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2020 ANNUAL

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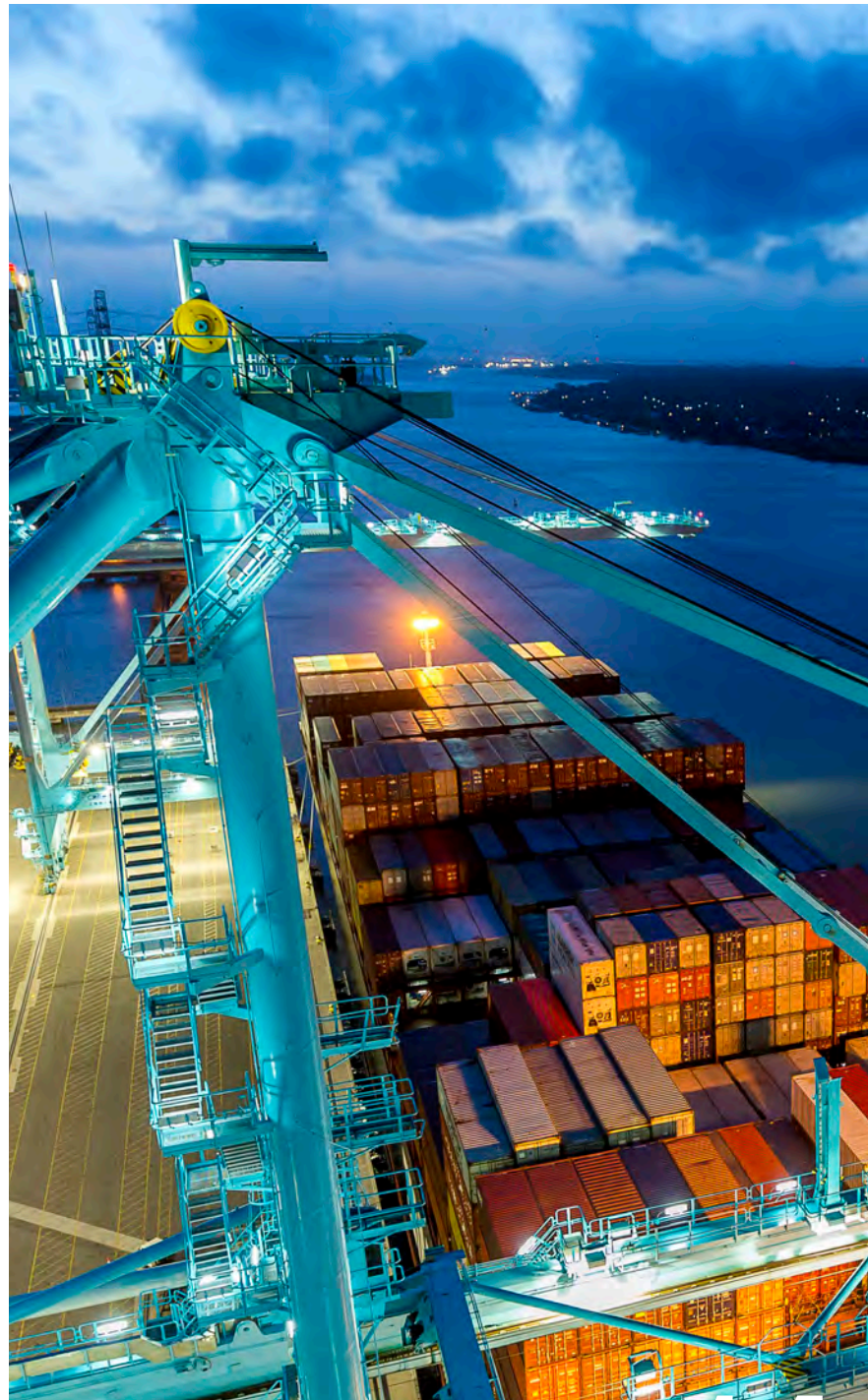
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JAXPORT focuses on growing Northeast Florida as a cruise destination with terminal improvements and area attractions.

TRENDING @ JAXPORT

X MARKS THE SPOT

JAXPORT reimagined its brand with a new logo, new website and updated social media, positioning the Florida port as a premier, global gateway that delivers a world-class customer experience.



GLOBAL



RELIABLE



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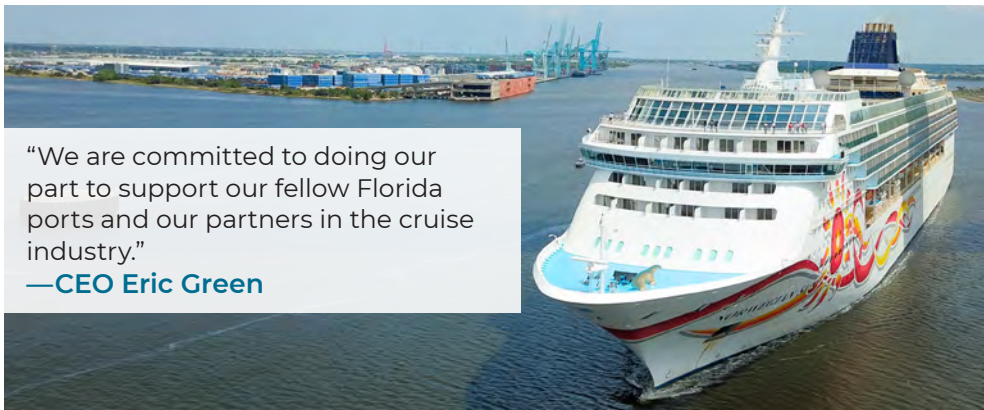


COMPETITIVE



INNOVATIVE

JAXPORT SERVES THE CRUISE INDUSTRY



“We are committed to doing our part to support our fellow Florida ports and our partners in the cruise industry.”
—CEO Eric Green

Five cruise ships, including JAXPORT’s regular home-ported ship Carnival Ecstasy, docked at JAXPORT during the cruise industry’s voluntary suspension of U.S. cruise operations due to COVID-19.

PORT PARTNERS KEEP CARGO MOVING DURING COVID-19

Port tenants and partners are committed to delivering a seamless transportation solution even in the midst of a global pandemic.



HEARD AROUND THE PORT

“Jacksonville is a business-friendly community and we are committed to doing what we can to help your business succeed here.”
- CITY OF JACKSONVILLE CITY COUNCILMAN RON SALEM

“JAXPORT, already Florida’s No. 1 gateway, is bound to see even greater numbers.”
- LLOYD’S LIST

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JAXPORT CEO DISCUSSES PORT'S GROWTH AND SUCCESS IN A CHANGING GLOBAL ECONOMY

By Chelsea Kavanagh



JAXPORT CEO Eric Green at the groundbreaking of the \$238 million SSA Jacksonville Container Terminal.

For more than a decade and a half, Eric Green has advocated for JAXPORT's growth and the jobs and opportunity it creates for Northeast Florida.

Green joined JAXPORT in 2005 and was named CEO in 2017. Two years later, the JAXPORT Board of Directors unanimously voted to extend his contract. Under Green's leadership, the port has set new cargo volume and revenue records, made significant progress on harbor deepening, and designed an

innovative public-private partnership to build the port of the future.

During his tenure, Green has also seen the industry landscape change, from the ever-increasing size of container ships to tariffs and a global pandemic. Through it all, JAXPORT continues to see success and growth.

JAXPORT Magazine sat down with Green to discuss his vision for the future, and the challenges and opportunities that lie ahead.

QUESTION: CORONAVIRUS CAUSED UNPRECEDENTED IMPACT ON THE GLOBAL SUPPLY CHAIN THIS YEAR. WHAT WILL THE LONG-TERM IMPACT LOOK LIKE?

ANSWER: I am very optimistic that the impact on our business will continue to be limited, due in large part to our diversification model.

JAXPORT is one of the most diversified ports in the country, and that is a very positive thing for us. As we've seen with tariffs and now the coronavirus, diversification—in both

trade lanes and cargo types—helps lessen the impact of volatility in the global economy.

Our strategic location is also beneficial. I am bullish on the ability of the Southeast U.S. economy to rebound. As the economy opens up, we are as well positioned as anyone to see cargo volumes stabilize, because of the strong demand from shippers and BCOs looking to reach the growing Southeast U.S. market.

In addition, because Northeast Florida has ample available warehouse space, we are well-suited to accommodate the industry's changing demands during this time.

Q: LAST YEAR WAS A RECORD YEAR FOR JAXPORT'S CONTAINER, AUTO, AND GENERAL CARGO VOLUMES. WHAT HAS CONTRIBUTED TO THIS SUCCESS?

A: On the container side, we continue to see success in our anchor trade lanes, Puerto Rico and Asia. JAXPORT's Asian trade is up 55 percent over the last five years. In addition, our three Puerto Rican carriers, TOTE Maritime Puerto Rico, Crowley and Trailer Bridge, maintain strong commitments to serving the island—while also continuing to expand—connecting Jacksonville to destinations throughout the Caribbean and beyond.

You can't tell the story of JAXPORT's growth without talking about autos. We are the nation's second-busiest vehicle handling port and growing this business is an important part of our strategy as we look to the future.

The Southeast is the fastest-growing region in the nation for auto sales and our location in the heart of this in-demand market, combined with our highway and rail connections, creates unmatched efficiencies.

Q: WHAT IS YOUR PROUDEST ACCOMPLISHMENT SINCE JOINING JAXPORT?

A: Because I know how much it means to our customers and to our community, my proudest accomplishment is moving the harbor deepening project two years ahead of its original schedule.

WHAT THEY ARE SAYING

Government, industry and local leaders weigh in on the groundbreaking of the SSA Jacksonville Container Terminal at JAXPORT's Blount Island Marine Terminal.



**ADMIRAL MARK H. BUZBY
U.S. DOT MARITIME ADMINISTRATOR**

"This is where we move military cargo in and out in times of crisis or during a national emergency. Keeping that capability tuned up is very, very important, which is why we're very happy to make this investment."



CONGRESSMAN JOHN RUTHERFORD

"As JAXPORT continues to set record cargo volumes year after year, I am committed to using my role on the House Appropriations Committee to support the vision of our local leaders and the folks at JAXPORT who work hard every day to keep our port city thriving."



JACKSONVILLE MAYOR LENNY CURRY

"Under the leadership of Eric Green, things are happening. The port is happening. I just want to take a moment to say to this Board, to this CEO: Keep pushing, and good work."



**JACKSONVILLE CITY COUNCILMAN &
JAXPORT CITY COUNCIL LIAISON
RON SALEM**

"Congratulations to JAXPORT! I am very proud to support this job-creating machine we are so lucky to have here in Jacksonville."



**JAXPORT BOARD CHAIRMAN
JAMIE SHELTON**

"This facility represents a milestone in the evolution of our port. Together, with the support of Secretary Elaine Chao and our federal, state and local partners—JAXPORT and SSA Marine are investing in our region's future and ensuring we can continue to create more jobs and economic opportunity for the people of Northeast Florida."

We employed a creative solution by engaging a private partner, SSA Jacksonville, making this the first federal deepening project to include funding from a private business. Last year we broke ground on a state-of-the-art international container terminal that will be complete around the same time as our deepening project.

The terminal agreement includes more than \$100 million in private investment and a \$20 million grant from the federal government. These investments in our port speak to the opportunity that exists in Jacksonville—a clear sign that our port is a growing player in global trade on the U.S. East Coast.

If I could pick one more accomplishment, it would be our customer service award. Last year,

readers of Logistics Management voted JAXPORT the top port in the nation for customer service. There is no higher honor than being recognized by your customers for doing good work.

Q: LET'S TALK CHALLENGES AND OPPORTUNITIES FACING THE PORT.

A: There's no doubt that our biggest challenge is also our single biggest opportunity. Providing adequate channel depth will always be a challenge until the Harbor Deepening project is complete. Harbor Deepening puts us in the major leagues on the East Coast.

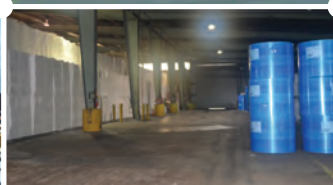
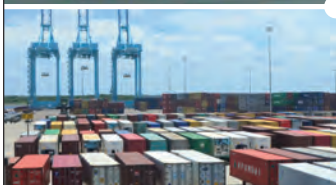
Because of our strategic location, everyone wants to be in Jacksonville, which puts land at a premium, especially now that we've reached the halfway point of the deepening project. To meet

the growing demand for space for containers and vehicles, we are currently looking to acquire land.

For containers, our long-term strategic plan calls for us to move about 2.5 million TEUs, that's about a million more than last year's record. We have capacity to reach 2.5 million today, but our goal is to get beyond that.

For vehicles, Jacksonville also has a lot of advantages that are driving increased demand. Again, it's all about location. We are the closest port to some of the most populous areas in Florida with the ability and space to move a high volume of passenger automobiles and trucks.

For the industry as a whole, there is a lot of opportunity in the liquefied natural gas (LNG) space, and we are proud to be a global leader in the use of LNG as a clean marine



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fuel. There have been more than \$1 billion in LNG investments in Jacksonville alone, and as the use of LNG expands globally, we are well-positioned to benefit from export opportunities.

Q: LOOKING AHEAD, WHERE DO YOU SEE JAXPORT IN THE NEXT DECADE?

A: The word that comes to mind is “Leader.” JAXPORT is a global leader in customer-focused transportation solutions, and we continue to build on that.

We are also one of the most efficient and diversified deepwater seaports on the U.S.

East Coast. As the population of the Southeast U.S. grows and more of the industry learns about JAXPORT’s advantages, continued growth for our port will follow.

Q: GIVE US A PEEK BEHIND THE CURTAIN. ANYTHING NEW ON THE HORIZON?

A: We are currently looking for opportunities to grow our reach in South and Central America and believe that we are a good candidate for adding a European container service.

We are also exploring opportunities to add space for our auto business—because if

we have it, we can fill it—as well as pursuing home port and port of call cruise opportunities by marketing JAXPORT to the cruise industry as a convenient drive-to-ship option.

Jacksonville is America’s Logistics Center for a reason. We have the distribution, the highway and rail connections, the service providers, efficient turn times and two-way channel traffic. Combined with fast access to more than 70 million consumers, an important selling point in the age of e-commerce, Jacksonville has a lot to offer—and the industry is taking notice. □



JAXPORT

SETTING THE STAGE FOR GR

HARBOR DEEPENING PROJECT UPDATE

JAXPORT's single biggest growth project, the deepening of our federal shipping channel to 47 feet from its current depth of 40 feet, remains two years ahead of its original schedule, with anticipated completion in 2023, based on continued funding.

2019: A BIG YEAR

JAXPORT ended the decade on a high note, setting port records for containers, autos and cargo revenue

More highlights:

TERMINAL GROUNDBREAKING

SSA Jacksonville broke ground on a state-of-the-art international container terminal at the Blount Island terminal.

AMPORTS EXPANDS ACREAGE

AMPORTS added 22.4 new acres of property for auto processing and storage space at the Dames Point terminal, with plans to develop additional acreage by 2023.



1.33M+ TEUs

UP 5% OVER 2018

ASIAN TRADE UP 55%
OVER PAST FIVE YEARS

OWTH

\$394M

COMMITTED OR PLEDGED FOR THE PROJECT

ECONOMIC IMPACT

\$31.1B

ANNUAL ECONOMIC OUTPUT FOR FL

26K+

JOBS IN NE FL

\$70.5K

AVG. SALARY FOR PORT-DEPENDENT JOBS

FTZ NO. 64 EXPANDS

Flagler County added, expanding zone reach to 5,000+ sq. miles



67.5M

In operating revenues



OVERALL TONNAGE

10.9 million tons of total cargo moved, up 4% over FY 18

CRUISE

195K

PASSENGERS SERVED

800

JOBS SUPPORTED BY CRUISE BUSINESS

AWARD-WINNING

#1

NAMED **TOP PORT IN THE NATION** FOR CUSTOMER SATISFACTION AND PERFORMANCE EXCELLENCE BY READERS OF LOGISTICS MANAGEMENT MAGAZINE

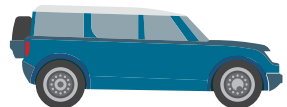
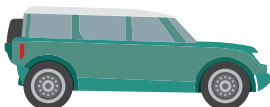
#2

AWARDED **SECOND MOST IMPROVED PORT** IN NORTH AMERICA FOR OVERALL PRODUCTIVITY BY JOURNAL OF COMMERCE

CEO ERIC GREEN NAMED **ONE OF THE STATE'S MOST INFLUENTIAL BUSINESS LEADERS** BY FLORIDA TREND

696K+

AUTOS



JAXPORT CEO Green gives Florida Department of Transportation Secretary Kevin Thibault a waterside tour of ongoing port projects, including harbor deepening.



HARBOR DEEPENING REACHES HALFWAY POINT

JAXPORT's single biggest growth opportunity—the deepening of the Jacksonville shipping channel to 47 feet from its current depth of 40 feet—continues to make major progress.

Contractors for the U.S. Army Corps of Engineers completed the first 5.5 miles in spring 2020, marking the halfway point for the 11-mile portion of the project through JAXPORT's Blount Island Marine Terminal.

In February 2020, the federal government contributed an additional \$93 million toward the cost of the deepening, fully funding the federal portion of the project through Blount Island. Two months prior, JAXPORT and

SSA Jacksonville broke ground on the new state-of-the-art SSA Jacksonville Container Terminal at Blount Island. Enhancements to the facility are scheduled to be complete around the same time as the deepening project (see side bar).

The project remains two years ahead of its original schedule, with anticipated completion in 2023, based on continued funding from all partners.

As JAXPORT continues to build the port of the future, a deeper harbor will allow the port to accommodate more cargo aboard the larger container ships currently calling on Jacksonville from destinations throughout the world. □

PREPARING FOR DEEPER WATER

The SSA Jacksonville Container Terminal at Blount Island remains open and fully operational during construction.

Terminal enhancements include:

- \$109 million in berth upgrades to simultaneously accommodate two post-Panamax vessels are scheduled to be complete in 2021.

- Phased yard improvements to accommodate up to 700,000 TEUs (twenty-foot equivalent units) annually.

- The addition of three more state-of-the-art container cranes, bringing the SSA facility's total to six.

- Construction of a vessel turning basin that will allow larger vessels calling on the terminal to turn at Blount Island, upon completion of the deepening project.

CUSTOMIZATION COMES STANDARD



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THE HIDDEN GEM ON THE U.S. EAST COAST

JAXPORT'S TRANSPORTATION & LOGISTICS ECOSYSTEM CREATES EFFICIENCIES AND COST SAVINGS FOR SHIPPERS

By Lori Musser

When it comes to building a supply chain—shippers and BCOs are searching for the ultimate treasure: a location that offers global connections, efficient intermodal operations, competitive rates, high-quality service and quick reach to their customers. It's much like searching for the infamous 'X' on a treasure map, where X marks the spot.

Logistics executives are increasingly finding that elusive bundle of transportation benefits in Jacksonville, Florida at the Jacksonville Port Authority (JAXPORT).

A hidden gem on the U.S. East Coast, JAXPORT is strategically located at the crossroads of the nation's

highway and rail network and within a day's drive of more than 70 million consumers. The list of companies achieving success in Jacksonville includes many household names, but for some, the Southeast port is new on the radar.

A 2018 survey of logistics professionals found that 42 percent



global gateway to Florida and inland U.S. destinations—where there is a skilled workforce with a collaborative spirit to optimize end-to-end supply chains for shippers both large and small.

UNLOCKING JAXPORT'S LOGISTICS ECOSYSTEM

"Jacksonville is an untold story," Peek said. "The biggest question we get from companies in the industry is: What does Jacksonville have to offer end to end?" The answer, he said, is an unparalleled transportation ecosystem comprised of experienced service providers dedicated to the efficient movement of cargo.

JAXPORT's "ecosystem" is helping the industry find cost advantages, expedite connectivity and reliability, as well as deliver unique opportunities to carriers as well as BCOs.

The 'ecosystem' terminology is a concept to describe all Jacksonville has to offer shippers: a strategic location in the growing Southeast U.S., ocean connections to/ from 140 ports around the world; intermodal connections to key markets including service by two Class I rail lines and regional rail; and an expansive network of service providers—from 100 trucking firms to dozens of freight forwarders and 3PLs—ready to safely and efficiently move cargo.

JAXPORT's team of experienced logistics professionals is providing shippers with innovative solutions to help grow

their business and bottom line by putting the ecosystem to work for them. From a strategically placed distribution center to backhaul opportunities and more—taking a deep dive into the ecosystem can increase efficiency and reduce the cost of your business' supply chain.

QUICK REACH TO A GROWING CONSUMER BASE

Population growth is driving consumption in Florida. JAXPORT's strategic location at the nexus of the nation's Southeastern highway and rail network provides shippers with seamless and efficient connections to this growing consumer base. Cargo moving through Jacksonville can quickly be deployed to key locations in Florida including Orlando, Lakeland, Titusville and Tallahassee, as well as to DCs in the southern part of the state.

Rich Doty is Geographic Information Systems Coordinator and

of those surveyed were unfamiliar with JAXPORT. "If you know us, you love us," said Robert Peek, Director/General Manager of Sales & Marketing at JAXPORT. "But there are many who don't know us."

The following stories reveal the seamless transportation experience found through JAXPORT—the



Research Demographer for the Bureau of Economic and Business Research (BEBR) at the University of Florida. He said the population of Florida is expected to reach 21.2 million in late 2019—up an estimated 1.8 million from Q1 of 2019.



"We've been able to reduce delivery times in the Southeast region by three days since we opened the Jacksonville warehouse."

—Aamir Baig, Article Co-founder & CEO

This does not include seasonal residents and tourists—and there are as many as 126 million visitors to the state each year.

BEBR does the official population projections for Florida on behalf of the legislature. "At a state level, our 2030 projection is to reach 24.4 million and our 2040 projection is 26.5 million people," said Doty. He predicts in total population, "Florida will overtake Texas and maybe California in my lifetime."

Florida has a unique offering for exporters: backhaul opportunities.

These opportunities may be location-specific and sometimes

product-specific for trucking and rail, but there are many. "We don't want to see equipment leave the state empty," said Aisha Eccleston, JAXPORT's Director of National Container Accounts.

"A properly positioned transload facility in Jacksonville can use empty equipment to offer better northbound and southbound economics than our competitors," Eccleston said. So, if an inland backhaul rate in Jacksonville is a fraction of the going rate at a competitive port, as is often the case, JAXPORT will help find it. "That's our strength," she said.

**ROOM TO GROW:
AMPLE WAREHOUSING &
DISTRIBUTION SPACE**

Northeast Florida's rapidly growing warehousing and distribution center sites, with more than 138 million square feet of space, support the port's growing

capacity with ample room to expand.

In the past year, the region has added a number of distribution centers for household names including Amazon, Wayfair, Ulta and Cra-Z-Art. These companies join a long list of others finding success in Jacksonville including Bridgestone Americas, Bacardi USA, Coach, Mercedes, Sysco and more.

For Canadian-based online furniture retailer Article, a strategically placed DC in North Florida has expedited shipping times to its Southeast consumer base. Article's Co-founder and CEO Aamir Baig has said the 300,000-square-foot Jacksonville DC allowed the company to "reduce delivery times in the Southeast region by three days."

Peter Anderson is Vice President of New Investments, Coastal Markets, with Pattillo Industrial Real Estate, a leading Southeast industrial real estate developer. Anderson said, "The Jacksonville community works hard to attract manufacturers and distributors to the area. We all row in the same direction, knowing our mutual success is dependent on the efforts

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of each other.” Anderson said Jacksonville has millions of square feet of large distribution center buildings available or under construction, offering many options for prospect companies. “Jacksonville also has thousands of acres of development-ready industrial land with good proximity to the port available for further development,” he said. “The other comparable port communities in the Southeast do not have the industrial land availability that is found in Jacksonville. Land pricing in Jacksonville is also lower than competitive port markets such as Miami and Everglades, Tampa, Savannah and Charleston, thus building rental rates tend to be lower than buildings found in those markets,” Anderson pointed out. He added that experience, well-capitalized developers, a pro-business attitude, and reasonable impact fees help make the local real estate market very competitive.

When you consider Jacksonville’s deep water, ocean service profile, highway and rail connections, warehousing advantages and access to a growing market, the “secret” that is Jacksonville’s transportation ecosystem won’t stay hidden for long. Already, Global Trade Magazine says Jacksonville is one of the best cities for logistics infrastructure, and in 2019, Logistics Management magazine readers ranked JAXPORT the No. 1 port in the South for customer satisfaction and performance excellence.

"For BCOs, it's a great time to route your freight through Jacksonville to take advantage of the savings found when shipping through JAXPORT," Peek said. □

SAMPLE OF COMPANIES DOING BUSINESS IN JACKSONVILLE



**Things are heating up.
Including the race for talent.**

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SHIPPING THROUGH A SEAPORT: FIVE TRENDS TO WATCH

By *Sandy Smith*

From uncertainty in international trade tariffs to emerging global issues affecting the supply chain, the landscape of international trade is rapidly becoming a complex environment.



Gabriel Rodriguez is President of the Florida Customs Brokers & Forwarders Association, Inc. (FCBF), a trade association for industry professionals that serve the import and export community. He is also the President of the customs brokerage and logistics management services company A Customs Brokerage, Inc.

Rodriguez recently sat down with JAXPORT to share his insights into five trends to watch in the year ahead.

TREND 1: INCREASING TECHNICALITIES

While the many codes and regulations for shippers can trip up a newcomer in particular, Rodriguez sees them becoming a bigger issue for all.

“The number one thing I see for a shipper facing issues is they didn’t do enough due diligence prior to transacting their shipment. They lack the necessary data or the right data to clear it through customs at origin or destination—which can result in a costly mess.”

With some 35 to 40 agencies involved in regulating some aspects of import and exports in the U.S. alone, “It gets extremely technical,” he said. “If you want to ship something out of the U.S.

or bring something in, you’ve got to research it and engage local resources. It’s about taking that additional step to do the work on the front end to ensure you are in full compliance.”

Organizations like FCBF and U.S. Commercial Service as well as the team at JAXPORT are available to help shippers “make sure they dot all their I’s and cross their T’s.”

These sorts of pitfalls are not just an issue for novice shippers. A recent change to the standards for wood packaging materials like pallets and crates caught even seasoned professionals off guard. “The international community changed their regulations and no longer allowed non-fumigated or non-treated wood,” said Rodriguez. “It caught a lot of people off guard. Even though it’s a regulation that’s been in place for the better part of a decade, they started enforcing it.”

The impact was immediate—and costly. “No one wants to have a container worth \$30,000 to \$50,000 refused entry into the country

and have to be returned to the country of export. Keeping up with regulations in this ever-changing world is a job in itself.”

TREND 2: GLOBAL UNCERTAINTY

Global tariffs tension increased nearly two years ago and continue to make news. The U.S. and China are among the biggest players and while political leaders have negotiated an initial deal, tremendous uncertainty remains. Add in emerging trade deals like the passage of the U.S.-Mexico-Canada Agreement (USMCA), which replaced NAFTA, and the still-unknown impact of BREXIT, in which Great Britain has left the European Union.

“Trade negotiations, whether with China, Europe or some emerging Asian nations, are always at the forefront of what cargo owners are facing,” said Rodriguez. “Shippers may be subject to restrictions on the import or face additional tariffs on the export. That’s a huge issue.”

In addition to tariff uncertainty, the global economy is now facing impacts of COVID-19, which shut down important trade lanes from China in early 2020. The impacts trickled throughout the supply chain and are now in full effect in the U.S. Early reports say the virus began in a particularly important manufacturing and

shipping zone in the People's Republic of China.

Rodriguez is uncertain on the potential impact of the virus, likening it to a weather event that caused disruption. "Curve balls get thrown at you that force contingencies in business to ensure that, when those disruptions occur, it doesn't bring the business to a grinding halt."

At the time of publication, the U.S. supply chain is facing new challenges every day related to COVID-19. Ocean carriers are issuing blank sailings, some ports are facing capacity issues as containers with non-essential goods remain on terminal and trucking firms continue to work around the clock to deliver goods to store shelves. COVID-19 will surely be a topic of discussion around the industry for many months and maybe even years to come.

[Editor's note: Read related story "Northeast Florida offers available warehouse capacity" at [JAXPORT.com/cargo-blog](https://www.jaxport.com/cargo-blog)]

TREND 3: CONSOLIDATION OF CARRIERS AND SERVICES

As major steamship carriers work together to make their shipping more efficient, "capacity is moved from trade lanes making it a little more difficult to ship as efficiently for cargo owners," Rodriguez said.

Consolidation of services is a new trend Rodriguez says he is paying particular attention to. "The larger world carriers are jumping into the 3PL and 4PL space and doing it overtly. The larger service providers are going to be swallowing up competition whether by acquisition or defeat."

One of Rodriguez' major concerns in this area: the impact on small business. "As a small business, when you get into relying on those behemoth companies, you lose the personal touch. This industry is still an industry of relationships. As much as people want to automate processes, there is still the need for human contact. I don't think that's ever going to go away. It's great for

your large multinational companies to deal with the large carriers. Your mom and pops and your small- and medium-sized business still need a little hand-holding."

TREND 4: DATA DEMANDS

Data-driven decisions have been around for a while, but Rodriguez believes the near future will continue to challenge and change the industry.

"Everybody is trying to get their hands on as much data as they can, integrating with their service providers and the supply chain to make sure that they're as efficient as possible," he said. "If you aren't using technology and automation now, you need to get there as quickly as possible. That's a conversation that I'm having on a daily basis, whether with the port, consignees or warehouses. Everybody is trying to integrate as fast as possible."

The implementation of the U.S. Customs and Border Protection's Automated Commercial

JAXPORT CONTAINER EXPERT JOINS BOARD OF FLORIDA TRADE GROUP



JAXPORT Director of Cargo Sales Frank Camp has been selected to serve on the Board of Directors for the Florida Customs Brokers & Forwarders (FCBF) Association. The Doral, Florida-based trade association is the most influential and active representative body of industry professionals serving the state's import and export community.

In addition to freight forwarders and Customs brokers, FCBF members represent industry leaders from throughout the supply chain, including cargo shippers and ocean carriers. FCBF members play an important role in port selection for the cargo community.

"Northeast Florida is a growing player in international trade and we are thrilled to welcome Frank to our team," said FCBF Board President Gabriel Rodriguez. "His knowledge and experience throughout the supply chain will be a valuable resource for our members as we work to elevate this dynamic industry and grow global trade opportunities throughout the state."

"Now, more than ever, seamless freight movement is critical to the health of our state and national economy," said Camp. "I am grateful for the opportunity to serve the industry in this role, while further elevating JAXPORT's reputation for outstanding customer service and ease of doing business."

Environment (ACE) protocol is accelerating the need for technology within the supply chain. “Now that all the partnering agencies are finalizing their protocols and coming on board in an automated fashion, entities that may not have been automated are now automated.”

Rodriguez expects to see a rapid pace of change in the industry as different solutions enter the market allowing existing platforms to integrate with each other. “It’s going to move at hyper speed,” he said.

TREND 5:
UNKNOWN AND EMERGING ISSUES

With the current pace of change, Rodriguez is clear that there may be major stories developing that

have not yet emerged. One area he is watching is the shift of supply chains from China to other Asian countries, as well as to South and Central America.

“That’s one of those issues that is slowly happening,” he said. “We may look up and see a huge factor that we didn’t see coming.”

With the trade negotiations and tariff restrictions with China, companies may look to move manufacturing elsewhere. It’s not a quick or easy solution. Companies that took small steps two years ago as tariffs were enacted may be capitalizing now. “Once you put something like that in motion, you’ve got to capitalize on it,” Rodriguez said. “As trade issues simmer down, that shift is still going

to happen. It will be one of those underlying stories that we’ll look back on as having a huge impact.”

With so many rapidly moving pieces, it might seem logical to outsource oversight of these complex issues. Rodriguez said that cargo owners “need to get to know the business a little bit more. At the end of the day, the responsibility—legally and logically—lies with the cargo owner.”

Help is there, whether through a government agency or a trade association like FCBF. “We’re there to facilitate trade,” Rodriguez said. “The more we can do that, the better off we all are.” □

Learn more about FCBF at fcbf.com.

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HELPING RETAILERS ADAPT TO CHANGING DISTRIBUTION MODELS

By Frank Camp, Director, Cargo Sales, JAXPORT

'Bigger is better' is no longer the best strategy for retailers looking to stand out in today's consumer-driven marketplace. As same-day and next-day delivery became the rule, not the exception—retailers are trading



large, rurally located distribution centers for smaller spaces located in metro areas.

Strategically located in the fastest-growing consumer market in the Southeast U.S., Jacksonville, Florida has become a hot spot for

retailers looking to get closer to the consumer and embrace a new way of thinking when it comes to their distribution models.

E-commerce giant Amazon opened its first distribution center in Northeast Florida in 2016 and continues to expand in the area—and for good reason. Jacksonville



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offers a unique combination of tools helping brands meet today's delivery demands including speed to market, a variety of warehouse space options and 845,000-plus skilled workers.

When it comes to getting closer to the consumer, there is no better place to be than Florida, ranked the third largest state in the U.S. by population and growing. The state currently boasts 21.8 million people with more than seven million of those residents living within a three-hour drive of JAXPORT terminals, according to the Florida Office of Economic and Demographic Research.

Shipping cargo through JAXPORT allows retailers to quickly reach this growing consumer market—

Truck Service Times to Key Markets

ORLANDO 147 miles - 2 h 17 min	MEMPHIS 752 miles - 10 h 57 min
TALLAHASSEE 180 miles - 2 h 47 min	LOUISVILLE 782 miles - 11 h 24 min
ATLANTA 363 miles - 5 h 11 min	CINCINNATI 794 miles - 11 h 47 min
MONTGOMERY 376 miles - 6 h 13 min	ST. LOUIS 916 miles - 13 h 17 min
CHARLOTTE 370 miles - 5 h 32 min	DALLAS 1,008 miles - 14 h 59 min
NEW ORLEANS 574 miles - 7 h 59 min	CHICAGO 1,077 miles - 16 h 1 min

and fast. With more than 100 trucking firms operating in and around Jacksonville, cargo is quickly transported from the port to a distribution center in

the region. JAXPORT's terminals are located minutes from three major highways, providing seamless connections to markets throughout the Southeast,

— FEATURE —

including Florida's growing I-4 corridor as well as the Atlanta and Charlotte markets.

Brands can also put the area's UPS and FedEx sort centers to work for their last-mile parcel distribution—both of which have recently completed multimillion-dollar expansions. This is just one of the many attributes of the area offering shippers a true seamless transportation experience—from shipping the product into the U.S. to last-mile delivery to the consumer.

Not only does Jacksonville offer speed to market—the area has more than 138 million square feet of flexible warehousing space ready to handle a variety of cargo types. From furniture and handbags to make-up and tires, Jacksonville's warehouse space is equipped to handle it all. Other retail giants now call the area home, including Wayfair, Bridgestone Tires, Ulta and Coach. These companies are taking advantage of the area's low operating costs and a skilled labor base trained to handle the ever-evolving technology in today's supply chain.

New Jersey-based LaRose Industries, LLC, or Cra-Z-Art, which manufactures and distributes toy and stationery

products, opened a new distribution center in Jacksonville in later 2019. Tampa Bay Business Journal quoted LaRose Industries' Chief Operating Officer Randy Tarino: "Jacksonville was eventually selected due to JAXPORT's superior advantage, as it regards the frequency of container ships from China and due to the availability of a building suitable to the needs of LaRose Industries within the required time frame."

As urban fulfillment trends continue to impact retailers' supply chains, brands can benefit from Jacksonville's transportation and logistics network. □

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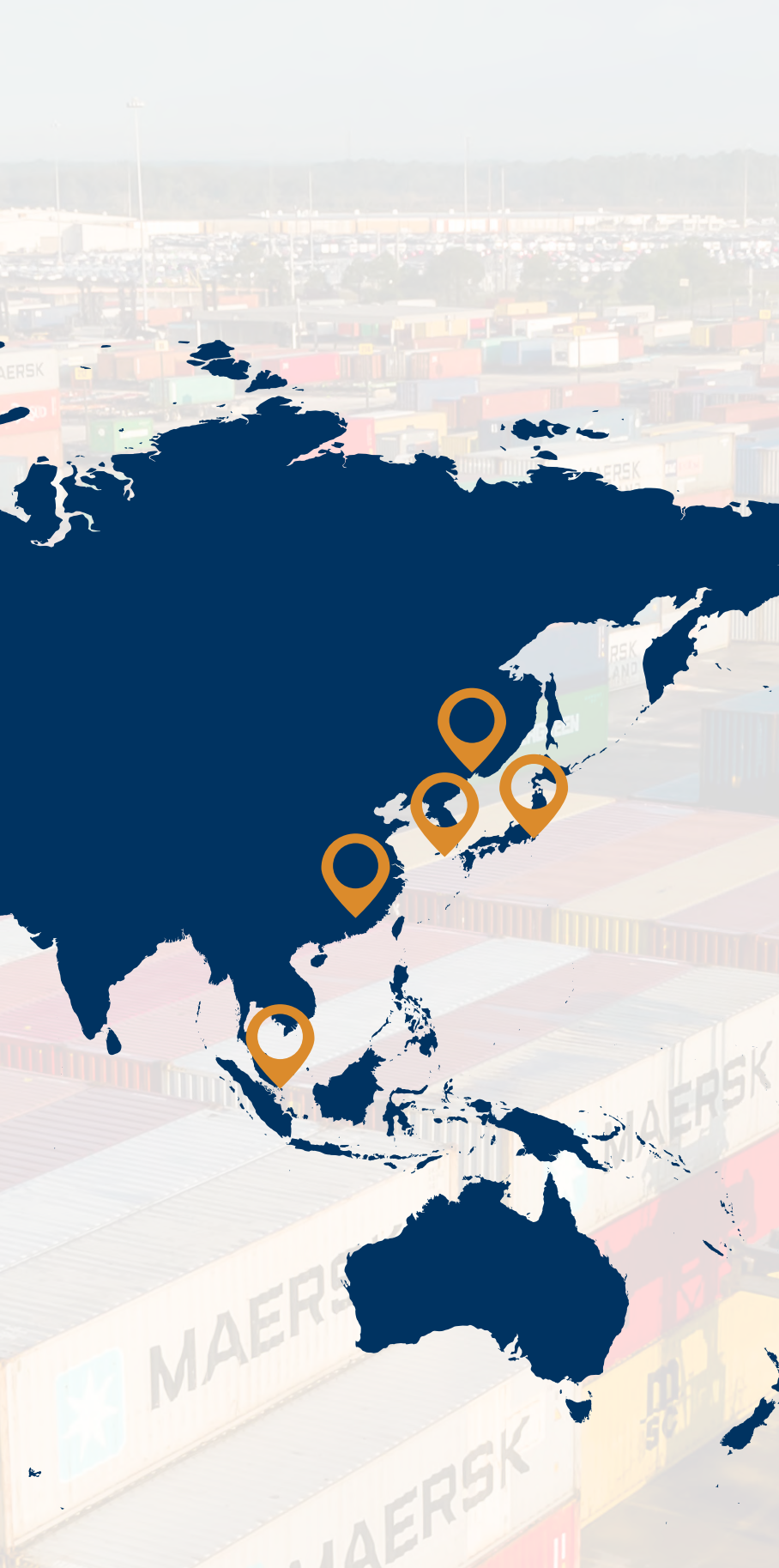




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THE ALLIANCE - ECI	Japan, People's Republic of China, Republic of China, Republic of Korea, Hong Kong, Panama
THE ALLIANCE - EC5	Thailand, Vietnam, Singapore, Sri Lanka, Canada, United Arab Emirates
ABUS TANGO / SEC	Brazil, Argentina
BAHAMAS EXPRESS	The Bahamas
CENTRAL AMERICA NORTHERN ZONE	Guatemala, Honduras, El Salvador, Nicaragua, Cuba
CENTRAL AMERICA SOUTHERN ZONE	Costa Rica, Panama
PUERTO RICO / CARIBBEAN	Puerto Rico, Virgin Islands, U.S. Virgin Islands, Dominican Republic, Leeward and Windward Islands, Trinidad & Tobago, Netherlands Antilles, Haiti, Cayman Islands
CARIBBEAN	Cayman Islands, Honduras, Guatemala, Nicaragua, Jamaica, Cuba
WEST AFRICA	Cameroon, Togo, Senegal, Ascension Island, Praia Da Vitória
NORTHERN ATLANTIC	Greenland
ECNA - EUROPE	Estonia, Finland

View transit times and ocean carrier services by port at: JAXPORT.com/trade-lanes-map



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DELIVERING UNDER PRESSURE

By Aisha Eccleston, Director, National Container Accounts, JAXPORT

With ecommerce accounting for about 11 percent of all U.S. retail sales and the outlook for the channel growing, consumers now demand speedy deliveries. To meet this increasing demand, JAXPORT and our logistics partners work together to optimize shippers' supply chains.



moving freight on the docks, we're blessed to have strong partners who take pride in being customer-centric. This spirit of service is one of the reasons why shippers named JAXPORT the No. 1 Port in the South in a recent survey by Logistics Management magazine.

Of course, JAXPORT's supply chain also makes economic sense. With a shipping channel in the river wide enough for two ships to pass at the same time, vessels experience greater freedom of movement

from the sea buoy to the berth than they do at other ports in the region. JAXPORT also offers strong rail service and intermodal access to markets from Florida to the Midwest. So, with competitive turn times at our terminals, more than 100 trucking firms in the area, and three interstate highways offering fast access to major markets, retailers enjoy expedited delivery to their distribution centers and final mile destinations.

Whether you operate a traditional brick and mortar, or an ecommerce shop, or both, Jacksonville is the exact place your supply chain can find success. □

One recent success story comes to mind. During the 2019 holiday season, an ecommerce client needed to route cooking appliances to a consumer base in the U.S. Southeast in time for Black Friday sales. They faced delays with another U.S. port. Instead, the client decided to ship through JAXPORT, and they achieved their goals of efficiency and speed to market, which not only strengthened their sales during peak season but also saved holiday dinners for families around the Southeast.

These types of successes are common at JAXPORT because we have some of the best partners in the business. From the dozens of ocean carriers calling Jacksonville to the stevedores and longshoremen



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FINDING SUSTAINABILITY OPPORTUNITIES IN YOUR SUPPLY CHAIN

By Lisa Wheldon, Director, Trade Development & Rail

Consumer trends are driving big changes in the way retailers do business today—from next day delivery to the shopping experience.

Retailers are also prioritizing sustainability.

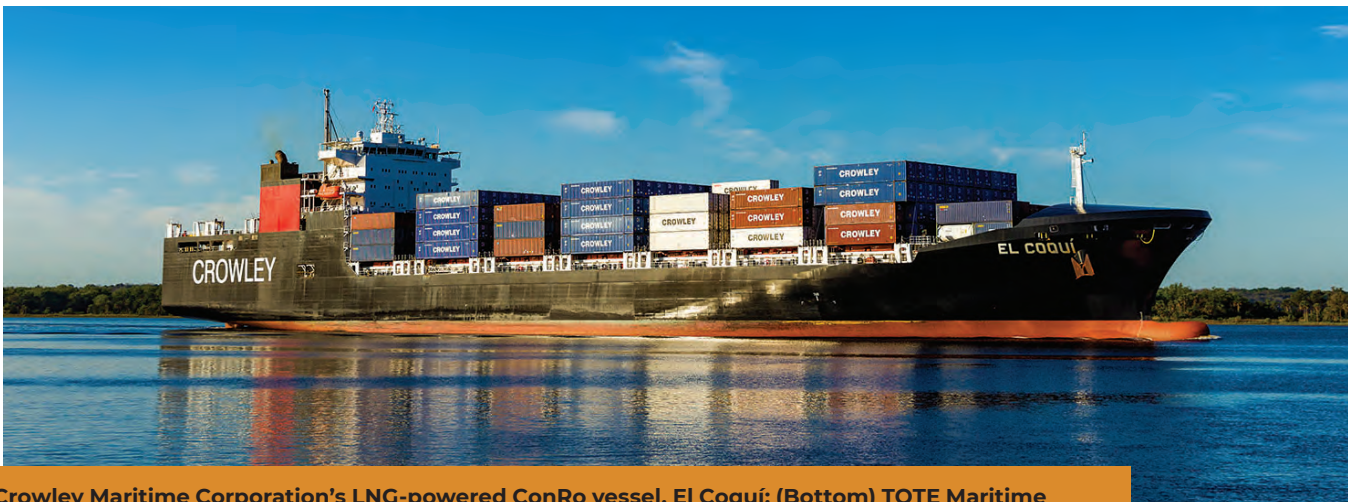
A recent study by IBM found nearly 60 percent of consumers



surveyed are willing to change their shopping habits to reduce environmental impact. These purpose-driven consumers purchase from brands that align with their values and lifestyle. For apparel and footwear brands—this group of consumers represents 35 percent of the market.

Retailers are achieving both their business goals and sustainability initiatives with the right supply chain partner in Jacksonville.

JAXPORT and its port partners are leading a clean fuel revolution. Northeast Florida is now a hub for Liquefied Natural Gas (LNG)—a cleaner alternate fuel source, ideal for ocean carriers looking to meet more stringent air quality regulations set by the International Maritime Organization (IMO).



(Top) Crowley Maritime Corporation's LNG-powered ConRo vessel, El Coquí; (Bottom) TOTE Maritime Puerto Rico's LNG-powered containership Isla Bella. Both vessels are homeported in Jacksonville, Florida.



The area currently has the largest LNG bunkering operation at any U.S. port, according to an Alternate Fuels Study published by the Florida Ports Council and Florida Natural Gas Association.

With three LNG facilities currently operating and one under construction—Jacksonville is the only East Coast port with LNG fueling capabilities. This infrastructure will serve the increase in LNG-powered vessels moving retailers' cargo around the globe. The Alternate Fuels Study reports there are more than 130 LNG-powered vessels in operation with an equal amount in new build orders.

Not only is natural gas an alternative fuel source for ocean transit, but you will also find it in intermodal transportation as well.

Regional rail line Florida East Coast Railway (FEC) locomotives

are equipped with dual fuel capabilities using both diesel and LNG. The company reports its locomotives use less diesel resulting in an 80 percent reduction of Nitrogen Oxide emissions. FEC operates a network of rail lines that run from Jacksonville to Central and South Florida—delivering retailers cargo to the growing Florida market.

The trucking industry also benefits from alternate fuels. In Jacksonville, global trade and logistics provider United Parcel Service (UPS) is using trucks powered by natural gas to make last-mile deliveries for shippers. UPS operates two distribution centers in Northeast Florida serving its customer base in the Southeast US. Other trucking firms using cleaner fuels include Raven Transport, Saddle Creek Logistics Services, and Dillon Transport.

While sustainability for retailers oftentimes looks like eco-friendly packaging and socially responsible giving—there are opportunities to embrace greener alternatives throughout your supply chain. Connecting with partners that share your values is profitable in the long run.

JAXPORT offers a transportation ecosystem designed to meet retailers' logistics needs within the context of environmental responsibility. In addition to LNG adoption, green initiatives at JAXPORT include electrified berths, state-of-the-art electric cranes and new on-terminal lighting designed to increase efficiency.

From ocean carriers running LNG-powered vessels to intermodal options delivering your product to 70 million-plus consumers living in the Southeast US—at JAXPORT, X marks the spot for sustainability in retail logistics. □



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BUILDING BREAKBULK IN JACKSONVILLE

By Laura Jane Pittman

Diversification is a common theme at the Jacksonville Port Authority (JAXPORT). From cars and containers to forest products and military equipment, JAXPORT's strategic location and terminal capabilities are a winning combination. The same is true for breakbulk cargo.

In fiscal year 2019, JAXPORT saw a seven percent increase in breakbulk cargoes, including wood pulp, with 934,600 tons moved. "Last year brought a number of new opportunities in breakbulk, particularly with a significant amount of paper products and wood pulp moving through the port," said Rick Schiappacasse, JAXPORT's Director of Forest Products and Specialty Cargo.

DIVERSIFIED CARGO

While forest products support a significant percentage of this cargo type at JAXPORT, the cargo segment remains diversified. HMM Co., Ltd. America recently handled a shipment of transformers through the port's Blount Island Marine Terminal—a job made even more complicated by a 1 a.m. cargo arrival time. (Pictured to the left.)

"This is the first one of these we have done through JAXPORT, and the process was seamless," said HMM Port Captain Peter Mastandrea. "Communication is really important on these types of jobs. Everyone involved—terminal operators, labor providers, the surveyor and truck drivers—was patient and careful with this high value cargo, and it ran incredibly smoothly, even though it was literally the middle of the night. A positive experience all around."



SSA Atlantic, a terminal operator handling cargo at Blount Island, handled the HMM transformers. Frank McBride, Vice President of Florida Operations at SSA Atlantic, says he has noticed an uptick in the movement of mobile power units such as generators. SSA Atlantic also handled a significant amount of building supplies headed to The Bahamas following Hurricane Dorian in the fall of 2019.

Freight forwarder Central Oceans, which specializes in the transport of oversized, complicated and project related cargo, has seen an increase in solar panel shipments, according to the company's Vice President of

Power Generation and Rail Logistics Theo Vallas. JAXPORT saw a more than 130 percent increase in solar panel imports in 2019 over the previous year as well as double-digit growth in exports.

Also increasing in demand is the movement of lumber and forest products, says Scott MacGregor, AVP Business Development Ports at Patriot Rail & Ports, a terminal operator handling freight at JAXPORT. "We have seen some fluctuations in the paper market, with the importing and exporting of liner board that is used for such things as food packaging and shipping," said MacGregor. "We have

found that with breakbulk, as with any cargo, it is important to stay diversified in terms of commodities, so the impact of market trends remains minimal."

The company recently moved a large crane support beam through the port's Talleyrand Marine Terminal. (Pictured above) The equipment, part of a ship's onboard crane, is 120 feet in length and weighs 25 metric tons. The crane part arrived to JAXPORT on a Spliethoff general cargo vessel from Poland where stevedores transferred the piece to a barge for transport to a North Florida shipyard.

“Our customers have a wealth of options with ocean carrier service to more than 70

cargo on scheduled carriers that have extra room—a cost effective option for the cargo owner.

Vallas. “At JAXPORT, the team is business friendly and flexible, and this type of work is second nature.”



“At JAXPORT, the team is business friendly and flexible, and this type of work is second nature.”

—Theo Vallas, Central Oceans

countries through Jacksonville,” said MacGregor. The port offers direct service to Asia, South America, the Caribbean and other key markets.

FUTURE CHALLENGES AND OPPORTUNITIES

As breakbulk needs expand and diversify, so do the handling needs of this kind of cargo. Shippers are finding creative ways to ship breakbulk cargoes. Freight such as military equipment and tractors are moved on roll-on/roll-off vessels with the use of roll trailers while flat racks are used to move this type of freight on container vessels. This allows shippers to move breakbulk

As new techniques for handling breakbulk cargo emerge, both McBride and MacGregor say investment in consistent additional training and equipment is necessary to meet the demands of the industry. “Ongoing training is a major factor in successfully keeping up with the specialized container market,” said McBride.

Jacksonville’s skilled workforce is one quality that is essential for this type of cargo. “It is harder to work with a port if it doesn’t understand and routinely handle this type of complex cargo,” said Central Oceans’

In addition to touting expert and reliable service, customer feedback consistently mentions the convenience of having a number of major interstates, rail options and an international airport nearby as factors that keep JAXPORT a major player.

“Some ports are shifting away from breakbulk toward container cargo, and factors such as congestion and prices can be challenges, particularly in the West Coast market. Jacksonville has the potential to offset some of this, particularly since there are not many hurdles and restrictions at JAXPORT compared to a number of other places,” said Vallas.

With on-dock warehousing storage, low congestion and quick access to both rail and highway options - shippers can build their breakbulk business through Jacksonville. □

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JACKSONVILLE'S COLD CHAIN: A HOT COMMODITY

By *Lori Musser*

Health-conscious dining is the latest in consumer trends according to Jeanette Mellinger, head of Uber Eats research. As the population increasingly looks for fresh food options the demand for cold storage is heating up—and Jacksonville's cold supply chain stands ready to serve with expanded warehouse capacity, an eye on sustainability and customer-focused solutions.

The Global Cold Chain Alliance (GCCA) is an industry organization working to promote “a universally strong cold chain where every product retains quality and safety through each link.” According to

GCCA's 2018 Customer Demand Research Report, food companies' top two concerns are brand protection and food safety, and they see cold chain providers as indispensable to those pursuits.

JAXPORT and its cold chain partners are building a gateway where shippers moving fresh and frozen cargoes can trim days off delivery times and protect the cargo every step of the way with end-to-end supply chain temperature stability.

REEFER CONNECTIVITY AND SERVICE

JAXPORT is well equipped for fresh and frozen cargo—with ocean

carrier service to worldwide ports, more than 1,600 reefer plugs on terminals, and 30 million square feet of temperature-controlled warehousing with 100,000-plus pallet positions throughout the region.

“We have excellent connectivity to Asian markets, as well as to and from those in South America, Central America, the Caribbean and Puerto Rico,” said JAXPORT's Director of Cruise, Cargo Development and Ro/Ro Alberto Cabrera. “Our expansive global connections provide a number of competitive options to move fresh and frozen cargo in and out of Jacksonville.”

To meet perishable shippers' demands for speed-to-market and food chain safety, JAXPORT offers competitive turn times for both vessels and trucks, as well as outstanding intermodal connections, to reach more than 70 million U.S. consumers within a day's drive of Jacksonville.

COLD CHAIN HUB

In addition to inland and ocean carriage, cold chain services offered by port partners include order picking, freight consolidation, monitoring and tracking of reefer cargo, blast freezing, USDA inspection, and fumigation. For highly perishable goods, the industry's flexible shipping and receiving hours are an added bonus.

Tyler Phillips, Manager, U.S. Warehouse Operations for Crowley Logistics, described the cold chain hub that has developed in Jacksonville. For Crowley, that hub is driven by its homeported fast-transit LNG-powered ships, and 'CrowleyFresh'.

CrowleyFresh bundles individual cold-chain storage and logistics offerings into one comprehensive solution, including customs brokerage, ocean and air-freight and trucking services. Crowley's newest cold storage facility was opened within its West 30th Street distribution center in Jacksonville last spring, bringing the company's statewide total to 30,000 square feet of temperature-controlled and 200,000 square feet of dry warehouse space.

The new facility provides another gateway in the Southeast, said Phillips. "It's uniquely suited

as an in-transit consolidation/deconsolidation point for customers with fully perishable loads, or for those looking to combine perishable and dry loads for more economical and reliable transit," said Phillips.

The Jacksonville location services multiple trade lanes including Puerto Rico, said Phillips, while increasing the velocity of customer supply chains, decreasing total landed costs, and offering seamless and reliable collaboration among the varying components of transport.

INNOVATION EVERY STEP OF THE WAY AT AQUA GULF

Scott Fernandez is Vice President of Business Development at Jacksonville's Aqua Gulf Transport, a top shipper and logistics provider in the Puerto Rico trade. In addition to dry warehousing, Aqua Gulf's new reefer warehouse, which opened at the end of 2018, offers a chilled section equipped with 264 pallet positions and 5,000 square feet of space, and a frozen section with another 5,000 square feet and 345 pallet racks.

"The set up maintains the cold chain from truck to warehouse through a cold dock," Fernandez said.

"State-of-the-art cold-sealed doors maintain 4,500 square feet of truck dock space at a temperature of 34 degrees."

Aqua Gulf can receive trucks from multiple vendors, unload, store cargo of varying types and build containers consolidating loads for multiple deliveries. Fernandez said the company aims to maximize value for the customer; it can consolidate and mix cargo with different weights and sizes to utilize all the space in a container. They even have a system

of temporary, reusable bulkheads that can be installed to allow two different temperature settings in one container.

NEW OR CONVERTED CAPACITY

Lineage Logistics, a global leader in temperature-controlled facilities, opened its second cold storage warehouse facility in Jacksonville in February 2020 to accommodate chilled and frozen products. The facility boasts an extended chilled loading dock area and touch-screen operated dock doors, among other innovative elements.

The nearly 223,000 square-foot facility will significantly expand the region's reefer capacity, reportedly providing 36,800 new pallet positions to address strategic shifts in industry demand.

Some companies are converting facilities to better reflect the evolving frozen:fresh split. Cabrera noted that the rate of growth in demand for fresh is currently outpacing the demand for frozen capacity. Burriss Logistics, for example, has moved from a 60:40 to a 50:50 split.

CREATIVE MARKET MODEL

Business models for perishables are changing. Several factors have led the cold chain industry to expand capacity for Puerto Rico. Hurricane damage, which impacted the electrical grid and limited warehouse capacity on the island, as well as electric rate impacts, resulted in shippers developing a Jacksonville just-in-time inventory model for Puerto Rico that relies on mainland reefer warehousing (inspecting, storing, racking, consolidating, etc.), and a speedy three-day transit.

"This creative market model has developed over the last few years and we have invested to meet the emerging demand," said Fernandez. While it applies to dry and reefer business, TOTE Maritime Puerto Rico and Crowley's fast transits and sizable reefer capacity make Jacksonville especially suitable to stage reefer cargo.

In the cold chain, having access to backup electrical is a best practice. At Aqua Gulf's North Jacksonville location, warehousing is powered by a 62,000-square-foot solar array, comprised of 1,786 solar panels capable of generating 2.25 MW of power per day. The facilities have regular grid power, solar power, and even backup generator power. "We will not go off temperature," said Fernandez. Maintaining cold chain integrity is important.

Efficient, effective facilities minimize loss and damage claims and attract new business. "Our quality control training employs a 'See Something—Say Something' policy, which is a

very effective claims prevention device. Keeping customers informed is an important factor in growing our business," Fernandez said.

LONGEVITY AND RELATIONSHIP MARKETING AT AJC

Chris Swartz is Director of Global Transportation and Logistics Services for Atlanta-based AJC International, a leading global marketer of proteins. The company's logistics arm is Jacksonville-based AJC Logistics, an independent company borne of helping customers move their product to market.

Those markets span the globe, however, the company's roots are in Puerto Rico. "AJC has served Puerto Rico for 48 years straight, with JAXPORT as our gateway," said Swartz. AJC has a 55,000-square foot facility for perishables, frozen goods, and ambient-temperature products in Jacksonville which largely serves Puerto Rico and the Caribbean. The company also offers nationwide trucking, ocean import and export

transportation services, and other 3PL services.

"We recently expanded our cold storage footprint, which really solidifies our position as premier refrigerated provider in JAXPORT," Swartz said.

The company specializes in consolidated mixed loads—case level items. "Customers like our array of services, and our experience," Swartz said. "They trust us. If you are handling perishable items that is critical."

Once a customer relationship and level of trust is established, Swartz said, AJC can help the customer defer inventory carrying costs and storage costs in Puerto Rico. "We like to say we are not in the storage business, we are in the moving cargo business."

TECH ON WATER

Fast transits and short sea routes are a perfect match for perishables. TOTE Maritime Puerto Rico's reefer



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fleet ships temperature-sensitive cargo to Puerto Rico, deploying two new technologies, NaturaLINE and CoolConnect.

TOTE's website describes the two innovative tools: "Carrier's NaturaLINE unit, which uses natural refrigerant CO2, can reduce carbon dioxide emissions by up to 28 percent compared to previous units using synthetic refrigerant, limiting its impact on the environment. At the same time, CoolConnect provides complete visibility of your shipment making shipping refrigerated goods even more convenient and predictable for you." CoolConnect provides real-time monitoring for reefer containers on the road, dock or vessel. Telematic technology within the reefer boxes provides data that allows TOTE to manage

and deliver time-sensitive cargo with precision and speed.

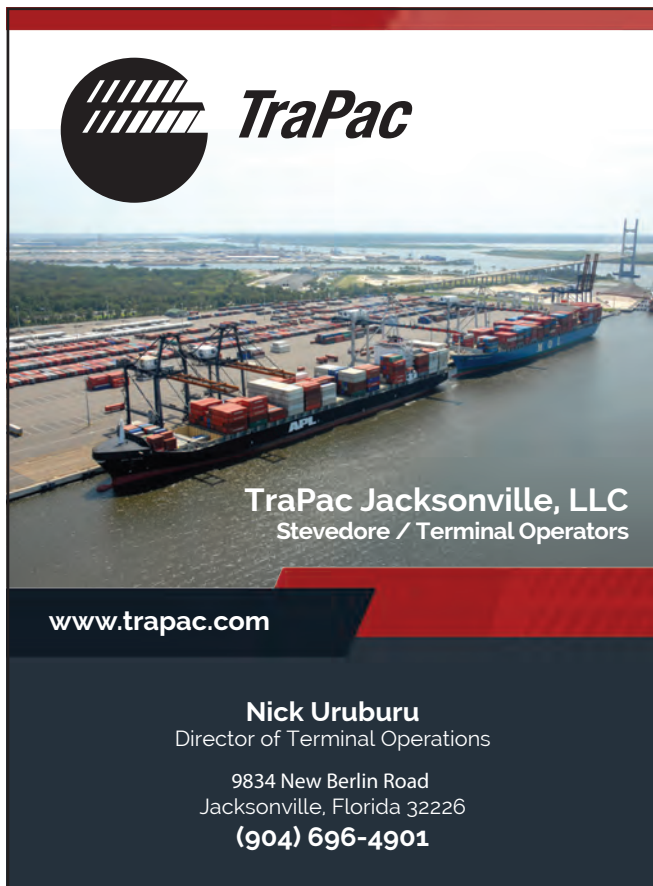
"TOTE Maritime is the first in the Jones Act trade, including Puerto Rico, to utilize NaturaLINE in our reefer fleet. This technology is a reflection of our commitment to providing our customers best in class technology while also caring for the environment," said Jim Wagstaff, Vice President of Operations at TOTE Maritime Puerto Rico.

ONGOING GROWTH

Any development that increases capacity, provides a service that better cares for perishables, or otherwise eliminates a weak link in the supply chain for temperature controlled cargo, is a welcome advancement for shippers.

Excellent customer service, with embedded priorities that continuously improve supply chain velocity and quality control, are serving port customers well. Cultivating and serving a growing industry can be a challenge, but Northeast Florida's cold chain continues to meet that challenge with more capacity and enhanced services.

Fernandez said that the teamwork that permeates Jacksonville's port industry is important for perishable goods, which can't miss a connection: "We're finding this model we have in JAXPORT attracts customers that may have been utilizing less efficient facilities or gateways for their reefer business." □



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RECORD-BREAKING CROWD ATTENDS 2020 STATE OF THE PORT ADDRESS



JAXPORT CEO Eric Green and Chief Financial Officer Beth McCague discussed JAXPORT's recent growth and plans for the future during the sold-out 2020 State of the Port address. Topics included an update on major projects, cargo records

set during fiscal year 2019, and emerging trends impacting the transportation and logistics industry.

450 transportation and logistics professionals attended the event hosted by the Propeller Club—Port

of Jacksonville—the largest crowd in the event's history.

"The size of the crowd here today speaks to the importance this port has on our community," said Green. "Deepening our harbor, investing in our facilities, and focusing on areas where we can capture more of the market share are all key parts of our strategy as we look to grow our port and create more jobs for our region and state."

An economic impact study finds that cargo moving through Jacksonville's port generates 138,000 jobs in Florida and \$31.1 billion in annual economic output for the region and state. □

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JAXPORT CONNECTS SMALL BUSINESSES WITH TRAINING & RESOURCES

Nearly 200 Northeast Florida business leaders participated in JAXPORT’s second annual Small & Emerging Business Appreciation Day. The daylong seminar included a procurement director’s panel, professional coaching session to help businesses create their own 90-second business pitch and speed networking. Marketing experts were also on hand to share strategies for branding a business on a budget.

“The networking alone is invaluable,”

said Kim Scott (pictured above), an attendee whose small business, The Morgan Company Promotional Advertising, provided promotional materials for the event. “For us, it all started with this event last year— and since then we’ve worked hard to establish relationships with the different agencies. This event really helped us understand that the city is on our side and they want to do business with us.”

JAXPORT promotes equal access to all procurement contracts. During the past four years, JAXPORT payments for work by certified Jacksonville Small and Emerging Businesses (JSEB) have topped \$28 million. □



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Learn how JAXPORT supports the cruise industry during COVID-19 on page 44.

GROWING CRUISE IN JACKSONVILLE

By Laura Jane Pitman

In the more than 15 years since the first passenger ship embarked from the Jacksonville Port Authority's Cruise Terminal, the cruise industry in Jacksonville has grown into a more than \$180 million business for the community. Nearly 200,000 passengers cruised from Jacksonville last year, and the number of yearly sailings has increased by 52 percent in the last decade.

According to the 2020 State of the Cruise Industry Outlook by Cruise Lines International Association (CLIA), cruise and stay is one trend of the future—with more than 65 percent of cruise passengers spending a

few extra days at embarkation or debarkation points. This is great news for Jacksonville, which has a reputation as being an ideal cruise port for its location and wealth of activities to do while in port.

"The significant trend in growth sets Jacksonville on an extraordinary trajectory to increase both cruise traffic and the reputation that follows travelers who have exceptional experiences while in our city," said Lillian Graning, Executive Director of the Duval County Tourist Development Council (TDC), which recently commissioned a survey about the economic impact of cruising on the region. "The TDC, Visit Jacksonville, JAXUSA Partnership

and JAXPORT have all rallied around this opportunity [cruise] and are establishing the support required to help the industry of tourism be the economic driver it has always held the potential to be."

Carnival Cruise Line runs its 2,056-passenger Carnival Ecstasy ship out of Jacksonville on year-round excursions to the Bahamas. In 2018, Carnival and JAXPORT reached an agreement to extend Carnival's Jacksonville service until at least May 2021, with the option to renew through 2027. This historic agreement for the port paves the way for more ships—and even additional cruise lines in Jacksonville, something industry leaders say they are eager to explore.

“We are very fortunate to have the cruise industry in Jacksonville,” said JAXPORT Chief Operating Officer Fred Wong. “Getting a long-term commitment from a cruise line has definitely moved the needle in terms of our direction and the investment needed to grow our cruise business.”

TERMINAL IMPROVEMENTS

An important step toward future growth includes JAXPORT’s recent investments in the passenger experience, from a new boarding bridge and parking expansion to interior improvements in the terminal.

A new overhead bridge design relocates passenger boarding to the Promenade floor and frees up lower levels for processing such things as baggage and food and beverage supplies—bringing increased efficiency to the overall preparation and loading process.

The relocation of passenger parking offers easier access to the terminal, a project that also included enhanced lighting and security.

“We have taken steps to make the passenger experience in Jacksonville as convenient and

safe as possible, and our external enhancements have been designed to make the embarkation process even more seamless,” said Wong.

Interior improvements made to the 63,000 square-foot terminal include an upgraded VIP lounge and additional terminal security. The baggage pickup area is now equipped with new heating and air systems to make it more comfortable.

To showcase Jacksonville’s unique location, a custom 37-by-18-foot paint and mosaic work of art was commissioned and created by Jacksonville artists Shaun Thurston and husband and wife team Kate and Kenny Rouh. The colorful, one-of-a-kind mural hangs in the main terminal building and spotlights scenes from the downtown Jacksonville skyline, area waterways and regional wildlife.

These improvements have already proved to be worth their while, said Scott Lara, a Jacksonville-based travel agent and industry expert, who runs a website called Cruise Genius. The passenger experience in Jacksonville is easier and more family-friendly

compared to larger markets, according to passenger feedback gathered by Lara. With more than 70 million people living within a one-day drive of the city, the convenience of being a “drive-to” port makes Jacksonville an extremely attractive option.

“Because of our airport and the wealth of places to see and things to do in our area, Jacksonville is a perfect cruise port. I am always proud to put people on a ship here,” said Lara. “Nearly 70 percent of cruisers are what I like to call ‘repeat offenders’—and they sign up for another cruise. The improvements made in Jacksonville are certainly likely to make people take another look.”

The results of the TDC survey on the local cruise market and its economic impacts found more than 60 percent of passengers surveyed cited easy access to the port as their primary reason for cruising out of Jacksonville. In addition, nearly 80 percent of respondents said they would be very likely to return to Jacksonville for a future vacation. They also noted that factors such as less traffic congestion, higher quality hotels and general destination affordability made a



positive impact on their experience.

With a significant percentage of passengers spending at least one night in Jacksonville before their cruise, and a small percentage staying at least one night after they disembark, local accommodation, entertainment and restaurant establishments benefit.



LOOKING TO THE FUTURE

In terms of the immediate future, JAXPORT has taken a more active focus on recruiting and retaining cruise traffic. It also remains in discussions with other

currently, cruise activity generates nearly 800 indirect and induced jobs, a 74 percent increase over the last 10 years.

“We are encouraged by the

“The passenger experience in Jacksonville is easier and more family-friendly compared to larger markets.” —Scott Lara, *TheCruiseGenius.com*

“Jacksonville is growing leaps and bounds as a destination and gives all indications that it will continue to do so,” said Graning. “Quantifying the impact cruise activity has on Duval county proves that the expansion effort is worthy of support across organizations. The investment in the cruise industry is a fantastic long-term investment.”

cruise lines about adding service to Jacksonville, according to Wong. The period for that would be two or more years from now, since cruise lines book up to 48 months in advance.

An expansion of the cruise industry in Jacksonville would have parallel benefits for the regional economy—

fact that several of the major cruise lines are in the process of adding larger ships to their inventory, thus freeing up some of the smaller vessels that would be ideal for Jacksonville’s specific market,” said Wong. “We are fully committed to the upward direction and growth of Jacksonville’s cruise market.” □

The article reflects interviews conducted prior to the voluntary suspension of cruise operations in response to COVID-19. To support the cruise industry during this time, JAXPORT provided berthing space to displaced cruise ships. Idling at a port rather than at sea increases fuel efficiencies and provides easy access to necessary provisions for crewmembers and the ships. Crew remained on the vessels while the ships were in Jacksonville, unless an exception was deemed necessary by U.S. Customs and Border Protection (CBP).

As of press time, news reports indicate continued consumer interest in cruising in the long term.

April 9, 2020—Los Angeles Times: Believe it or not, people are still booking cruises for next year

In the last 45 days, CruiseCompete.com, an online cruise marketplace, has seen a 40% increase in bookings for 2021 compared with 2019, said Heidi M. Allison, president of the company. Only 11% of the bookings are from people whose 2020 trips were canceled, she said.

April 2, 2020—Maritime Executive: Report: Cruise Line Booking Numbers Look Strong for 2021

“Booking volume in the last 30 days for 2021 is actually up nine percent versus the same time last year,” UBS analysts wrote in a client memo on March 31.

March 13, 2020—Cruise Lines International Association Statement

Adam Goldstein, CLIA Global Chairman said, “During this time, we will continue to work with the CDC and others to prepare for resumption of sailings when it is appropriate. We know the travel industry is a huge economic engine for the United States and when our ships once again sail, our industry will be a significant contributor to fueling the economic recovery.”

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St. Johns Ship Building

BEYOND THE PORT: SHIPBUILDING IN JACKSONVILLE

By *Sandy Smith*

U.S. Department of Transportation Maritime Administration Administrator Mark H. Buzby reported at a March 2019 hearing on U.S. Maritime and Shipbuilding Industries, that 90 percent of global shipbuilding occurs in three countries—China, Korea and Japan.

According to a 2015 report by the Eno Center for Transportation, an unbiased expert source of information on critical and emerging topics in transportation, less than one-third of one percent of shipbuilding occurred in the United States.

And despite these staggering statistics, Jacksonville is still home to a thriving—if small—environment that builds and repairs ships and provides supplies to those who do.

Steve Ganoë, Owner of St. Johns

Ship Building, based in Palatka, Florida said there is “quite a bit” of shipbuilding that occurs in Northeast Florida—and sets the region apart from the rest of the state. “Other areas in Florida cater only to recreational boats or yachts while some ports have little to no capacity. It’s really unique what we have here.”

Robert Peek, JAXPORT’s Director/General Manager, Sales and Marketing, agrees, calling it an “an important but quiet sector.”

He adds the region’s broader maritime industry “relies on each other for business.”

Nowhere is that truer than W&O Supply, which began providing piping products for ships and shipyards in 1975. The company remains headquartered in

Jacksonville to this date with a presence in locations around the world. “Our location has allowed W&O to prosper with a strong maritime workforce, attractive and affordable location for employee transfers, and a strong economic climate in Northeast Florida especially with the success of the local and surrounding ports,” said Tammy Emerson, W&O’s Market Leader, Florida.

Here is a look at a few of the companies prospering in various aspects of shipbuilding in Northeast Florida.

BAE SYSTEMS

BAE Systems is a massive conglomerate with more than 85,000 employees worldwide. Its focus includes land and air innovations as well as cybersecurity and electronics. Its sea operations

include the design, manufacture and repair of surface ships, submarines, torpedoes, radar, and command and combat systems.

In Jacksonville, ship repair operations are based at the intersection of the St. Johns River and the Atlantic Intracoastal Waterway, and at Mayport Naval Station. Recent work includes the modernization of several guided missile cruisers. The local facility includes a floating dry dock with a 13,500-ton lift, a marine railway with a 4,000-ton lift, and crane capacity of up to 150 tons.

NORTH FLORIDA SHIPYARDS

Another longtime firm—having begun in 1977—North Florida Shipyards maintains two facilities for ship repair and conversion. Commodore's Point and Mayport Naval Station operations provide vessel conversion, dry-docking and repair services for commercial and government clients.

The company's skills include blasting and coating; diesel and steam propulsion; HVAC systems; hydraulics; joiner work; lagging; material and logistics control; piping; rigging; rudder and propeller repairs; and steel fabrication and installation.

ST. JOHNS SHIP BUILDING

Located on the St. Johns River, the full-service shipbuilding and marine repair facility is a "viable resource for drydocking, layberth dockage areas and repairs," Ganoe said.

The facility includes a 1,200-ton dry dock, two rail launch systems, a large fabrication shop and a 400-foot launch basin. It also includes complete carpentry, electrical and machine shops.

In 2017, the company launched a 190-foot landing craft vessel, Grand Master II, for Bahamas Ferries, designed for cargo transport among the islands.

It was one of three landing crafts ordered by Caribbean transport groups.

Other recent projects include a 267-foot dump scow barge, a 157-foot offshore support vehicle, a 190-foot landing craft, a 180-foot deck barge and a 30,000-barrel tank barge. The company also crafts custom house boats and can handle just about any type of repair.

W&O SUPPLY

W&O operates 17 branches in the U.S., Europe and Asia. The company's Jacksonville location is home to a staff of 81, including corporate headquarters, a local branch and a 45,000-square-foot central distribution facility. The product line has expanded from the original piping to include valves,

"We are conveniently located less than two miles from the port, which saves time and freight costs."
—Tammy Emerson, W&O

fittings, engineered products and automation. All products are focused on the marine and upstream oil and gas industries, Emerson said.

The company, which had a record-breaking year in 2019 thanks to a strong economy and military rebuilding, sees continued growth with the deepening of the Jacksonville port. "As a global distributor of pipe, valves, fittings, and other engineered solutions, W&O thrives on a healthy economy in shipbuilding and ship repair. With the Jacksonville port busier with larger vessels, there are more maritime companies setting up local offices and more port traffic, which all means opportunity for W&O and other companies that service the maritime industry." □



PORT EMPLOYEES SUPPORT AREA CHARITIES THROUGH ANNUAL GIVING CAMPAIGN

During the February meeting of the JAXPORT Board of Directors, JAXPORT presented checks worth more than \$30,200 to the United Way of Northeast Florida and Community Health Charities.

The funds, raised by employee donations during the JAXPORT Annual Charity Drive, will support local charities providing services to the citizens of Northeast Florida. JAXPORT and its employees have contributed nearly \$690,000 to the two charities since 2002.

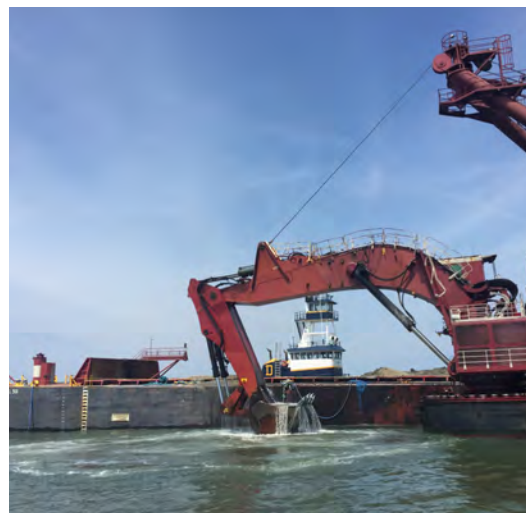
JAXPORT sponsors and participates in numerous Northeast Florida community outreach programs. For more information, visit JAXPORT.com/Community. □



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