Employ Florida Banner Center Global Logistics

Comprehensive Industry Analysis
Logistics Industry
State of Florida

February 22, 2011

Final

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About the Analysis

The *Comprehensive Industry Analysis for the Logistics Industry in the State of Florida (Analysis)* was commissioned by the Employ Florida Global Logistics Banner Center for Workforce Florida, Inc. to evaluate the relative strengths and weaknesses of the state's business climate for the logistics industry. The goal of the *Analysis* is to provide the state with tools and information to develop a targeted marketing campaign to attract the logistics industry to certain areas of our state that are thriving with port and logistics infrastructure complemented by industry specific training and education.

The *Comprehensive Industry Analysis* is comprised of an examination, review and utilization of content from nearly 20 state, regional and local research studies and additional resources that cite port, trade, transportation and logistics in their respective research.

The Banner Center for Global Logistics offers a special thank you to the Florida Chamber Foundation and Cambridge Systematics for their timely research, partner input and findings reported in their December 2010 *Florida Trade and Logistics Study*. Because this analysis dovetailed the completion of the extensive work and research provided by the Florida Chamber Foundation, the Banner Center opted to utilize significant content and recommendations contained in the *Florida Trade and Logistics Study* to show the cohesiveness of our partnership and to move the important issues and opportunities that the State's Logistics Industry provides for business and job growth in the name of strong economic development.

Under contract with the Employ Florida Global Logistics Banner Center, JT&T, LLC Consultants has prepared the following analysis and recommendations for the logistics industry in the State of Florida.

Contents

Executive Summary

Florida's logistics industry is poised to attract business and industry that create jobs and enhance economic opportunities for all. Florida boasts solid strategic plans that include 14 deepwater ports, logistics centers, foreign trade zones, rural areas of critical economic concern, inland ports and a favorable small and emerging business climate. This combination plus a favorable tax climate plus a good educational system promote opportunity for business growth in logistics and international trade.

Florida's **Seaports** economic impact on the logistics industry is as follows:

- 550,000 direct and indirect jobs throughout Florida[1]
- Cargo operations and port related jobs amount to $66 billion and $24 billion in personal income[2]
- Cruise operations generated an additional 127,000 jobs[3]
- Every dollar in state funds spent for seaports results in $6.90 economic benefits to the state[4]

Doing business within a Florida **Free Trade Zone** helps increase regional jobs and provides economic incentives that help businesses decrease costs of doing business.

Three areas of **Rural Areas of Critical Economic Concern (RACEC)** have been designated in Florida. The state allows these regions certain provisions for economic development initiatives such as waived criteria and requirements for economic development programs. Additionally, funding is provided to the regions to help perform economic research, site selection, and marketing to produce a catalytic economic opportunity and a site in each RACEC designated for targeted economic development.

Inland ports also offer competitive advantages for site selection allowing a full integration of the state's transportation and logistics network giving the region a competitive advantage for site selection including business and job growth.

Small and emerging businesses thrive in Florida's economy and the opportunities for firms to engage in logistics and international trade are endless. The U.S. Government has several initiatives to help these businesses grow locally and prosper globally.

Trade, logistics and distribution industries employed 570,000 Floridians in 2008, with an average wage nearly 30 percent higher than the average for all industries in the state. Each job in Florida's trade and logistics cluster supports about two other jobs in the state's economy. The trade and logistics cluster supports about 1.7 million jobs in Florida, nearly 22 percent of the state's employment.

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[1] Florida Ports Council, 2010 Economic Action Plan for Florida, A Blueprint to Leverage Florida's Strategic State-Seaport Partnership. The 550,000 port related jobs measure is related to seaport operations only and includes both direct and indirect impacts, including a pretty broad measure of indirect impacts to include any jobs connected with any good that moves through a seaport.

[2] Ibid

[3] Ibid

[4] Florida Department of Transportation, Florida Statewide Seaport System Plan, December 2010

This cluster also creates a favorable environment for other industries which rely on freight as input to their products and services. Key Florida industries such as agriculture, mining, energy, manufacturing, construction, retail, and tourism require efficient and reliable flows of raw materials or intermediate or final goods to meet customer needs. These industries account for 37 percent of all jobs in the state. [5]

Florida ranks among the best states for business and entrepreneurs because of its pro-business state tax policies and competitive **cost of doing business** and has competitive and targeted financial advantages. The Florida Chamber Foundation, Enterprise Florida, Inc., Workforce Florida, Inc. and other key economic stakeholders strive to review Florida's challenges and bring the right partners to the table for business and job growth to the region. Although it is important to note the weaknesses, Florida boasts one of the most collaborative efforts to incentivize logistics business to grow in our state.

State of Florida	
Strengths	**Weaknesses**
Large Consumer Market *	Imbalance of Trade Flows*
Education System	Poor Location for Domestic Distribution*
Strategic Location*	Limited Penetration of Asian and European Trade Lanes*
Transportation Infrastructure*	Transportation System Capacity *
Extensive Global Ties*	Limited Funding*
State of the Industry - Florida	Aggressive Investments by Competitors
Quality of Life	Common Constraints among Florida's Seaports
	Educational System

* Source: Florida Chamber Foundation, Florida Trade and Logistics Study, December 2010

The **Employ Florida Global Logistics Banner Center** is a division of Workforce Florida, Inc. and is positioned to collaborate with its college and university partners to help employees remain prepared to do their jobs well today and in the future; ensure that employers have a qualified, capable, highly trained, certified workforce to help make logistics companies more competitive; and to retain and attract these types of companies to Florida.

State of Florida	
Degrees, Certifications, Training and Partners by the Numbers	
4	Associate's Degrees in Logistics
7	International or Logistics Focused Career Academies; two (2) in Development
9	Additional Colleges or University offering Logistics Degrees
10	Bachelor's Degrees in International Trade and/or Logistics; one (2) in Development
10	Global Logistics Banner Center Educational Partners
11	Logistics Industry Certifications; one (1) in Development
11	Master's Degrees in International Trade and/or Logistics
21	Logistics, Supply Chain, Warehousing, Transportation Professional Associations

[5] Florida Chamber Foundation, Florida Trade and Logistics Study, December 2010. The 570,000 trade and logistics jobs include jobs related to moving and distributing goods in all modes, but are only direct impacts, with the indirect and induced impacts, they total 1.7 million.

State of Florida	
Degrees, Certifications, Training and Partners by the Numbers (cont.)	
23	Regional Work Force Board to Help Businesses and Job-seekers Succeed
26	Customized Training Program Opportunities

The State of Florida is poised to lead in logistics education, workforce and economic development. With key organizational support from the Global Logistics Banner Center, Workforce Florida, Inc., Enterprise Florida, Inc., the Florida Chamber Foundation, Florida Department of Transportation and other key agencies and industrial stakeholders, Florida's business, site selection and employment outlook in the logistics industry is promising.

Section 1
State of the Industry

Florida has often been called "The Gateway to the Americas." According to Enterprise Florida, Inc. statistics, if Florida were its own country it would be the 20th largest economy in the world. Florida's transportation infrastructure includes a 12,066-mile state highway system, 14 deepwater seaports, 2,796 miles of main route rail lines, 19 commercial airports, and two of the only eight commercially licensed spaceports in the United States. AWI – Florida Logistics and Distribution Industry Labor Market Industry Profile Report, May 2010.

This section will cover Florida's:

- **Enterprise Florida Inc. - Statewide Strategic Plan**
- **Logistics and Distribution Employment Hubs**
- **Fourteen International Deepwater Seaports**
- **Foreign Trade Zones**
- **Logistics and Distribution Centers**
- **Rural Areas of Critical Economic Concern / Inland Ports / Integrated Logistics Centers**
- **Favorable Small and Emerging Business Climate**

► Enterprise Florida Inc. - Statewide Strategic Plan

Enterprise Florida Inc. (EFI) is a public-private partnership serving as Florida's primary organization devoted to statewide economic development.

EFI's mission is to diversify Florida's economy and create better paying jobs for its citizens by supporting, attracting and helping to create globally competitive businesses in innovative, high-growth industries.

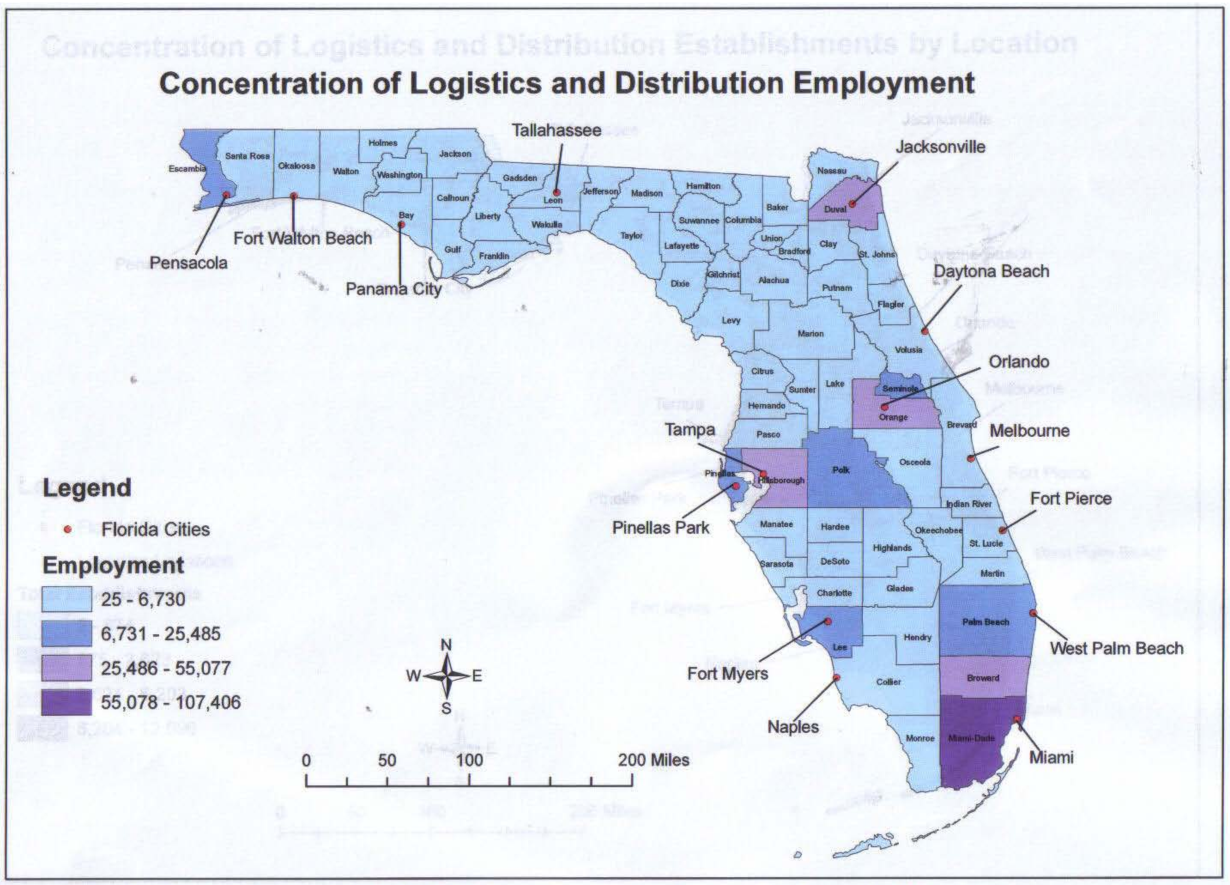
EFI accomplishes this mission by focusing on a wide range of industry sectors, including clean energy, life sciences, information technology, aviation/aerospace, homeland security/defense, financial services, professional services, and manufacturing. In collaboration with a statewide network of regional and local economic development organizations, EFI helps to improve Florida's business climate, ensuring the state's global competitiveness.

Enterprise Florida is committed to assisting companies confidentially with their expansion and location plans. EFI provides site selection services, demographic information, incentive information, trade leads and much more. They also coordinate introductions to their network of economic development partners located throughout the state.

Although the focus of this report in on the state of the industry as it relates to logistics, it is important to understand Florida's business climate. EFI recently released a report which is worth the read due to its focus on Florida's Global leadership in exports, high-tech exports and foreign direct investments. Florida's Competitiveness 2010 – Roadmap to Florida's Future, 2010-2015 Statewide Strategic Plan for Economic Development can be found at http://www.eflorida.com/IntelligenceCenter/Reports/roadmap/CompetitiveAnalysis2010.pdf or by contacting Enterprise Florida, Inc.

► Logistics and Distribution Employment Hubs

Also in 2010, the Agency for Workforce Innovation, a branch of Workforce Florida, Inc., engaged the Labor Market Statistics Center to engage in a study of Floridas's Logistics and Distribution Industry findings were released May 2010. Below is a chart of the Logistics and Distribution hubs within Florida. These hubs coincide directly with the 14 international seaports and trade clusters, see chart below.



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

► International Deepwater Seaports

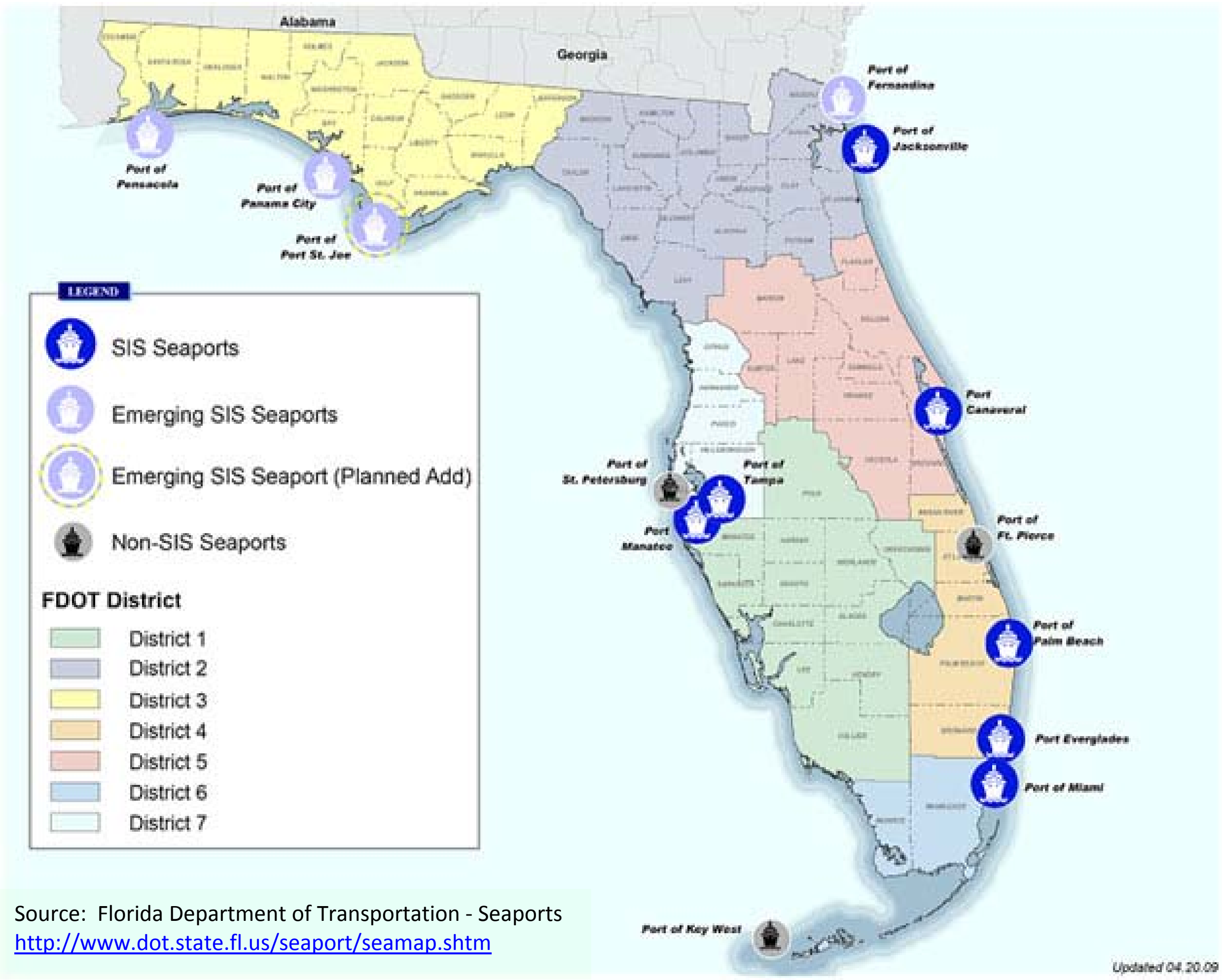
Florida's Governor Rick Scott stressed the important roles Florida's ports play in the State's economy.

"It's critical that Florida's ports and infrastructure be modernized so that our state's economy is positioned to thrive," said Scott. "As trade expands with Latin America, Florida is uniquely positioned to play a major role in international trade. The Chamber's trade and logistics study paints a very clear picture of what must be done to make Florida an international hub for logistics and freight handling, and I will do everything I can as governor to help our state achieve that goal."

Sunshine State News, Kevin Derby, December 2010

Research completed by the Florida Department of Transportation (FDOT) in 2006 found that every $1 in state funds spent for seaports results in $6.90 economic benefits to the State.[6]

Further research completed by the Florida Ports Council in 2010 found that Florida's seaport system cargo activity provides 550,000 direct and indirect jobs throughout Florida, including 100,000 port-related jobs and 450,000 user-related jobs, amounting to $66 billion and $24 billion in personal income. Cruise operations generated an additional 127,000 jobs.[7]



Source: Florida Department of Transportation - Seaports
http://www.dot.state.fl.us/seaport/seamap.shtm

1. Port Canaveral
2. Port Everglades
3. Port of Fernandina
4. Port of Fort Pierce
5. Port of Jacksonville
6. Port of Key West
7. Port Manatee
8. Port of Miami
9. Port of Palm Beach
10. Port of Panama City
11. Port of Pensacola
12. Port of Port St. Joe
13. Port of St. Petersburg
14. Port of Tampa

[6] Florida Department of Transportation, Florida Statewide Seaport System Plan, December 2010
[7] Florida Ports Council, 2010 Economic Action Plan for Florida, A Blueprint to Leverage Florida's Strategic State-Seaport Partnership. The 550,000 port related jobs measure is related to seaport operations only and includes both direct and indirect impacts, including a pretty broad measure of indirect impacts to include any jobs connected with any good that moves through a seaport.

Information contained within the FDOT Florida Statewide Seaport System Plan, December 2010 reveals that Florida ports provide a high level of access to national and global markets and because of this they increase the state's ability to retain, grow, and attract businesses and industries dependent on efficient waterborne transportation.

Florida's seaports as a system share a common goal: economic competitiveness in a global market. Each has a different market commodity focus diversifying in containers serving both Florida and U.S. markets; and non-containerized general cargo, liquid bulk and dry bulk serving mostly Florida markets. They also have different trade lane focuses. Some center on traditional routes such as Puerto Rico, Caribbean and Central/South America. Others are aligned with domestic services in the Gulf and Atlantic. Still others are pursuing emerging markets with Asia and other short sea/transshipment routes.

Florida's geographic location, as well as its extensive coastline, has resulted in the development of a system of regional ports that primarily serve Florida's business and residents. The largest population centers (South Florida, Central Florida, Tampa Bay and Jacksonville) generally coincide with the location of the large ports and have the largest concentration of logistics centers.[8]

► Foreign-Trade Zones

Another competitive advantage that Florida has is the 20 Foreign-Trade Zones (FTZ) located throughout the state. The State of Florida has the most Foreign-Trade Zones over ANY other state in the nation. Foreign-Trade Zones, sometimes referred to as Free-Trade Zones, encourage import companies to make improvements and/or changes to their product here on U.S. Soil. The foreign trade zone designations help create jobs on U.S. soil by benefitting the city in which they are located.

According to Site Selection, November 2010, Foreign-Trade Zones offer an opportunity to help companies reduce total delivered cost and to be more competitive in three very important ways:

- Reduces supply chain process time
- Reduces importing costs
- Reduces cost of loss through better security

And, for capital investors who choose to locate operations in a Florida Foreign Trade Zone, there are several ways they are able to reduce the cost of doing business. As long as product remains inside the FTZ:

- No duty is paid on re-exported merchandise
- No duty is paid on merchandise for domestic consumption until it leaves the FTZ – resulting in duty deferment
- No Duty is paid on defective merchandise that is not sold
- The lowest duty is paid for manufactured finished goods
- Product can be stored, manufactured, altered, destroyed or changed in the FTZ without incurring duty costs

[8] Florida Department of Transportation, Florida Statewide Seaport System Plan, December 2010

Doing business within a Florida Trade Zone helps increase regional jobs and provides economic incentives that help businesses decrease costs of doing business.

Florida Foreign-Trade Zones and Subzones	
No. 25	Broward County (Port Everglades)
No. 32	Miami
No. 42	Orlando
No. 64	Jacksonville
No. 65	Panama City
No. 79	Tampa
No. 135	Palm Beach County
No. 136	Brevard County (Canaveral)
No. 166	Homestead (Miami)
No. 169	Manatee County (Port Manatee)
No. 180	Miami (Wynwood)
No. 193	Pinellas County (St. Petersburg)
No. 198	Volusia & Flagler Counties
No. 213	Fort Myers
No. 215	Sebring (Port Manatee)
No. 217	Ocala
No. 218	St. Lucie County (Fort Pierce)
No. 241	Fort Lauderdale (Port Everglades)
No. 249	Pensacola
No. 250	Sanford

Source: The National Association of Foreign-Trade Zones

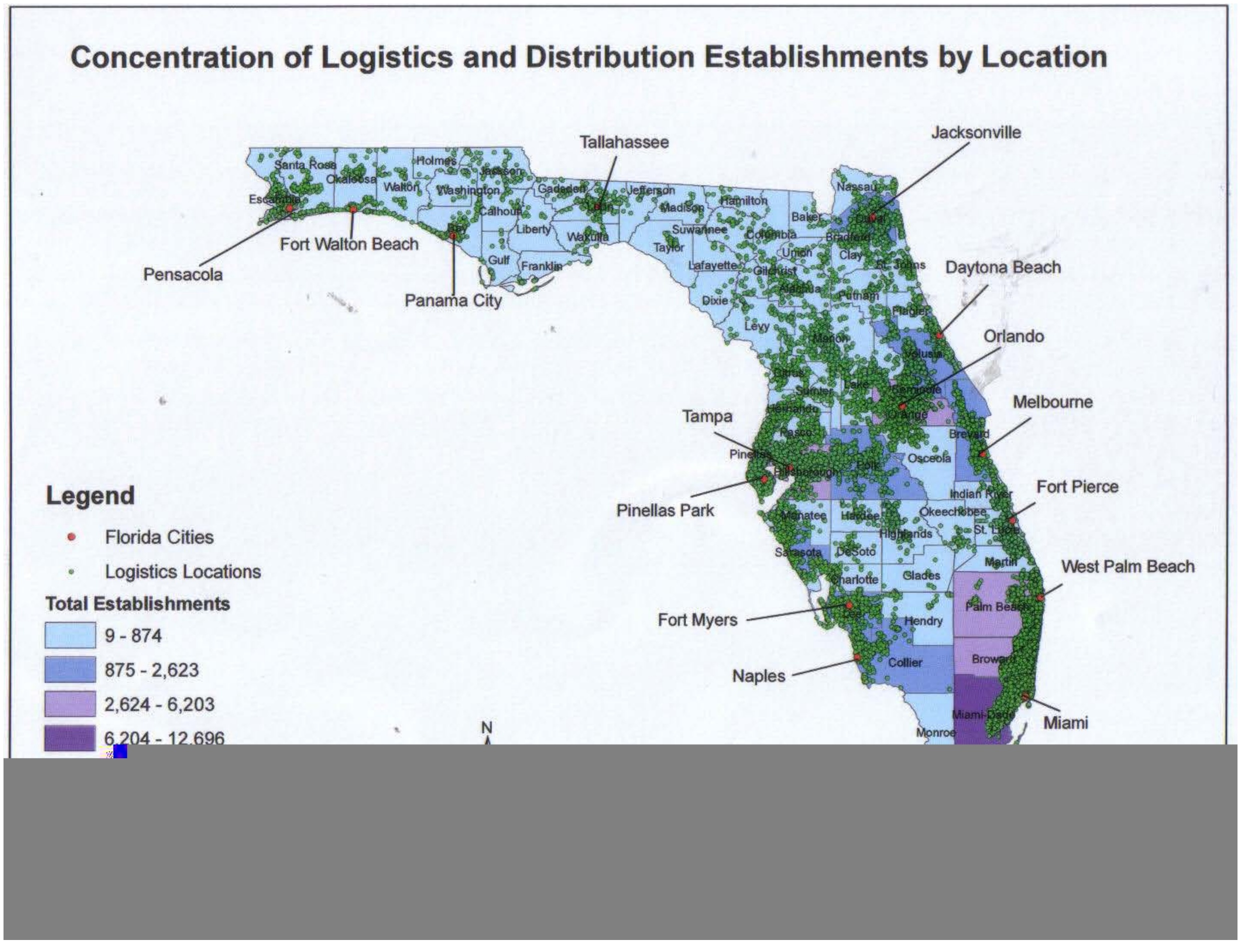
In 2005 an Annual Report was submitted by Grantees to the Foreign-Trade Zones Board, U.S. Department of Commerce: At that time, Florida's only had 19 Foreign-Trade Zones and they accounted for:

- Annual Volume: $4.69 billion
- Exports: $1.27 billion
- Employment: 4,786
- Active Firms 255
- Active Subzones: 11

► Logistics and Distribution Centers

Florida's transportation and logistics industries include transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation.

The logistics and distribution industry includes the following sectors: wholesale trade, air transportation, rail transportation, water transportation, truck transportation, support activities for transportation, and warehousing and storage.



► Rural Areas of Critical Economic Concern / Inland Ports / Integrated Logistics Centers

According to Enterprise Florida, Inc., unlike rural areas in other states, Florida's rural counties offer close proximity to strategic business resources, a wealth of business opportunities, an outstanding quality of life and plenty of available land. In fact, these counties are hardly "rural" given that each is no farther than an hour away from an airport, large city or a college. Moreover, Florida is home to some of the best small towns in the U.S. Florida's small towns provide some advantages that are not easily found in other small towns across the U.S.

Some of the unique advantages of Florida's rural communities include:

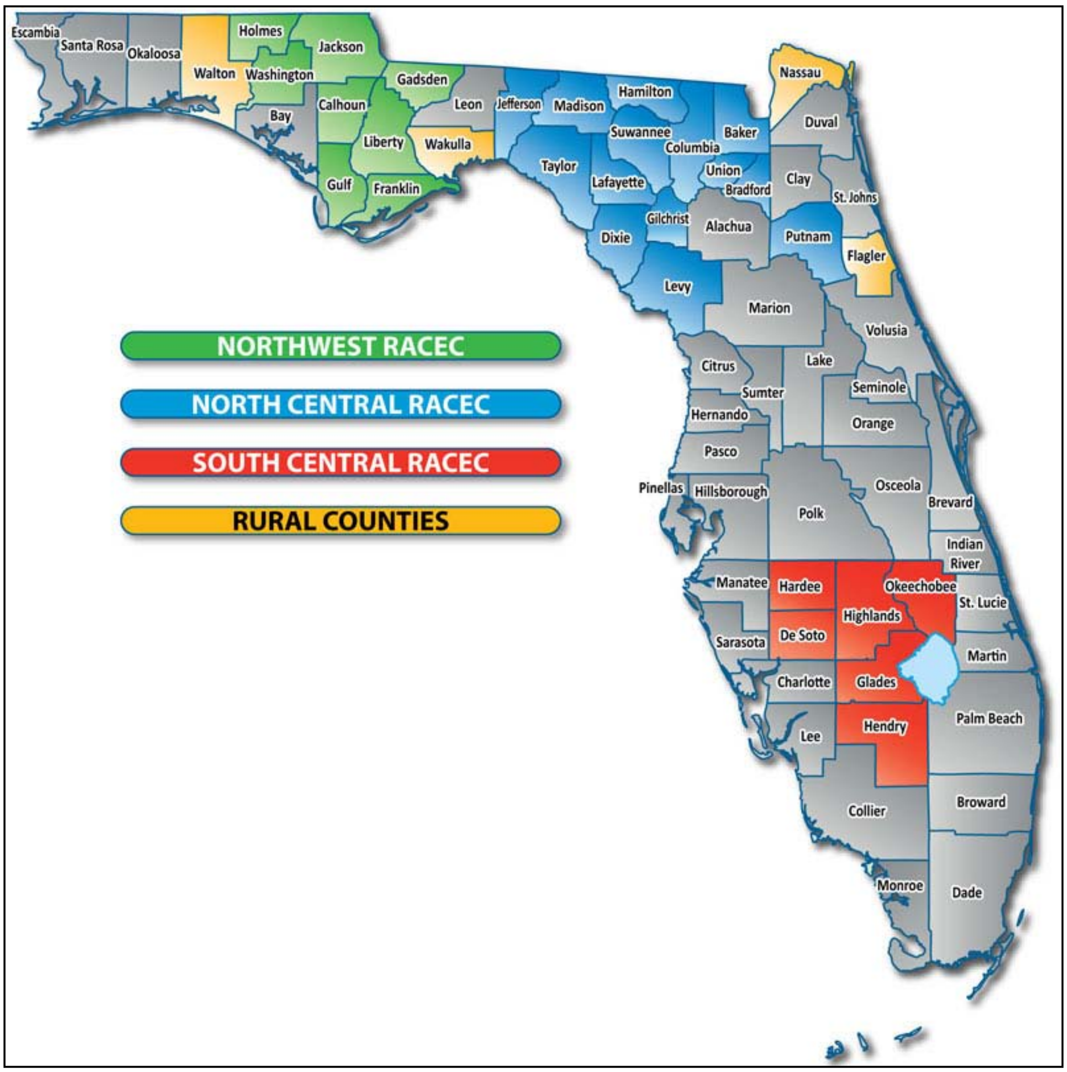
- Fast growing and highly motivated labor force with strong work ethics
- Cost-effective environment for business
- More economically vibrant and accessible communities than in other states' rural areas
- Lack of congestion / available land
- Environmentally pristine environments

- Small towns ranked among the best to live in the U.S.
- Eligibility for special financial incentives

The State's leadership is actively involved in developing Florida's rural areas. It recently designated three rural areas of Florida for a specific revitalization initiative called the Rural Economic Development Catalyst Project.

Florida's Rural Areas of Critical Economic Concern (RACEC) are regions comprised of rural communities that have been adversely affected by extraordinary economic events or natural disasters. The designation of the three RACECs in Florida allows these regions certain provisions for economic development initiatives such as waived criteria and requirements for economic development programs. Additionally, funding is provided to the regions to help perform economic research, site selection and marketing to produce a catalytic economic opportunity and a site in each RACEC designated for targeted economic development.

Rural Areas of Critical Economic Concern, State of Florida



Source: Enterprise Florida, Inc.

► Inland Ports / Integrated Logistics Centers

The state of Florida is also poised to offer strategic inland ports and integrated logistics centers. Three regions worth noting have garnered key stakeholder attention: south (Palm Beach County); central (Winter Haven); and northeast (Columbia County) Florida. These regions are now poised to be integral pieces in the logistical movement of goods from the international seaports they serve. Inland ports and integrated logistics centers are an integral economic development initiative and will improve the diversification of transportation and logistical movement of containerized and break-bulk items that are moving through these regions of Florida.

Benefits of inland ports and integrated logistics centers are as follows:

- Competitive advantage of a region due to the diversification of the portfolio of port services
- Redirection of port investments and financial capabilities to stimulate employment and regional development
- Allows full integration of transportation and logistics network giving the region a competitive advantage for site-selection
- Business and job growth for the regions and the state

► Favorable Small and Emerging Business Climate

Small and emerging businesses thrive in Florida's economy and the opportunities for firms to engage in logistics and international trade are endless. The U.S. government has several initiatives to help these businesses prosper globally.

Small businesses favorably skew the state's job statistics. According to data published by the Small Business Administration in 2006, Florida's 426,073 small employers and 1,618,119 non-employers make significant contributions to the state's economy, and they bring innovative products and services to the marketplace. They are an important source of employment and opportunity throughout the state. (Note: A small business is defined as one with fewer than 500 employees.)

The number of small employers in Florida was 426,073 in 2006, accounting for 99.0% of the state's employers and 44.0% of its private-sector employment. (Source: U.S. Dept. of Commerce: Bureau of the Census.)

Profile of small businesses and international trade - Synopsis of the 2008 Small Business Administration (SBA) Report to the President.

In 2007 U.S. real exports rose by 7.9 percent—compared with an increase of 2.2 percent in real GDP. Much of the U.S. surge in exports was attributable to the strength of other currencies relative to the U.S. dollar. The increase helped to lessen the existing U.S. trade deficit, as real imports, although at a higher level increased at a lower rate of 2.0 percent.

How are small businesses faring in this international trade climate? Clearly, there is room for growth. Small firms with fewer than 500 employees make up 97.3 percent of identified U.S. exporting companies. The total known value of exports has continued to increase, nearly doubling to $910.5

billion over the 1996–2006 decade. The small firm share of that value has declined slightly over the past decade, from 31.1 percent in 1996 to 28.9 percent in 2006.

What equips small firms for exporting? Some international indicators pinpoint innovation as a strength of U.S. companies, and studies by the Office of Advocacy have found that small firms can play a pivotal role in innovation.

The challenges are also there for small firm competitiveness in a global marketplace. They include exchange rate risk, strong global competition, a variety of regulatory and legal frameworks, and intellectual property concerns, among others.

Small businesses have often ignored the international marketplace because they could. In a globalized economy, more and more small firms will need to consider export opportunities as an important key to survival and growth. A variety of tools are available to help them transition to world-class business success.

March of 2010, U.S. President Barack Obama signed an executive order on a National Export Initiative to double U.S. exports in the next five years.

”Exports by Small and Medium-Sized Enterprises (SMEs). Members of the Export Promotion Cabinet shall develop programs, in consultation with the TPCC, designed to enhance export assistance to SMEs, including programs that improve information and other technical assistance to first-time exporters and assist current exporters in identifying new export opportunities in international markets.”

The findings of the report and the proposed support structure to assist Small and Medium Size Businesses are outlined in the findings published September 10, 2010.
http://www.whitehouse.gov/sites/default/files/nei_report_091510_extended.pdf

In addition, businesses in Florida can take advantage of Free Trade Agreements. These agreements can create opportunities for Americans and help to grow the U.S. economy. The Office of the United States Trade Representative (USTR) has principal responsibility for administering U.S. trade agreements. This involves monitoring our trading partners' implementation of trade agreements with the United States, enforcing America's rights under those agreements, and negotiating and signing trade agreements that advance the President's trade policy.

The United States has free trade agreements (FTAs) in effect with 17 countries. These FTAs build on the foundation of the WTO Agreement with more comprehensive and stronger disciplines than the WTO Agreement. Many of our FTAs are bilateral agreements between two governments. But some, like the North American Free Trade Agreement and the Dominican Republic-Central America-United States Free Trade Agreement, are multilateral agreements among several parties.

Section 2
State of Florida Strengths and Weaknesses

Florida enjoys much competitive strength in trade and logistics, but also faces significant challenges. The state has been very aggressive in combining efforts of like-minded economic-focused agencies, chambers and programs to grow the economy. These leaders including the Florida Chamber Foundation and Florida Governor Rick Scott are passionate about showcasing the business opportunities involved in the logistics and international trade arena. While this section touts Florida's strengths as an economic engine, it is important to recognize the weaknesses as opportunities to further develop state initiatives to help businesses thrive. This section will cover the following:

Strengths

Large Consumer Market*
Education System
Strategic Location*
Transportation Infrastructure*
Extensive Global Ties*
State of the Industry - Florida
Quality of Life

Weaknesses

Imbalance of Trade Flows*
Poor Location for Domestic Distribution*
Limited Penetration of Asian and European Trade Lanes*
Transportation System Capacity*
Limited Funding*
Aggressive Investments by Competitors
Common Constraints among Florida's Seaports
Educational System

*****Source and verbiage content for Section two (2) that are marked with an asterisk are taken directly from the Florida Chamber Foundation, Trade and Logistics Study, 2010

► Strengths

Large Consumer Market*

Florida's population, nearly 19 million residents in 2009, will soon rank 3rd in the United States.

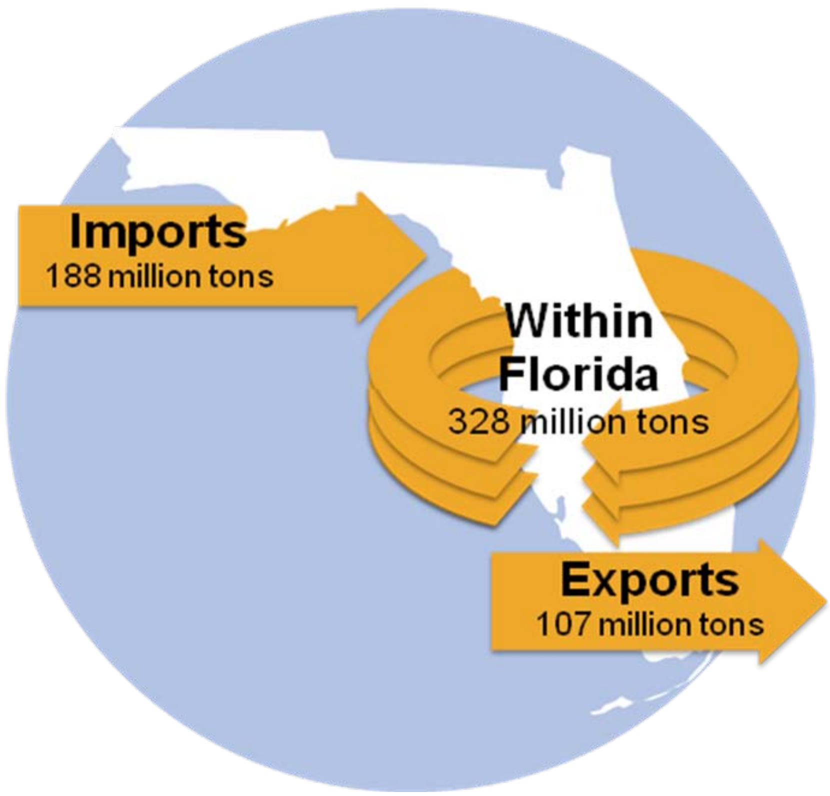
Education System

The Employ Florida Global Logistics Banner Center was created in 2007 and since that time, the Banner Center has developed curriculum frameworks and certifications to develop Florida's pipeline of logistics talent. Section five (5) defines the Career Pathways for our state's Logistics industry. These pathways include Career Academies; Associate's Degrees; Bachelor's Degrees; Master's Degrees; and Certifications and Training all supported by industry partners, economic stakeholders and educational institutions.

Strategic Location

Florida is located near the intersection of growing east-west and north-south trade lanes. This location has allowed Florida to establish a dominant position for north-south trade, accounting for more than 25 percent of the value of all U.S. trade with the Caribbean, and more than 35 percent with Central and South America. These well established trade lanes are a critical foundation for Florida trade among the states. Florida also hosts more than 81 million out-of-state visitors each year, another large market for consumer goods.

Florida Trade Flows, 2009
Estimated Domestic and International Trade Flows



Source: Martin Associates, 2010 estimate based on TRANSEARCH PIERS, and STB Rail Waybill Data
Chart Source: Florida Chamber Foundation

Transportation Infrastructure *

Florida's extensive transportation system moves freight to, from and within the state. The system includes:

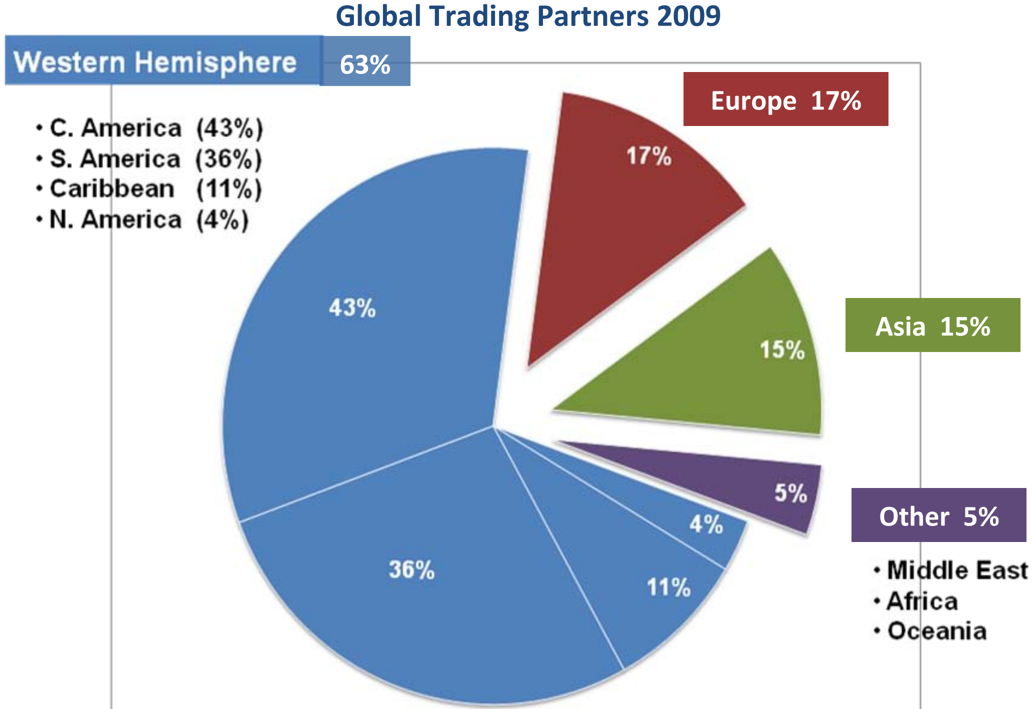
- 21 commercial service airports, including the Miami International Airport, which ranked 12th worldwide (and 4th in the United States) for cargo volumes in 2009
- The nation's largest commercial spaceport at Cape Canaveral (and newly licensed spaceport under development at Cecil Field near Jacksonville), which positions Florida for future growth in the emerging commercial space industry
- 14 deepwater seaports, including four (4) of the nation's 25 largest container seaports

- More than 1,540 miles of navigable waterways, including the Atlantic and Gulf Intracoastal Waterways and major inland waterways including the Escambia, Miami, and St. Johns Rivers
- Nearly 2,800 miles of rail lines, with 48 large freight rail terminals (those handling at least a half-million tons per year), including nine (9) intermodal freight rail terminals
- More than 12,000 centerline miles of state highways of which nearly one third are designated as part of Florida's Strategic Intermodal System

Extensive Global Ties *

Florida's population is one of the most diverse among the states, with a large percentage of residents who are foreign born or have cultural ties to other nations, especially Latin America and the Caribbean. The large tourism industry—including 5 million overseas visitors each year – is an ongoing source of consumers and business leaders worldwide familiar with Florida products. Florida has developed an extensive network of support services to help connect businesses to global markets. These include 20 foreign trade zones, consulates representing 80 nations, and specialized expertise in international law, finance and logistics**.**

Global Trading Partners 2009



Source: Enterprise Florida, Inc
Chart Source: Florida Chamber Foundation

Enterprise Florida, Inc. released a March 2010 report titled Florida's International Business Highlights. This report contains valuable detailed data about Florida's International countries of trade, foreign direct investments and products that are exported and imported. Our favorable trading climate and diversification of north/south and east/west trade lanes make Florida a viable environment to conduct business.
http://www.eflorida.com/IntelligenceCenter/download/INT/TR_Trade_Florida_Origin_Export.pdf

Measures of Florida's Global Leadership				
	Current National Rank	Current Value	Average Benchmark States	Increase or Decrease since 2000
Share of U.S. Exports	5	4.20%	6.30%	Increase
Share of U.S. High-Tech Exports	3	6.70%	8.30%	Increase
Share of U.S. Foreign Direct Investments	9	2.80%	5.00%	Increase

Source: Enterprise Florida, Inc. - Florida's Competitiveness Report 2010

State of the Industry - Florida

In addition to the strengths listed in the Florida Chamber Foundation's Study above, Florida enjoys other competitive advantages as listed below and explained deeper in Sections 2 and 4.

- Florida's Favorable Climate for Small Business Growth
- 20 Foreign Trade Zones
- Educational Pipeline
- Inland Ports
- Rural Areas of Critical Economic Concern
- Statewide Strategic Planning Focused on Trade and Logistics
- International Airports
- Growth opportunities in the Rural Areas of Critical Economic Concern (RACEC)

Quality of Life

Florida's remarkable quality of life attracts both companies and employees to the state. It is one of the state's biggest assets and it makes Florida one of the best places to live in the United States. Although this study is an analysis of the labor and logistics climate in the state it is important to note Florida's quality of life as one of Florida's biggest strengths in choosing to grow or relocate a business. Below is a list of quality of life indicators compiled by Enterprise Florida, Inc.

Climate
Florida is called the Sunshine State for a good reason. The average annual high temperature is 81 degrees F (27° C), while the average annual low temperature remains a comfortable 60 degrees F (16° C).

Education
Florida's leaders are committed to having the best educational system possible. The state's school system, where rigorous standards for small class sizes and regular testing have improved performance, is ranked 5th in the nation by *Education Week* and it has the success stories to prove it. Florida also has a multitude of renowned colleges and universities, technical institutions, and community and state colleges. All Florida residents live within 50 miles of a post-secondary educational institution.

Cost of Living

Florida remains one of the most desirable and affordable places to live. Yet, in many ways, Florida's cost of living is below that of other states with similar economic growth and in-migration rates. Its state and local governments are committed to keeping its low tax environment, plentiful modern amenities and quality public services. Several sites offer cost comparisons for living expenses between Florida and other states and within Florida.

Arts and Culture

Florida offers a broad spectrum of arts, history and culture to stimulate the mind and soul. In addition to hosting numerous international festivals, high-profile art exhibitions, well-known entertainers and traveling Broadway shows, Florida is home to professional musicians and orchestras, dance troupes, literary legends and world-class entertainment, as well as a multitude of art, science and history museums.

Recreation

With over 1,300 golf courses, miles of white sandy beaches, unique shopping experiences and thousands of lakes, local and regional parks and recreation areas, Florida has something for everyone. Add to that a myriad of cultural amenities, world-class theme parks, and sporting events and you have a clear recipe for a well-rounded and rewarding lifestyle.

Tourism

Famous for its pristine beaches, beautiful nature preserves and unrivaled entertainment parks, Florida is one of the top tourist destinations in the world. The state's booming tourism industry offers great business opportunities as well as a dynamic, growing market for companies. To learn more, please browse www.VISIT FLORIDA.com.

► Weaknesses

Imbalance of Trade Flows*

The combination of a large consumer market and a small manufacturing base create an imbalance of trade flows. The trade flow analysis indicates inbound freight tonnage (from other states or nations) is nearly 80 percent larger than outbound freight tonnage. This suggests nearly one half of all trucks, rail cars, ships and cargo planes which bring goods to Florida return empty – adding to the cost of delivering goods in the state.

Poor Location for Domestic Distribution*

Florida traditionally has been a poor location for distributing goods to other parts of the United States because of its location on a peninsula in the southeast corner of the nation. For example, when traveling 500 miles by highway, 27 percent of the U.S. population is reachable from Atlanta, but only 14 percent from Orlando. When traveling 1,000 miles by rail, 74 percent of the U.S. population is reachable from Atlanta, but only 29 percent from Orlando. This poor domestic location has reinforced the small size of Florida’s manufacturing industry.

Limited Penetration of Asian and European Trade Lanes*

Despite its large size, Florida remains a small player in U.S. trade with Asia and Europe. The projected growth with the Jacksonville Port Authority (JAXPORT) is favorable in opening the Asian trade lanes. Florida accounts for less than 5 percent of U.S. trade by value with Europe and Asia, as well as Canada and Mexico, which tend to use the surface border with the United States.

Transportation System Capacity*

Florida's seaports must deepen channels, expand terminals, and improve road and rail connections to accommodate growth in freight and passenger flows. Air passenger and cargo travel may exceed available capacity at Florida's airports by 2060 unless significant investments are made. The freight rail system does not currently serve all regions of the state, and available rail capacity may not be sufficient for a significant increase in intermodal freight volumes and planned expanded passenger rail service. Most major urban and interregional highway corridors will likely be heavily congested during peak periods by 2035, even after planned investments are made.

Limited Funding*

Public sector funding for transportation and economic development at the state, regional and local levels in Florida remains constrained. Economic development funding traditionally has been smaller as a percentage of gross state product than competitor states, and funding levels are not predictable from year to year. Available transportation funding will not be sufficient to pay for all needed transportation capacity improvements, and the funding gap is likely to grow as demand increases.

In addition to the Challenges listed above from the Florida Chamber Foundation's Study, the Florida Department of Transportation's (FDOT) Florida Statewide Seaport System Plan released October 13, 2010 states the following challenges:

Aggressive Investments by Competitors

Florida's ports are losing cargo market share to key competitors. Partly this is due to the geographic and market factors beyond their control, and partly this is due to more aggressive investment by competitors. Both Georgia and Alabama have state port authorities and a limited number of facilities, which makes it easier for them to focus their investments for maximum effect. In Florida, the investments are not part of a higher-level strategy, but are dispersed among many different competing facilities. [9]

Common Constraints among Florida's Seaports

Collectively, Florida's ports have significant "strengths to build on," provided that key constraints are addressed. Most (although not all) ports report a common set of constraints: navigation channel/turning basin/berth improvements, terminal space, compatibility with adjoining land uses, truck/rail access and connectivity with key inland markets. Assisting the ports in addressing these constraints, as a funding and implementation partner, has been and should be a Florida Department of Transportation priority.[10]

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[9] Florida Department of Transportation, Florida Statewide Seaport System Plan, December 2010

[10] Ibid

Educational System

Although Florida's Educational system for logistics is listed as a strength, there are still many opportunities to integrate the established career pathways of learning into many other regions of the state that have strong logistics and distribution hubs. Florida's biggest trade competitor to the north, Georgia, has a diverse network of logistic degrees, certifications and training opportunities touching most of their logistics clusters. Florida's educational chart of progress is located in Section five (5) of this report.

*****Source and verbiage content for Section two (2) that are marked with an asterisk are taken directly from the Florida Chamber Foundation, Trade and Logistics Study, 2010

Section 3
Labor Market Analysis

Many of Florida's key economic agencies are saying that the state faces a once-in-a-generation opportunity to transform its economy by becoming a global hub for trade, logistics and export-oriented manufacturing activities. These state, regional and local agencies are combining their resources to focus on growing this industry cluster. Because of this unprecedented attention and growth, the logistics industry has kept the state's economic outlook as favorable in the jobs and employment arena. And, in some areas like northeast Florida and rural areas, it is very likely that these logistics job opportunities are what kept the unemployment rate from escalating further during our recessionary period. This section will cover the following areas:

State of Florida Labor Statistics
Estimated Growth in Trade-related and Logistics Jobs
Florida's Logistics Industry Comparison to other Southeastern States
Logistics Jobs and Salaries
Top Logistics Occupations

► State of Florida Labor Statistics

The Florida Chamber Foundation released a Logistics and Trade Study December 2010. Findings in the study state that Florida has long been an important consumer market and a gateway for trade between the United States and Latin American and Caribbean nations. Over the next decade, several trends will position Florida for a larger, more commanding role as a trade hub:

- Florida is located in the fastest growing U.S. business and consumer market, the arc of southern states from Texas to Virginia
- Florida also is located at the crossroads of growing north-south and east-west trade lanes, with access to more than 1.1 billion consumers in the Western Hemisphere by 2035
- Widening the Panama Canal, together with the growth in Latin American and Caribbean markets, will realign global trade lanes and increase flows through this region in the coming decades[11]

Trade, logistics and distribution industries employed 570,000 Floridians in 2008, with an average wage nearly 30 percent higher than the average for all industries in the state. Each job in Florida's trade and logistics cluster supports about two other jobs in the state's economy. These include jobs in industries which supply goods and services to the trade and logistics cluster (such as fuel, packaging, and specialized legal and financial services), as well as jobs in retail and other industries which benefit from consumer spending by employees in these direct and secondary jobs. Including these multiplier effects, the trade and logistics cluster supports about 1.7 million jobs in Florida, nearly 22 percent of the state's employment.[12]

[11] Florida Chamber Foundation, Florida Trade and Logistics Study, December 2010
[12] Ibid

According to the U.S. Bureau of Labor Statistics (BLS), logistics is the second largest employment sector in the United States. BLS also recently reported that the truck transportation and warehousing industry provide 2.1 million wage and salary jobs in 2008.

Trade and logistics flows also help create a favorable environment for other industries which rely on freight as input to their products and services. Key Florida industries such as agriculture, mining, energy, manufacturing, construction, retail and tourism require efficient and reliable flows of raw materials or intermediate or final goods to meet customer needs. These industries account for 37 percent of all jobs in the state. (U.S. Dept. of Commerce, Bureau of Economic Analysis wage and salary employment data.)[13]

Trade and Logistics in Florida

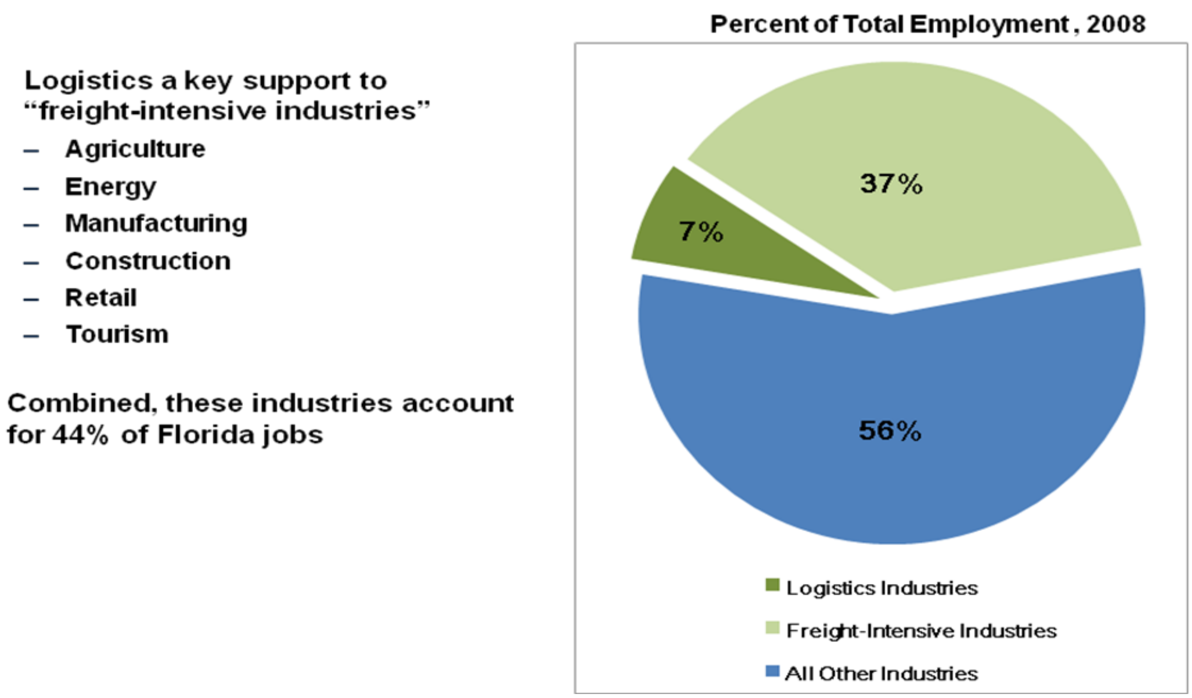


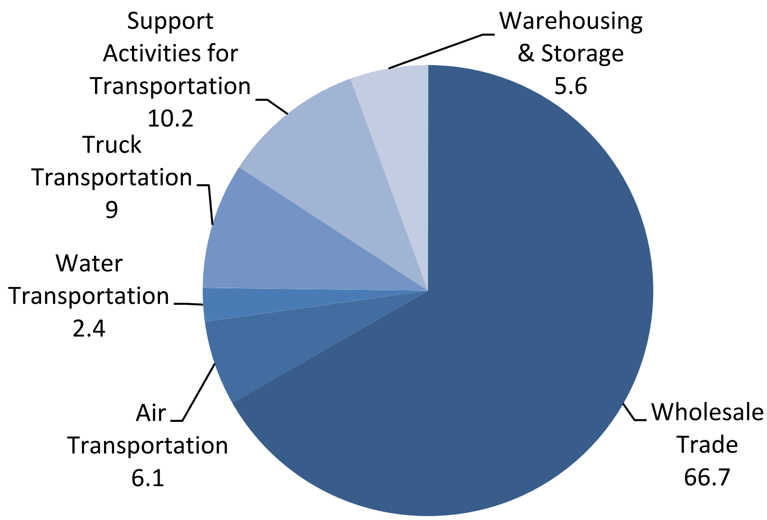
Chart Source: Florida Chamber Foundation
Chart Data Source: Cambridge Systematics Analysis of Bureau of Economic Analysis Data, 2008

According to the Agency of Workforce Innovation's May 2010 Florida Logistics & Distribution Industry Labor Market Industry profile, the 2008 annual average wage for workers in the logistics and distribution industry was $53,605, exceeding the state's total annual average wage of $40,579 by 32.1 percent. Water transportation had an annual average wage of $64,098, the highest in logistics and 58.0 percent higher than the state wage.

Florida's labor force and employment availability and statistics can be found on the Enterprise Florida, Inc. website at http://www.eflorida.com/ContentSubpage.aspx?id=1902.

[13] Florida Chamber Foundation, Florida Trade and Logistics Study, December 2010

Florida Logistics and Distribution Employment by Subsector 2008 Not Seasonally Adjusted



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

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

► Estimated Growth in Trade-related and Logistics Jobs

The Florida Chamber Foundation is pulling statewide ports, economic development, educational institutions and government entities together to move the state in one positive direction for the trade and logistics industry. The key findings result in a bright future for our state's job and workforce. Section four (4) of the Florida Trade and Logistics Study extensively details many opportunities to increase import and export cargo growth which exemplify Florida's competitive strength and job growth. Details of this study section can be found at: https://www.communicationsmgr.com/projects/1378/docs/FloridaTradeandLogisticsStudy_December2010.pdf

If the Import and export recommendations in the study are pursued together, they could support over 32,000 jobs annually in the trade and logistics sector. They would generate $3.3 billion in business sales, $2.1 billion in personal income, and $193 million in state and local tax revenues. If supporting economic impacts are realized, these opportunities bulleted above could also create up to an additional 111,000 jobs in export oriented industries including advanced manufacturing. They would generate with an additional $18.2 billion in business sales, $5.8 billion in personal income, and $530 million in tax revenues. These economic impact estimates are preliminary and should be refined as the timing and nature of specific opportunities becomes clearer.[14]

The State of Florida inaugurated a new governor, Rick Scott, into office January 2011. The Governor is touting a 7 7 7 plan, meaning 700,000 jobs in seven (7) years with a seven (7) step plan. The potential impact of 143,000 new jobs in the trade and logistics industry sector per this study could only positively

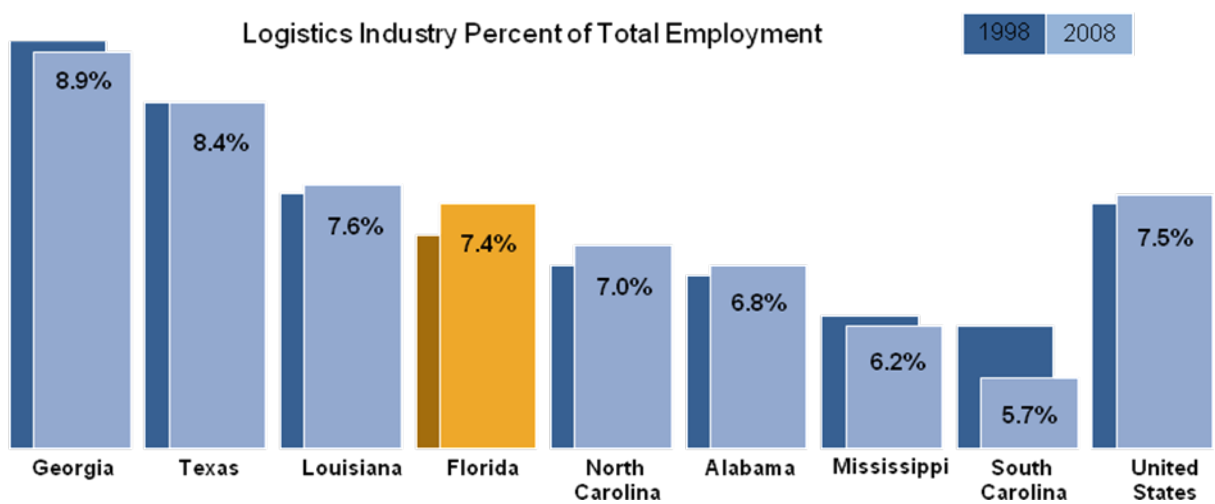
[14] Florida Chamber Foundation, Florida Trade and Logistics Study, December 2010

impact his plan. Having the support of Florida's Governor and Workforce Agency could favorably influence this industry cluster to make those said job numbers a reality.

► Florida's Logistics Industry Comparison to other Southeastern States

Employment in trade, logistics and warehousing totaled 570,000 people in 2008. This represented 7.4 percent of all jobs in Florida. According to calculations using the U.S. Department of Commerce, Bureau of Economic Analysis Data, the average wage in these industries was $53,970, about 29 percent higher than the average for all jobs in the state.

Trade and Logistics Jobs by State



Source: U.S. Department of Commerce, Bureau of Economic Analysis.
Chart Source: Florida Chamber Foundation

- **Employment in trade, logistics and warehousing totaled 570,000 people in 2008. This represented 7.4 percent of all jobs in Florida, up from 7 percent in 1998.**
- **The average wage in these industries was $53,970, about 29 % higher than the average for all jobs in the state.**[15]

The trade and logistics cluster's share of total jobs is about the same as the national average, suggesting the industry is not a major platform for serving other states. Georgia and Texas are examples of southern states which have been more successful than Florida at growing logistics as part of their economy.[16]

Northeast Florida Regional Note:
According to a recent Jacksonville Chamber of Commerce Cornerstone report, the Jacksonville region has a thriving economy for trade and logistics growth.

[15] Florida Chamber Foundation, Florida Trade and Logistics Study, December 2010
[16] Ibid

The Northeast Florida region hosts one of the highest concentrations of military personnel in the world and has one of the highest retention rates of separated and retired military personnel in the nation.

The U.S. Military are the largest users of logistical processes in the United States. Military retirees make prime candidates for filling white collar Logistics related jobs. Their average age is around 50 years and they bring a wealth of experience to the industry. In addition, retirees and veterans quite often top the charts on soft-skills, dependability and resourcefulness most needed to carry out logistical processes.

► Logistics Jobs and Salaries

Jobs and Salaries in Logistics, Transportation, and Supply Chain Management

Job Title	Annual Salary Range
Buyer Purchasing Agent	$30-45K
Customer Service Manager	$30-60K
Distribution Manager	$35-70K
Distribution Supervisor	$24-60K
Inventory Manager-Planner	$25-50K
Logistics Planner	$60-75K
Logistics Analyst	$25-50K
Logistics Services Salesperson	$35-70K
Logistics Manager	$40-70K
Materials Manager	$35-60K
Purchasing Manager	$35-60K
Shipping/ Receiving Clerk	$19-27K
Shipping/ Receiving Supervisor	$22-40K
Supply Chain Manager	$88-92K
Supply Chain Analyst	$30-70K
Traffic Manager	$35-60K
Transportation Manager	$30-70K
Transportation Analyst	$30-50K
Transportation Coordinator	$20-40K
Warehouse Stock Clerk	$19-26K
Warehouse Manager	$35-60K
Warehouse Supervisor	$26-60K

Listed salaries may vary depending on location, experience and education.
Salary information from www.salary.com and www.logisticsmgmt.com.
Source: UNF Continuing Education Website

There is a need for companies to be more proactive in their approach to recruiting, developing and retaining the supply chain professionals they need to stay competitive. It is important to note that Florida's Career pathways as developed by the Employ Florida Global Logistics Banner Center are an important step to create and maintain a fresh pipeline of talent. More information about these pathways can be found in Section four (4) of this report.

► Top Logistics Occupations

The 15 largest occupations listed in the table below represent approximately 59 percent of the jobs in the logistics and distribution industry.

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

* Post Secondary Adult Vocational Certificate (PSAV)

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

The following occupations account for approximately 31 percent of the employment in the logistics and distribution industry

- Non-technical sales representatives (wholesale and manufacturing)
- Heavy and tractor-trailer truck drivers
- Hand laborers and freight, stock and material movers
- Technical sales representatives (wholesale and manufacturing)

Section 4
Cost of Doing Business

Florida ranks among the best states for business and entrepreneurs because of its pro-business tax policies and competitive cost of doing business. Florida is proud of its competitive and targeted financial advantages.

This section will cover Florida's:

Competitive Cost of Doing Business
Pro-Business Tax Structure
Tax Advantages
Smart Laws
Expedited Permitting
Florida Business Incentives
Available Resources

Unless noted otherwise, the source of information for this section is Enterprise Florida, Inc.

► Competitive Cost of Doing Business

Florida offers a cost-efficient alternative to other competitive high-tech states. Put simply, land, labor and capital are more affordable in Florida than in California, New York or Texas. Plus, for businesses in certain targeted industries, the state offers additional incentives. Businesses looking for workforce training, road infrastructure or specialized locations, may also qualify for specific incentive programs.

► Pro-Business Tax Structure

Business dollars go a lot farther given Florida's limited corporate taxes and no personal income tax. Thanks to a history of responsible fiscal decisions and high financial reserves, Florida has earned an AAA bond rating – the highest available – while enjoying this low tax climate. Businesses thrive in this low tax environment and employees enjoy the benefit of no personal income tax.

► Tax Advantages

Florida's stable and highly favorable tax climate provides advantages that make a Florida location profitable for every type business. Progressive legislation also ensures that Florida remains a worldwide hub for new and expanding businesses.

► Smart Laws

Tort reform has been a priority for Florida's business-friendly leaders. Some of their most recent successes include the elimination of joint liabilities, rate reductions for workers compensation insurance and class-action suit reform.

Expedited Permitting

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

Clusters of No Tax Burdens within the State of Florida
Corporate income tax on limited partnerships
Corporate income tax on subchapter S-corporations
State personal income tax guaranteed by constitutional provision
Corporate franchise tax on capital stock
State-level property tax assessed
Property tax on business inventories
Property tax on goods-in-transit for up to 180 days
Sales and use tax on goods manufactured or produced in Florida for export outside the state
Sales tax on purchases of raw materials incorporated in a final product for resale, including non-reusable containers or packaging
Sales/use tax on co-generation of electricity

Florida Offers Sales and Use Tax Exemptions on…

- Machinery and equipment used by a new or expanding Florida business to manufacture, produce or process tangible personal property for sale
- Labor, parts and materials used in repair of and incorporated into machinery and equipment
- Electricity used in the manufacturing process
- Certain boiler fuels (including natural gas) used in the manufacturing process
- Semiconductor, defense and space technology-based industry transactions involving manufacturing equipment
- Machinery and equipment used predominantly in research and development
- Labor component of research and development expenditures
- Commercial space activity — launch vehicles, payloads and fuel, machinery and equipment to produce items used exclusively at Spaceport Florida
- Aircraft parts, modification, maintenance and repair, sale or lease of qualified aircraft
- Companies engaged in Florida to produce motion pictures, made for television motion pictures, television series, commercial music videos or sound recordings

Combined with Florida's other business advantages and excellent quality of life, this cost competitive environment creates an unbeatable value proposition for both business owners and employees alike.

Florida Business Incentives

By clicking on the link below, businesses can review the State of Florida incentives for business growth.
http://www.eflorida.com/ContentSubpage.aspx?id=472

► Available Resources

For entrepreneurs and growing businesses, Florida offers access to capital from private, federal and other sources and has implemented other initiatives, such as the Florida Opportunity Fund, to stimulate capital formation in the state. Strategic business support is also available from the numerous entrepreneurship centers around the state.

- **Fee-Based Study**

  Although limited data exists on the cost of doing business in the logistics industry sector, a fee-based Analysis was released late 2010 by the Boyd Company, Inc., a location consultant for BizCosts ®.

  The report titled "A Comparative Distribution Warehousing Industry Cost Analysis" addresses labor; electric and natural gas; land acquisition and construction; comparative ad valorem and sales tax; and shipping costs in the Jacksonville, Orlando, Palm Beach County, Miami, Tampa/St. Petersburg, Ft. Myers/Cape Coral, Pensacola regions of the state. The study lists five (5) Florida cities in the top 20 nationwide for least expensive cities to launch a corporate headquarters. The full study can be obtained by clicking on www.BizCosts.com .

- **www.myflorida.com**

  This is the official portal of the state of Florida that lists the regulatory requirements to starting a business in the state.
  http://www.myflorida.com/

Section 5
Career Pathways, Education, Certifications

The State of Florida is uniquely positioned to handle the training and educational needs to both nurture and provide continuing education for our state's workforce for the Logistics, Transportation, International Trade and Supply Chain related employment opportunities. Under the guidance of Workforce Florida, the Employ Florida Global Logistics Banner Center has emerged as the leader in the state to build relationships between industry, economic development partners and educational stakeholders to develop career pathways that will provide the state's employers with qualified talent for years to come. The following areas will be addressed in this section:

Employ Florida Global Logistics Banner Center
Career Academies
Post Secondary Education / AS Degrees / Bachelors / Masters
Certifications
Customized Training and Education Services
Professional Industry Associations
Statewide Training and Skills Assessment – Study Group Findings

► Employ Florida Global Logistics Banner Center

The Employ Florida Global Logistics Banner Center (Banner Center) provides information, education and training to develop the most relevant and cutting edge logistics and distribution skills in people in order to supply a pipeline of talent to employers in the logistics and distribution industry and employers across industries that have the logistics and distribution function.

Partners

Three educational institutions form the Global Logistics Banner Center:

- Florida Gateway College
- University of North Florida – Division of Continuing Education
- Polk State College – Corporate College

These three partners work in concert with our consortium:

- Florida State College at Jacksonville
- University of Florida – Supply Chain and Logistics Engineering (SCALE)
- Embry-Riddle Aeronautical University
- Nova Southeastern University – H. Wayne Huizenga School of Business and Entrepreneurship
- Broward College
- Gulf Coast Community College
- St. Leo University

The consortium provides a comprehensive, coordinated approach to developing a highly-skilled workforce for Florida. The combined efforts of nine public and private colleges and universities led by

Workforce Florida emphasizes entry-level as well as advanced technical training, and degree programs that create a unique model for education and training.

These educational institutions also work with local high schools and vocational schools to assist them in adopting college credit courses for students seeking careers in logistics and distribution fields. The objective is to encourage students to work within Florida while continuing to pursue college certifications and degrees.

Mission
The mission of the Banner Center is to impact Florida's economy by collaboratively engaging industry, education, workforce and economic development in a creative and innovative environment to address the current and future workforce needs of a targeted industry.

Employ Florida Banner Centers are a commitment from the state of Florida's Workforce Florida, Inc. and the colleges and universities to help employees remain prepared to do their jobs well today and in the future; ensure that employers have a qualified, capable, highly trained, certified workforce to help make these companies more competitive; and to retain and attract these types of companies to Florida.

As part of that commitment, the Global Logistics Banner Center will support Florida's industries by offering:

- Skilled worker training and continuous education services;
- Curriculum development with clear standards (including industry recognized certifications where possible);
- Formalization of industry skill standards and workforce credentialing;
- Educational research;
- Technical support for logistics and distribution industries and related ones;
- Fostering spin-off business opportunities.

State of Florida Academies, Degrees and Certifications

International or Logistics Career Academies	County
Columbia High School Global Logistics Academy	Columbia
Distrotek is a Polk Career Academy located at Kathleen High School	Polk
First Coast High School International Trade and Logistics Academy	Duval
Nathan B. Forrest High School's Global Logistics and Supply Chain Technology	Duval
Ponte Vedra High School Academy of International Business and Marketing	St. Johns
Robert E. Lee High School International Logistics Academy	Duval
Terry Parker High School's Global Business Enterprises SLC (GBE)	Duval
Note: Both Baker and Clay Counties are looking to implement International or Logistics Career Academies in the fall of 2011	
Associate's Degrees	**County**
Florida State College at Jacksonville (FSCJ)	Duval
Florida Gateway College (FGC)	Columbia
Polk Community College	Polk
Broward College	Broward

State of Florida Academies, Degrees and Certifications (cont.)

Bachelor's Degrees	County
Embry Riddle Aeronautical, Worldwide	Various
Saint Leo University	Various
University of Florida (UF)	Alachua
Florida International University (FIU)	Miami-Dade
Florida Atlantic University (FAU)	Broward
Nova Southeastern University (NSU)	Various
University of South Florida, Main (USF)	Hillsborough
Barry University	Leon
Florida State University (FSU)	Leon
University of North Florida (UNF)	Duval

Note: Florida State College at Jacksonville and Florida Gateway College are seeking Bachelor's Degrees in Logistics, fall of 2011

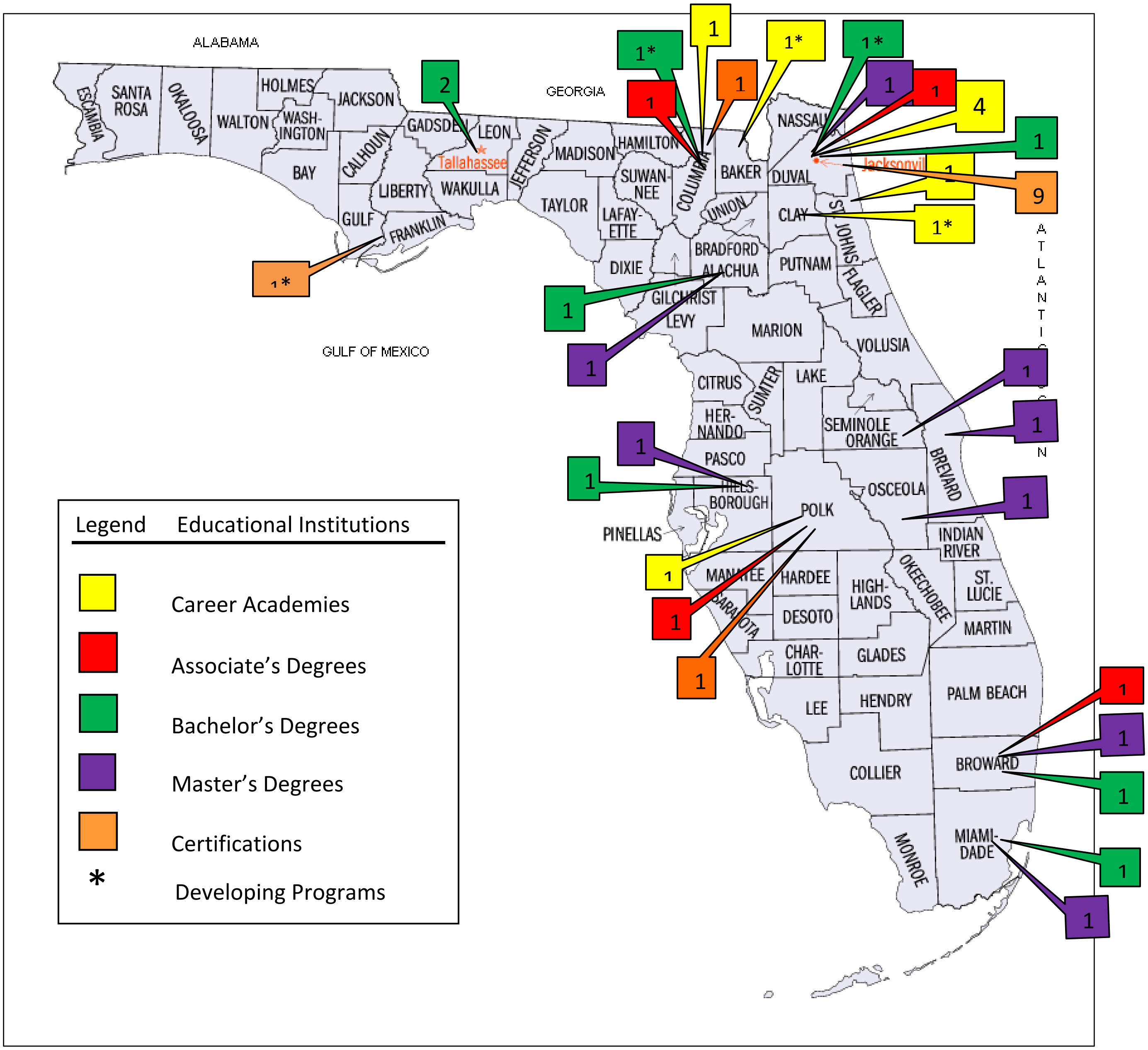
Master's Degrees	County
Nova Southeastern University (NSU)	Various
University of Florida (UF)	Alachua
University of Miami (U of M)	Miami-Dade
University of Central Florida (UCF)	Osceola
Florida International University (FIU)	Miami-Dade
Embry Riddle Aeronautical, Worldwide	Various
University of South Florida, Main (USF)	Hillsborough
Florida Institute of Technology	Brevard
Florida Atlantic University (FAU)	Broward
Rollins College	Orange
University of North Florida (UNF)	Duval

Certifications	County
Global Logistics Associate (GLA) – FSCJ, FGC	Duval / Columbia
Professional Designation in Logistics and Supply Chain(PLS) – FSCJ	Duval
Certification in Transportation and Logistics Cohort Program (CTL) - UNF	Duval
Certification in Transportation and Logistics Cohort Program (CTL) - UNF	Duval
Professional Designation in Logistics Supply Chain Management (PLS) - UNF	Duval
Supply Chain Management/Logistics Technology Certification Program - UNF	Duval
Supply Chain Management/Logistics Financial Management Certification Program - UNF	Duval
Freight Agent/Broker - UNF	Duval
Logistics and Transportation Specialist – FSCJ / FGC / Polk State College (PSC)	Duval

Note: Gulf Coast Community College (GCCC), Panama City, is seeking a Logistics Certification in the fall of 2011

Sources: 2011 Hanover Research – Academy Administration Practice and Employ Florida Global Logistics Banner Center

State of Florida Educational Institutions and Programs by County



► Career Academies

The Employ Florida Global Logistics Banner Center and its business and industry partners in Florida are preparing youth for the logistics and supply chain jobs of tomorrow through Career Academies that are in tune with today's technology. Students in grades 9 through 12 at the following schools will be well-positioned to become the logistics leaders of tomorrow:

Columbia High School Global Logistics Academy – Columbia County, Florida

A four-year program designed to prepare students for entry-level employment in the fields of global logistics, materials handling and distribution. The Academy provides instruction in purchasing procedures, stock-control systems, storage methods, use of material handling equipment, inventory control, receiving and stock handling, stock-keeping, shipping, human relations, job interview skills, merchandising math, entrepreneurship, computerized inventory systems and computer-assisted instruction. This program provides the opportunity for a cooperative education experience during the senior year at many local businesses for qualified students.

First Coast High School International Trade and Logistics Academy, North Jacksonville, Florida
This academy prepares students for careers in international business, supervision and management, marketing, accounting, office management, and all careers that deal with the global movement and management of people, materials and goods by road, air, rail and water. Modeled after the highly successful program at Banning High School in Los Angeles, students currently study under a business framework while enjoying field trips and work-based learning opportunities in the logistics field.

Robert E. Lee High School International Logistics Academy, West Jacksonville, Florida
This academy offers a sequence of courses providing relevant technical knowledge and skills needed to prepare students for further education and employment in the growing industry of logistics. The 2010-2011 school year is the Academy's inaugural year with an initial count of 42 students. It is anticipated that each succeeding year will have an ever-increasing number of students who, in addition to rigorous coursework, will be exposed to real-life, and simulated applications and experiences in the logistics field.

Academy of International Business and Marketing at Ponte Vedra High School – St John's County, Ponte Vedra, Florida
The academy prepares students for careers in the global marketplace. Increasing globalization has defined business during the last decade requiring students to understand international business including free trade areas, global competition and foreign investment opportunities. The Academy offers the students two "strands" (pathways)—the marketing strand and the business strand. The marketing strand of the academy is designed for students interested in marketing consumer and industrial goods and services focusing on international marketing. The business strand of the Academy provides students with hands-on training in an integrated academic and business curriculum that prepares them for college and a career in the international business community.

Distrotek is a Polk Career Academy located at Kathleen High School and sponsored by Rooms-To-Go – Polk County, Florida.
The program inspires students to seek positions in management and supervision. Rooms-To-Go is part of the warehousing and distribution industry which occupies over 22 million square feet of space in Polk County and is one of the county's fastest growing industries. Distrotek is a step toward meeting the industry's need for well-focused, well-qualified and well-trained supervisors and managers. Distrotek students will be challenged to reach high levels of achievement in English, writing, business computing, science and math. Students take a solid core of business management and supervision courses.

Nathan B. Forrest High School's Global Logistics and Supply Chain Technology Career Academy
This program offers a sequence of courses providing relevant technical knowledge and skills needed to prepare students for further education and employment in the growing industry of logistics. The 2010-11 school year is the Academy's inaugural year with an initial count of 81 students. It is anticipated that each succeeding year will have an ever-increasing number of students who, in addition to rigorous coursework, will be exposed to real-life, and applications and experiences in the logistics field.

Terry Parker High School's Global Business Enterprises SLC (GBE)
This community is designed to allow students to make connections between their lives and the events of the global community. It will also develop skills that will equip them for post-secondary education and for careers in international business, business administration and operations, and the culinary and hospitality industries. Students may explore additional training and participate in internships through the three career academies housed in Global Business Enterprises of Hospitality and Tourism, International Business and Academy of Culinary Arts.

Baker and Clay Counties, Florida will implement logistics or international trade academies in August 2011.

► Certifications

- Global Logistics Associate (GLA) – FSCJ, FGC
- Global Logistics Manager - FSCJ
- Certification in Transportation and Logistics Program (CTL) - UNF
- Professional Designation in Logistics Supply Chain Management (PLS) - UNF
- Supply Chain Management/Logistics Technology Certification Program - UNF
- Supply Chain Management/Logistics Financial Management Certification Program - UNF
- Freight Agent/Broker - UNF
- Logistics and Transportation Specialist – FSCJ / GCCC / PSC / FGC

► Customized Training and Education Services

The Employ Florida Global Logistics Banner Center specializes in developing training programs designed to meet the specific needs of a company or organization. Special training programs may draw from the content of other courses listed on their web site or brochures or they may be focused on other subject areas.

The logistics industry and its employees can greatly benefit from the Banner Center's shared resources such as curriculum, instructors and technology. The Banner Center offers an extensive selection of training and educational programs that are up-to-date and specific to the respective industries. The courses have been reviewed by a statewide Advisory Council comprised of professionals actively involved in their company's day-to-day operations. Specialized professional development training is offered in:

Warehouse and Certification

- Introduction to Supply Chain Management
- The ABC's of Warehouse Operations
- Warehouse Management Safety
- Warehouse Worker Safety
- Professional Truck Drivers (CDL Licensure)
- Truck Driver Safety Program
- Truck Driver Simulator Training
- Federal Motor Carrier Regulations
- OSHA Safety and Health Certification

Logistics and Supply Chain

- Introduction to Logistics: Basics
- Developing and Implementing Partnerships in the Supply Chain
- International Logistics and Distribution Management
- Inventory Management Concepts: From Basics to Strategy
- Logistics Management and Performance Measurement
- Returns Management and Reverse Logistics
- Introduction to Supply Chain Management
- Modeling the Integrated Supply Chain and Strategies
- Supply Chain Management Law and Ethics
- Supply Chain Management: Planning for Effective Operations
- Export / Import and the Supply Chain
- Third Party Logistics (Outsourcing)
- Road Map Corporate Manager's Certificate

Transportation

- Transportation and Logistics Overview
- Transportation Management

Business Skills

- Negotiation Skills
- Sales and Marketing
- Human Resource Management
- Project Management
- Team Building and Leadership Skills
- Lean Production for Logistics
- Innovation and Change Management
- Technical Writing for Logistics Managers
- Customer Service Management
- Language and communication skills to help you succeed in today's global marketplace: Chinese, Japanese, Spanish, German and more.

► Post Secondary Education - AS Degrees / Bachelors / Masters

Employ Florida Global Logistics Banner Center Partners

Florida Gateway College (FGC) – Lake City, Florida
https://www.fgc.edu/academics.aspx
Supply Chain Management – A.A.S. / Supply Chain Management – A.S. / Logistics – B.S. (Future)

University of North Florida (UNF) – Jacksonville, Florida
http://www.unf.edu/ce/logistics/
Center for Logistics & Supply Chain Management Executive Education
Logistics and Transportation Flagship Program – B.S.

Polk State College – Supply Chain Management Institute, Polk County, Florida
http://www.corporatepsc.com/institutes/supply-chain-management

St. Leo University – Tampa, Jacksonville, Florida
http://www.saintleo.edu/About-SLU/Directory/Department-Listing/University-Communications

Embry Riddle Aeronautical University, Daytona, Jacksonville
Master of Science in Logistics and Supply Chain Management
http://worldwide.erau.edu/degrees-programs/graduate/supply-chain-management.html
Bachelor of Science in Transportation
http://worldwide.erau.edu/degrees-programs/undergraduate/transportation.html

Florida State College at Jacksonville (FSCJ), Jacksonville, Northeast Florida
http://www.fscj.edu/mydegree/academics/schools/transportation-logistics/index.php
Supply Chain Management A.S.

Supply Chain and Logistics Engineering Center (SCALE) – University of Florida (UF) – Gainesville, Florida
http://www.ise.ufl.edu/scale/

Nova Southeastern University - H. Wayne Huizenga School of Business and Entrepreneurship – Ft. Lauderdale, Tampa, Jacksonville and other areas statewide
http://www.huizenga.nova.edu/About/
MBA in Logistics and Supply Chain Management (SCM) – Fall 2011

Broward College – Ft. Lauderdale/Miami, Florida
http://www.broward.edu/programs/#BS
BS in Supply Chain Management – Fall 2011

Gulf Coast Community College, Panama City/Panhandle area of Florida
http://www.gulfcoast.edu/default.htm
Logistics Certificate in Development – Fall 2011

The following three charts list degree completions in the logistics and related field since 2008-09 and can be used as a guideline to determine the state's talent and educational degrees. However, it is important to note that this data does not include many of the Bachelor's and Master's degrees created since the inception of the Global Logistics Banner Center in 2008.

Total Degree Completions in Logistics and Material Management and Related Programs							
Degree Type	Degree Conferred					5-year Change	
	2004-05	2005-06	2006-07	2007-08	2008-09	Numeric	Percent
Florida							
Bachelor's	8,881	9,610	9,897	9,647	8,915	34	0.00%
Master's	5,059	5,072	5,455	5,910	6,362	1,303	26.00%
Total Degrees	13,940	14,682	15,352	15,557	15,277	1,337	10.00%
United States							
Bachelor's	156,591	161,854	165,363	167,959	168,304	11,713	7.00%
Master's	102,172	105,252	109,503	116,953	127,470	25,298	25.00%
Total Degrees	258,763	267,106	274,866	284,912	295,774	37,011	14.00%

Note: Table includes CIP codes 11-3071, 13-1081, 49-0101, 49-0104, 52-0201, 52-0101, 52-0205, 44-0401

Source: U.S. Department of Education, NCES IPEDS Data Center

Total Degree Completions in Logistics and Material Management							
Degree Type	**Degree Conferred**					**5-year Change**	
	2004-05	**2005-06**	**2006-07**	**2007-08**	**2008-09**	**Numeric**	**Percent**
Florida							
Bachelor's	0	0	0	0	1	1	N/A
Master's	77	84	76	107	97	20	26.00%
Total Degrees	77	84	76	107	98	21	27.00%
United States							
Bachelor's	1,538	1,251	1,267	1,387	1,514	-24	-2.00%
Master's	237	427	368	323	330	93	39.00%
Total Degrees	1,775	1,678	1,625	1,710	1,844	69	4.00%

Note: Table includes CIP codes 11-3071, 13-1081

Source: U.S. Department of Education, NCES IPEDS Data Center

Total Degree Completions in other International Logistics - Related Programs							
Degree Type	**Degree Conferred**					**5-year Change**	
	2004-05	**2005-06**	**2006-07**	**2007-08**	**2008-09**	**Numeric**	**Percent**
Florida							
Bachelor's	8,881	0	0	0	1	1	N/A
Master's	4,982	84	76	107	97	20	26.00%
Total Degrees	13,863	84	76	107	98	21	27.00%
United States							
Bachelor's	155,053	1,251	1,267	1,387	1,514	-24	-2.00%
Master's	237	427	368	323	330	93	39.00%
Total Degrees	1,775	1,678	1,625	1,710	1,844	69	4.00%

Note: Table includes CIP codes 49-0101, 49-0104, 52-0201, 52-0101, 52-0205, 44-0401

Source: U.S. Department of Education, NCES IPEDS Data Center

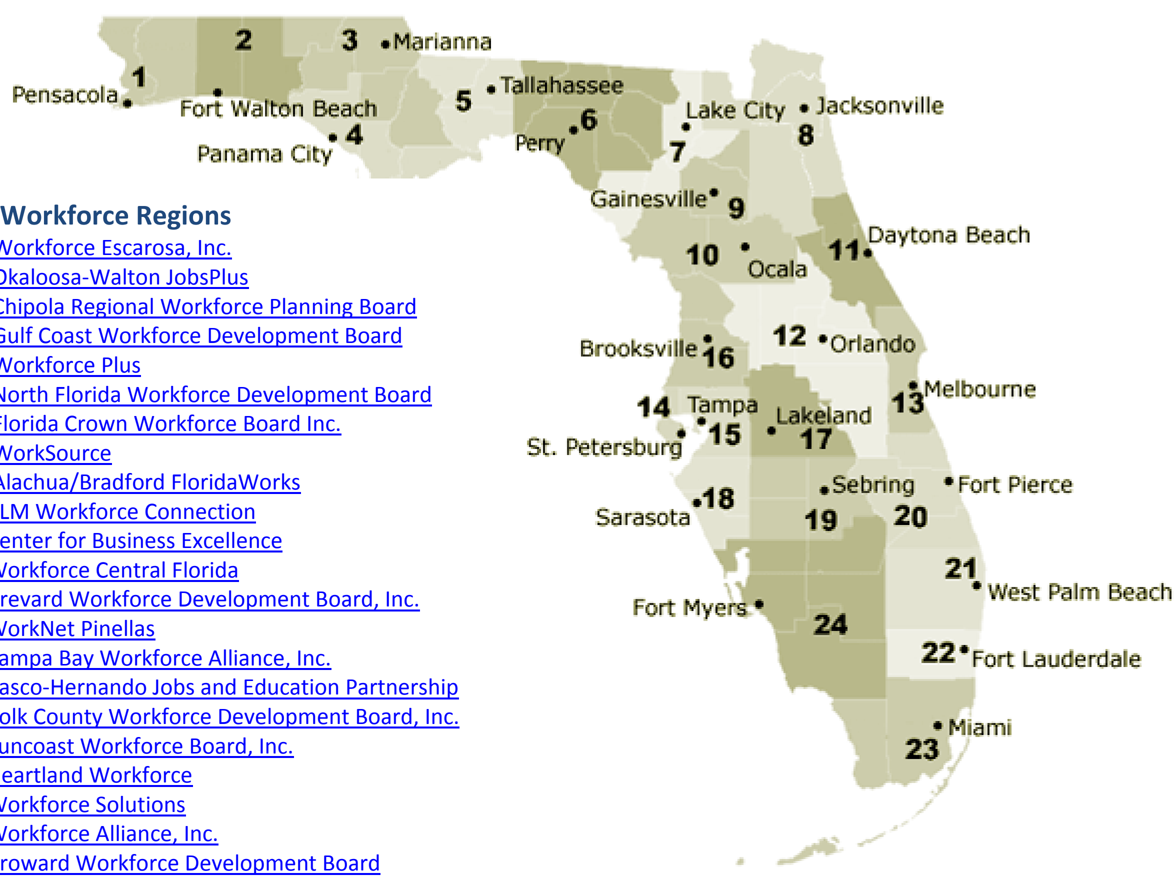
Explanation of Florida's Logistics and Logistics-related CIP and SOC codes. Although these industry codes are not fully cohesive in the study charts, they are the best available data for this cluster.

Transportation, Storage and Distribution Managers (SOC Code 11-3071)
Logistics and Materials Management (CIP Code 52.0203)
Logisticians (SOC Code 13-1081)
Aeronautics / Aviation / Aerospace Science and Technology, General (CIP Code 49-0101)
Aviation / Airway Management and Operations (CIP Code 49-0104)
Business Administration and Management, General (CIP Code 52-0201)
Business / Commerce, General (CIP Code 52-0101)
Operations management and Supervision (CIP Code 52-0205)
Public Administration (CIP Code 44-0401)
Classification of Instructional Programs (CIP)
Standard Occupational Classification Code (SOC)

The data collected represents years 2004 -2009. Mid 2008, the Employ Florida Global Logistics Banner Center (formerly called the Banner Center for Logistics and Distribution) began to bring educational, industry and economic partners to the table to develop statewide career pathways for our thriving logistics industry. Since that time and more current to the data presented in the previous tables, Associates, Bachelors and Master degreed programs have been implemented across several statewide institutions of learning. The data in the chart shows Florida as very competitive with the nation in Logistics fields. Workforce Florida, Inc., the state's workforce agency for education and employment innovation is investing in programs of training and education that focus on the needs of Florida's 14 deepwater, international seaports. Florida leads the nation in the number of seaports.

Florida's Workforce Regions

A catalyst for creating and nurturing world-class talent, Workforce Florida is the statewide, business-led workforce policy board. Charged with overseeing the state's workforce system, Workforce Florida develops strategies to help Floridians enter and advance in the workforce while supporting economic development priorities and strengthening the state's business climate.

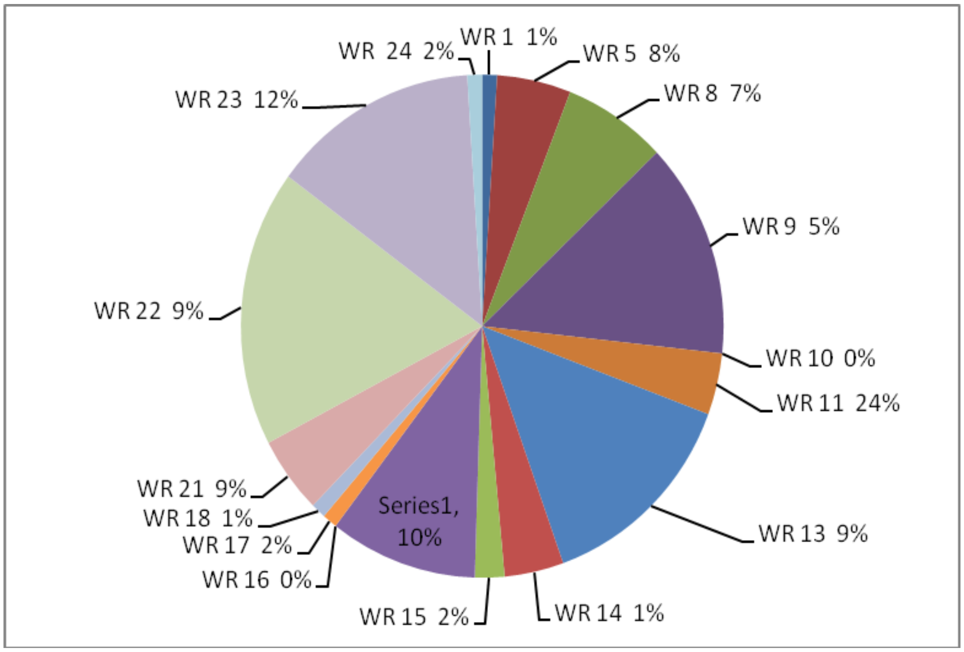


Florida's Workforce Regions

1. Workforce Escarosa, Inc.
2. Okaloosa-Walton JobsPlus
3. Chipola Regional Workforce Planning Board
4. Gulf Coast Workforce Development Board
5. Workforce Plus
6. North Florida Workforce Development Board
7. Florida Crown Workforce Board Inc.
8. WorkSource
9. Alachua/Bradford FloridaWorks
10. CLM Workforce Connection
11. Center for Business Excellence
12. Workforce Central Florida
13. Brevard Workforce Development Board, Inc.
14. WorkNet Pinellas
15. Tampa Bay Workforce Alliance, Inc.
16. Pasco-Hernando Jobs and Education Partnership
17. Polk County Workforce Development Board, Inc.
18. Suncoast Workforce Board, Inc.
19. Heartland Workforce
20. Workforce Solutions
21. Workforce Alliance, Inc.
22. Broward Workforce Development Board
23. South Florida Workforce Board
24. Southwest Florida Workforce Development Board

Chart Source: Workforce Florida, Inc.

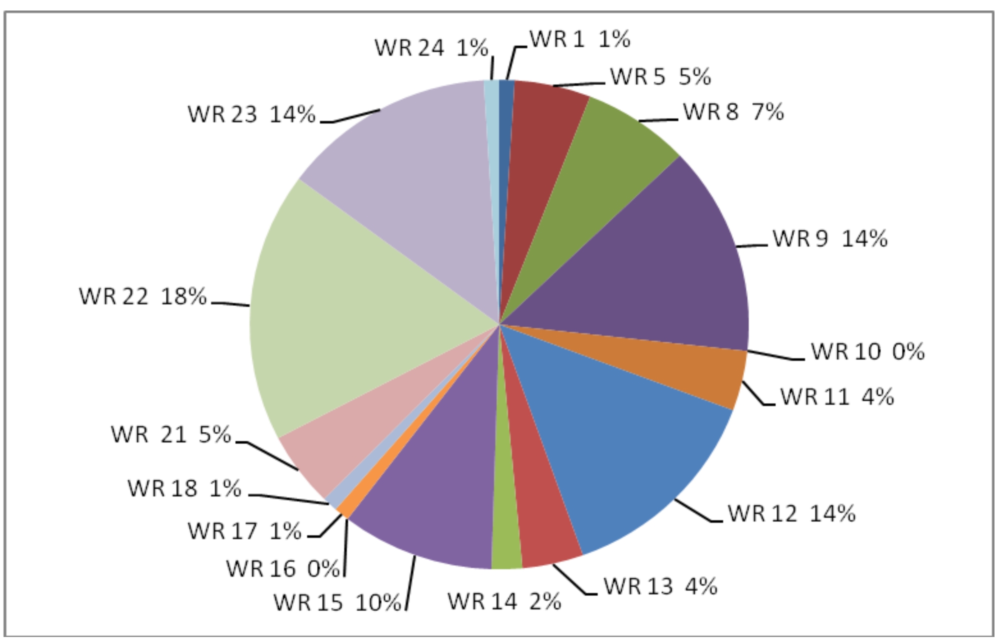
Florida Bachelor's Degree Completions in All Industrial Logistics- Related Programs (2009) by Workforce Region



Source: © 2011 Hanover Research – Academy Administration Practice

The logistics education and training offered through the Banner Center and its partners keeps Florida poised to have a top-notch educated workforce that surpasses the 2009 national trend.

Florida Master's Degree Completions in All Industrial Logistics- Related Programs (2009) by Workforce Region



Source: © 2011 Hanover Research – Academy Administration Practice

► Professional Industry Associations

Professional networking is pertinent to growing business or creating employment opportunities. Florida has a statewide network of key professional organizations focused on the logistics, transportation, warehousing, distribution, supply chain and international trade industries listed below.

American Association of Exporters and Importers (AAEI)
www.aaei.org

American Association of Port Authorities (AAPA)
www.aapa-ports.org

American Institute for Shippers' Associations (AISA)
www.shippers.org

American Society of Transportation and Logistics (AST&L)
www.astl.org

American Trucking Associations (ATA)
www.truckline.com

Association for Operations Management (APICS)
www.apics.org

Association of American Railroads (AAR)
www.aar.org

Cargo Airline Association (CAA)
www.cargoair.org

Council of Supply Chain Management Professionals (CSCMP)
www.cscmp.org

Florida Public Transportation Association (FPTA)
www.floridatransit.org

Florida Trucking Association (FTA)
www.fltrucking.org

Institute for Supply Management (ISM)
www.ism.ws

Institute of Logistical Management
www.logistics-edu.com

Institute of Packaging Professionals (IoPP)
www.iopp.org

International Society of Logistics (SOLE)
www.sole.org

International Warehouse Logistics Association (IWLA)
www.iwla.com

Manufacturers Association of Florida
www.mafmfg.com

Material Handling Industry of America (MHIA)
www.mhia.org

National Private Truck Council (NPTC)
www.nptc.org

Transportation Intermediaries Association (TIA)
www.tianet.org

Voluntary Interindustry Commerce Solutions Association (VICS)
www.vics.org

► Statewide Training and Skills Assessment – Study Group Findings

An Employ Florida Global Logistics Banner Center Advisory Council Meeting was held late January 2011 where initial findings of this report were released. Nearly 70 statewide representatives from the educational institutions, economic development and industry partners gathered in Northeast Florida to discuss future training and educational needs for our state. The charts and data contained within the next few pages summarize the study group's key findings.

Study Group participants included the key Banner Center Educational Partners, WorkSource, Chambers and Economic Development Partners, and Career Academies and School board representatives. In addition, the following industrial partners were present: Advanced Supply Chain Solutions, Blue Lynx, CSX, Great Wide Logistics, Horizon Lines, ICS Logistics, JAXPORT, LandStar, MOSAIC, PenserSC, Target, UPS, Wal-mart and Winn Dixie.

Skills Needed for Florida's Logistics Workforce
Communications
Computer / Software
Cultural diversity
Integrated Learning and Life Skills
International / Cross-Cultural
Logistics Systems
Maintenance
Management
Mechanical / Technical
Operations
Sales / Marketing
Soft Skills
Strategic Thinking
Technology and Information
Transportation Systems
Truck Driving
Warehousing Operations

Highlights

- Most companies communicate their logistics job openings via word of mouth
- Most companies utilize their own website list job openings; however 33% of the reporting companies listed www.monster.com as a viable option
- From all of the educational levels, high school diplomas and Bachelor's degrees are the most sought after when hiring new employees
- Most larger corporations had their own in-house training staff, curriculum and systems

Emerging Technologies or Processes in the next 5-10 Years
Automation
Business Improvement Metrics/Measurements
Business Intelligence Across All Industries
Contract Negotiation
Fuel Efficient Fleets
GPS Tracking Technologies
Green Industry / Sustainability Practices
Linking Transportation Costs with Forecasting
Optimization Tools / Modules
Real-time Data Flow for Inventory Control
RFID, Barcode, SAAS
Robotics
Safety
Security
Use of Smart Phones / Technologies to Reduce Costs
Warehouse Management
Training Needed for Florida's Logistics Workforce
Aging Workforce - Training, Workshops
Apprenticeships
Attendance / Punctuality Skills
Basic Management
Bridging the Generation Gap
Changing Curriculum (Employer/Educator Relationships)
DOT Compliance
Earlier Exposure to Logistics
Embracing Change
Emerging Technologies and Handheld Devices Training
Forklift Operations
Going "Green" / Sustainability -vs.- Profitability
Hazmat
Inventory Management - Technology Trends
Languages (Spanish, Portuguese, Creole)
Lean Six Sigma Processes (Efficient and Profitable)
Passing a Background Check
Research
Skills Training Prior to Employment
Supervision Focusing on Leadership Training
Truck and Maintenance Repair
Updating Mature Equipment, Machines and Techolonogies
Work Ethics

What Industry Wide Certifications and Training Does Your Company Require?
Advanced Degrees
Certification in Transportation and Logistics Program (CTL)
Certifications in Supply Chain Management
Certified in Production and Inventory Management (CPIM)
Certified Public Accountant (CPA)
Certified Supply Chain Professional (CSCP)
Commercial Drivers License (CDL)
Fork Lift Operator
Global Logistics Associate (GLA)
Global Logistics Manager (GLM)
Industry related certifications
MS Office Suite
Professional Designation in Logistics Supply Chain Management (PLS)
Safety
Six Sigma
Truck and Maintenance Repair

What can government and academic institutions do to address your challenges?

- Offer more graduate and undergraduate degrees in Supply Chain Management / Logistics while encouraging individuals to have at least five (5) years field experience
- Offer courses on a quarterly basis
- Create links between business and educational organizations
- Develop road maps for high school students to actively engage logistics education and workforce
- Offer night and weekend workshops
- Add more high school programs
- Do plant tours
- College – offer co-op programs
- Courses must not only discuss operations but combine finance and logistics concepts
- Offer training and workshops
- Teach students in high school the importance of punctuality and stress the importance of keeping their record clean
- Offer more logistics courses and programs at the high school and college level

Section 6
Conclusions and Recommendations

Recommendation 1: Enhance current partnerships and infuse the Employ Florida Global Logistics Banner Center's (Banner Center) Logistics Career Pathways into key state strategic planning initiatives.

The Florida Chamber Foundation released the Florida Trade and Logistics Study December 2010. The Chamber is actively outreaching to all labor, economic, education and industry partners serving as a catalyst for creative solutions for the state's logistics and trade industry to encourage business growth and economic development.

The Chamber uses a Six Pillar Framework as an organizing force for strategic planning at local, regional and state levels. The first pillar is Talent Supply and Education.

Earlier in 2010, Enterprise Florida, Inc. released Florida's Competitiveness 2010 – Roadmap to Florida's Future, 2010-2015 Statewide Strategic Plan for Economic Development which includes a global competitiveness section focusing on state origin-exports and high tech exports, both which will favorably affect our economy.

These and other reports including ones by the Florida Department of Transportation, regional economic agencies, work force divisions, and ports associations, all are lacking the necessary language to stress the career logistics career pathways as defined by the Banner Center and its partners.

The Banner Center should continue to develop relations with these organizations, participate in their studies and encourage them to include logistics career pathways language into their studies and strategic statewide plans.

Recommendation 2: Establish advocacy initiatives to help Florida's International Seaports utilize the educational pipeline and career pathways in their sales efforts and to maintain qualified employees.

Just four (4) years ago, an educational pipeline of strong logistical career pathways did not exist. Since the inception of the Employ Florida Global Logistics Banner Center, students in high school to incumbent workers now have the opportunity to receive education to enhance their employability.

Many factors are considered when growing, relocating or developing a business. Florida's 14 international seaports are critical to the growth of the logistics industry. Many of the state's goods are logistically imported or exported through our seaports. The Banner Center should create an advocacy campaign not only to educate the ports about the opportunities for their sales efforts, but to utilize the developed curricula to keep their employees up to date on industry trends, technology and standards.

Recommendation 3: Create targeted marketing plans to encourage logistics, warehousing and distribution companies to consider growing in regions of the state that are designated as Rural Areas of Critical Economic Concern (RACEC) and /or communities developing inland ports.

The Columbia County model of combining the State's designation of the region as a RACEC with the introduction of an inland port and combining public-private partnership dollars to create warehouse and distribution centers to augment the growth of international trade at the Jacksonville Port Authority (JAXPORT) is a great model for the other two RACEC regions identified in Section 1 of this report. In addition, Columbia County has developed a strong partnership with its local post secondary institution of higher learning, Florida Gateway College (FGC), to support and develop degrees and training opportunities to ensure companies that the local labor force is available and, most importantly, qualified to fill the jobs needed for their business growth.

Companies looking to develop, relocate or grow their businesses in Florida should closely look at the financial incentives offered by the state's rural or inland port communities. The cost of doing business is less because of the economic incentives offered to grow these regions.

In addition, the rural and inland port community's economic development agencies should create sales tools so that their respective international seaports could use the economic benefits in their sales efforts to companies looking to import or export goods and are seeking a strong distribution and warehousing network.

Recommendation 4: Encourage state labor and economic agencies to use cohesive messaging on Florida's logistics and trade strengths.

Florida's Logistics and Trade Strengths
Large Consumer Market*
Education System
Strategic Location*
Transportation Infrastructure*
Extensive Global Ties*
Quality of Life
State of the Industry – Florida
• Logistics and Distribution Employment Hubs
• Fourteen (14) International Deepwater Seaports
• Foreign Trade Zones
• Logistics and Distribution Centers
• Rural Areas of Critical Economic Concern / Inland Ports
• Favorable Small and Emerging Business Climate

* Source: Florida Chamber Foundation, Florida Trade and Logistics, Study, December 2010

Recommendation 5: Advocate to have Enterprise Florida, Inc. put the logistics and trade industry cluster on their Targeted Industry Cluster or Strategic Areas of Emphasis lists.

Enterprise Florida Inc. (EFI) is a public-private partnership serving as Florida's primary organization devoted to statewide economic development. EFI through strategic analysis and input from statewide economic stakeholders identifies industry clusters that are prime targets to enhance Florida's economy. Once added to one of EFI's key lists, there is a greater chance of logistics businesses receiving incentives, grants or additional support to grow and prosper in Florida.

Therefore, the Banner Center and its industry partners should continue to partner with EFI and encourage the addition of logistics industry cluster to their Targeted Industry Cluster or Strategic Areas of Emphasis lists.

Recommendation 6: Develop a comprehensive plan to market the Employ Florida Global Logistics Banner Center and its statewide partner degrees, certification and training to Florida's current logistics labor force.

State of Florida	
Degrees, Certifications, Training and Partners by the Numbers	
4	Associate's Degrees in Logistics
7	International or Logistics Focused Career Academies; two (2) in Development
9	Additional Colleges or University offering Logistics Degrees
10	Bachelor's Degrees in International Trade and/or Logistics; one (2) in Development
10	Global Logistics Banner Center Educational Partners
11	Logistics Industry Certifications; one (1) in Development
11	Master's Degrees in International Trade and/or Logistics
21	Logistics, Supply Chain, Warehousing, Transportation Professional Associations
23	Regional Work Force Board to Help Businesses and Job-seekers Succeed
26	Customized Training Program Opportunities

According to the labor statistics in Section three (3) of this report, there are over one-half million workers employed in the logistics industry. The Banner Center should create a comprehensive plan to market the logistics career pathways and training to these employers so that their employees would will have first-hand knowledge of industry trends, technologies, processes and applications that enhance business growth and global competitiveness in our state.

Resources

Columbia County Industrial Development Authority – WilsonMiller, Inc.
Go-To-Market Columbia County Site Assessment Summary

Comparative Distribution Warehousing Industry Costs
www.BizCosts.com

Economic County of Palm Beach County, Inc. – Inland Port
www.economiccouncilpbc.org

Employ Florida Global Logistics Banner Center
www.logisticsbannercenter.com

Enterprise Florida, Inc.
www.eflorida.com

Enterprise Florida, Inc. – Cambridge Systematics in Association with Fairfield Index
North Central RACEC Target Industry Report, May 2007

Enterprise Florida, Inc. - Florida's Competitiveness 2010 – Roadmap to Florida's Future, 2010-2015 Statewide Strategic Plan for Economic Development
http://www.eflorida.com/IntelligenceCenter/Reports/roadmap/CompetitiveAnalysis2010.pdf

Enterprise Florida, Inc. - Florida's Incentives for Businesses
http://www.eflorida.com/ContentSubpage.aspx?id=472

Enterprise Florida, Inc. - Florida's International Business Highlights - March 2010
http://www.eflorida.com/IntelligenceCenter/download/INT/TR_Trade_Florida_Origin_Export.pdf

Enterprise Florida, Inc. - Florida's Labor Force and Employment Availability
http://www.eflorida.com/ContentSubpage.aspx?id=1902

Florida Agency for Workforce Innovation, Labor Market Statistics Center
Florida Logistics and Distribution Industry, May 2010
http://www.labormarketinfo.com/library/pubs/indusprofile/industryprofile_logistics_n_distribution.pdf

Florida Chamber Foundation
Florida Trade and Logistics Study, December 2010
https://www.communicationsmgr.com/projects/1378/docs/FloridaTradeandLogisticsStudy_December2010.pdf

Florida Department of Transportation – Seaports
http://www.dot.state.fl.us/seaport/seamap.shtm

Florida Department of Transportation - Florida Statewide Seaport System Plan, December 2010
http://www.dot.state.fl.us/seaport/pdfs/_FDOT%20Seaport%20Plan_Report_complete.pdf

Florida Department of Transportation – Seaports
http://www.dot.state.fl.us/seaport/seamap.shtm

Florida Gateway College - Hanover Research
Industrial Logistics Program Demand

Florida Ports Council
2010 Economic Action Plan for Florida – A Blueprint to Leverage Florida's Strategic State-Seaport Partnership

Florida Ports Council
Investing in Florida's Seaports to Promote Job Growth and State and Local Revenues

Florida Seaport Transportation and Economic Development Council
A Five-Year Plan to Achieve the Mission of Florida's Seaports 2008/2009 – 2012/2013

Jacksonville Port Authority (JAXPORT)
The Local and Regional Economic Impacts of the Jacksonville Port Authority Fiscal Year 2007/2008

Office of the United States Trade Representative
http://www.ustr.gov/trade-agreements

Office of the President of the United States Executive Order – National Export Initiative
http://www.whitehouse.gov/the-press-office/executive-order-national-export-initiative
http://www.whitehouse.gov/sites/default/files/nei_report_091510_extended.pdf

O*Net Online, US Department of Labor
http://online.onetcenter.org/find/

SITE Selection – November 2009 - Ports and Free Trade Zones
www.siteselection.com/portal/index.shtml

SITE Selection – November 2010 – Ports and Free Trade Zones
Real Connections, Adam Bruns

Small Business Association (SBA)
http://archive.sba.gov/advo/research/profiles/09profilestot.pdf
http://archive.sba.gov/advo/research/sb_econ2008.pdf

State of Florida
www.myflorida.com

Sunshine State News, Kevin Derby, December 2010
www.sunshinestatenews.com

The Cornerstone Regional Economic Development Partnership
Logistics and Distribution Labor Market Analysis, Cecil Commerce Center, Jacksonville, Florida

The Georgia Center of Innovation for Logistics
2010 Georgia Logistics Report – Fueling Logistics Competitiveness
www.georgialogistics.org

The National Association of Foreign-Trade Zones
www.naftz.org

US Census Bureau
http://www.census.gov/

US Department of Education, NCED IPEDS Data Center
www.ed.gov

US Bureau of Labor Statistics
www.bls.gov

US Bureau of Economic Analysis
www.bea.gov

Workforce Florida, Inc.
www.workforceflorida.com

www.logisticsmgmt.com

www.monster.com

www.salary.com