

DISTRIBUTION & LOGISTICS SERVICES

INDUSTRY OVERVIEW



Distribution & Logistics continues to grow as a vital industry in Florida, as the wholesale trade, transportation, and logistics industry employs more than half a million individuals.

Due to an extensive interstate network, there are over 33 million consumers within an eight-hour drive of Tampa and Hillsborough County. Thanks to a top-rated airport with more than 250 daily flights, the largest seaport in Florida, and a major presence of one of the nation's leading railroad transportation suppliers, our community is a prime location for distribution and logistics centers servicing the state of Florida, the United States, and beyond.

With more than 20 million people in Florida, trucks travel in and out of the state regularly to deliver a variety of goods. Each year, more than \$160 billion worth of goods flow through Florida's ports and airports, and with a local manufacturing industry boasting more than 2,800 companies, the need to transport goods to consumers is high.

Not only do distribution and logistics centers in Tampa and Hillsborough County make sense, they are better for your business.

“More than ever, top talent from across the U.S. wants to make Tampa their home. This partnership helps make that a reality. We couldn't be more excited to further our investment in expanding in this market.”

**- BOBBY HARRIS, CEO,
BLUEGRACE LOGISTICS**

TAMPA BAY'S LEADING DISTRIBUTION & LOGISTICS COMPANIES

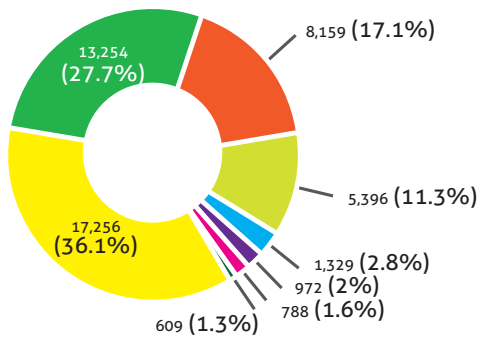


Amazon
Automated Petroleum
& Energy
BlueGrace Logistics
C&S Wholesale Grocers
FreightCenter, Inc.

Gordon Food Services
Integrity Express Logistics
JaggedPeak
Patterson Companies
Save-A-Lot Distribution
Star Distribution Systems

Sysco International
Food Group
The Bernd Group
Total Quality Logistics

DISTRIBUTION & LOGISTICS SERVICES INDUSTRY OCCUPATION TOTAL 2017 JOBS



- Laborers and Freight, Stock, and Material Movers
- Heavy and Tractor-Trailer Truck Drivers
- Light Truck or Delivery Services Drivers
- Shipping, Receiving and Traffic Clerks
- First-Line Supervisors of Helpers, Laborers, and Material Movers
- Logisticians
- Cargo and Freight Agents
- Transportation, Storage, and Distribution Managers

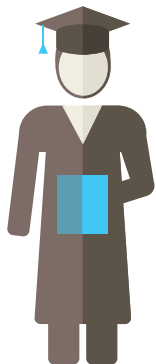
AVERAGE WAGE BY DISTRIBUTION & LOGISTICS SERVICES OCCUPATIONS AND SECTORS

SOC CODE	OCCUPATION	AVERAGE WAGE	
		TAMPA MSA	U.S.
43-5011	Cargo and Freight Agents	\$41,000	\$44,300
53-1021	First-Line Supervisors of Helpers, Laborers, and Material Movers	\$43,400	\$50,200
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$37,500	\$43,600
53-7062	Laborers and Freight, Stock, and Material Movers	\$26,600	\$28,700
53-3033	Light Truck or Delivery Services Drivers	\$34,700	\$34,800
13-1081	Logisticians	\$74,700	\$77,800
43-5071	Shipping, Receiving and Traffic Clerks	\$29,500	\$33,200
11-3071	Transportation, Storage, and Distribution Managers	\$103,700	\$97,600
NAICS CODE	SECTORS	AVERAGE WAGE	
		TAMPA MSA	U.S.
48	Transportation and Warehousing	\$50,016	\$52,382

Source: JobsEQ®, 2017 Q2.



TOTAL FLORIDA DEGREES AWARDED BY LEVEL



Bachelor's
104,805

Post Graduate
43,210

Source: National Center for Education Statistics (NCES), 2014-2015

TAMPA MSA DISTRIBUTION & LOGISTICS SERVICES DATA

\$49,864 **AVERAGE**
ANNUAL WAGES

31,638 **EMPLOYEES**

1,851 **COMPANIES**

Source: JobsEQ®, 2016

ADVANTAGES

With a large manufacturing presence, Hillsborough County is a prime location for warehouse distribution and third party logistics providers.

Warehouse distribution and logistics firms have found Plant City and Eastern Hillsborough County an ideal location. Companies like Gordon Food Services, Dart Container, and Amazon continue to expand in the area.

Why? There's room to grow: In 2016 alone, construction had begun on more than 700,000 square feet of distribution and light industrial space in Hillsborough County. However, overall vacancy rates were as low as 5.5 percent.

There's a large population to serve: Nearly 5 million people live in the I-4 Corridor, a quarter of the population of the entire state of Florida. With a high demand for consumer goods, the Central Florida region is a popular location for the distribution and logistics industry.

Third party logistics providers are also experiencing growth in the area, with companies like Blue Grace Logistics, Integrity Express Logistics, and Total Quality Logistics hiring at a rapid rate. Home-grown Blue Grace Logistics plans to hire up to 700 in the next few years and recently received a \$255 million investment from private equity giant Warburg Pincus.

And thanks to Hillsborough County's high quality talent pipeline, third party logistics providers succeed at filling positions from business development managers to logistics managers. University of South Florida's Muma College of Business offers both an undergraduate program and MBA concentration in supply chain management, while University of Tampa also offers a variety of coursework through the Sykes College of Business. Technical schools in the region round out the talent pipeline, offering CDL programs.



DEMOGRAPHICS

TOTAL MSA POPULATION: **3M**
TOTAL MSA LABOR FORCE: **1.5M**
MEDIAN AGE: **37**
COLLEGE DEGREE HOLDERS: **31%**
COST OF LIVING INDEX: **94.8** (2017)

RANKINGS

#1 CITY FOR FIRST TIME HOME BUYERS
(ZILLOW, 2018)
#1 BEST STATES IN THE NATION FOR
HIGHER EDUCATION
(U.S. NEWS & WORLD REPORT, 2018)
#2 BEST STATES FOR BUSINESS
(CHIEF EXECUTIVE MAGAZINE, 2017)

CONNECTIVITY ASSETS



TAMPA INTERNATIONAL AIRPORT

Tampa International Airport (TPA) serves as the community's gateway to the world, with more

than 250 daily flights and over 80 nonstop domestic and international destinations such as New York, San Francisco, Chicago, Zurich, Panama City, Frankfurt, and London.



PORT TAMPA BAY

Port Tampa Bay is the largest and most diversified port in Florida, with more than 5,000

acres of land. As the closest full-service port to the Panama Canal, Port Tampa Bay opens up exporting opportunities to Latin America and Asia. The Port recently invested in two post-Panamax gantry cranes to handle increased containerized business.



INTERSTATES AND ROADS

Interstate systems I-4, I-75, and I-275 link the Tampa Bay area to numerous major domestic

markets and more than 33 million consumers in an eight-hour drive. Additionally, a new truck ramp from Port Tampa Bay leads directly to and from I-4, which connects to I-75 less than 10 miles away.



RAILS

Our region offers 500 miles of active railroad and siding tracks operated by CSX, one

of the nation's leading transportation suppliers. CSX maintains a major rail yard, an intermodal terminal, a TRANSFLO terminal, and an automotive distribution center in Tampa.



TAMPA HILLSBOROUGH ECONOMIC DEVELOPMENT CORPORATION



For more information on the distribution and logistics services industry in Tampa and Hillsborough County, please contact Steve Morey, Vice President, Business Development, at (813) 518-2630 or smorey@tampaedc.com

Tampa Hillsborough Economic Development Corporation is the lead designated economic development agency for Hillsborough County and the cities of Tampa, Plant City, and Temple Terrace. Established in 2009 as a partnership between the public sector and private corporate investors, the EDC works to develop and sustain a thriving local economy through the attraction, retention, and expansion of high wage jobs and capital investment within targeted industry sectors.