

FLORIDA

sets the

FUTURE



The Sunshine State is a strategic and economic powerhouse, driving companies' logistics success and setting the stage to play an even more substantial role in the coming years.





While nine U.S. states have at least one panhandle—an elongated protrusion—it can be argued that Florida’s panhandle, a 200-mile strip at its northwestern end, is easily the most well-known in the country.

In a logistics sense, the entire state of Florida is something of a panhandle, functioning as a geographic landing and launching strip into the rest of the country and the world.

The third-largest state and fourth-largest economy in the United States, Florida offers world-class business amenities and infrastructure. That’s why companies from around the world choose it as the site for their national and international headquarters.

Florida is home to nearly 3,000 headquarter offices, including 16 Fortune 500 corporate headquarters. Moreover, numerous international firms base key facilities in Florida to take advantage of the state’s easy access to global markets.

IDEAL BUSINESS CLIMATE

Florida’s geographic location makes it one of the primary logistics sites for any business seeking to access the U.S. East Coast or Gulf Coast.

Florida’s low corporate tax burden, absence of a personal income tax, and modern infrastructure provide the perfect climate for business. A nexus point for international business, Florida is truly the Sunshine State—the strategic

and economic center of the Americas.

Capitalizing on and enhancing Florida’s geographic advantages are trucking, railway, port, and airport assets that rival or exceed those found anywhere else on the globe. Companies across all industries can benefit from the state’s huge market, large workforce, and tremendous diversity, notes Enterprise Florida, a public-private partnership that serves as the state’s principal economic development engine.

Florida’s government and economic development leaders work together to ensure the state’s business climate remains favorable to companies of all sizes. A right-to-work state, Florida is developing legislative, fiscal, and marketplace initiatives such as insurance tort reform, targeted industry incentives, and other business-friendly initiatives.

Businesses looking for workforce training, road infrastructure, or specialized locations may also qualify for specific incentive programs.

In the logistics sphere, Florida has one of the world’s most extensive multi-modal transportation systems, featuring international airports, deepwater shipping ports, extensive highway and rail networks, and multiple hubs that

allow for high-speed data transmission from around the United States to Europe, Latin America, and Africa.

“Florida consistently ranks among the best states to do business in thanks to its pro-business policies, competitive business costs, and streamlined regulatory environment,” says Ray Ramu, executive vice president and chief customer officer for Saia Inc. In business for nearly a century, Saia offers nationwide coverage, non-asset truckload service, and third-party logistics.

PLANNING FOR GROWTH

“The state’s favorable tax structure, government policies, and relatively low costs make planning for future growth easy as well,” Ramu says. “Additionally, the state offers a relatively low cost of living and high quality of life as well as typically favorable weather, which is advantageous for companies and individuals alike.”

Florida is a key market for Saia. “We offer next-day service for the entire state and to and from Florida from portions of the Southeast,” Ramu says. “This, combined with our enhanced residential white-glove service, our guaranteed services, access to Puerto Rico via the Jacksonville gateway, and our array of specialty products and services—including those offered by 3PL LinkEx—provides tremendous value to customers.”



A major player in the intermodal sector, both domestic and international, Florida East Coast Railway is a 351-mile freight rail system along the east coast of Florida. It is the exclusive rail provider to South Florida’s ports and connects with other railway systems.



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Photo: Miami-Dade Aviation Department

Miami International Airport (MIA) offers service to more than 160 cities on four continents, with dedicated freighter service to 112 global destinations. MIA serves as a distribution hub for perishable products, telecommunications equipment, pharmaceuticals, and textiles.

Through its extended and partner coverage, Saia serves the entire continental United States, Alaska, and Hawaii, as well as Canada, Mexico, and Puerto Rico. The company handles more than 26,000 daily shipments.

ENHANCING PROCESSES

Saia LTL Freight was founded in 1924 in Houma, Louisiana, by Louis Saia, Sr., a produce dealer who realized there was more success to be achieved in delivering produce than selling it. The first Saia truck was his car with the rear seats removed. Today, Saia is a billion-dollar-plus powerhouse with nearly 170 terminals and offices, including nine terminals in Florida.

Nationwide, Saia employs more than 10,000 people. The American Trucking Associations' Safety Management Council has recognized Saia LTL Freight for its outstanding safety record.

Known for its commitment to promoting a safe and healthy environment, the company makes substantial investments and process enhancements to continuously improve the fuel economy of its fleet and the energy efficiency of its facilities.

"Our goal is to keep reducing our carbon footprint and minimize our use of resources," Ramu says. "Our fleet initiatives include modernizing our equipment to improve fuel efficiency, transitioning to alternative fuels when practical, and using new technologies to become even more efficient at routing

drivers, loading trucks, and handling freight on our docks."

Within its facilities, Saia also has energy-saving policies in place and a phased upgrade to LED lighting. Other conservation initiatives include the recycling of used oil, hazardous waste, scrap metal, waste paper/cardboard, and tires.

In these challenging times, can Saia continue to serve Florida and the rest of its vast coverage area with the same intensity Louis Saia, Sr. brought to the company nearly 100 years ago?

"Now more than ever, Saia has the capability to deliver logistical solutions for any aspect of a business's transportation or shipping requirements," Ramu says. "We provide consistent, dependable LTL service along with an arsenal of specialty products for both domestic and international shipping needs."

TEAM EFFORT

You might say that Florida is a state of partnerships—in the air, on land, and at sea.

As one example, Emir Pineda, manager of Aviation Trade & Logistics for Miami International Airport (MIA), is quick to point out the essential connections the airport enjoys with the state's ports and over-the-road logistics providers through MIA Cargo HUB, the world's largest gateway to Latin America and the Caribbean. MIA serves as the hub for distribution

of perishable products, hi-tech commodities, telecommunications equipment, textiles, pharmaceuticals, and industrial machinery.

"Florida is well-positioned for many reasons," Pineda says. "Shippers have more ports available (11 cargo ports) to them in Florida than just about any other state in the union. And you can connect to the world through Miami."

One of 19 commercial airports in the state, MIA offers service to more than 160 cities on four continents, with dedicated freighter service to 112 global destinations.

INNOVATION STATION

"These connections play really well when it comes to e-commerce," Pineda says, adding that Amazon has announced plans for a one-million-square-foot distribution center in South Dade, the southern area of Miami-Dade County.

"Take this into account when it comes to innovation," Pineda says. "Think of Florida as a hub for innovation."

In that regard, he notes, Florida is not only a gateway to the world but to the entire universe. Home to the Kennedy Space Center, Florida is first when it comes to all things interplanetary. "We track trade in space," Pineda says. "I don't think any other state can say that."

Speaking of trade, the network extending from MIA Cargo reaches international proportions that may surprise casual observers. The airport's top cargo destination is Brazil, followed

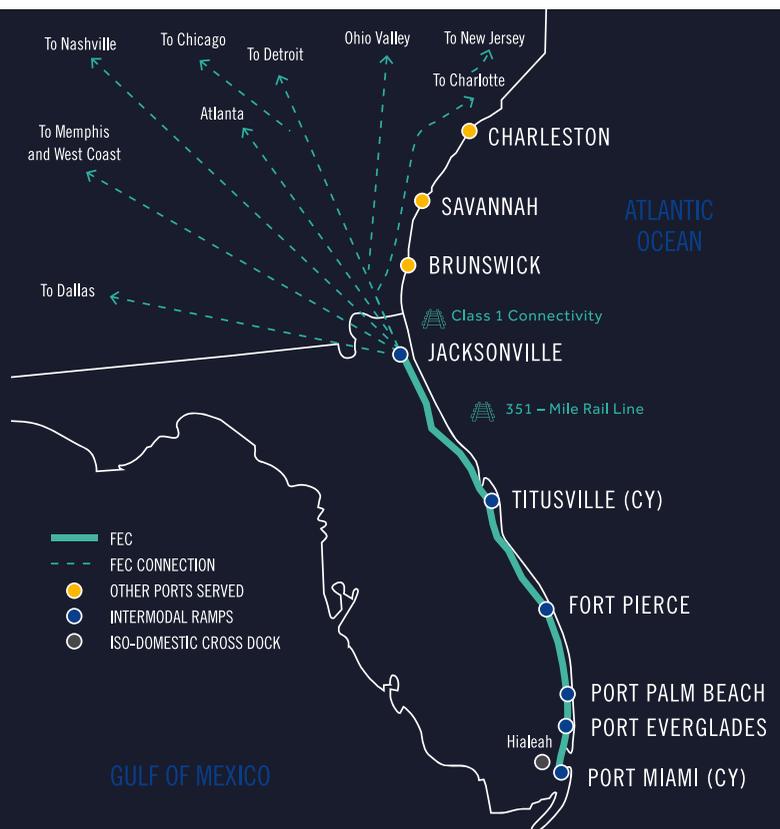
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by Colombia and Chile. On the import side, China ranks first.

The largest number of international visitors arriving at Miami International come from Canada, followed by the United Kingdom.

Traffic likewise is heavy domestically. “Fifteen million trucks come in and out of Florida every week,” Pineda says. “In all directions, we are well positioned to be your trade partner for logistics.”

Florida logistics leaders are not only looking up, they are looking ahead. “Florida has an infrastructure plan for logistics,” Pineda explains. “This is a dedicated effort coordinated by the Florida Department of Transportation.” Pineda worked with the Florida Chamber of Commerce Trade & Logistics Institute on its most recent five-year plan.

GROWTH EXPECTATIONS

Plans for growth factor in expectations that the volume of cargo at MIA will nearly double in the next decade from 2.5 million tons to 4.5 million tons. Consequently, Miami International is updating its infrastructure—adding new buildings and renovating existing structures.

The airport also is acquiring more land. “We’re handling today’s cargo and planning for tomorrow,” Pineda says, adding that a new truck staging area is expected to be built in approximately two years as part of the new development plans.

Growth and change are especially important for Miami International in part because cargo moves not only on passenger flights but significantly on cargo flights as well.

More than 100 airlines serve the airport, and it functions as the number-one perishables airport in the region. Pineda points out that 89% of the flowers, 61% of the fruits and vegetables, and 48% of the seafood that arrive by air into the United States come through MIA.

Pharmaceuticals also figure heavily into the airport’s traffic. While most of the pharmaceuticals are received from India, and most are sent to Brazil, handling them safely and securely requires highly developed local expertise. MIA is the first airport in the Western Hemisphere to be designated an International Air Transport Association (IATA) Pharma Hub.

Miami International also is designated as a Foreign Trade Zone (FTZ) magnet site, which translates into the entire airport serving as an FTZ. The airport is working on establishing a Cargo Communication System, which is an electronic platform enabling information exchange between public and private stakeholders to improve the airport community’s competitive position, with the goal of lowering costs and increasing efficiency and communication among all stakeholders.

Located on 3,230 acres of land near downtown Miami, MIA is operated by

the Miami-Dade Aviation Department and is the property of Miami-Dade County government.

TRACKING SUCCESS

Notwithstanding the enduring romance of rail travel—immortalized in all manner of books, songs, and movies—the fact is that trains are serious business. And no business leaders understand—and rely—on that fact more than logistics and supply chain practitioners.

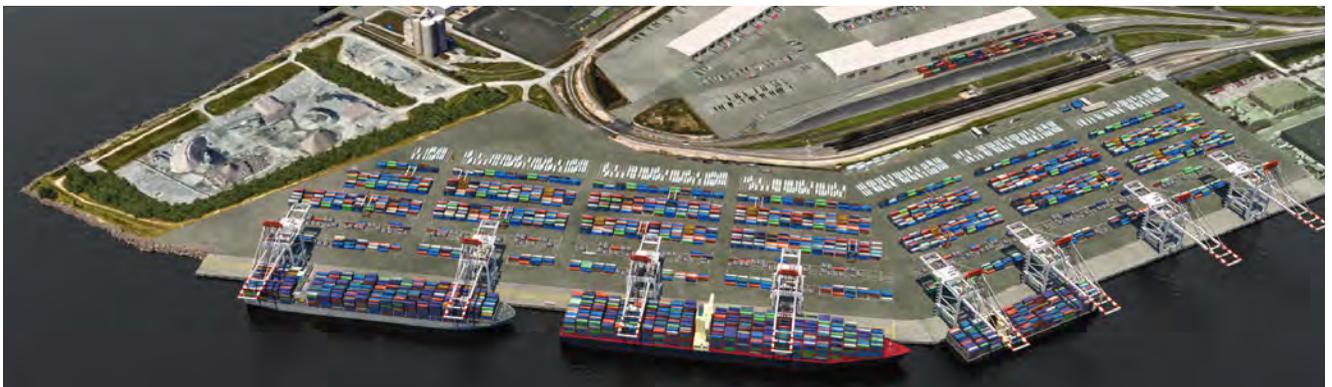
In Florida, the entity keeping logistics providers on track is Florida East Coast Railway (FEC), which offers carload service and functions as a major player in the intermodal sector, both domestic and international.

A 351-mile freight rail system trekking its way along the east coast of Florida, FEC is the exclusive rail provider to South Florida’s ports and connects with other railway systems to move freight throughout the country.

“Florida East Coast Railway provides rail service throughout the state from Jacksonville and down to Miami,” explains Nathan Asplund, the company’s CEO.

Principal among FEC’s attributes and areas of expertise are:

Carload. FEC moves a variety of carload commodities, including aggregates (crushed rock), automobiles, perishables, packaged foods, building and industrial materials, ethanol, bio-fuels, and other petroleum products.



Port Tampa Bay plans to create a highly efficient on-port logistics park to offer enhanced services to its tenants and users. Its strategic and master plans—dubbed Vision 2030—are in progress and include expanding and modernizing its marine terminals.

Miami International Airport



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Saia LTL Freight was founded in 1924 in Houma, Louisiana, by Louis Saia, Sr., a produce dealer. The first Saia truck was his car with the rear seats removed. Today, Saia is a billion-dollar-plus powerhouse with nearly 170 terminals and offices, including nine terminals in Florida.

Intermodal. Truck-like intermodal service provides shippers the convenience of door-to-door service and shipment tracing with delivery speeds that match those of trucking, with enhanced reliability and reduced carbon emissions.

Over-the-road. FEC's regional trucking carrier, Raven Transport, provides line-haul, heavy-haul, and tanker transportation services for the Southeast, Midwest, and Northeast, with operating authority to service all 48 contiguous states.

Real estate. The railway has multiple industrial development sites available to help companies advance their strategic position within the state along FEC's mainline track from Jacksonville to Miami, including parcels and third party-owned land and facilities.

FLEXIBLE SOLUTIONS

FEC operates on-dock at PortMiami and near-dock in Port Everglades, with direct rail services to Charlotte, Savannah, and Atlanta. FEC operates intermodal terminals in Miami, Fort Lauderdale, Fort Pierce, Titusville, and Jacksonville, giving customers the flexibility of running eight trains daily in each direction to comply with transit times and facilitate on-time performance.

"Also in our portfolio," Asplund adds, "we offer a door-to-door service connecting the U.S. Southeast with

south Florida, attending Georgia, North and South Carolina, and up to Tennessee with FEC-owned 53-foot containers."

From this expansive perspective, Asplund views the Florida landscape and he likes what he sees on the horizon. He says the challenges posed by the industry curtailments due to the global health crisis have prompted creativity in the Sunshine State.

"The current situation has led Florida to look for side developments," Asplund says. "Tourism has been impacted as well as local consumption and investment. Although South Florida is heavy in real estate, the geographic location puts the state in a very productive and efficient location near the Caribbean, Central and South America.

"This puts PortMiami in a prime location for the supply of these countries," he adds. "Apart from that, the Miami area specifically is a big supplier of limestone and raw materials for the construction industry."

Looking beyond the horizon, Asplund sees even better things to come for FEC. "Our alliances with the two Class 1 railroads connecting in Jacksonville have broadened our services and capabilities to reach other markets to supply South Florida as our biggest destination domestically," he says.

"FEC is working to offer highway-like service between Jacksonville and Miami, attending the increasing regulations

from electronic logging devices (ELDs), electronic hardware attached to a commercial motor vehicle engine to record driving hours, and others," he adds.

LOGISTICS LIFE FORCE

More than 70% of the Earth is water, and where there is water there is life. Those two salient facts have much to do with the logistics life force that water represents in the state of Florida. And at the center of it all is Port Tampa Bay near downtown Tampa on the western coast of the Florida Suncoast, approximately 25 sea miles from the Gulf of Mexico.

"Port Tampa Bay's strategic geographic location presents excellent logistics options for companies that serve the market," says Raul Alfonso, executive vice president and chief commercial officer of Port Tampa Bay.

"There are substantial efficiencies and savings to be obtained by moving product to our port to reach this market, instead of serving it as part of a domestic supply chain from other out-of-state ports," he adds. "We have confirmed savings in port operations and inland (trucking) of more than \$800 per container load."

Such savings are attainable by companies that have chosen to deploy a new Central Florida First strategy that takes advantage of the port's new ocean services, ease-to-market accessibility,

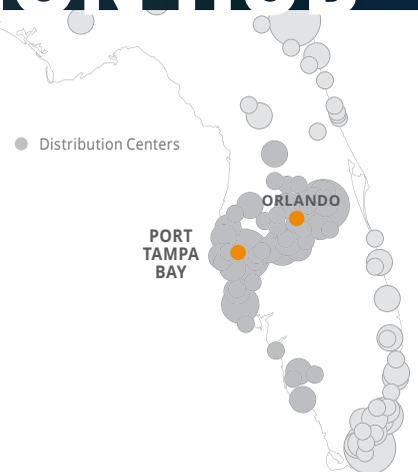


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Florida's largest port, Port Tampa Bay offers a strategic location that plays a bigger role in supply chain networks for shippers and distributors. Near downtown Tampa on the western coast of the Florida Suncoast, the port sits approximately 25 sea miles from the Gulf of Mexico.

and ability to generate economies of scale on inland last-mile distribution—for example, one truck driver being able to complete three or four deliveries daily from Port Tampa Bay to the market's distribution centers along the I-4 Corridor.

The rising impact of e-commerce has increased Port Tampa Bay's role in supply chain networks for shippers and distributors.

"Port Tampa Bay offers our users the opportunity to rationalize services, improve on delivery transit times, and reduce operating costs," Alfonso says. "These are reasons why we are becoming a new, efficient alternative to serving our fast-growing market, for the major trade lanes handling the containers carrying consumer goods into our market."

VISION FOR THE FUTURE

Port Tampa Bay's role in the Florida logistics infrastructure is not limited to the part it plays once products land or launch. Florida's largest port, Port Tampa Bay has land assets available for development.

"Our plans are to create a highly efficient on-port logistics park to offer great efficiencies to our tenants and users," Alfonso says, adding that the port's strategic and master plans—dubbed Vision 2030—are in progress.

For example, the Ports America container terminal at Hookers Point is being expanded to accommodate

capacity of more than 1 million TEUs. Just 200 yards away from the Ports America Terminal, the 130,000-square-foot Port Logistics Refrigerated Services facility provides services to the food/perishables imports and distribution industry.

LOGISTICS PARK, PHASE ONE

"Between the two terminals, we will start the construction of a near-dock, rail-served transload facility, to be operated by Perry-Taylor Distribution Services, supporting our two terminal operations," Alfonso says. "This is the first phase of our future logistics park, which can accommodate more than 300,000 square feet of additional facilities."

Meanwhile, CSX, a leading supplier of rail-based freight transportation in North America, serves the port's diverse portfolio of logistics and transportation services. CSX offers regular intermodal services into the Tampa and Central Florida markets, with excellent northbound capacity to connect Port Tampa Bay's international traffic to all major markets in the United States.

Officials of Port Tampa Bay and its private-sector partners are bullish about the port's future as a major logistics hub.

"We are implementing these development plans, alongside the State of Florida Department of Transportation and the federal government, who understand our region's growth and the importance of

Port Tampa Bay as a major economic engine for the future of our state and our region," Alfonso says.

The Central Florida region is, in fact, the fastest-growing area for commercial and industrial real estate development. The region is the state's primary distribution hub for all types of consumer products, including food products, beverages, furniture, and building and construction materials.

The region also boasts more than 380 million square feet of facilities, with more than 10 million square feet of additional capacity currently under construction.

ECONOMIC SUPER-STATE

Given all this, it is no hyperbole when Enterprise Florida calls the state "a true economic super-state."

The Florida Department of Economic Opportunity (DEO) makes its confidence in the future official, stating: "Florida will have the nation's top-performing economy."

For those seeking to establish a base for business, including warehouse and distribution facilities—or are in search of an ideal portal through which to move their products—the DEO has this to say: "Florida is committed to increasing its global competitiveness as a destination for business, capital, talent, innovation, and entrepreneurship."

In short, Florida is working hard to fuel the future. ■

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The Florida East Coast Railway (FEC) is a 351-mile freight rail system located along the east coast of Florida. It is the exclusive rail provider for PortMiami, Port Everglades, and Port of Palm Beach. FEC connects to the national railway system in Jacksonville, Florida, to move cargo originating or terminating there. Based in Jacksonville, FEC provides end-to-end intermodal and carload solutions to customers who demand cost-effective and premium quality.

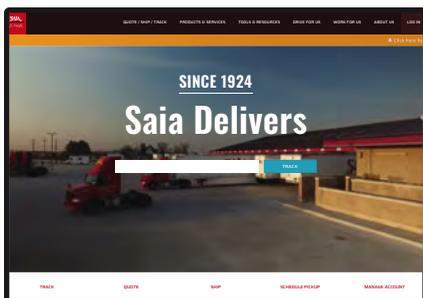


MIAMI INTERNATIONAL AIRPORT • www.miami-airport.com

Miami International Airport (MIA), located on 3,230 acres of land near downtown Miami, is operated by the Miami-Dade Aviation Department and is the property of Miami-Dade County government. Founded in 1928, MIA now offers more flights to Latin America and the Caribbean than any other U.S. airport, boasts a lineup over 100 air carriers, and is the top U.S. airport for international freight. MIA is also the leading economic engine for Miami-Dade County and the state of Florida, generating business revenue of \$31.9 billion annually.

PORT TAMPA BAY • www.porttb.com

Tampa/Hillsborough County boasts some of the highest-rated international and domestic shipping facilities in the nation. Strategically located on Florida's west coast, Port Tampa Bay is easily linked to rapidly expanding markets in Central and South America, and beyond the Panama Canal. The port also provides ship building, maintenance, and repair. To learn more about these services, point your browser to the port's website.



SAIA • www.saia.com

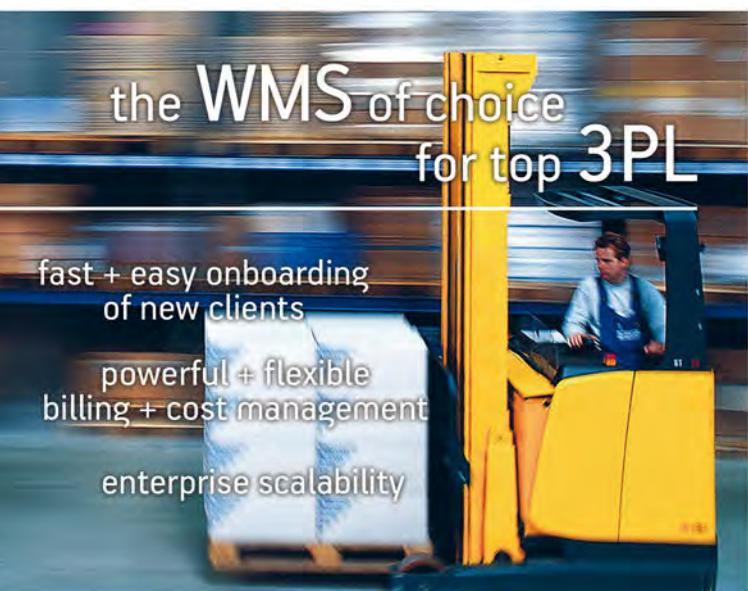
For nearly 100 years, Saia LTL Freight has been providing customers with fast, reliable, regional and interregional shipping. With 169 terminals located in 34 states, Saia LTL Freight offers a range of products and services that are backed up by a guarantee like no other in the industry. Our Customer Service Indicators, or CSIs, allow us to measure our performance each month against a set of six indices that our shippers said are the most important to them.



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