

6.0 **MARKETING PLAN**

6.1 INTRODUCTION. Jacksonville area real estate market characteristics and trends and broader aviation industry trends affecting development of Cecil Commerce Center are profiled in this section. Types of businesses and industries being sought after for the Jacksonville area are also identified and specific types of businesses and industries are recommended for Cecil Commerce Center. Key state and local agencies and organizations that should be engaged in marketing Cecil Commerce Center are identified, including joint marketing needs and opportunities for the JAA and other local agencies. Recommendations are also made to inform various private industry representatives, including site location consultants, commercial and industrial brokers, and commercial and industrial developers about Cecil Commerce Center and to engage them in its development.

The basis for a dynamic ongoing marketing program for Cecil Commerce Center is a comprehensive branding and marketing strategy to maximize market awareness of and interest in these substantial development opportunities. Various print and electronic media materials prepared by Ware-Malcomb are profiled and introduced in this Marketing Plan.

This overall study and master plan address market potentials for the approximately 8,300 acres of the former NAS Cecil Field south of Normandy Boulevard, including areas owned and/or under the jurisdiction of the City of Jacksonville and the Jacksonville Aviation Authority (JAA). This area is referred to as Cecil Commerce Center South. Within Cecil Commerce Center South, the JAA is responsible for approximately 6,100 acres south of 103rd Street and east of Aviation Avenue, including the existing airfield and hangars. Remaining lands south of Normandy Boulevard, including those between 103rd Street and Normandy and those south of 103rd Street and west of Aviation Avenue, are owned by the City. The City also owns lands between Normandy Boulevard and I-10, referred to as Cecil Commerce Center North.

6.2 MARKET PROFILE AND TRENDS. Development opportunities for Cecil Commerce Center South include a mix of industrial, aviation, commercial, and office

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uses. General industrial uses are dominant, including various distribution and manufacturing activities. These uses total 14.5-18.9 million square feet (MSF), with warehousing and distribution being the principal activities. Aviation-related industries and activities, including aircraft manufacturing, aircraft maintenance, repair, and overhaul (MRO), air cargo, and general aviation are second largest with 5.7-7.0 MSF. Commercial land uses total 3.0 MSF and consist mainly of retail facilities. Office uses total 2.0 MSF.

Ranges of industrial and aviation uses relate to development scenarios with and without an additional north-south runway east of the existing airfield, as shown in Table 6.1 below. The table also shows amounts of proposed development in lands owned by the JAA and City.

Table 6-1. Development Program, Cecil Commerce Center South (millions of square feet)

Land Use	JAA-Owned		City-Owned	Total	
	With Runway	No Runway		With Runway	No Runway
Industrial	4.78	9.19	9.67	14.45	18.87
Aviation-Related	5.70	4.40	1.32	7.02	5.71
Retail/Commercial	1.95	1.98	0.99	2.94	2.97
Office	1.49		0.49	1.97	
Total	13.92	17.06	12.47	26.39	29.53

Development in that portion of Cecil Commerce Center under jurisdiction of the JAA may be limited by Federal Aviation Administration (FAA) policy that airport lands be leased to developers and end users, not sold. This policy will tend to narrow the number of potential developers and end users interested in JAA land, due to the preference or need of a wide majority to own land parcels in order to obtain financing and generate returns through selling outparcels and “flipping” successful properties. This will be particularly true for commercial properties, including retail, hotel, and office developments.

The JAA may find it necessary ultimately to seek from the FAA the ability to sell parcels planned for non-aviation uses, in particular the area identified as

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Development Area #8 in the Development Plan, which is adjacent to the new Branan Field-Chaffee Expressway and planned for significant retail and office development.

6.2.1 Industrial Market. The Jacksonville Metropolitan Area has 110 MSF of industrial/warehouse space, according to Commercial Jacksonville, Inc., a member of the Cushman Wakefield Alliance of real estate organizations (see Table 6-2). At least half has been developed since 1980, averaging approximately 2.0 MSF per year during the period. Nearly two-thirds (71.5 MSF) is located north and west of the St. Johns River in Duval County. The Northside/Westside area constitutes the industrial heart of the metropolitan area, with older concentrations found inside the I-295 beltway and newest concentrations found outside the I-295 loop.

Table 6-2. Jacksonville Metropolitan Industrial Market, 2Q07

Parameter	North/West Duval Co.	Southeast Duval Co.	Other Counties (1)	Total Region
Total SF	71,492,123	27,283,306	11,226,874	110,002,303
Share of Total Region (%)	65.0	24.8	10.2	100.0
Vacant SF	3,573,038	1,562,553	447,212	5,582,803
Percent Vacant	5.0	5.7	4.0	5.1

(1) Includes Clay, Nassau, and St. Johns Counties

Source: Commercial Jacksonville, Inc., Marketbeat Snapshot, Industrial Overview, Second Quarter 2007

With growing national and international recognition of Jacksonville as a desirable location for business and industry (particularly for distribution and logistics), including recent Jaxport successes with two large Asian shipping companies, average annual industrial demand is projected to increase in the future to around 3.5-4.0 MSF per year, with the majority continuing to occur in the Northside/Westside area. The beginnings of this future level of demand are reflected in the absorption of 3.8 MSF of industrial space in the first half of 2007, as reported by Commercial Jacksonville, Inc.

Inasmuch as the Northside/Westside area accounts for nearly two-thirds of the existing regional industrial inventory, the assumption is made that this area will

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continue to dominate the industrial market to at least the same share in the future. This share translates to future annual demand in the 2.5-3.0 MSF range. Recognizing that there are many other industrial parks and properties in the Northside/Westside area, the large size, airport infrastructure, and I-10 location should allow Cecil Commerce Center to compete successfully for a minimum 25 percent share the Northside/Westside market, or approximately 625,000-750,000 SF per year.

For comparative purposes, Pattillo's successful 1000-acre Westside Industrial Park west of I-295 and north of I-10 in the Jacksonville Westside has averaged approximately 400,000 SF per year range over the past 16+ years. This park developed out largely during in period of lower overall regional market activity than that expected in future years.

The Development Plan includes a total of 21.5-24.6 MSF of industrial space, including aviation-related facilities. In addition, the assumption is made that Cecil Commerce Center North (north of Normandy Boulevard) has potential for 10-12 MSF of industrial space, including the new 1.0 MSF Bridgestone/Firestone distribution center. Therefore, average annual absorption of 625,000-750,000 SF for Cecil Commerce Center, North and South, would require a buildout period up to 50 years. This buildout period will be shortened if and as demand for industrial space in the Jacksonville market escalates even more in the future. Buildout of Cecil Commerce Center South can be accelerated further if and as it is developed and marketed successfully as a national/global center of excellence for aviation-related industries.

6.2.2 Aviation Industries Market

A. Manufacturing and MRO Activities. Aviation-related industries for which Cecil Commerce Center is well suited include the manufacture of aircraft, components, equipment and parts and aircraft maintenance, repair, and overhaul (MRO) activities. Aviation industries lead the list of target industries that the Jacksonville Regional Chamber of Commerce and Jacksonville Economic Development Commission are promoting for the Jacksonville area. While target

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industry lists may be alphabetical, inclusion of aviation and aerospace industries in an otherwise short list of business and industry clusters indicates that those primarily responsible for economic development in the area consider Jacksonville a player in national and global aviation markets.

The Jacksonville area is indeed a player. The area has a long history in Naval aviation. Although NAS Cecil Field was closed as an active military base in the late 1990s, NAS Jacksonville remains and continues to grow. Its Fleet Readiness Center Southeast facility is among the largest MRO facilities in the U.S., employing more than 4,000. Northrop-Grumman's aircraft manufacturing/MRO facility in St. Augustine is among the region's largest private employers, with 1,200 workers. There are a number of other aviation-related manufacturing and service industries in the Jacksonville area.

Cecil Commerce Center is home to several of these industries, including Boeing and Flightstar, and has been and is being looked at by other firms as a place to locate. The Center has approximately one million square feet of existing hangar space, all of which is reported to be leased, primarily to aviation-related firms.

The Development Plan includes 5.7-7.0 MSF of space for aviation-related uses. This is considered a reasonable allocation of space to be absorbed over a multi-year development program for Cecil Commerce Center, commensurate with growing national and global demands for new commercial and military aircraft and maintenance of existing aircraft.

The outlook for aviation industries is very positive based on forecasts of commercial and general aviation aircraft by the FAA (see Table 6-3). The U.S. commercial aviation fleet is projected to increase by 47 percent from 2006 to 2020 to 11,200+ aircraft. General aviation aircraft are projected to increase by 21 percent during the same period to 275,000 aircraft. Growth of demand for military aircraft can also be expected. The combination of maintaining aging existing fleets and meeting the demand for new aircraft is expected to generate significant manufacturing and MRO opportunities in the years ahead. The Jacksonville area is already a proven national center of excellence for MRO activities and the distinct possibility that Boeing may

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build and test its next generation of cargo planes at Cecil Commerce Center augurs well for the long term growth of manufacturing and MRO activities at Cecil.

Table 6-3. Forecast Growth of U.S. Civilian Aircraft, 2006-2020

Type of Aircraft	Number		Growth	
	2006	2020	Number	Percent
Commercial	7,626	11,203	3,577	46.9
Mainline carrier passenger jets	3,886	6,041	2,155	55.4
Regional jets (up to 90 seats)	1,687	2,689	1,002	59.4
Cargo jets	997	1,468	471	47.2
Turboprop/piston aircraft	1,056	1,005	(51)	(4.9)
General Aviation	226,422	274,914	48,492	21.4
Piston powered	170,967	181,750	10,783	6.3
Turbine powered	49,855	73,664	23,809	47.8
Light sport aircraft (ultralights)	5,600	13,200	7,600	135.7
Microjets	0	6,300	6,300	---

Source: Federal Aviation Administration, 2006 Forecast; URBANOMICS, Inc.

B. Air Cargo. At present, air cargo activity in the Jacksonville area is on par with many other U.S. metropolitan areas in relation to metropolitan area population. JIA currently functions as a “local market station” for inbound and outbound cargo. A detailed assessment of the U.S. air cargo market, including data for airports in Jacksonville and other Florida metro areas, is presented in **Attachment 6A**. Miami International Airport is the only true air cargo hub and international gateway in Florida and is the dominant U.S. airport for Latin American trade.

Growth of air cargo activity in the Jacksonville area is likely to continue to be driven mainly by local demand. The area is not a manufacturing center for small high-value products, including electronic and medical products, which can travel efficiently and in large quantities by air. Likewise, the area does not have the central hub location characteristics of, for example, Memphis and Louisville to be a major collection, sorting, and distribution center for firms like FedEx and UPS.

Historical air cargo projections for Cecil Commerce Center by others show limited potential. These projections range from only 5,520 to 16,375 enplaned tons by 2024, which is less than the 79,000 metric tons of air cargo handled at JIA in 2006.

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An earlier generation of the Cecil Commerce Center Development Plan showed approximately 500,000 square feet of air cargo facilities, which would support 200,000 tons of annual air cargo activity, which is more than twice that at JIA in 2006. On the other hand and despite low air cargo projections by others, it is recommended that 500,000 square feet of cargo handling space and 200,000 tons of annual activity be considered as long range planning and marketing goals for Cecil Commerce Center. For comparative purposes, 200,000 tons is only eleven percent of air cargo handled at Miami International in 2006.

The potential exists with aggressive marketing for Jacksonville to become a secondary player in the growing Latin American market, particularly as air operations and land at Miami International become severely constrained. It is recommended that the JAA develop and implement a long range strategy and aggressive marketing plan to make Cecil Commerce Center a secondary hub and gateway for the Latin American market and possibly a southeast regional mini-hub for UPS, which has a major presence in Jacksonville.

6.2.3 Retail/Commercial Market

A. Retail Development. Demand for retail goods and services from on site industrial, aviation, and office businesses and employment would be in the range of 500,000-650,000 SF, compared to the 3.0 MSF included in the Development Plan for Cecil Commerce Center South. Therefore, the vast majority of demand for proposed development would have to originate primarily from surrounding residential areas. The amount of retail space proposed over and above that required to meet on site demands will support the convenience and community retail needs of an estimated 35,000-40,000 households.

The current population of western Duval County and northeastern Clay County is an estimated 450,000 living in approximately 170,000 households. According to County projections, the population of this area is projected to grow by an average 7,500 per year over the next 20 years, generating approximately 2,800 new households per year. This annual growth rate over 20 years will support up to 3.5 MSF of new retail/commercial space in the area, only a portion of which will be

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captured in Cecil Commerce Center South. Thus, buildout of 3.0 MSF of space in Cecil Commerce Center South would be extended over a much longer period of time.

B. Hotel Development. The 21.5-24.5 MSF of space for industrial and aviation-related uses and 2.0 million of office/R&D space in the Development Plan will generate significant overnight visitor traffic and hotel demand from contractors, sales people, corporate trainers and executives, and customers. A rule of thumb is that 1.0-1.5 MSF of office/business park space will support 100 hotel rooms. For the mix of industrial and office uses proposed in the Cecil Commerce Center, a ratio of 100 hotel rooms per 3.5-4.0 MSF may be more realistic, as hotel demand associated with large scale industrial/warehouse uses with low employment densities will tend to be much lower.

Based on this factor, proposed industrial and office uses in the Development Plan will support approximately 700 hotel rooms. For Cecil Commerce Center, North and South, total hotel demand may be in the range of 1,000 rooms. For the 700 hotel rooms associated with demand in Cecil Commerce Center South, one full service hotel/conference center with 200-250 rooms is recommended, with the remaining room demand divided among limited service and extended stay facilities, each with approximately 100-125 rooms. Not all of these facilities need to be planned in Cecil Commerce Center South, as there are likely to be more attractive locations in or adjacent to Cecil Commerce Center North near the future Branan Field-Chaffee expressway interchanges at I-10, New World Avenue, and Normandy Boulevard.

6.2.4 Office Market. The Jacksonville metropolitan area has an estimated 48.7 MSF of “rentable” office space, according to CoStar Group (see Table 6-4). This may include some but not all single-user owner-occupied facilities in the market, which would increase the total inventory of office space. Like the industrial/warehouse market, at least half of the current inventory has been added in the past 25 years, averaging approximately 1.0 MSF of new space per year and ranging to 1.5+ MSF in peak years of activity. Here, however, the majority of metropolitan area office space (54.7 percent) is found in suburban southeastern Jacksonville (26.6 MSF). The Northside/Westside market accounts for less than 1.0 MSF of space and less than

Global Logistics at Cecil Commerce Center

two percent of the metro area total.

Table 6-4. Jacksonville Metropolitan Office Market, 2Q07

Parameter	North/West Duval Co.	Southeast Duval Co.	Duval Co Core (1)	Other Counties (2)	Total Region
Total SF	857,848	26,648,091	17,510,614	3,696,940	48,703,493
Share of Total Region (%)	1.8	54.7	35.9	7.6	100.0
Vacant SF	176,100	3,203,832	2,066,328	410,127	5,856,387
Percent Vacant	20.5	12.0	11.8	11.1	12.0

(1) Includes Downtown (Northbank and Southbank), Riverside, and San Marco

(2) Includes Clay, Nassau, and St. Johns Counties

Source: CoStar Group, Jacksonville Office Market, Mid-Year Report

The growth rate for the Jacksonville area office market is also expected to increase in the future as the region continues to grow in size and national/global prominence. The Northside/Westside area will increase its share of regional office growth for two basic reasons:

- Growth of Port-related activity and development of the Cecil Commerce Center as a major regional/national distribution, logistics, and aviation-industries hub will generate related corporate office opportunities.
- Demographics of the Northside/Westside area are changing gradually because of the emergence of new attractive residential communities in the area and nearby, including Oakleaf Plantation in northern Clay County. Several large DRI-scale developments are also planned in the general area, which will help change and upgrade the residential character of the area, making it more attractive for white-collar and white-coat suburban office/business park development.

Changing demographics are illustrated by rapidly rising prices of new homes in the Duval County Northside/Westside area and northern Clay County, as shown in Table 6-5. Average prices paid for new single family homes increased 68 to 87 percent in three submarket areas listed in the last three years (2003-2006).

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Table 6-5. New Single Family Home Price Trends, 2003-2006

Area	2003	2004	2005	2006
West/Southwest Duval Co	147,610	161,988	182,759	248,577
Northwest/North Duval Co	162,578	191,108	213,004	303,703
North Clay Co	157,638	197,119	223,069	274,129

Source: Realty Reporting Services, Inc.; and URBANOMICS, Inc.

The amount of office space included in the Development Plan is comparatively modest (2.0 MSF), and may reflect a history of limited demand for office space in the Northside/ Westside area. However, demand for prime office space is expected to increase over time, particularly as Cecil Commerce Center develops into a major center of commerce and industry, the Branan Field-Chaffee expressway is completed, and the area becomes an increasingly desirable residential address.

Cecil Commerce Center presents attractive future opportunities for an amenity-oriented business/office park of the scale and quality currently found in southeastern Jacksonville and represented by such developments as Flagler Center and Southpoint. The east side of the Center adjacent to the Branan Field-Chaffee expressway is the optimal location for such an office/business park.

6.3 JACKSONVILLE INDUSTRIAL AND BUSINESS PARKS. There are a number of planned industrial and business parks in the Jacksonville area, all competing for a share of the industrial and office markets, some with more success than others. Developments in the Northside/Westside area are industrial parks, in that their orientation is almost entirely to the distribution and manufacturing industries. Those in southeastern Jacksonville are business parks oriented primarily to office uses.

Several industrial and business parks in the Jacksonville area are profiled below to illustrate types and mix of development, level of competition in the market, and buildout and absorption histories for representative projects. One trend worth noting is that warehouse/distribution facilities are getting larger. Whereas, industrial buildings under 200,000 SF have been typical in the past, several new and proposed buildings are much larger, including some over 500,000 SF.

Global Logistics at Cecil Commerce Center

- 6.3.1 Westside Industrial Park.** This 1,000-acre industrial park is located north of I-10 and west of I-295 in Northwest Jacksonville, and is the most successful in the area. Atlanta-based Patillo Construction is the developer. The park, consisting mainly of leased warehouse/ distribution facilities, was initiated around 1990. Current buildout and new construction totals approximately 7.0 MSF, for an average in the 400,000 SF range per year. There are more than 30 industrial buildings in the park, most of which are in the 100,000-200,000 SF range. UPS operates a 500,000 SF distribution facility on an adjacent property. Major Westside Industrial Park tenants include Volvo Parts North America (truck parts), Henry Schein (medical products), Kraft Foods (food products), American Tourister (luggage), W.W. Grainger (industrial products), and Dyncorp (postal equipment).
- 6.3.2 Westlake Industrial Park.** This 1,500-acre industrial park is also located in Northwest Jacksonville west of the Westside Industrial Park. Owned by the Norfolk Southern Railroad, this project is part of a large DRI-scale planned community called New Duval that never got off the ground. The industrial park has been in place for years in a largely undeveloped state, but has become an active industrial location in only the past few years beginning with the development of Southeast Toyota's new 300,000 SF vehicle processing and distribution center. The site has comparatively few environmental limitations, rail service, all utilities, and significant additional buildout potential, but visibility and highway access are poor in comparison to Cecil Commerce Center. Poor road access notwithstanding, Hillwood Properties will develop a 400,000 SF warehouse/distribution center for Laney & Duke and Unilever, an international food and health products company, plans to locate in a new 772,000 square foot regional warehouse/distribution center in this park. In addition, a South Carolina-based developer is planning 1.8 MSF of speculative industrial space in the park.
- 6.3.3 Jacksonville International Tradeport.** The Tradeport, a 425-acre business park adjacent to Jacksonville International Airport (JIA), was begun in the late 1980s by Atlanta-based Wilma Southeast. The park consists of a mix of warehouse/distribution, manufacturing, and flex office/industrial facilities, and several hotel/motel properties along Airport Road. There are approximately 3.2 MSF of industrial and flex space existing and under construction, including 1.2 MSF

Global Logistics at Cecil Commerce Center

completed or started in 2007. Major Tradeport tenants include Coach (distributor of leather products) Armor Holdings and BAE Systems (defense contractors), and Encore Forwarding and National Distribution Centers (distribution firms).

New developments include Majestic International Tradeport, consisting of 833,000 SF of spec warehouse/distribution space in two buildings, and Creekside at Tradeport with 335,000 SF of warehouse and flex office space in three buildings. The latter is being developed by the Jackson-Shaw Company, which purchased nine existing leasable buildings with a total of 994,000 SF and 86 acres of land in 2005-2006 to become the lead Tradeport developer. Even counting these new projects, absorption over the long term has been comparatively slow at well under 200,000 SF of new construction per year, on average.

California-based Majestic Realty Co., developer of above-mentioned Majestic International Tradeport, has also entered into a long-term land lease agreement with the JAA to develop an adjacent 328-acre tract of JIA property called Woodwings East as an industrial park primarily for warehouse/distribution facilities.

6.3.4 Northeast Jacksonville Projects. The area of Jacksonville north of the St. Johns River and east of I-95 has become the new “hot” area for industrial development as the result of growing Port activity and increased regional accessibility provided by the SR9A freeway, which is the eastern beltway counterpart to I-295 on the west side of Jacksonville. There are several new and proposed industrial parks in this area, although much smaller than those in Northwest and North Jacksonville, and vacant residential lands are being rezoned for industrial development in this area.

New developments include Pattillo’s 350-acre NorthPoint Industrial Park and several smaller projects including Alta Lakes Commerce Center, Alta Lakes Industrial Park, JaxPort Industrial Park, and Dames Point Center. Activity in the NorthPoint Industrial Park includes a proposed 800,000 SF build-to-suit Sears warehouse/distribution center and 500,000 SF of speculative warehouse/distribution space. Plans for the other three sites total around 2.0 MSF of build-to-suit and speculative industrial space.

Global Logistics at Cecil Commerce Center

The 1,500-acre Imeson Industrial Park is also located in Northeast Jacksonville on the site of the original metropolitan airport. This park has been in development for three decades and has an estimated 6.0 MSF of existing single-user and multi-tenant industrial space, including a mix of distribution and manufacturing firms. Imeson has one of the largest, if not the largest, privately-owned industrial building in Jacksonville, with 1.8 MSF. A significant amount of vacant land remains for additional development. New activity in this project includes an 817,000 SF Samsonite warehouse/distribution center and plans for a warehouse complex and transportation terminal on a 44-acre site by ICS Logistics.

6.3.5 Flagler Center. This 1,000-acre mixed-use business park is located adjacent to the I-95/Old St. Augustine Road interchange in southeastern Jacksonville. Owned and developed by the Flagler Development Co, the real estate arm of Florida East Coast Railroad, the project was conceived initially as a rail-served industrial park, but has become more of a suburban office park. Existing and proposed development totals approximately 2.5 MSF, approximately 75-80 percent of which is a mix of single-user and multi-tenant office space and 20-25 percent is warehouse/distribution space. Largest users are Citicorp Credit Services, which has an 80-acre site with 500,000 square feet of office space, and a 360,000 SF General Motors parts distribution center. Flagler Center also includes a community hospital and medical office building serving the surrounding area. URBANOMICS considers Flagler Center to be most representative of potential business park development in the Cecil Commerce Center.

6.4 OTHER LOGISTICS AIRPORTS AND COMMERCE CENTERS. The list of former U.S. military air bases being repositioned as public airports and logistics centers is significant and growing. Most are former Air Force Bases. The majority of facilities are in the western states, but examples are found nationwide. East Coast facilities include Pease International Tradeport (former Pease AFB) in Portsmouth, New Hampshire, and Donaldson Center (former Donaldson AFB) near Greenville, South Carolina. West Coast facilities include the March Global Port (former March AFB) near Riverside, California, and the Southern California Logistics Airport (former George AFB) in Victorville, California. Facilities between the coasts include

Global Logistics at Cecil Commerce Center

Rickenbacker International Airport and Global Logistics Park (former Rickenbacker AFB) in Columbus, Ohio, and Port San Antonio (former Kelly AFB) in San Antonio, Texas.

Characteristics of five logistics airports and commerce centers are profiled in this report as background for planning, developing, and marketing Cecil Commerce Center. Four are former Air Force Bases and one, Alliance Texas, is a well-known and heralded large private development in the Dallas-Fort Worth area. Facilities profiled in this subsection are:

- A. Alliance Texas, Fort Worth, TX
- B. Rickenbacker Int'l Airport/ Global Logistics Park, Columbus, OH
- C. Port San Antonio, San Antonio, TX
- D. Pease International Tradeport, Portsmouth, NH
- E. Mather Airport and McClellan Park, Sacramento, CA

6.4.1 Alliance Texas. Alliance Texas is a 17,000-acre master planned mixed-use project developed from the ground up by Dallas-based Hillwood Development Corp beginning in 1989 (www.alliancetexas.com). The project is located 16 miles north of downtown Fort Worth, Texas, along I-35. It is part of the Dallas-Fort Worth Metroplex, a metropolitan area of six million residents.

Existing development in Alliance includes Fort Worth Alliance Airport (AFW) and 28 MSF of commercial and industrial space. AFW is owned by the City of Fort Worth and managed by Alliance Air Services, a Hillwood subsidiary. The airport has two runways (9,600 and 8,200 FT) both of which are being lengthened. Alliance industrial and commercial tenants include 150+ companies with 28,000 employees. Key corporate tenants include Tech Data Corp, Texas Instruments, Motorola, UPS Supply Chain Solutions, LG Electronics, Ryder Transportation, Federal Express, Textron/Bell Aerospace, and American Airlines. Alliance serves as FedEx's Southwest hub and the American Airlines aircraft maintenance and engineering center. In addition to this aviation, industrial, and commercial activity, Alliance has more than 6,000 homes.

Global Logistics at Cecil Commerce Center

Alliance consists of a number of named industrial, office, commercial, and residential communities, including:

- Alliance Gateway, a 2,400-acre park for large-scale industrial users.
- Alliance Center, a 2,600-acre aviation, industrial, and office complex surrounding AFW.
- Alliance Advanced Technology Center, a 1,400-acre technology complex.
- Westport at Alliance, a 1,500-acre industrial and distribution park adjoining the Burlington Northern Santa Fe (BNSF) rail line and 735-acre intermodal yard and terminal.
- Westlake Corporate Center, an 800-acre campus office park.
- Alliance Commerce Center, a 300-acre office and high-tech industrial park.
- Alliance Air Trade Center, a 52-acre air cargo complex at AFW.
- Alliance Town Center, a 500-acre retail, office, hospital, and residential center.
- Alliance Crossing, a 170-acre commercial complex with a mix of hotels, retail facilities, and offices.

The centerpiece of the development is the Alliance Global Logistics Hub, a multi-modal inland port featuring Fort Worth Alliance Airport, a unique private industrial airport, a BNSF intermodal facility, Interstate Highway service (I-35 bisects the project), and Foreign-Trade Zone designation (FTZ #196). Alliance and AFW benefit greatly from being in a market the size of the Dallas-Fort Worth Metroplex, a major US transportation hub and international gateway. Air Cargo handled at AFW in 2006 totaled 250,478 metric tons, ranking 28th among 160 North American airports tracked by Airports Council International. Dallas-Fort Worth International (DFW) ranked 10th with 757,856 tons handled in 2006.

Global Logistics at Cecil Commerce Center

6.4.2 Rickenbacker International Airport and Rickenbacker Global Logistics Park. The International Airport (LCK) and Global Logistics Park (www.rickenbacker.org) are located 12 miles south of downtown Columbus, Ohio, just outside the I-270 beltway. Columbus is the Ohio state capitol and center of a metropolitan area with a population of 1.7 million in 2006. The 5,000-acre former Air Force Base was realigned in 1994 as an Air National Guard station, but has been transformed largely into a civilian airport and commerce center.

Rickenbacker is the first public use air cargo airport in the US and currently is the largest public all-cargo airfield in the world, with two 12,000-foot runways. It is operated by the Columbus Regional Airport Authority (CRAA) and, as the regional air cargo hub, handled 113,714 metric tons of cargo in 2006, ranking it 46th among 160 North American airports. Port Columbus International Airport (CMH) is the main air carrier airport in Central Ohio.

The southeast Columbus area is the largest and most active industrial market in the region with 61 MSF, including 10 MSF in Rickenbacker. Some 38 MSF of industrial, office, and commercial space has been developed in and around Rickenbacker since 1994, for an average of almost 2.5 MSF per year. Developers active in the Rickenbacker area include Duke Realty Corp, Prologis, Opus Group, Carey Realty Investments, and Daimler Group.

Rickenbacker facilities include a 43,000 SF passenger charter terminal, more than 500,000 SF of air cargo space, a 96-room hotel, and a new 300-acre Norfolk-Southern intermodal rail yard and terminal that will open in 2008. Air cargo facilities include a 275,000 SF FedEx ground and air hub and sorting and distribution facility and 164,000 SF of general cargo buildings operated by the CRAA. The air cargo complex is being developed by the CRAA through the Franklin Community Improvement Corporation (FCIC), a non-profit entity through which key facilities are financed with public and private funds.

Rickenbacker Global Logistics Park encompasses 1,600 acres in several locations, called campuses, around the airport. Development is being undertaken by a partnership formed in 2005 between the CRAA, Duke Realty Corp., a major Indianapolis-based commercial/ industrial developer, and Capital Square, Ltd, a

Global Logistics at Cecil Commerce Center

local investment firm. Originally planned for 1,200+ acres of airport property, two additional 160-acre tracts were or are being acquired for an average \$57,000 per acre for one tract and \$84,000 for the other. The Park can accommodate up to 22 MSF of space over a projected buildout period of 12-15 years and is adjacent to Norfolk-Southern's new intermodal terminal. Development thus far includes four large warehouse/distribution/logistics facilities with 2.5 MSF of space.

Existing buildings owned and operated by the CRAA include four hangars and three small air cargo buildings. Two hangars are leased to end users for rates in the \$3.00-\$3.75/SF range. The other two hangars are leased to companies that have improved and sublease the facilities. Master lease rates are in the \$2.75/SF range; subleases are in the \$6.50-\$7.00/SF range. Lease rates for the three existing air cargo buildings are in the range of \$5.00-\$8.50/SF, plus CAM charges of \$1.15/SF. Lease rates for private bulk warehouse/ distribution space typically are in the \$3.25-\$3.50/SF range, plus expense charges of \$0.35-\$0.50/SF. Rickenbacker land is both sold and leased. Current CRAA land lease rates are approximately \$0.40/SF.

6.4.3 Port San Antonio. Port San Antonio is the new name for KellyUSA, the former Kelly Air Force Base in San Antonio, Texas (www.portsanantonio.us). San Antonio has a 2006 metropolitan area population of 1.9 million. Port San Antonio is located less than 10 miles from downtown San Antonio inside the I-410 beltway near I-35.

The 4,700-acre Kelly AFB, a former Air Force industrial and logistics center, had an inventory of 592 buildings with 16.2 MSF and an 11,500-foot runway. Before its closure in 2001, Kelly AFB had over 20,000 personnel, including 15,000+ civilians. Approximately 1,900 acres of Base property and 11.4 MSF of buildings were transferred to the Greater Kelly Development Authority (GKDA), an agency created by the City of San Antonio. The development was branded "Kelly USA." Phase I privatization and reuse of existing facilities was accomplished largely by the end of 2004. Current employment totals about 12,000. Major tenants include Boeing, Pratt & Whitney, GE, Lockheed Martin, Ryder Integrated Logistics, and EG&G Logistics.

Global Logistics at Cecil Commerce Center

Phase II, which began in 2004, involved approximately \$360 million of infrastructure improvements, including \$245 million from the private sector, and seen as necessary for attracting new development. The Phase III plan is to make KellyUSA an international air/rail/truck cargo port, capitalizing on its South Texas location near the main I-35 NAFTA trade route. Toward this end, the GKDA was renamed the Port Authority of San Antonio (PASA) and KellyUSA was re-branded Port San Antonio.

New projects include an 89,000 SF air cargo terminal and the 130-acre East Kelly Railport. Initial development of the East Kelly Railport includes a 360,000 SF rail-truck transfer center. Rail service is provided by both Union Pacific and Burlington Northern Santa Fe. Union Pacific is also planning to build a 300-acre intermodal rail terminal nearby on I-35.

Representative new properties being leased by PASA include a 43,200 SF office/flex facility (\$12/SF office and \$4.50/SF warehouse, triple net, plus a \$2.25/SF infrastructure/CAM/ insurance charge), a 108,000 SF warehouse (\$4.35/SF, triple net, plus a charge of \$1.25/SF), and the 89,000 SF air cargo terminal (\$7.50/SF, triple net, plus a charge of \$2.84/SF). All of Port San Antonio has Foreign Trade Zone status (FTZ #80-10).

6.4.4 Pease International Tradeport. Pease International Tradeport, the former Pease Air Force Base, is located in Portsmouth, New Hampshire, on I-95 approximately 50 miles north of Boston. Pease, a 4,255-acre former Strategic Air Command base, was closed in 1989 and is among the most successful military base redevelopments in the U.S (www.peasedev.org).

Tradeport facilities include Portsmouth International Airport (PSM) and an adjacent business park totaling approximately 3,000 acres. PSM has an 11,300-foot runway, 55,000 square foot passenger terminal, and several air cargo and warehouse buildings. Limited regional air passenger service is provided by Skybus and Boston-Maine Airways. PSM is a major air cargo hub, having handled 285,267 metric tons in 2006, ranking it 24th in North America. Nearby Boston Logan International Airport ranked 22nd with 324,859 tons of air cargo in 2006.

Global Logistics at Cecil Commerce Center

Redevelopment is the responsibility of the Pease Development Authority (PDA), an agency created by the state legislature in 1991. The Tradeport has approximately 4.5 MSF of existing and committed development, with 240 tenants and 6,400 employees to date. The diverse tenant list includes businesses in the aviation, biotech, information technology, computer software, manufacturing, import-export, engineering, R&D, financial services, telecommunications, and health services sectors. Key corporate tenants include Ingersoll Rand, Fisher Scientific, Cisco Systems, and Emerson Electric.

Six colleges have facilities at the Tradeport offering day and evening classes. Approximately 1,100 acres of Tradeport property have Foreign Trade Zone designation (FTZ #81). Portsmouth-based Two International Group is the leading private developer (www.twointernationalgroup.com).

6.4.5 Mather Airport and McClellan Park. Mather and McClellan are two former Air Force Bases in Sacramento, California, the State capital. Sacramento had a metro area population of 2.1 million in 2006. Mather, a 5,700-acre former pilot training center, was closed in 1993 and is 12 miles southeast of downtown. McClellan, a 2,900-acre former military industrial and logistics center, was closed in 2001 and is 10 miles north of downtown near I-80.

Redevelopment objectives for both are quite different. Mather was re-opened in 1995 as a 2,900-acre air cargo airport and is operated as part of the Sacramento County Airport System (www.sacairports.org). McClellan, which is surrounded by development, is being redeveloped primarily as an industrial park (www.mcclellanpark.com). McClellan has a 10,600-foot runway, but aviation activities are limited to general aviation and corporate use.

Global Logistics at Cecil Commerce Center

Mather Airport (MHR) has two runways (11,300 and 6,100 FT), 185,000 SF of hangar space, over 500,000 SF of warehouse and office space, 40 acres of air cargo ramp space, and 800+ acres for industrial development. MHR handled 61,390 metric tons of air cargo in 2006, nearly all generated by UPS and Airborne Express. MHR has nearly as much air cargo activity as Sacramento International (SMF), the region's main passenger airport and FedEx hub, which handled 67,674 metric tons of air cargo in 2006.

McClellan AFB closed with an inventory of 155 industrial and 35 warehouse buildings totaling 11 MSF. Unique facilities included a nuclear radiation center, digital network-switching center, and aircraft instrument and computer facility. The base once employed over 13,000, including 10,500 civilians. Vacated industrial, commercial, and aviation assets were purchased from Sacramento County by Industrial Realty Group, LLC (IRG) (www.industrialrealtygroup.com), a Los Angeles-based developer, and master planned as a mixed-use commerce center, including extensive MRO facilities and a general aviation and executive jet airport.

McClellan Park now has 8.5 MSF of hangar, industrial, and commercial space and is home to 180+ tenants with 8,000+ workers. Key tenants include Northrop-Grumman, Boeing, Raytheon, and General Dynamics. Facilities include a 134-room hotel and conference center and 2.4 MSF of rail-served warehouse space served by Union Pacific and Burlington Northern Santa Fe. Development, marketing, and leasing activities are managed by McClellan Business Park, LLC, a partnership of IRG and the Morgan Stanley Real Estate Fund.

6.5 BUSINESS AND INDUSTRY TARGETS. Local economic development organizations and agencies have identified various types of business and industry as well suited to the Jacksonville area, desirable to attract and grow, and supportable by the area's labor and transportation resources and quality of life. Key organizations and agencies include the Jacksonville Regional Chamber of Commerce, Jacksonville Economic Development Commission (JEDC), and Jacksonville Port Authority (JPA). These entities and their targets, including those well suited to Cecil Commerce Center, are profiled below.

Global Logistics at Cecil Commerce Center

6.5.1 Jacksonville Regional Chamber of Commerce. The Jacksonville Chamber is the lead private sector economic development marketing organization for Jacksonville/Duval County and several other Northeast Florida counties. Through its Cornerstone Regional Development Program, the Chamber is targeting its promotion and marketing activities primarily on seven business and industry clusters:

- A. Aviation - aerospace and aircraft manufacturing and service industries
- B. Financial and Insurance Services
- C. Headquarters
- D. Information Technology
- E. Life Sciences - including medical products and services
- F. Logistics - including warehousing, distribution, transportation, and wholesaling
- G. Manufacturing - particularly the automotive industry

Cecil Commerce Center is particularly attractive to and competitive for the Aviation, Logistics, and Manufacturing clusters. The Center will also prove attractive for certain types of businesses and industries in the Information Technology and Life Sciences clusters, and may also prove attractive as a corporate, regional, and division headquarters location, particularly for firms in and serving the Aviation and Logistics industries.

6.5.2 Jacksonville Economic Development Commission (JEDC). The JEDC is the lead public agency for economic development in Jacksonville/Duval County, and is responsible for promoting business and industry, downtown development, and sports and entertainment, among others. JEDC represents City/County government in dealings with firms seeking to locate and develop in Jacksonville, including coordination with other City/County agencies and negotiation of incentives. Serving as master planner and developer for sections of Cecil Commerce Center not under JAA jurisdiction is a new role for the JEDC, in that it moves the agency from its traditional roles as a project advisor and facilitator in economic development to having direct responsibility for project implementation.

Global Logistics at Cecil Commerce Center

Whether acting as advisor, facilitator, or developer, however, the JEDC has adopted five business and industry clusters as the principal targets for promoting economic development and considering incentives. These targets are much the same as those of the Jacksonville Chamber:

- A. Aviation and Aerospace
- B. Supply Chain Logistics
- C. Finance and Insurance
- D. Information Technology
- E. Advanced Manufacturing

6.5.3 Jacksonville Port Authority (JPA). The JPA is the lead public agency for promoting and marketing waterborne commerce and developing and operating marine terminals. As such, the agency targets all activities that constitute the maritime commerce industry, including import and export firms, freight forwarders, shipping companies, warehousing and distribution services, marine equipment dealers, and various other marine services. Facilities and firms associated with Port activity are located almost entirely along and near the St. Johns River east of downtown. However, recent development of the Southeast Toyota auto processing and distribution center miles from the Port in the Westlake Industrial Park on the west side of Jacksonville indicates that Port-related development is possible in interior locations. The proposed new Mitsui and Hanjin marine terminals will dramatically increase Port activity and demand for land-based transportation and distribution services throughout the Jacksonville area.

Global Logistics at Cecil Commerce Center

6.5.4 Specific Target Industries for Cecil Commerce Center. Most promising businesses and industries for Cecil Commerce Center include aviation industries, particularly manufacturing and MRO activities; truck-oriented general warehousing and distribution; various non-aviation manufacturing industries; and management, professional, technical, and research services related to the aviation and non-aviation industries. Specific business and industry types recommended for the Cecil Commerce Center are listed below in Table 6-6.

Table 6-6. Target Industries for Cecil Commerce Center

NAICS Code (1)	Industry
<i>Aviation/Aerospace Industries</i>	
33641	Aircraft and aircraft parts manufacturing
33632/636	Aircraft lighting, hardware, and flight instrument manufacturing
33251	Aircraft seats and related products manufacturing
42186	Aircraft, engines, parts, equipment, and supplies wholesaling
48811	Air cargo handling
48819	Aircraft maintenance, repair, and testing services

(continued)

Global Logistics at Cecil Commerce Center

Table 6-6. Target Industries for Cecil Commerce Center (continued)

NAICS Code (1)	Industry
<i>Transportation/Distribution Industries</i>	
42112/113	Automotive parts and products wholesaling
42145	Hospital and medical equipment and supplies wholesaling
42181/183/184/185	Construction, service industry, and industrial equipment and supplies wholesaling
42241	Groceries and food products wholesaling
42261	Plastic materials and products wholesaling
48411/412	General freight trucking -- local and long-distance
48851	Freight forwarders and shipping agents
49311	General warehousing and distribution for manufacturers and retail chains
541614	Supply chain management/logistics services
<i>Manufacturing Industries</i>	
32121	Engineered wood products
32612/619/622/629	Plastic and rubber products
33232	Ornamental and architectural metal products
33261/271/291	Fabricated and machined industrial metal products
33392	Materials handling equipment
33441	Semiconductors and electronic components
33451	Instruments and controls
33531	Electrical equipment
33611	Automobiles and light duty trucks
33631/634/636/637/639	Motor vehicle parts and equipment -- non-electrical
33632	Motor vehicle parts and equipment -- electrical and electronic
33699	Other transportation equipment
33911	Medical equipment and supplies

(continued)

Global Logistics at Cecil Commerce Center

Table 6-5. Recommended Target Industries for Cecil Commerce Center (continued)

NAICS Code (1)	Industry
<i>Management and Support Activities</i>	
51421	Data processing and management
54133/162	Engineering and environmental services
54169/171	Technical and R&D services
55111	Company management -- corporate, regional, and division offices
56121	Business and facilities support services

(1) North American Industrial Classification System

Source: URBANOMICS, Inc.

6.5.5 Education, Training, and Research Center. Cecil Commerce Center presents the opportunity to develop a world class education, training, and research center for aviation-related activities, logistics, and other technology-oriented activities. The existing FCCJ facility would be a prominent part of a larger complex of facilities and programs. Other potential education, training, and research partners include the Duval County School District, University of North Florida, University of Florida, and/or Florida State University. This center would include vocational training facilities for those pursuing careers as aircraft mechanics, electronics technicians, and other trades, for advanced education in aeronautical engineering, materials science, and other technology sectors, and for research in these areas.

Cecil Commerce Center provides an excellent laboratory for these activities, and an education, training, and research center is likely to be a major asset for attracting for business and industry. A location adjacent/near the proposed mixed use transit center should be considered. This education and research center could include a business incubator with an initial 80,000-120,000 square feet of office and research space. A full service hotel/ conference center would complement this education, training, and research center.

Global Logistics at Cecil Commerce Center

6.6 MARKETING STRATEGY

6.6.1 Marketing Partners. Goals of a marketing program for Cecil Commerce Center are to increase market awareness of development opportunities and to actively promote development. This is done by working with and through state and local allies and industrial and commercial real estate brokers, industrial and commercial developers, and site location consultants. Successful marketing and development of Cecil Commerce Center will require ongoing involvement of all these players.

Development of Cecil Commerce Center will be carried out principally by commercial and industrial developers, who will purchase or lease parcels from the City and JAA, improve those parcels, build and lease speculative space and/or develop build-to-suit space for specific end users. This will be true for most general industrial uses, office facilities, and retail facilities.

Where developers purchase or lease parcels for speculative and build-to-suit space, finding end users and tenants will be their direct marketing responsibility and/or would be carried out with and through brokers, site consultants, and/or local and state economic development marketing organizations. Chief among the latter group are the Jacksonville Regional Chamber of Commerce, Jacksonville Economic Development Commission, and Enterprise Florida.

This development and marketing process may also apply to aviation-related facilities, although the JAA will have a more active role in marketing to end users because of its knowledge of and expertise in the aviation industry. In addition, some end users will lease parcels directly from the JAA as landowner, as illustrated by purchase of the Bridgestone/ Firestone site in Cecil Commerce Center North directly from the City.

The challenge to the JAA is to implement a program combining direct marketing to commercial and industrial developers and some end users, promoting and supporting marketing actions by other partners, and providing attractively-packaged, adequate, up-to-date information about Cecil Commerce Center South to various partners and industry representatives in a timely and ongoing manner.

Global Logistics at Cecil Commerce Center

Lists of site consultants, industrial/ commercial brokers, and industrial/commercial developers are presented at the end of this section as **Attachments 6B, 6C, and 6D**.

6.6.2 Joint Marketing. At the beginning of this master planning process for Cecil Commerce Center, it was understood that the JAA would be responsible for planning and potentially developing all land south of Normandy Boulevard, including existing City-owned land. Correspondingly, the City through the JEDC was to be responsible for lands north of Normandy Boulevard. More recently, however, there have been some initial indications that the Jacksonville Port Authority (JPA) may take over responsibility for some or all City-owned lands in Cecil Commerce Center. The matter is still to be decided.

Whether the JEDC or JPA has ultimate responsibility for land currently owned by the City, joint marketing and development strategies, programs, and agendas should be established through appropriate interagency cost and mission sharing agreements and closely knit working groups. One such group that should be formed is a Cecil Marketing Team having shared responsibilities in developing and implementing marketing strategies and activities.

6.6.3 Branding and Marketing Media. Successful marketing and promotion of Cecil Commerce Center will require an attractive and informative website, collateral materials, print advertising, and news briefs in selected trade publications. Site consultants, for example, most often identify, screen, and short-list potential locations for corporate clients before initiating telephone contacts and site visits. Therefore, communities and developments with high quality, comprehensive, and user-friendly websites have a head start in the screening process. Ware-Malcomb has designed a logo, website, brochure, and other materials to market Cecil Commerce Center, as described below.

A. Logo. The logo is the graphic foundation for Cecil Commerce Center's project identity/brand. The project logo pictured throughout this report includes air, ground, rail, and port symbols to reinforce multi-modal capabilities at Cecil Commerce Center. The logo builds from a graphic the City released to promote Jacksonville as "America's Logistics Center." There is potential for cross-

Global Logistics at Cecil Commerce Center

reinforcement as recognition of either the City's logistics logo or Cecil Commerce Center's logo grows. The logo will appear on all marketing materials related to the project, including website, e-mailer, brochure, multi-media, print ads, and signage.

B. E-mailer. To announce Cecil Commerce Center and drive traffic to the new website, an e-mailer designed to match the look and feel of the website (and other marketing materials) will be distributed to site location consultants, commercial and industrial brokers, commercial and industrial developers, local and state economic development allies, various aviation and industrial organizations, and others. The e-mailer will include a contact for development and leasing opportunities, a link to the website and potentially an invitation to sign up for a Cecil Commerce Center newsletter. The e-mailer can be distributed to a mass contact list and individually to those inquiring about the project. This is a great tool for providing an overview of Cecil Commerce Center and making additional information available through a mouse click. Recipients can also easily forward the e-mailer to partners, investors, and others.

C. Website. Constructed in html and flash formats, the website for Cecil Commerce Center is built to feature the project and the City of Jacksonville to developers, brokers, and site selectors. The website combines engaging, sophisticated flash animation with easy-to-navigate, quick access html to create a credible presentation that is functional. The viewer experiences a flash movie of "global" graphics and animated key words on the home page before choosing from menu options including: Development, Amenities, Services, Community, Sustainability, Media, Contact, Air, Ground, Rail, and Port.

Since building interest in development at Cecil Commerce Center is key, the Development tab sits in the prominent first position on the menu bar. Under this section, users can browse development opportunities by site plan or building product type and instantly download related brochure inserts (see Brochure description). Three-dimensional perspective renderings of the site and building types serve as images to inspire the viewer. The Development section is built with growth in mind. Soil reports, engineering, and frequently requested other information can be added when available or needed.

Global Logistics at Cecil Commerce Center

Amenities and Services menu sections offer information for parks, conferencing center, job training at FCCJ, foreign trade zone, and trusted vendors. Sustainability pages are also included under a separate menu tab to reinforce the importance of the environment to Cecil Commerce Center, promote the actions taken for conservation, and emphasize potential LEED certified developments.

Another key feature of the website is the City of Jacksonville. Through the Community section, viewers get a snapshot of City demographics, work force, and area attractions. Community pages include links to City of Jacksonville, Economic Development, and Chamber of Commerce websites for expanded information. Multi-modal features of the City are also featured in individual Air, Ground, Rail, and Port sections. These sections include logistics and transportation statistics provided by JAA, CSX, and JPA, along with links to their respective websites for expanded information. The Community and multi-modal sections create great cross-marketing opportunities. By simply linking each organization to the site (and vice versa) we grow credibility, show expanded support, and increase web search preference and optimization.

D. Brochure. A unique brochure package for Cecil Commerce Center allows the Marketing Team to customize information for individual recipients and opportunities. The brochure construction includes a cover with two pockets, four bound inside pages, and individual loose pages or “inserts.” The front pocket is intended to hold correspondence such as a personalized cover letter as well as a multi-media CD. The CD features the same interactive multi-media available on the website. The back pocket holds loose inserts featuring available properties and building product types, including industrial, aviation, office, and retail sites and buildings. These inserts can be updated to reflect new available properties.

The four bound inside pages include project information such as location, amenities, services, multi-modal capabilities, and City of Jacksonville information. This information is pertinent no matter the building type or opportunity. Since this information will require infrequent updates, print quantities can be maximized for improved brochure unit cost.

Global Logistics at Cecil Commerce Center

E. **Print Advertising.** The Marketing Team should allocate marketing resources to developing and placing ads and news briefs in the leading economic development and site location industry trade journals. This type of advertising, used judiciously, will help increase external market awareness of Cecil Commerce Center among site location consultants and corporate real estate and strategic planning executives. The leading trade journals are:

- Area Development (www.areadevelopment.com)
- Business Facilities (www.BusinessFacilities.com)
- Expansion Management (www.ExpansionManagement.com)
- Site Selection (www.siteselection.com)

Site Selection magazine is the most widely read by site seekers and is affiliated with the Industrial Asset Management Council (IAMC) (www.iamc.org). Area Development and Business Facilities are perhaps the most popular among economic development professionals.

6.6.5 Marketing Actions. Successful marketing and development of Cecil Commerce Center South will require the JAA be proactive on several fronts. These include designing, producing, and distributing marketing information to introduce the project to the marketplace, enlisting support from local and state allies to promote the project, and entering into relationships with brokers and developers as needed to start the development process. Recommended actions for interacting with local and state economic development allies, site location consultants, industrial/commercial real estate brokerage firms, and industrial/ commercial real estate developers are outlined below.

It is also recommended that the JAA join the Industrial Asset Management Council (IAMC) and its parent organization CoreNet Global (www.corenetglobal.org), and attend and participate in their regional and national conferences. CoreNet Global is an amalgam of the former Industrial Development Research Council (IDRC) and National Association of Corporate Real Estate Executives (NACORE). This organization has a broad membership, including economic development professionals, commercial/industrial brokers and developers, and corporate

Global Logistics at Cecil Commerce Center

representatives from commercial and industrial sectors, including retail. IAMC is a breakaway organization with an orientation to the manufacturing and distribution industries.

A. Local and State Allies. Local and state allies in promoting economic development in Northeast Florida and the Jacksonville area are the Jacksonville Regional Chamber of Commerce, Jacksonville Economic Development Commission, Jacksonville Port Authority, and Enterprise Florida. The Chamber through its Cornerstone Program is the lead marketing organization in the region and typically is the first point of contact for site location consultants and corporate personnel involved in searching for sites. Thus, it will be important for the JAA to ensure that the Chamber has complete and up-to-date information about Cecil Commerce Center South and that the project is well represented in Chamber communications with and presentations to site consultants and corporate representatives. The JAA should become an active member in the Cornerstone program if not already so.

B. Site Location Consultants. Although site consultants frequently will contact the Chamber for information about specific sites, many first conduct Internet searches to shortlist communities they wish to contact further. The JAA will be well served by making site consultants directly aware of opportunities at Cecil Commerce Center South. The following actions are recommended:

- Compile a list of industry site location consultants (see **Attachment 6B**).
- Mail or e-mail basic introductory information on Cecil Commerce Center to these consultants with personalized cover letters and inviting them to consult the web site for additional information.
- Coordinate beforehand with the Jacksonville Regional Chamber to determine how this relates to their marketing initiatives and schedule.
- Follow up with periodic mailings of up-to-date information.
- Host a familiarization tour for site consultants when product is available to show; coordinate with the Jacksonville Chamber.

Global Logistics at Cecil Commerce Center

C. Industrial/Commercial Brokers. Industrial/commercial real estate brokers have their own networks of industry contacts and are often involved in site searches. In addition, involvement of brokerage firms in the marketing and development of Cecil Commerce Center helps relieve the JAA of the burden of carrying a large internal staff marketing and sales/leasing staff. The following actions are recommended:

- Interview national real estate brokerage firms and select one to represent the JAA in marketing land in Cecil Commerce Center. **Note:** Brokerage firm should have a strong industrial resume, national brand name, and local office (see **Attachment 6C**).
- Involve as member of the brokerage's marketing team an individual based in Atlanta in order to increase regional, national, and international exposure.
- Invest as necessary in assembling due diligence information to provide qualified site information to the brokerage firm, as would be required by the ultimate buyer and end user.

D. Industrial/Commercial Developers. National and regional developers also have their own industry contacts and are well aware of development trends and user needs. Inasmuch as the JAA may not wish to take on the role of end developer, experienced industrial/commercial developers will be called on lease land from the JAA and deliver product to the market. The following actions are recommended, including a two-step RFP/ RFQ process that is generally used by the JAA:

- Identify qualified national and regional developers (see **Attachment 6D**).
- Select an area of 200-500 acres in Cecil Commerce Center South as the first increment of development.
- Develop a request for qualifications (RFQ) for this property and increment of development and distribute to identified developers.
- Evaluate responses and develop a short list of those developers to receive a request for proposal (RFP).
- Develop and distribute the RFP to short-listed developers, providing details on the property and requirements and expectations of the JAA.

Global Logistics at Cecil Commerce Center

- Evaluate proposals and select two developers, with each taking 100-250 acres, approximately, to provide for fair market value competition within Cecil Commerce Center.
- Market additional lands in phases in similar manner.
- Invest as necessary in assembling due diligence information to qualify and characterize the properties being marketed for buyers to make realistic decisions.
- Develop an on-site marketing center to introduce the project to prospective buyers, allowing for display of aerials, site maps, project photos, and the like.
Note: This would also double for a marketing office for the selected brokerage company to provide for on-site marketing of the project.

6.7 INCENTIVES. Incentives have become commonplace in attracting a new business to a community or helping an existing business expand. However, it is often a requirement that the business be part of a specified target industry and that wages exceed the local average. Financial incentives generally available from state and local governments are primarily employer driven and not normally extended to developers of speculative industrial and commercial space. The State of Florida and City of Jacksonville have a number of employer-based incentives that would be available to specific employers, including training grants, infrastructure grants, and tax rebate programs that help make Florida communities competitive. Detailed information on these incentive programs can be found on the Enterprise Florida and JEDC websites: (www.eflorida.com) (www.jaxdevelopment.net).

6.7.1 Land-Based Incentives. In addition to specific incentives available to end users, lands and specific parcels designated as Enterprise Zones, Foreign Trade Zones, and Community Redevelopment Areas, among others, can help these leverage employer-based incentives and, in some cases, can extend assistance to developers. The following designations should be sought or maximized to help stimulate private investment at Cecil Commerce Center.

Global Logistics at Cecil Commerce Center

A. Enterprise Zone/Empowerment Zone. Enterprise and Empowerment Zones are programs that provide state and Federal sales and corporate tax incentives and tax-exempt financing for businesses that create jobs in areas of need. The principal Zones in Jacksonville is the area north and west of downtown. In addition, approximately 1,300 acres of land in Cecil Commerce Center is so designated, including 450 acres in Cecil Commerce Center South. All such designated land in Cecil Commerce Center South, however, is City-owned and located west of Aviation Avenue. There are no lands currently owned by the JAA that are so designated. Given this fact, the JAA should meet with the City to determine and pursue procedures to extend the designation into areas owned by the JAA to encompass some or all of the 10.5-13.6 MSF of potential industrial and aviation-related space on JAA lands. Otherwise, JAA lands are at a distinct competitive disadvantage to those owned by the City both north and south of Normandy Boulevard.

B. Foreign Trade Zone. FTZ designation for some or all land at other logistics airports and commerce centers around the U.S. is common and is a prominent marketing asset and incentive. Such designation is attractive and often necessary for firms engaged in import-export activities, in that cost savings can be significant on imported goods subject to U.S. tariffs. The Jacksonville Port Authority is the grantee for FTZ #64 in Jacksonville. Under its current grant, JPA can designate approximately 2,000 acres of land. However, only about 500 acres is currently utilized at 6-7 existing locations, including Blount Island and Talleyrand marine terminals and sites in the Jacksonville International Tradeport (12 acres) Imeson Industrial Park (75 acres), and Westlake Industrial Park (47 acres). Designation of FTZ subzones in Jacksonville generally has been specific to individual businesses and facilities as opposed to blanket designations of areas for speculative future development. However, it will be desirable for the JAA to pursue with the JPA designation of an FTZ subzone in Cecil Commerce Center to help promote future development opportunities, particularly in the air cargo market.

Global Logistics at Cecil Commerce Center

C. Community Redevelopment Area (CRA)/Tax Increment Finance District (TIF). CRA/TIF designation of Cecil Commerce Center will allow local property tax revenues generated by future development to be reserved for public improvements and uses that directly benefit Cecil Commerce Center. Among various uses, these funds can be used for infrastructure and site improvements to make land parcels more marketable to developers and end users. Normally intended to promote and help fund development in downtowns and urban neighborhoods, the City of Jacksonville has also used this approach to help stimulate development adjacent to Jacksonville International Airport. The City and JAA should work together to establish CRA/TIF designation for Cecil Commerce Center.

D. Special Transportation Concurrency Exception Area. Designation of Cecil Commerce Center as a Concurrency Exception Area, as is being studied by the City, would allow development to proceed on a “pay-and-go” basis without the City having to make or commit to needed public road improvements in the surrounding area as a condition of development approval. Instead, developers would make “fair share” payments to a special trust fund and could move forward with their projects without risking denial based on inadequate road capacity. Such a Concurrency Exception Area is found in the SR9A/Gate Parkway/Baymeadows Road area. Application of this concept, which requires review by the Florida Department of Community Affairs (DCA), to Cecil Commerce Center makes great sense in that the amount and pace of development and job creation could otherwise be significantly limited and delayed. The JAA should participate to the fullest extent in discussions and studies with the City, leading to establishment of a Concurrency Exception Area for Cecil Commerce Center.

Global Logistics at Cecil Commerce Center

6.7.2 Direct Site Cost Incentives. The potential competitive edge for bringing developers and end users to Cecil Commerce Center is the flexibility the City and JAA have in establishing and negotiating, on a case-by-case basis, marketable land prices and lease rates, given that the property has a zero cost basis. Flexibility on land price and lease terms will be particularly important for circumstances where extraordinary or unusual soil/drainage conditions and infrastructure requirements impair project feasibility.

There are likely to be some circumstances where the City and JAA may find it necessary to fund infrastructure and site improvements up front in order to provide marketable and cost-feasible development parcels/sites to developers and end users. These improvements could be financed from various potential public sources, including grants, bonds, TIF revenues, and land sales/lease revenues (see Financial Plan).

Another incentive approach used by the JAA for the Woodwings East project at JIA is to enter into long term land leases with developers based on sharing net revenues from subsequent building leases. This allows developers to economize on leasing land before the land begins to generate income from its subsequent development.

ATTACHMENT 6A. AIR CARGO MARKET

Types of Air Cargo Airports. Airports with air cargo facilities and services are one or a combination of three air cargo types:

- **Local Market Station.** These airports serve inbound and outbound shipments generated by the surrounding market area. This category applies to most metropolitan airports in the U.S., including Jacksonville International (JIA).
- **Hub.** These airports serve as regional or national cargo consolidation and redistribution centers in which inbound shipments are received from multiple market areas, sorted, and distributed to multiple market areas. Memphis International (MEM), the national hub for Federal Express, is the leading example. Others include Louisville International (SDF), the national UPS hub, and Indianapolis International (IND), the second largest FedEx hub in the U.S.
- **International Gateway.** These airports receive and consolidate inbound shipments from outside the U.S. and process the inbound goods for distribution to their final destinations. Examples include Miami International (MIA), Los Angeles International (LAX), and New York's Kennedy International (JFK).

Air Cargo Comparisons. Airports Council International-North America (ACI-NA) tracks annual air cargo activity at 160 North American airports, measured in metric tons. Memphis International (MEM) ranks first with 3,692,081 million metric tons in 2006. Miami International (MIA) is the top ranked Florida airport and fifth overall with 1,830,591 metric tons. JIA is the fifth ranked Florida airport and 62nd overall with 78,773 metric tons.

Air cargo activity in 2006 for selected Florida airports in the ACI-NA inventory is summarized in Table 6A-1. It is worthwhile noting that air cargo activity in five of the above eight Florida airports, including JIA, increased by 3.0 percent or more from 2005 to 2006, compared to a flat 0.6 percent increase for all 160 North American airports in the ACI-NA survey.

Global Logistics at Cecil Commerce Center

Table 6A-1. Air Cargo Comparisons for Selected Florida Airports, 2006

Airport	2006 Air Cargo (metric tons)	North American Rank	Percent Change in Cargo vs 2005 (1)
Miami International (MIA)	1,830,591	5	4.3
Orlando International (MCO)	198,009	31	(12.4)
Fort Lauderdale International (FLL)	148,161	39	(6.9)
Tampa International (TPA)	109,132	47	19.8
<i>Jacksonville International (JAX)</i>	<i>78,773</i>	<i>62</i>	<i>3.4</i>
SW Florida International (RSW)	19,465	106	7.5
Tallahassee (TLH)	15,832	112	34.4
Pensacola (PNS)	2,936	131	(7.0)
(1) Figures in parentheses (0.0) indicate a loss. Palm Beach International Airport not included in the ACI-NA survey.			

The most interesting and telling comparison of air cargo activity among airports is in relation to their metropolitan area populations. Air cargo indices (tons of cargo per capita) have been developed for a number of airports and their corresponding metropolitan areas (see Exhibit A1), to illustrate the market orientation and comparative strength of metropolitan area air cargo activity.

The 2006 air cargo index for the Jacksonville metropolitan area is 0.06 tons per capita, compared to 0.47 tons per capita for the Miami/Ft. Lauderdale consolidated metropolitan area and 0.10 tons per capita for the Orlando metropolitan area, but is actually greater than the Tampa/St. Petersburg metropolitan area index of 0.04 tons per capita. Air cargo indices for a number of U.S. metropolitan areas are compared in Table 6A-2.

Air cargo indices less than 0.10 tons per capita are found in the majority of U.S. metropolitan areas, indicating that air cargo activity in these areas is largely a function of locally generated demand. In this regard, the Jacksonville index is in line with many other southeastern and southwestern metropolitan markets of similar size, including Austin, Charlotte, Greensboro/ Winston Salem, Nashville, Raleigh/Durham, and Richmond, and has a higher index than other several southeastern metro areas including Birmingham, Charleston, Norfolk/Newport News, Savannah, and Tampa/St. Petersburg.

Global Logistics at Cecil Commerce Center

Indices above 0.10 tons per capita, particularly over 0.15 tons per capita, indicate that these metropolitan areas and airports also function as air cargo hubs. Biggest hubs include Memphis, Louisville, and Indianapolis, which are generally similar in population to the Jacksonville metropolitan area. Smaller hubs include Toledo, Fort Wayne, Huntsville, and Columbia, SC. It is not at all surprising that most air cargo hubs, except those that also function as gateways for international air cargo, are not found in coastal areas but are located well inland.

Table 6A-2. Comparison of Air Cargo Indices for Selected U.S. Metropolitan Areas

Metropolitan Area and Airport	Metro Area Population, 2006	2006 Air Cargo (metric tons)	Air Cargo Index (tons per capita)
Memphis, TN-AR (MEM)	1,274,704	3,692,081	2.90
Louisville, KY-IN (SDF)	1,222,216	1,983,032	1.62
Indianapolis, IN (IND)	1,666,032	987,449	0.59
Toledo, OH (TOL)	653,695	353,508	0.54
Miami/Ft. Lauderdale, FL (MIA/FLL)	4,189,844	1,978,752	0.47
Fort Wayne, IN (FWA)	408,071	116,978	0.29
Huntsville, AL (HSV)	376,753	69,448	0.18
Dallas/Ft Worth, TX (DFW/AFW)	6,003,967	1,008,334	0.17
Atlanta, GA (ATL)	5,138,223	746,502	0.15
Columbia, SC (CAE)	703,771	97,098	0.14
Orlando, FL (MCO)	1,984,855	198,009	0.10
Charlotte, NC-SC (CLT)	1,583,016	148,463	0.09
Raleigh/Durham, NC (RDU)	1,458,940	107,970	0.07
Austin, TX (AUS)	1,513,565	104,196	0.07
Greensboro/Winston Salem, NC (GSO)	1,141,992	76,363	0.07
<i>Jacksonville, FL (JAX)</i>	<i>1,277,977</i>	<i>78,773</i>	<i>0.06</i>
Nashville, TN (BNA)	1,455,097	67,893	0.05
Tampa/St. Petersburg, FL (TPA)	2,697,931	109,932	0.04

Source: Airport Council International-North America; URBANOMICS, Inc.

Global Logistics at Cecil Commerce Center

Implications for Cecil Commerce Center. Air cargo activity in the Jacksonville area is on par with many other U.S. metropolitan areas in relation to metropolitan area population. JIA currently functions as a “local market station” for inbound and outbound cargo. Miami International Airport is the only true air cargo hub and international gateway in Florida and is the dominant U.S. airport for Latin American trade. Growth of air cargo activity in the Jacksonville area is likely to continue to be driven mainly by local demand, although the potential exists, with aggressive marketing, to become a secondary player in the growing Latin American market, particularly as air operations and land at Miami International become severely constrained.

Historical air cargo projections for Cecil Commerce Center by others show limited potential. These projections, summarized in Table 6A-3, below, range from only 5,520 to 16,375 enplaned tons by 2024, which is less than current activity at JIA.

Table 6A-3. Air Cargo Projections for Cecil Commerce Center to 2024

Projection Source	2024 Enplaned Tons
Reynolds, Smith & Hills - 1997 Northeast Florida Aviation System Plan and Cecil Field Feasibility Study	
-- Mini-Hub Scenario	6,967
-- International Gateway Scenario	16,375
Reynolds, Smith & Hills - 1988 Cecil Field Strategic Airport Master Plan	13,763
Avcon - 2005	5,520

Source: Avcon, Cecil Field Master Plan Update, 2007

Global Logistics at Cecil Commerce Center

These projections are in sharp contrast to current air cargo activity at other former military air bases and other air cargo-oriented facilities that the JAA may seek to emulate at the Cecil Commerce Center. Some of these facilities and their current air cargo activity are listed in Table 6A-4.

Table 6A-4. Selected Other U.S. Air Cargo Airports

Airport and Location	Comment	2006 Air Cargo (metric tons)
Pease Int'l Tradeport (PSM), Portsmouth, NH	Former Pease AFB	285,267
Fort Worth Alliance (AFW), Fort Worth, TX	Part of Alliance Texas development	250,478
Rickenbacker Int'l (LCK), Columbus, OH	Former Rickenbacker AFB	113,714
Sacramento Mather (MHR), Sacramento, CA	Former Mather AFB	61,390
Port San Antonio, San Antonio, TX	Former Kelly AFB	NA
March Global Port, Riverside, CA	Former March AFB	NA

NA Data not available (being researched)

Source: Airports Council International-North America; URBANOMICS, Inc.

It is recommended that the JAA develop a long range strategy and an aggressive marketing plan to make Cecil Commerce Center a secondary hub and gateway for the Latin American market and possibly a southeast regional mini-hub for UPS, which has a major presence in Jacksonville.

The Development Plan for Cecil Commerce Center South shows 5.7-7.0 MSF of aviation-related building space, including aircraft and aircraft parts and equipment manufacturing, MRO facilities, aviation services, and air cargo operations. An earlier generation of the Plan showed approximately 500,000 square feet of air cargo facilities, which would support 200,000 tons of annual air cargo activity. In the present day, this is aggressive considering that 2006 air cargo activity at JIA totaled 78,773 metric tons. However, 200,000 tons as a long range goal for Cecil Commerce Center is only eleven percent of current air cargo activity at Miami International.

For planning purposes, one ton of annual cargo will require approximately 2.5 square feet of warehouse/processing space. This is based on analysis of cargo volumes in relation to warehouse space at a number of U.S. airports (see Exhibit A2). JIA has a similar ratio of cargo volume and warehouse space according to data published by [Air Cargo World](#).

Global Logistics at Cecil Commerce Center

Exhibit 6A-1. Air Cargo Indices for Selected U.S. Metropolitan Areas, 2006

Metropolitan Area	Airport	Population	Air Cargo (metric tons)	Air Cargo Index
Memphis, TH-AR	MEM	1,274,704	3,692,081	2.90
Louisville, KY-IN	SDF	1,222,216	1,983,032	1.62
Indianapolis, IN	IND	1,666,032	987,447	0.59
Toledo, OH	TOL	653,695	353,508	0.54
Miami/Ft. Lauderdale, FL	MIA/FLL	4,189,844	1,978,752	0.47
Lincoln, NE	LNK	293,970	93,847	0.33
San Francisco/Oakland, CA	SFO/OAK	4,180,027	1,263,074	0.30
Fort Wayne, IN	FWA	408,071	116,978	0.29
Manchester, NH	MHT	402,789	79,990	0.20
Dayton, OH	DAY	838,940	151,119	0.18
Huntsville, AL	HSV	376,753	69,448	0.18
Chicago, IL	ORD/MDW	9,505,748	1,572,963	0.17
Dallas/Fort Worth, TX	DFW/AFW	6,003,967	1,008,334	0.17
Salt Lake City, UT	SLC	1,067,722	181,375	0.17
DesMoines, IA	DEM	534,230	93,091	0.17
Atlanta, GA	ATL	5,138,223	746,502	0.15
Los Angeles/Orange Co, CA	LAX/LGB/BUR	12,950,129	2,027,000	0.15
New York, NY-NJ-CT	JFK/EWR/LGA	18,818,536	2,629,200	0.14
Boston, MA-NH	BOS/PSM	4,455,217	610,126	0.14
Columbia, SC	CAE	703,771	97,098	0.14
Portland, OR	PDX	2,137,565	283,773	0.13
Riverside/Ontario, CA	ONT	4,026,135	493,952	0.12
Denver, CO	DEN	2,408,750	281,921	0.12
Seattle/Tacoma, WA	SEA	3,263,497	341,952	0.10
Orlando, FL	MCO	1,984,855	198,009	0.10
Omaha, NE	OMA	822,549	85,554	0.10
Philadelphia/Wilm, PA-NJ-DE	PHL	5,826,742	532,163	0.09
Minneapolis/St. Paul, MN	MSP	3,175,041	275,041	0.09
Hartford/Springfield, CT-MA	BDL	1,875,015	168,575	0.09
Charlotte, NC-SC	CLT	1,583,016	148,463	0.09
Albuquerque, NM	ABQ	816,811	76,181	0.09
Houston, TX	IAD	5,539,949	409,122	0.07
Washington, DC-MD-VA	IAD/DCA	5,290,400	354,438	0.07
Phoenix, AZ	PHX	4,039,182	286,798	0.07
Kansas City, MO-KS	MCI	1,967,405	134,948	0.07
San Antonio, TX	SAT	1,942,217	128,854	0.07

(continued)

Global Logistics at Cecil Commerce Center

Exhibit 6A-1. Air Cargo Indices for Selected U.S. Metropolitan Areas, 2006 (continued)

Metropolitan Area	Airport	Population	Air Cargo (metric tons)	Air Cargo Index
Columbus, OH	LCK/CMH	1,725,570	122,308	0.07
Austin, TX	AUS	1,513,565	104,196	0.07
Milwaukee, WI	MKE	1,509,981	101,889	0.07
Raleigh/Durham, NC	RDU	1,458,940	107,970	0.07
Greensboro/Winston Salem, NC	GSO	1,141,992	76,363	0.07
San Diego, CA	SAN	2,941,454	188,649	0.06
Sacramento, CA	SMF/MHR	2,067,117	129,064	0.06
<i>Jacksonville, FL</i>	<i>JAX</i>	<i>1,277,977</i>	<i>78,773</i>	<i>0.06</i>
Tulsa, OK	TUL	897,752	51,505	0.06
Detroit, MI	DTW	4,468,966	214,140	0.05
Baltimore, MD	BWI	2,658,405	123,954	0.05
Nashville, TN	BNA	1,455,097	67,893	0.05
Tampa/St. Petersburg, FL	TPA	2,697,731	109,132	0.04
Richmond, VA	RIC	1,194,008	51,187	0.04
Cleveland/Akron, OH	CLE	2,815,058	92,331	0.03
St. Louis, MO-IL	STL	2,796,368	85,551	0.03
Birmingham, AL	BHM	1,100,019	31,075	0.03
Savannah, GA	SAV	320,013	9,222	0.03
Norfolk/Newport News, VA-NC	ORF	1,649,457	31,193	0.02
Charleston, SC	CHS	603,178	7,152	0.01

Source: U.S. Bureau of the Census; Airports Council International-North America; URBANOMICS, Inc.

Global Logistics at Cecil Commerce Center

Exhibit 6A-2. Air Cargo Facilities at Selected U.S. Airports, 2006

Airport	Air Cargo (metric tons)	Air Cargo Warehouse Space (square feet)	Warehouse Space per Ton of Cargo
Seattle, WA (SEA)	341,952	900,000	2.63
Rickenbacker, OH (LCK)	113,714	290,000	2.55
Miami, FL (MIA)	1,830,591	2,900,000	1.58
Austin, TX (AUS)	104,196	229,000	2.20
Kennedy, NY (JFK)	1,636,357	4,100,000	2.51
Newark, NJ (EWR)	974,961	1,400,000	1.44
Houston, TX (IAH)	409,122	880,000	2.15
DesMoines, IA (DSM)	93,091	300,000	3.22
Atlanta, GA (ATL)	746,502	2,000,000	2.68
Pittsburgh, PA (PIT)	86,684	225,099	2.60
Chicago, IL (ORD)	1,558,235	2,932,360	1.88
Orlando, FL (MCO)	198,009	511,136	2.58
Omaha, NE (OMA)	67,561	198,000	2.93
Indianapolis, IN (IND)	987,449	2,000,000	2.03
<i>Jacksonville, FL (JAX)</i>	<i>78,773</i>	<i>200,000</i>	<i>2.54</i>
Huntsville, AL (HSV)	69,448	200,000	2.88
Portland, OR (PDX)	283,773	661,070	2.33
Minneapolis/St Paul, MN (MSP)	275,041	747,000	2.71
Baltimore, MD (BWI)	123,954	395,000	3.19

Source: Airports Council International-North America; Air Cargo World; URBANOMICS, Inc.

Global Logistics at Cecil Commerce Center

ATTACHMENT 6B. SITE SELECTION CONSULTANTS

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<p>Frank G. Binswanger Clive C. Mendelow Binswanger CBB 2 Logan Square Philadelphia, PA 19103 (215) 448-6000</p>	<p>James M. Bruce, Jr. Business Facility Planning Consultants, LLC Box 920280 Norcross, GA 30010-0290</p>	<p>Dr. C. R. (Buzz) Canup Canup & Associates 6917 Via Ricco Drive Austin, TX 78749 (512) 658-2899</p>
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<p>Betty McIntosh KMPG Peat Marwick 303 Peachtree Street, Suite 20 Atlanta, GA 30308 (404) 221-2345</p>	<p>Robert E. Leak, Sr. Leak-Goforth Company, LLC 4601 Six Forks Road, Suite 500 Raleigh, NC 27609 (919) 786-2502</p>	<p>Bob C. Goforth Leak-Goforth Company, LLC 7045 San Sebastian Avenue Jacksonville, FL 32217 (904) 731-9767</p>
<p>Saul Grohs Ronald Ruberg Location Advisory Services 720 King Georges Post Rd, Ste 3-F Fords, NJ 08863 (732) 738-1250</p>	<p>R. Scott Schmidt, Robert Pittman, Jennifer Tanner, William Hearn, Michelle Harris Lockwood Greene Consulting 303 Perimeter Center N, Suite 800 Atlanta, GA 30346-2402 (770) 829-6500</p>	<p>Joan Herron Lockwood Greene Consulting 840 Crescent Centre Dr, Suite 220 Franklin, TN 37067 (615) 778-6621</p>

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ATTACHMENT 6B. SITE SELECTION CONSULTANTS (continued)

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<p>Michael Mullis Sheri Mullis J. M. Mullis, Inc. 3753 Tyndale Drive Memphis, TN 38125 (901) 753-0373</p>	<p>James Beatty NCS International 5623 Willit, Suite 100 Omaha, NE 68152 (402) 572-9292</p>	<p>Alexander Paul Price Waterhouse Coopers 1301 Avenue of the Americas New York, NY 10019-6013 (212) 259-6086</p>
<p>Jim Semradek, Jr. Semradek & Co, Inc. 410 Park Avenue P.O. Box 99 Boca Grande, FL 33921-0099 (941) 704-7292</p>	<p>Michael Butler Semradek & Butler, Inc. 10828 Fellows Creek Drive Plymouth, MI 48170 (734) 414-5900</p>	<p>William H. Boyd Site Location Services, Inc. 3614 Stonewall Court Atlanta, GA 30339 (770) 712-6205</p>
<p>David D. Brandon Site Selection Group, LLC 1700 Pacific Avenue, Suite 2200 Dallas, TX 75201 (214) 271-0586</p>	<p>Larry Kimbler Ka Cotter The Staubach Company 15601 Dallas Parkway, Suite 400 Dallas, TX 75001 (972) 361-5000</p>	<p>Dennis Donovan Katie Burdorf William Frederick K. John Gutshaw WDG Consulting, LLC 101 Fieldcrest Avenue, 1st Fl Edison, NJ 08837 (732) 790-1300</p>
<p>Raymond Walker The Walker Company 600 West Peachtree Street Atlanta, GA 30308 (404) 892-1600</p>		

Source: Leak-Goforth Company, LLC; URBANOMICS, Inc.

Global Logistics at Cecil Commerce Center

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NAI Commercial Jacksonville (Regional) 10407 Centurian Parkway, Suite 110 Jacksonville, FL 32256 (904) 358-2717 www.naicommjax.com	Colliers International One Independent Drive, Suite 2401 Jacksonville, FL 32202 (904) 358-1206 www.colliers.com

Source: Venture Partners, LLC

ATTACHMENT 6D. INDUSTRIAL/COMMERCIAL DEVELOPERS

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<p>Duke Realty Corporation 600 East 96th Street, Suite 100 Indianapolis, IN 46240 (317) 808-6000 www.dukerealty.com</p>	<p>Panattoni Development Co. 4601 DTC Boulevard, Suite 650 Denver, CO 80237 (303) 790-4737 www.panattoni.com</p>
<p>Liberty Property Trust 500 Chesterfield Parkway Malvern, PA 19355 (610) 648-1700 www.libertyproperty.com</p>	<p>Hillwood Development Corporation 5430 LBJ Freeway, Suite 800 Dallas, TX 75240 (972) 201-2800 www.hillwood.com</p>
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<p>Majestic Realty Co. 13191 Crossroads Parkway North, Sixth Floor City of Industry, CA 91746-3497 (562) 692-9581 www.majesticrealty.com</p>	<p>Weingarten Realty Investors 2600 Citadel Plaza Drive, Suite 300 Houston, TX 77008 (713) 866-6000 www.weingarten.com</p>
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<p>Pattillo Construction Company 4102 Bulls Bay Hwy Jacksonville, FL 32219 (904) 695-2452 www.pattilloconstruction.com</p>	<p>Ryan Companies 50 South 10th Street, Suite 300 Minneapolis, MN 55403-2012 www.ryancompanies.com</p>
<p>Seefried Industrial Properties, Inc. 4200 Northside Pkwy Bldg 1, Suite 300 Atlanta, GA 30327 (404) 233-0204 www.seefriedproperties.com</p>	<p>Jackson Shaw Company 13291 Vantage Way, Suite 105 Jacksonville, FL 32218 (904) 741-8710 www.jacksonshaw.com</p>

Source: Venture Partners, LLC