment, plentiful modern amenities, and quality public services."

Which explains why logistics professionals and other business leaders fly to the state and stay there year round. They find it's not a bad bargain for weather year round: The average annual high temperature is 81 degrees and the average annual low is a comfortable 60 degrees.

Enterprise Florida focuses on what the state offers to those seeking an ideal location for their manufacturing and distribution facilities. Golf courses and beaches have their appeal, but for savvy executives it is the region's transportation infrastructure, workforce, and other logistics and business advantages that make the sun shine brightest of all.



Florida's warehousing availability, abundant and qualified talent pool, and multi-modal transportation infrastructure make the site selection process easy.

PARTNERS IN PROGRESS

Enterprise Florida is a public-private partnership between Florida's business and government leaders who share a mission to expand and diversify the state's economy through job creation. In pursuit of that mission, the organization works closely with a statewide network of economic development partners and is funded both by the State of Florida and by private-sector

businesses. Enterprise Florida champions the state as the premier location for business expansion and relocation, creating a renewed interest in Florida as a top state for business both nationally and internationally. Its activities have resulted in a significant number of new jobs and capital investments.

"Enterprise Florida works with economic development offices in each of the state's 67 counties to encourage job growth and promote all regions of the state," explains Cori Henderson, director of business development. "Additionally, Florida's workforce and utility partners all play a vital role in making Florida as competitive as possible."



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FLORIDA | THE FUTURE IS HERE SM

Marttila and Henderson readily rattle off the state's competitive advantages:

■ Florida's favorable business tax structure, government policies, and competitive costs simplify planning for future growth. Florida consistently ranks among the best states for business, thanks to its pro-business state tax policies, competitive cost of doing business, and streamlined regulatory environment.

■ The state's government and economic development leaders work together to ensure the business climate remains favorable to companies of all sizes, including some of the nation's leading corporations. Florida is working on legislative, fiscal, and marketplace initiatives such as insurance tort reform, targeted industry incentives, and many others. Florida is also a right-to-work state.

■ Florida offers a cost-efficient alternative to other competitive high-tech states. For businesses in certain targeted industries or specialized locations, the state offers additional financial incentives. Businesses looking for workforce training, road infrastructure, or specialized locations may also qualify for specific incentive programs.

■ Business dollars go further in Florida, given the state's tax advantages, tax exemptions, and zero state personal income tax.

"Florida understands that businesses need certainty, predictability, and efficiency in government regulations," says Marttila. "Our regulatory agencies and local governments provide quicker, less costly, and more predictable permitting processes for significant economic development projects without reducing environmental standards."

INFRASTRUCTURE AND WORKFORCE

Florida's multi-modal infrastructure supports more than 19.9 million residents and more than 100 million visitors annually. Florida has one of the world's most extensive multi-modal transportation systems, featuring international airports, deep-water shipping ports, extensive highway and rail networks, and multiple hubs that allow for high-speed data transmission from around the United States to Europe, Latin America, and Africa.

"Florida is connected to the world in every possible way," says Marttila. "From

"Florida is connected to the world in every possible way. From strong cultural and trade connections with Latin America to unmatched global reach via modern ports and airports and the state's leadership in the budding space travel industry, Florida is a true global hub for business."

— **Paul Marttila**, Senior Vice President of Business Development, Enterprise Florida

strong cultural and trade connections with Latin America to unmatched global reach via modern ports and airports, and the state's leadership in the budding space travel industry, Florida is a true global hub for business."

The state also is recognized as one of the top five telecom hubs in the world. The Network Access Point in Miami serves as a major switching station for internet traffic coming to and from Latin America, while other high-speed networks, such as the Florida Lambda Rail and LA Grid, facilitate research and development efforts. In addition, Florida features some of the fastest and most widely available wireless networks.

Helping businesses reach their full potential, the state boasts a diverse workforce of nearly 10 million. Not surprisingly, Florida's talent pipeline is consistently ranked among the best in the nation. Much of the credit for the outstanding skills of the Florida workforce can be given to the state's excellent educational institutions and unique workforce training programs.

"As one of the largest states in the nation, Florida offers a large and talented pool of workers to employers," says Henderson. "Florida's labor force is also more affordable than other leading high-tech states, thanks to a favorable tax structure and lower business costs. In addition, Florida's professionals are more culturally and linguistically diverse, providing additional competitive advantages to employers in the global marketplace."

The state's 12 public universities, six major medical schools, and numerous private colleges and universities work closely with the business community to build

programs that reflect the needs of Florida's industries. Florida's colleges and universities are among the nation's top performers in research and development, and technology commercialization.

"Florida's customized training programs and incentives help companies become operational and profitable in less time and with lower costs," says Marttila.

CareerSource Florida, the state's innovative partnership for workforce training, provides programs such as Quick Response Training and Incumbent Worker Training to help existing and new companies recruit, train, and maintain cutting-edge skills, and keep pace with new technologies.

"Florida's business and lifestyle resources allow us to promote the state in ways no other state can," Marttila says. "While some states may have a great quality of life, their high taxes can discourage business growth. Other states may have a business-friendly tax climate but they don't have the workforce available in Florida or the ease of access to international markets. Florida is the only state that can offer all of those resources — workforce, pro-business climate, infrastructure, international access, and quality of life."

MAGAYA SETS SITES ON MIAMI

"Who doesn't want to live here?" asks Jesus David Rodriguez, president of Magaya Corporation, a Miami-based multinational corporation that develops software for the logistics and supply chain sector.

Rodriguez has reason to be enthusiastic about his adopted state — not to mention his adopted country. "I started my journey in 1999 when I came to the United States," he explains. His journey has led to astounding success in an equally astounding short

JAXPORT IS INVESTING FOR YOUR FUTURE



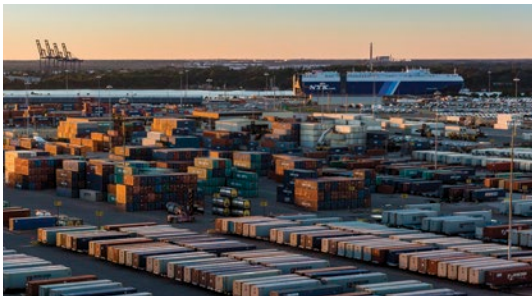
DEEPER WATER

The federal project to take Jacksonville's harbor to 47 feet will increase the region's competitive edge.



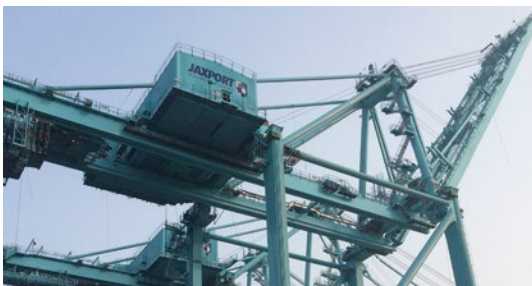
NEW ON-DOCK RAIL FACILITY

JAXPORT's Intermodal Container Transfer Facility serves the Blount Island and Dames Point Marine Terminals.



REVITALIZED TERMINALS

A multi-million dollar program to enhance docks, berths, rail and terminal areas continues to position JAXPORT for growth.



NEW 100-GAUGE CRANES

Three state-of-the-art container cranes at Blount Island add to the existing lineup of post-Panamax equipment at the TraPac Container Terminal.



STATE INFRASTRUCTURE FUNDING

Transportation projects totaling \$2.5 billion are being completed at JAXPORT and around the region.

amount of time. “It might seem fast now, but it didn’t seem so fast in the beginning,” he says.

Magaya’s official beginning was in 2001 when the company was incorporated. “I dreamed of starting a software company because building software is what I love,” he says. “I have the best partners in the world and this couldn’t have happened without them. We saw the opportunity in Florida. You don’t have to go anywhere else; you can grow right here.”

THE COMPLETE PACKAGE

Magaya’s products serve a variety of customers in the logistics space. Among them is Neutralogistics, a full-service logistics company specializing in freight management, imports, exports, trucking, warehousing, distribution, and brokerage.

“We work hand-in-hand with Magaya,” says Joe Vazquez, director of operations for Neutralogistics, which is also based in Miami. “It’s a complete package.”

Vazquez cites Magaya as an important factor in his own company’s growth, including its expansion to 200,000 square feet spread between two buildings, one dedicated to freight forwarding consolidation and the other to Free Trade Zone warehousing and distribution.

Magaya’s best-known software products are the Magaya Cargo System, Magaya Warehouse Management System, Magaya Supply Chain Solution, and Magaya Commerce System.

Rodriguez says Florida is an ideal location for serving logistics companies, and Magaya has taken full advantage of the potential that represents. Magaya now serves more than 2,000 companies around the world in 80 different countries from its Miami headquarters, as well as offices in Houston, Los Angeles, and Sao Paulo, Brazil.

“South Florida is a trading place,” Rodriguez says. “Anyone who comes here can build an exporting business.”

Magaya is helping to improve the logistics climate even more by funding logistics programs at several schools in Florida, including Florida International University, University of North Florida, and Miami Dade College. It is a win-win situation, as students gain knowledge and logistics companies gain a better-educated workforce.

“The students gain the main advantage,” Rodriguez says. “They will have the knowledge needed to help the companies they work for.”

That formula of knowledge-based innovation fueling company growth has worked for Magaya itself. “As the industry evolved, we added features to the software as our clients told us they wanted to give their customers even more service,” he says. “We created our products to meet their needs.”

Magaya Cargo System, the company’s first product, is designed specifically for

pace that logistics providers must keep up with it in order to stay competitive. That is driving Magaya to work on its new Logistico product, which connects e-commerce and logistics.

Magaya continually improves its services to keep customers on the cutting edge. “It’s important that we stay close to our customers so we can spot the trends, get them acclimated, and help them grow,” Rodriguez says.

Magaya’s philosophy is to help companies succeed by offering a complete and



Magaya Corporation fully leverages Florida’s potential, and serves more than 2,000 companies around the world in 80 different countries from its Miami headquarters.

freight forwarders, non-vessel operating common carriers (NVOCCs), logistics providers, and others in the logistics sector.

“As we’ve grown along with our customers, we expanded to create supply chain software solutions to serve the end-to-end needs of purchasing, pricing, inventory control, distribution, sales, and e-commerce order fulfillment,” Rodriguez says. “We also provide a range of consulting and implementation services to help businesses accomplish their goals.

“Our implementation team leverages industry best practices and applies cultivated expertise as they collaborate with our clients to ensure Magaya meets their expectations and delivers a world-class experience,” he adds.

He says the company is always looking to spot “the next big thing” in logistics. E-commerce is growing at such a rapid

flexible package designed to grow with them. And he can’t imagine a better place for that sunny outlook to meet its promise than Florida.

EXCEPTIONAL PORTS

As a peninsula between the Straits of Florida, the Gulf of Mexico, and the Atlantic Ocean, Florida’s sun and water go hand in hand, and that is good news for logistics providers.

The state is home to 15 seaports serving different markets and accommodating a variety of industries. “There isn’t a type of cargo our ports can’t handle,” says Doug Wheeler, president and CEO of the Florida Ports Council. “In addition, many of our ports have warehouse facilities to allow manufacturing on-site, many have storage space available for large bulk commodities, many have extensive berths and



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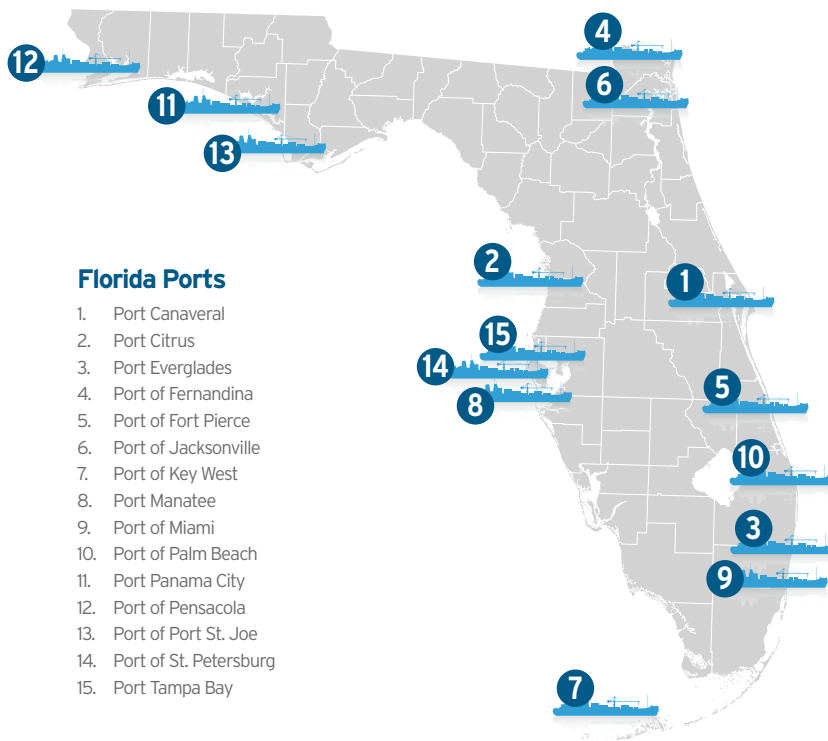
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modern cargo terminals, and many manage perishable transport.

"Some of our ports have tunnels, bridges, and expressways that allow trucks to bypass urban traffic and decrease travel time," he adds. "In many cases, a truck can go from Florida to New Jersey without stopping at a single red light."

And of course the state is post-Panamax ready. "By increasing the channel depth to 50 feet at strategic Florida ports, we can accommodate larger ships and more containers," Wheeler says. "Currently, PortMiami has a deeper channel and Port Everglades and JAXPORT [Jacksonville] are beginning expansion soon."

In many cases, cargo at Florida's ports can reach 70 percent of the U.S. consumer population in four days or less. The state has a built-in consumer base of 20 million residents and more than 100 million annual visitors, which decreases transport time and increases reach.

"Our state is home to the top three cruise ports in the world: PortMiami, Port Canaveral, and Port Everglades," Wheeler says. "More than 15 million cruise passengers move through Florida ports every year. The industry provides the state with

almost 150,000 jobs and \$7.9 billion in direct spending."

Florida seaports employ a strong workforce and already support approximately 700,000 jobs and nearly \$97 billion in total economic activity, which will only continue to grow. Governor Rick Scott and the Florida State Legislature have recently invested billions of dollars in Florida ports, with more than \$3.5 billion allocated for future projects.

The Florida Ports Council is a nonprofit corporation that serves as the professional association for Florida's 15 public seaports and their management. The ports are: Port Canaveral, Port Citrus, Port Everglades, Port of Fernandina, JAXPORT, Port of Key West, Port Manatee, PortMiami, Port of Palm Beach, Port Panama City, Port of Pensacola, Port of Fort Pierce, Port of Port St. Joe, Port of St. Petersburg, and Port Tampa Bay.

Florida's network of seaports is one of the state's greatest economic assets, positively affecting every region and resident. Whether moving more than 100 million tons of cargo annually or millions of cruise passengers, Florida's seaports generate and support an array of commerce.

The Florida Seaport Transportation and Economic Development (FSTED) Council, administratively supported by the Florida Ports Council, is a public entity created by statute and charged with carrying out the state's economic development mission by implementing seaport capital improvement projects at the local level. The FSTED Council was created within the Department of Transportation, and consists of the port directors of all 15 publicly owned seaports and a representative from the Department of Transportation and the Department of Economic Opportunity.

Legislation creating the FSTED Council in 1990 was designed to forge a partnership between the state and its seaports. It is driven by an approach to project development that reflects the special characteristics of seaports: They are public entities, but must function as businesses to fulfill their public purpose.

"The state of Florida's seaports is strong and we are witnessing unprecedented focus and investment in our ports," says Wheeler. "This dedication allows us to better position Florida as a global hub for trade, expand our world-leading cruise industry, and further our designation as the gateway to the Americas."

STRENGTH OF RELATIONSHIPS

Standing in testimony to the strength of the relationships among Florida's ports is the Jacksonville Port Authority, popularly known as JAXPORT. "I've been here three years and had the chance to intersect with the Florida Ports Council, the governor's office, and the Florida Department of Transportation," says JAXPORT CEO Brian Taylor. "I've witnessed the collaboration among this collection of ports. Each one offers unique attributes to service certain types of cargo."

This collaboration provides extraordinary benefits to shippers. "Think of the global trade advantage by having access to so many ports," Taylor says. "Shippers can pick and choose what type best suits their needs. That is one of the major advantages of shipping to and from Florida."

Those advantages rose significantly at JAXPORT in summer 2016 when the port moved into the new Panama Canal era with the arrival of the *MOL Majesty*, the

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first containership to call the port through the Panama Canal's expanded locks. The ship arrived in late July at the port's TraPac Container Terminal at Dames Point, where crews loaded and unloaded cargo.

The 991-foot *Majesty* has a maximum capacity of 6,274 TEUs (containers) requiring 46.5 feet of water when fully laden. The federal project to increase JAXPORT's harbor to 47 feet to accommodate larger container vessels fully loaded is now under construction.

"The arrival of the *MOL Majesty* through the new locks is a reminder that this is a time of great growth potential at JAXPORT and Northeast Florida," Taylor says. "We already have the infrastructure, highway and rail connections, labor options, and efficiency that the international cargo industry demands. And we are on our way toward a harbor depth that will accommodate ships like the *Majesty* at capacity, creating jobs and opportunity."

The impact goes beyond containerships. Along with the *Majesty*, a new, wider roll-on/roll-off automobile carrier also arrived through the new locks. "These two ships signal a new era," Taylor says.

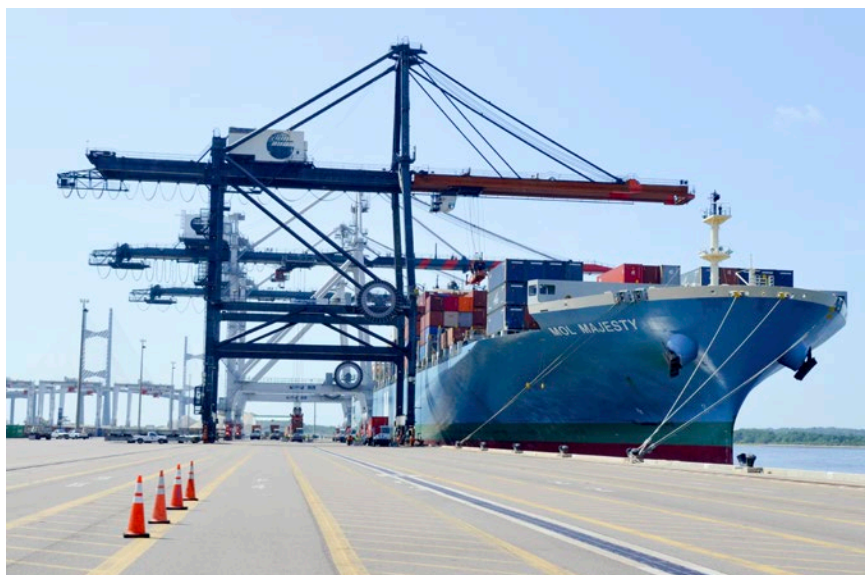
LEADING THE WAY

JAXPORT is a leader in the move to post-Panamax capacity. "New cranes are arriving that will be operational in November 2016, and we are making berth improvements to accept those cranes," Taylor says. "We're also remedying navigational challenges to meet our new needs."

Taylor believes that the collaborative system of Florida's ports, working through the Florida Ports Council, gives all Florida ports a special edge. "We use the system as a vehicle to fund projects, trade best practices, and share information without crossing boundaries," he says.

JAXPORT is a vital player in the network. "The port serves 61 countries, 112 international ports, and 40 ocean carriers," Taylor says. "It has a diversified book of business and the ability to handle a variety of specializations."

Jacksonville's enviable location contributes mightily to JAXPORT's busy traffic. "Jacksonville is Florida's northernmost port, and the westernmost port on the East Coast, so we are in the best position to serve central Florida," he says. "We also



The *MOL Majesty* was the first containership to arrive at JAXPORT through the Panama Canal's new, expanded locks.

have a unique ability to serve markets to the north. Trucks come up I-95, pick up cargo and drop it off, so they are able to move cargo back. Companies can reach 60 million consumers within a one-day truck trip from Jacksonville."

Yet another advantage is Jacksonville's Foreign Trade Zone (FTZ) designation. "The FTZ is a real differentiator for us," Taylor says. "Jacksonville is one of the largest in the country, and companies are increasingly interested in the advantages of importing and exporting within the trade zone."

In addition, Jacksonville's highly skilled and diversified labor force sets the city apart. "We have 3,000 military service personnel here, creating a pool of skilled, educated, hard-working people to fill logistics and transportation jobs," Taylor says.

For its part, the Jacksonville Port Authority works hard to connect Florida manufacturers with all the partners they need to move cargo efficiently. "We work to put the whole thing together," he notes.

KEEPING ON TRACK

Getting things from here to there to the proverbial market square gets on track with Florida East Coast Railway (FECR), a 351-mile freight rail system located along the east coast of Florida. It is the exclusive rail provider to South Florida's ports, and connects with other railway systems to move freight throughout the country.

Based in Jacksonville, the railway provides end-to-end carload and intermodal solutions to shippers that demand more cost-effective options without compromising service quality.

The Florida East Coast Railway's scheduled railroad service offers competitive solutions. FECR provides its drayage operation through FEC Highway Services (FECHS), which allows FECR to provide truck-like, door-to-door service in the local markets it serves.

FECR also provides carload service and moves commodities such as aggregate (crushed rock), automobiles, bulk liquids, building materials, orange juice, electronics, and other items Floridians use daily.

FECR partnered with PortMiami to build an on-dock rail facility to provide faster and more cost-effective service to intermodal customers. In addition, it worked with Port Everglades to construct a new near-dock Intermodal Container Transfer Facility (ICTF) to serve ocean carriers that call on the market.

"FECR and South Florida ports invested in infrastructure to reach 70 percent of the U.S. population in less than four days," says Adam Bridges, senior vice president of marketing and strategic planning at FECR.

Such strategic assets translate into a new landscape for shippers. "The location of distribution centers is changing, based on trade-offs that retailers make between cost and speed of goods to market," Bridges says.



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*Source: Seamless Retail Survey Results 2015

“Florida’s population growth has stimulated new distribution center development. In addition, FECR offers a variety of green-field sites for economic expansion with rail capabilities in one of the fastest-growing markets in the United States.”

Bridges believes Florida is earning the title “America’s Logistics Center” based not only on its location, but also on its transportation infrastructure and collective efforts to provide state-of-the-art logistics services.

“Florida offers all four pillars of logistics — rail, air, maritime, and highway,” Bridges says. “Rail and highway networks connect the region with every part of the country. Efficient utilities, state-of-the-art telecommunications, available land, a skilled workforce, and competitive operating costs combine to make the region the smart choice for businesses.”

FECR plays a vital role in the state’s logistics advantages by providing direct links between Florida and the nation’s Class I rail networks. FECR facilitates the growth of import and export products, as well as local industries, helping to create jobs and reduce supply chain costs in the region.

With multiple daily double-stacked train departures, the railway offers scheduled and reliable solutions for:

■ Intermodal (domestic and international), ramp-to-ramp, door-to-ramp, or door-to-door.

■ Carload (including transload and industrial development) services in private and FECR-provided equipment.

“FECR connects Florida with networks serving markets including Nashville, Memphis, Dallas, Cincinnati, Columbus, and Chicago,” Bridges says.

TRACK TO THE FUTURE

The railway has its sights squarely focused on the future.

“FECR is building the rail workforce of tomorrow through an apprenticeship program that trains talented high school students to be the next generation of rail-roaders,” Bridges says. “We also provide customers with an e-commerce suite of applications, such as EZ Buy and FECR Connect, enabling them to search, order, and ship with the click of a button.”

Any look toward the future confirms that growth in Florida is flying.

“Florida is a high-growth state,” says Chris Mangos, director of marketing for the Miami International Airport (MIA). “In early 2016, Florida surpassed New York as the country’s most populated state, following only California and Texas. Growth is expected to continue with an additional 8.8 million people by 2030.”

But the state is not only soaring in population numbers. “Aside from tourism — 105 million visitors in 2015 alone — Florida is growing in international trade and commerce, in the high-tech and biomedical industries in several areas of the state, as well as in agriculture, international banking, and finance,” Mangos notes.

He views this growth from the leading international freight airport in the nation. Miami International Airport — one of 19 commercial airports in the state — is the second-leading international passenger gateway to the nation. Overall economic impact from aviation activities at the airport totals \$33.7 billion annually, contributing 282,724 jobs directly and indirectly to the economy.

International trade (imports and exports) at the airport during 2015 reached

Where Assets and Opportunity Meet

You might say that Florida sits at the intersection of Asset Street and Opportunity Avenue. And the light is green. That would certainly be the view of Jason Reed, CEO of ReedTMS Logistics, a company looking both ways and making the most of the Sunshine State’s business and logistics advantages.

“Florida is unique because it is both a consumption state and a peninsula, which allows us to leverage a surplus of capacity with quality network providers,” Reed says. “We make it our mission to maximize service levels for both our local and national customers. We are also located near major ports, which allows us to provide additional value-added solutions to satisfy rising customer demands for import/export.”

Reed knows something about making the best of both worlds. ReedTMS is a transportation provider comprised of Reed Transport Services Inc. and TMS Logistics Inc. In 2010, Reed Transport and TMS Logistics formed a strategic partnership to provide expanded service offerings that address the logistics needs of shippers in North America.

Reed Transport offers high-quality brokerage and freight management services, while TMS Logistics is an asset-based provider of dry van, dedicated fleet services. With a database of more than 17,000 carriers, Reed Transport arranges

in excess of 60,000 truckloads per year for more than 500 customers.

“We are defining the true path for an asset-based 3PL by leveraging our logistics assets to offer more value-added services to our client base,” Reed says. “For example, we offer a produce LTL consolidation program in all major growing regions, as well as high-volume produce import locations.”

Florida is the right place and now is the right time to plant the seeds for growth near and far, Reed says. The company recently opened a branch office in Pennsylvania and now operates seven locations across the United States: three in Florida and one each in Pennsylvania, Ohio, Kentucky, and California.

Florida’s advantageous location makes the state not only a great place to do business but also a great place to live, which goes a long way in explaining why so many executives and well-trained logistics professionals have made the state their home.

“One major economic advantage of locating in Florida is a cost of living that is much lower than other ocean states,” Reed points out. “When you pair that with affordable real estate and no state tax, it makes expanding into Florida a great opportunity to increase capital.”

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\$52.8 billion, representing 93 percent of Florida's air trade value and 37 percent of the state's combined total (air and sea) trade values.

"Miami International Airport is the leading gateway to the Latin American/Caribbean region and serves as Florida's trade post for regions to the south," Mangos says. "Moreover, the airport measures in air trade share in the Americas maintain themselves as the largest in the Western Hemisphere."

The details bear him out:

■ MIA handles 83 percent of all air imports and 79 percent of all air exports between the United States and the Latin American/Caribbean markets.

■ The airport is the leading perishables import center in the Americas, handling more than 66 percent of all perishables by air in the hemisphere. High on the list are flowers (89 percent share), fruits and vegetables (72 percent share), and fish and seafood (51 percent share).

■ Miami International Airport is a leading export center for high-technology goods, averaging more than \$800 million in exports per month.

■ As a growing global industry, pharmaceuticals are finding their way through the airport, which serves as an intercontinental transit point. Imports/exports of these products totaled \$2.95 billion at the airport during 2015.

Little wonder, then, that Miami International Airport is considered a logistics jewel, not only in Florida but across the country and around the world. The airport has the largest concentration of airlines—currently 102—of any U.S. airport. Of these airlines, 41 are all-cargo, providing access to 105 markets around the world.

More than 60 passenger airlines carry belly cargo to 157 destinations. MIA's nonstop reach now extends to all of the Americas, Europe, and the Middle East/Gulf region.

A NETWORK OF SUPPORT

The airport is supported by an extensive trucking network moving goods to all Florida markets, and to U.S. and Canadian markets as well. A large international trade infrastructure surrounds the airport and includes more than 60 million square feet of warehousing, 900 international freight

forwarders and customs brokers, and a large contingent of federal inspection and regulatory agencies that facilitate the clearance and movement of goods.

The Greater Miami/South Florida area is home to more than 1,400 multinational corporations, the largest concentration of domestic and international banks south of New York City, and the third-largest consular corps in the United States, with 69 consulates, 45 bi-national chambers, and 22 foreign trade offices.

Efficient utilities, state-of-the-art telecommunications, available land, a skilled workforce, and competitive operating costs combine to make the region the smart choice for businesses."

— **Adam Bridges**, Senior Vice President of Marketing and Strategic Planning, Florida East Coast Railway

The airport continues to expand its global outreach. "We continually target and add new routes," Mangos says. "By October 2016, five new airlines will join the MIA family, offering new routes into Latin America, the Caribbean, and Europe. Negotiations continue to develop Florida's first non-stop passenger routes to Asia, while the airport is already served by four Asian cargo airlines offering service to three major cargo hubs in Asia."

Later in 2016, the airport will finalize a conceptual seven-phase plan aimed to improve and expand cargo and related facilities. The Cargo Optimization, Redevelopment, and Expansion (CORE) program will involve optimizing the use of



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existing facilities and space to provide additional near-term capacity.

The plan also calls for the removal and redevelopment of select existing facilities that are costly to maintain, replacing them with new, more efficient facilities with an eye toward further incremental development to serve demand-driven needs and growth. New concepts now in motion to complement MIA's traditional cargo activities include expanding the airport's outreach as a global pharmaceuticals hub.

The airport also is in the process of attaining designation as a Foreign Trade Zone. Mangos expects that in 2017 all airport facilities will offer Magnet Site FTZ status to business partners operating in the airport's facilities. This will permit the airport to market itself to firms seeking on-airport manufacturing and/or providing value-added services on goods and products within its facilities while attaining the numerous benefits of a FTZ environment.

Florida city of Lakeland, ideally located in Polk County about halfway between Tampa and Orlando.

"With Florida as our corporate hub, we've been able to operate with an entrepreneurial spirit," says Scott Thornton, chairman. "As a family-owned, professionally managed company, we pride ourselves on having the flexibility to accommodate customers' individual requirements—even as their operations grow and change.

"Our ability to customize and scale operations to meet the needs of each customer sets us apart in the industry and has enabled us to achieve 50 consecutive years of revenue growth," he adds.

Thornton believes Florida's business climate is a key factor in the company's success.

"The business-friendly climate in Florida encourages innovation and collaboration," he says. "Saddle Creek was able to invest in a sustainable compressed natural gas

Saddle Creek has experienced dynamic growth, both organically and through strategic acquisitions. In the past six years, the company has doubled in size. The 3PL now operates more than 17 million square feet of space in 41 locations nationwide with the help of more than 2,700 associates—nearly 1,000 of them in Polk County.

Saddle Creek's integrated service offerings have grown to include warehousing, omni-channel fulfillment, transportation, packaging, and more. The company also has entered new industries and markets, and expanded its technology capabilities.

WHATEVER IT TAKES

Saddle Creek has managed to grow from a small regional warehousing company to a leading nationwide logistics provider without losing its unique corporate culture. Company-wide, employees share an intense commitment to upholding core values, conducting business with integrity, and going the extra mile to meet customers' needs. Appropriately enough, the company's brand promise is: "Whatever It Takes!"

Saddle Creek has increased employment significantly to support business growth. It takes great care to select employees who fit the corporate culture and share the company's sense of entrepreneurial responsiveness. The superior talent pool available in Florida enables such selectivity.

"In today's competitive marketplace, it can be challenging to hire and retain high-caliber talent," Thornton says. "Because service excellence and scalability are at the heart of our value proposition, this is a key area of focus as we continue to grow. Fortunately, Florida's growing workforce gives us the opportunity to draw from a broad talent pool and be more selective, so we can find the associates who best fit our corporate culture."

The company also has invested in resources such as automation systems, materials handling equipment, and warehouse space to support its customers' needs. Saddle Creek recently expanded its Lakeland facility to more than 2.6 million square feet.

Looking to the future, Thornton says the company will reflect the innovation that is emblematic of the Florida logistics marketplace. "As the omni-channel business model has become the gold standard in



From its corporate office in Lakeland, Fla., Saddle Creek Logistics Services offers a full range of third-party logistics services, warehousing, omni-channel fulfillment, transportation, packaging, and more.

ENTREPRENEURIAL SPIRIT

Smack in the middle of Florida's logistics superstructure sits Saddle Creek Logistics Services, a family-owned company providing third-party omni-channel logistics services to a variety of industries including food and beverage, consumer packaged goods, electronics, recreation, and more. Since its founding in 1966, the company has been a fixture in the Central

(CNG) fleet to provide an alternative fuel option with near-zero emissions for area shippers. To provide fuel for this fleet, we invested in a CNG fueling station at our Lakeland headquarters. Florida Natural Gas and TECO Energy Inc. were instrumental in helping us achieve this initiative."

The company's record since its inception gives testimony to the power of such collaboration. Throughout its history,



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today's marketplace, we are developing custom solutions to meet the growing need for speed, service and scalability," he says. "By blending longstanding services with new capabilities, we're finding creative ways to help companies in Florida and around the country get products where they need to be quickly, cost effectively, and seamlessly."

And this bright future will most certainly take place under the sunniest of skies. "Florida will continue to be home base for our operations as we continue on our strategic expansion path," Thornton says.

A prime location in the heart of Central Florida's I-4 corridor gives Plant City, just

president of Transcend Development Corp., echoes Austin's enthusiasm. "It's an ideal location, and that will be even more true tomorrow than it is today. This location puts us within one hour of about 8 million people."

Enhancing the location for logistics professionals is Transcend Development's Lakeside Station Logistics Park. Transcend Development is the land development affiliate of Sunrise Homes Inc., which Appleyard serves as vice president.

"Being centrally located in Plant City, we can reach some 20 million people with next-day service," adds Larry Jimenez Jr.,

annual spending increase of \$2.3 billion, projects an economic impact study prepared by economists at the University of South Florida.

Helping to facilitate and manage all this growth is the Plant City EDC. "Our core mission is to help create jobs for Hillsborough County and the region," Austin says. "We are a public-private partnership recruiting companies to our area and facilitating expansion."

Austin boasts that the area is not only ideally suited for warehousing and distribution facilities, but also for manufacturing. "We have a large agribusiness cluster here," he says, "as well as manufacturing and plastics. We also are the winter strawberry capital of the world. Out of all that comes a lot of different products, including corrugated cardboard, packing shells, fertilizers, and microbial products, which is an industry we hope to grow."

"And because of our competitive real estate market, we also are attracting more back-office operations," Austin adds.

"We find ourselves at the crucible of the powerful forces of Lakeland, Tampa, and Orlando," says Appleyard. "We sit at a point of inevitability."

Jimenez says Star Distribution consistently has experienced double-digit growth over the past eight years. "We unload 300 to 400 CSX boxcars per month and average 75 inbound trucks per day," he says. "Our private fleet consists of 80 day cabs and approximately 250 trailers. We guarantee our customers next-day delivery to any point in the state of Florida."

RIGHT TIME, RIGHT PLACE

All of this adds up to the right time and place in a community focused on progress. "Every community says it is the most business-friendly," says Austin, adding that it is far more than rhetoric in Plant City. "I would put Plant City against any other city when it comes to business leadership. Our government leaders see themselves as service providers, not regulators, and that makes this a great place to do business."

From beginning to end and every point along the way, it's all about the supply chain. Florida is perfectly positioned—and perfectly capable—to provide the services and expertise to make the trip efficient, cost effective, and successful.



Star Distribution is the only 3PL to offer guaranteed, next-day delivery from its Central Florida distribution center to any Florida location.

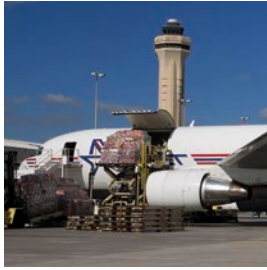
outside Lakeland, a bird's-eye view of the Sunshine State's vibrancy and growth. "Our biggest asset in Florida is that we are centrally located," says Jacob "Jake" Austin, president and CEO of the Plant City Economic Development Corp. The city is in the longstanding logistics hotspot of Hillsborough County.

"We're growing faster than any other region in the country," Austin says. "A lot of people move here for jobs—not just from other states, but internationally. With that growth comes demand for more goods. Fulfillment centers are popping up to meet those demands."

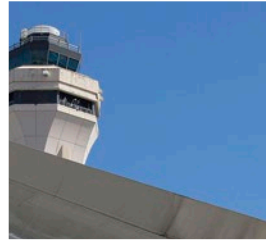
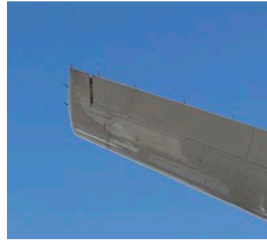
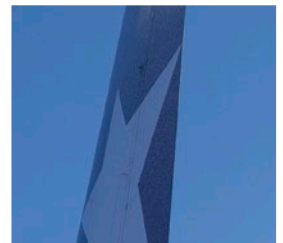
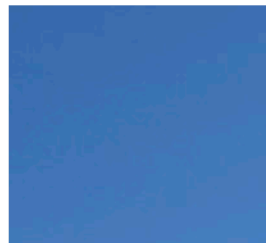
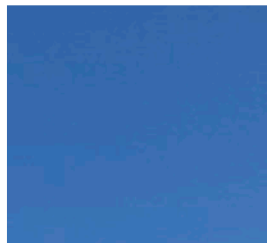
Robert Appleyard, executive vice

president of business development for Star Distribution Systems, which is located in the Lakeside Station Logistics Park. Star Distribution has been Florida's premier third-party logistics provider since 1931. The company provides comprehensive warehousing, order fulfillment, truckload, and LTL transportation services.

With I-4 just five minutes away, Lakeside Station Logistics Park includes 1,400 acres zoned for mixed use, with nearly 1,000 acres of developable uplands. Industrial users benefit from direct railway access. Upon completion, Lakeside Station Logistics Park may result in the creation of more than 18,000 new jobs and an



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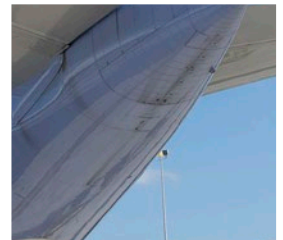
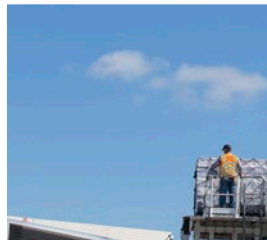


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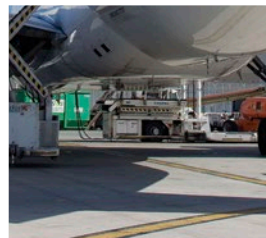
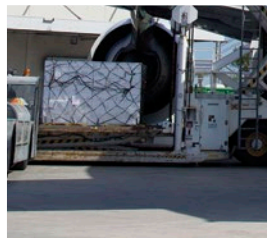


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“Florida officials are extremely cognizant of how important supply chains are in the state,” says Tom Kretschmer, vice president and general manager of retail and consumer brands for Ryder System, Inc. “The Florida Strategic Plan for Economic Development, released in 2014, highlights several initiatives, including plans to cultivate supply chain talent, improve roads, and continue to add infrastructure that will be conducive for supply chains to operate given the expected increased volume due to the Panama Canal expansion.

“In Florida, warehouses and distribution networks cross traditional city and county lines,” he adds. “This, coupled with the fact that Florida is ideally located for importing and exporting goods throughout the Americas and with Europe, shows why state officials are putting their focus on supply chain infrastructure. From improved airports and seaports, to partnering with colleges and vocational schools, Florida is positioning itself to welcome supply chains of all capabilities.”

As a fully diversified transportation and supply chain solutions company, Ryder



Headquartered in Miami for more than 80 years, transportation and supply chain solutions company Ryder has developed a stellar reputation, not only across North America, but also within Florida.

has been maximizing the value of transit-related assets since 1933 and is a leader in supply chain management and third-party logistics.

“Being headquartered in Miami for more than 80 years, Ryder has a great reputation not only across North America, but within the state,” Kretschmer says. “We partnered with vocational/technical schools to develop talent; became an employer of

choice for drivers, technicians, and supply chain engineers; and took advantage of the infrastructure the state has put in place to help our customers grow their business, meet consumer demands, and lower operating costs.”

Ryder’s global logistics offerings encompass warehousing and distribution services including crossdocking, distribution management, packaging, reverse logistics for



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product returns, and value-added services such as sequencing, kitting, and line-side replenishment. The company's transportation offerings include Ryder Dedicated Transportation Solutions, which combines truck drivers, fleet maintenance, routing, scheduling, management, and administrative support, as well as transportation management, cross-border solutions, and freight brokerage.

In addition, through Ryder TranSync, Ryder account teams analyze customers' networks to provide business intelligence and analytics that enable seamless planning across all providers and modes, and maximize asset utilization.

"We are a fully diversified transportation and supply chain solutions company," Kretschmer explains. "We are also the only third-party logistics provider with a fully integrated portfolio that includes fleet management, dedicated transportation, and supply chain solutions."

"Ryder is a single-source provider that can manage customers' warehouses and distribution centers, while also managing their transportation, drivers, route optimization, and safety compliance," he adds. "With this fully integrated solution, our customers receive end-to-end visibility into their supply chain and transportation. They also gain the ability to focus on their business."

HOME SWEET HOME

For all of this, Kretschmer says, Florida is the ideal home.

"Florida has a growing population, a large tourism industry, a significant retail sector, and a consumeristic culture," he says. "To that end, we operate many of our customers' distribution centers to support that consumer demand in Florida."

"Another attractive reason to invest in distribution activity in Florida is the access to freight capacity heading into Central and South America," Kretschmer adds. "For products or consumers with a specific correlation to Central and/or South America, Ryder' multi-cultural distribution experts can speak many of the languages and understand many of the unique cultures."

Moving product may be the shorthand definition of logistics, but that hardly tells the whole story. Essential to logistics infrastructure is moving product effectively and

safely storing it along the way. Here, too, Florida stands out as a leader.

Case in point: Commercial Warehousing Inc., a Central Florida-based warehousing, transportation, distribution, and logistics company that essentially does it all. The 50-year-old company has 1.2 million square feet of dry warehousing and 660,000 square feet of temperature-controlled warehousing available. The company also offers premium packaging services to all industries.

"Commercial Warehousing provides a full suite of logistics services to our client base," says Kevin Margeson, company president. "These include our core business in value-added warehousing and distribution services in five sites across central and northeastern Florida."

With offices and facilities in Winter

food-grade ambient facilities totaling almost 2 million square feet across 10 sites. The company also provides a complete suite of ancillary services, including value-added multi-packaging and comprehensive transportation services.

Emblematic of the strong spirit of entrepreneurship in the Sunshine State, Commercial Warehousing has forged its own path since 1966 when Commercial Carrier Corporation, as the company was then known, opened its first warehouse in Auburndale to support its trucking operations.

"We are privately held," says Margeson. "This means we are not preoccupied with next quarter's financial results. By collaborating with customers, we make decisions that are best for their business. We understand that doing the right thing for our



Winter Haven, Fla.-based Commercial Warehousing has added state-of-the-art poly pack and ARPAC packaging technology to its extensive services portfolio.

Haven, Commercial Warehousing is unique in that it operates in the capital-intensive cold storage arena, where its owned-and-operated facilities comprise 15 million cubic feet of space across central and northeastern Florida, as well as nearly 100,000 square feet in Atlanta. The Florida sites include the company headquarters in Winter Haven, along with campuses in Groveland, Bartow, Jacksonville, and Auburndale.

Commercial Warehousing also owns and operates a growing portfolio of

clients is how Commercial Warehousing develops and maintains profitable, long-term relationships."

Margeson says the company enjoys the best of both worlds — a small-company infrastructure with big-company backing.

"Our lean organizational structure means we have the ability to make informed decisions fast," he says. "Leadership is a phone call away from front-line management and is engaged in the day-to-day business."

"This nimbleness and senior engagement

provides Commercial Warehousing customers with confidence they have partnered with a third-party logistics provider able to make decisions and react quickly to immediate needs or critical changes in their business,” Margeson says.

ANSWERING TO CUSTOMERS

“Having the strength and capital of a half-billion-dollar organization that handles all the back-office activity such as finance, IT, and real estate allows Commercial Warehousing to be entrepreneurial and focused on what is really important—the business of our clients,” he adds.

With a focus on the food and beverage industry, the company’s institutional knowledge and resources in the cold storage arena include unique construction specifications of cold storage facilities, regulatory compliance and safety expertise, product traceability, and production batch/lot control.

“If you are talking refrigeration, you are talking our language,” Margeson says. “We don’t answer to a third-party landlord—we answer to our customers.”



Commercial Warehousing is progressively including more environmentally friendly initiatives. Its efforts recently placed the company on the *Inbound Logistics* list of 75 Green Supply Chain Partners. The list highlights companies with impressive green credentials chosen for their measurable green results, sustainability innovation,

continuous improvement, and industry recognition.

The story of the company’s success mirrors the story of Florida’s success overall. When it comes to logistics, that story is summed up in the Sunshine State’s record of earning all As in the three Ps: performance, partnership, and progress. ■

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