

The Florida Senate
COMMITTEE MEETING EXPANDED AGENDA

COMMERCE AND TOURISM
Senator Leek, Chair
Senator Arrington, Vice Chair

MEETING DATE: Tuesday, February 4, 2025
TIME: 8:30—10:30 a.m.
PLACE: *Toni Jennings Committee Room*, 110 Senate Building

MEMBERS: Senator Leek, Chair; Senator Arrington, Vice Chair; Senators Davis, DiCeglie, Gruters, McClain, Smith, Wright, and Yarborough

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
1	Brief Overview of Committee's Jurisdiction		
2	Panel Discussion on Florida Manufacturing		
	Other Related Meeting Documents		



FLORIDA
COMMERCE

**Florida Manufacturing Presentation
for the Senate Committee on
Commerce and Tourism 2/4/25**

Florida Secretary of Commerce, J. Alex Kelly

Florida is a Manufacturing State

- ❑ Florida's manufacturing output (GDP) has grown from \$43.5 billion in 2014 to \$73 billion in 2022, a 67.8% growth rate over 9 years. This rate of growth has significantly outpaced all other leading manufacturing states.
- ❑ Florida became the 10th largest state in the country for manufacturing employment, reaching 422,800 in September 2023, passing both Georgia and New York.
- ❑ Florida is a leading state in manufacturing for aerospace and aviation, military and defense, computer and electronics products, life sciences, marine industries, and agricultural sciences.



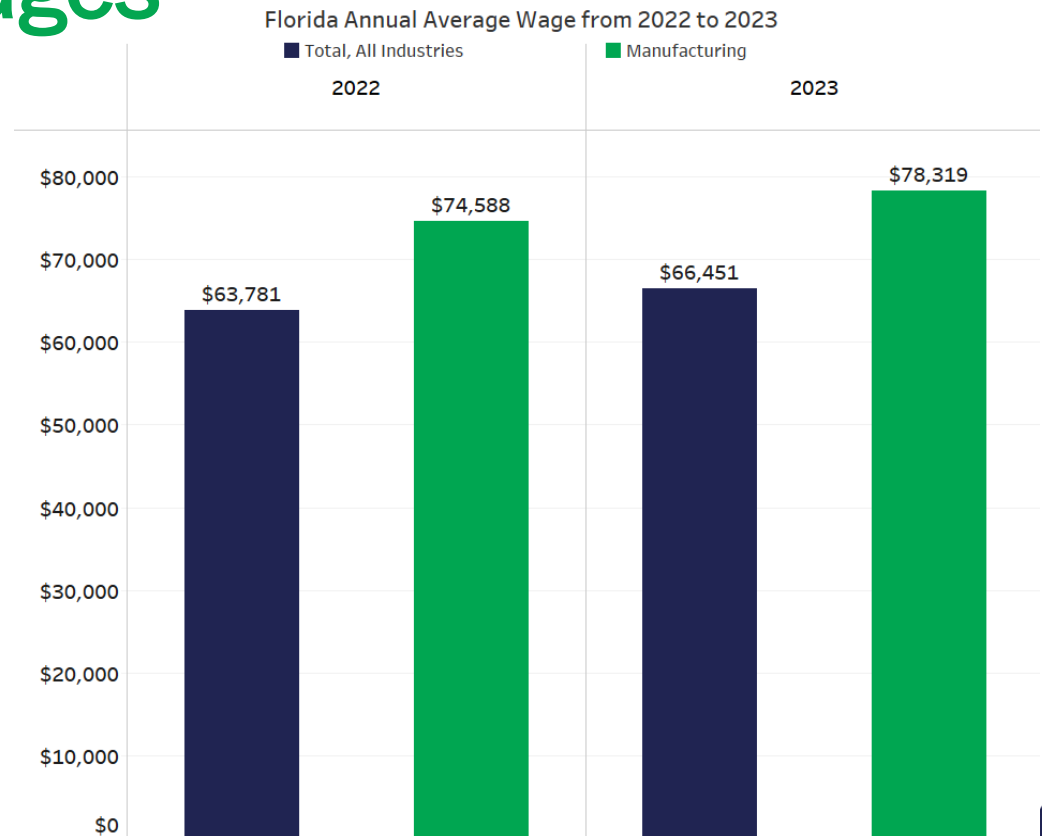
Why Does Manufacturing Matter? Highest Indirect Jobs Impact

- ❑ According to the Economic Policy Institute:
 - ❑ For every 100 direct manufacturing jobs in the manufacture of durable goods, another 744.1 indirect jobs are sustained; and
 - ❑ For nondurable goods manufacturing, 100 direct jobs sustain 514.3 indirect jobs.
- ❑ In other words, Florida's 420,000+ manufacturing jobs produce more than 2.8 million indirect jobs.



Why Does Manufacturing Matter? Higher Average Wages

- ❑ Manufacturing jobs generally pay higher wages than those in other industries.
- ❑ From 2022 through 2023, the average annual wage of the manufacturing industry cluster increased more than the average annual wage of all industries and grew at a faster rate.



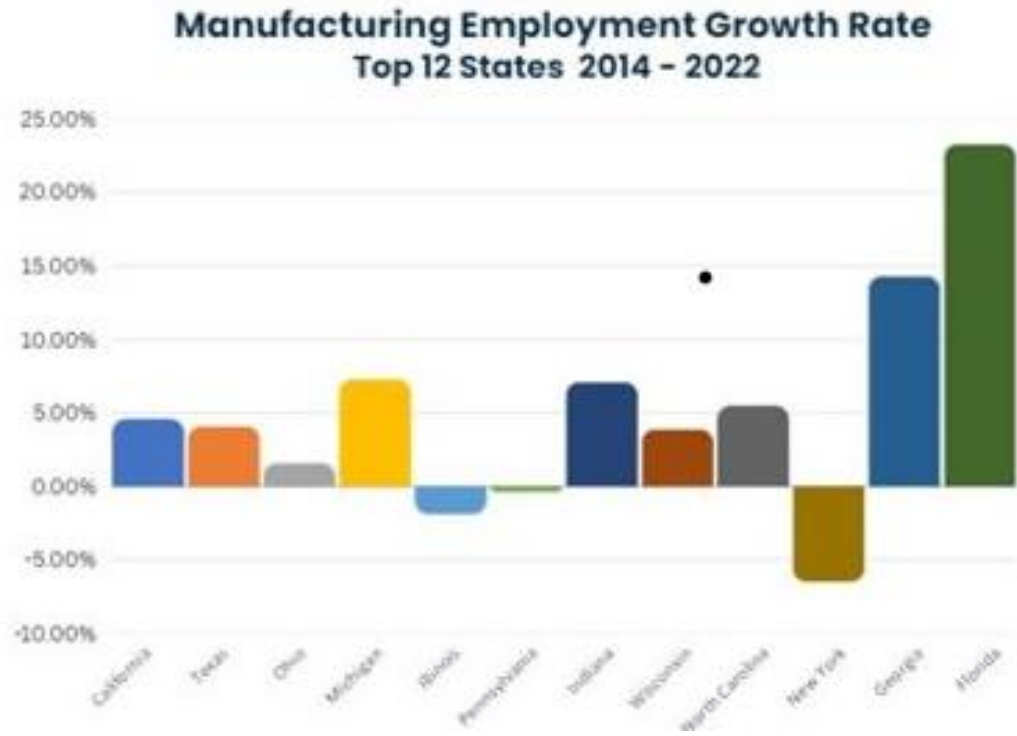
Why is Manufacturing in Florida Accelerating and Attractive?

- ❑ Florida has achieved a unique mix of workforce, infrastructure, financial readiness, and leveraging its geography to make Florida one of the safest places for business to have confidence in capital formation:
 - ❑ #1 in the nation ranking for Talent Development; #1 in the nation ranking for Higher Education; #1 ranking for business formations; #1 ranking for entrepreneurship; #16 in the world \$1.6 Trillion economy; AAA credit rating; business friendly tax climate and minimal regulations; 14 deepwater seaports; 21 commercial service airports and a total of 125 public use airports; 3 spaceports; 20 major military installations; record setting investments in transportation infrastructure and environmental resiliency; and connective role between markets in the U.S. (especially the southeast), Europe, and Central and South America.



Manufacturing Growth in Florida

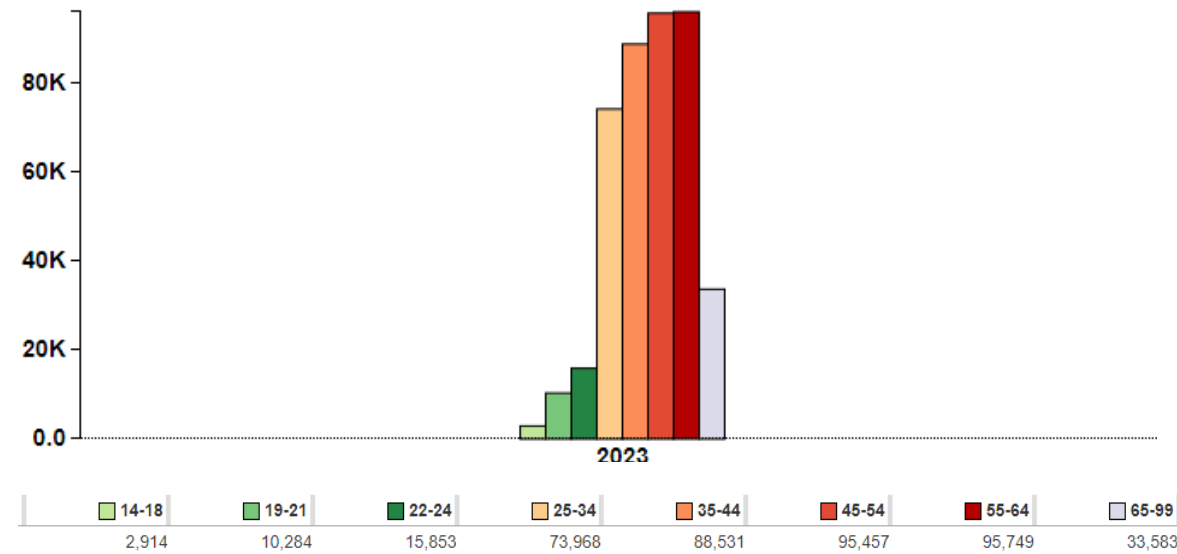
- ❑ From 2014-2022, Florida had the highest growth in manufacturing employment among large states.
- ❑ Florida is up 6,495 manufacturing establishments since 2019, growing by approximately 30%.



Manufacturing Employment in Florida

- ❑ Manufacturing employment in Florida has grown by 23.3% since 2014, significantly higher than other leading states.
- ❑ The average manufacturing jobs per establishment has declined from 18.5 in 2019 to 15.7 in 2024, with advancements like automation, robotics and AI.
- ❑ Manufacturing workers are older than most industries, meaning retirements disproportionately impact manufacturing.

Florida Manufacturing Workers by Age - 2023



Manufacturing Drives Export Trade

- ❑ In 2022, U.S. manufactured goods exports totaled nearly 77% of all U.S. merchandise exports.
- ❑ For Florida, manufactured goods exports totaled more than \$62.3 billion, just over 92% of Florida's total merchandise exports.

Table 2
Florida's 2022 Exports and Imports by NAICS Commodities

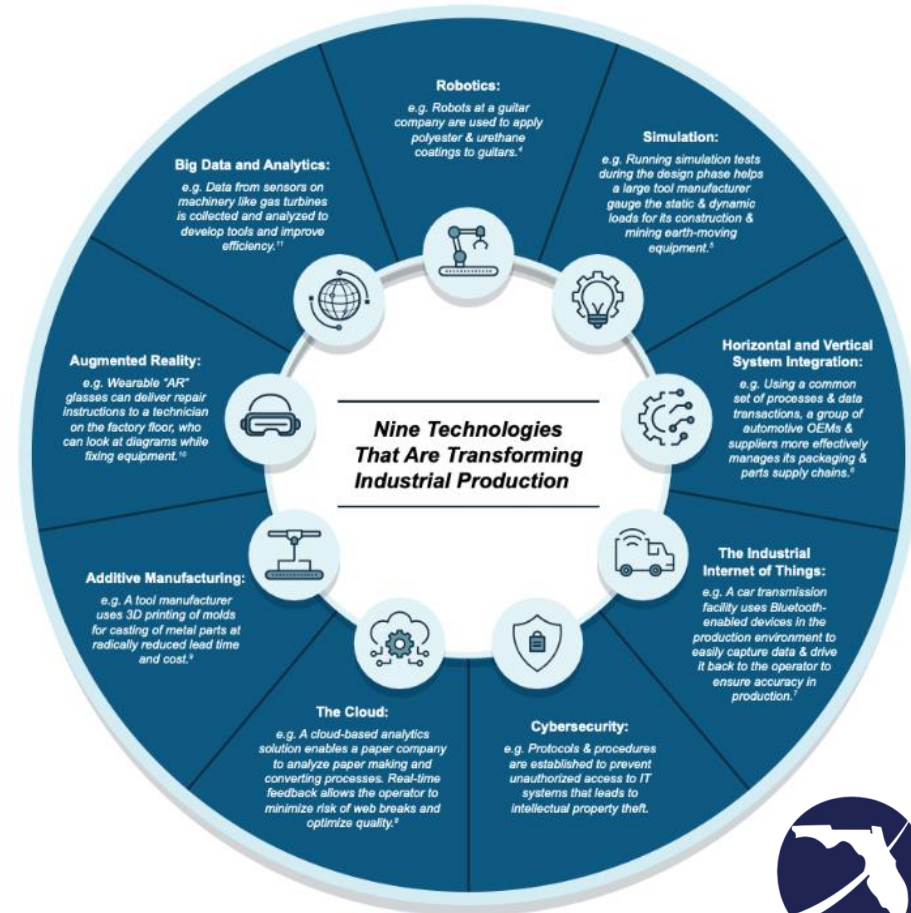
NAICS Commodities	Exports		Imports	
	Value (\$B)	%	Value (\$B)	%
Agriculture, Forestry, Fishing & Hunting	\$1.46	2.15%	\$11.94	10.66%
Mining, Quarrying, & Oil & Gas Extraction	\$0.15	0.22%	\$0.51	0.46%
Manufacturing	\$62.37	92.1%	\$92.83	82.90%
Other	\$3.75	5.53%	\$6.70	5.98%
State Totals	\$67.73	100%	\$111.98	100%



Manufacturing Industries are Increasingly STEM Industries

Industry 4.0 Core Technologies

- ❑ Florida's investments in STEM education, workforce education, and R&D in K-12, the 48 technical colleges, 28 state colleges, many of the 12 state universities, and even private institutions have positioned the state's reputation as a leader in tech industries.
- ❑ Continuing to identify, leverage, surge, and stack funding in partnership opportunities will provide resources to sustain technology growth, adoption, and use, strengthening manufacturing.



Source: Boston Consulting Group



Florida's Policy Framework Creates a Resilient Foundation for Manufacturing

- ❑ Governor Ron DeSantis and the Florida Legislature have set clear goals to ensure that Florida students at all levels are workforce ready.
- ❑ Florida's focus on high-demand/high-wage skills, computer science education, apprenticeship and on-the-job training, and entrepreneurship are working.

Executive Order 19-31: Aims for Florida to be #1 in workforce education by 2030.

The 2021 REACH Act: Establishes the REACH Office for workforce development, focusing on education, training, and support services.

REACH Act 2.0 (2023): Reinforces the emphasis on Career and Technical Education (CTE) to provide high-quality jobs and enhance Florida's economy.

CTE Success: 17 pathways, nearly 800,000 students enrolled, significant growth in manufacturing.

Economic Benefits: Reduced import dependence, strengthened local manufacturing, and a more resilient economy.



Aviation and Aerospace Manufacturing

Florida is a global leader in aviation and aerospace manufacturing, with over 17,000 aerospace-related companies, employing over 120,000 workers, and generating over \$19 billion in annual revenue.

17K

AEROSPACE RELATED COMPANIES

>120K

WORKERS EMPLOYED

>\$19B

ANNUAL REVENUE

Defense Manufacturing

Defense Manufacturing: Florida is home to over 30,000 federal contractors, and over 25,000 manufacturers, many of which support defense.

>30K

FEDERAL CONTRACTORS

3RD

NATIONWIDE EMPLOYMENT

914,000

JOBS IN FLORIDA



Computer and Electronics Product Manufacturing

Semiconductor and related microelectronics product manufacturing as well as broader electronics and communications equipment manufacturing.

5th

NATIONWIDE EMPLOYMENT

>\$3.7B

GDP GENERATED IN 2021

Medical Devices, Equipment, and Pharmaceuticals Manufacturing

Florida ranks second in the nation for medical device manufacturing, with strong production in medical device subcategories, such as \$2 billion (27% of the national total) for contact lens manufacturing.

2nd

IN THE NATION

27%

NATIONAL CONTACT LENS MANUFACTURING

Boat and Ship Building Manufacturing

Florida is the top state for boat building and shipbuilding manufacturing, with over 19% of the establishments in the U.S. boat building sector located in Florida.

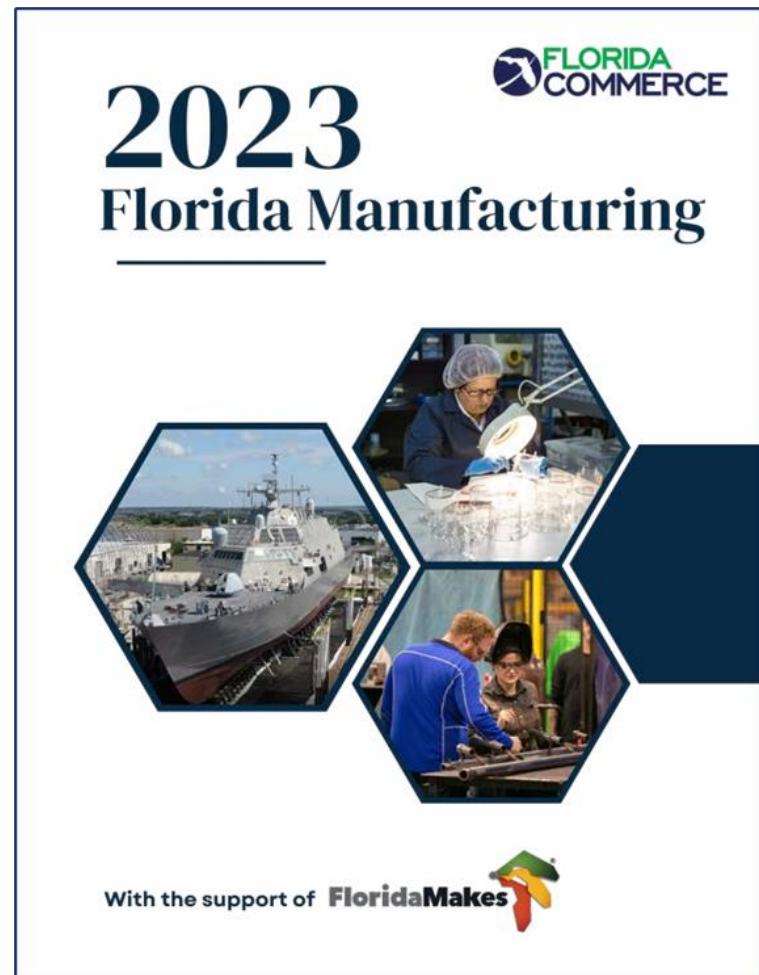
>19%

OF ALL ESTABLISHMENTS IN FLORIDA



Manufacturing Resources

- ❑ Look for the “Stakeholder Toolkit: Economic and Workforce Development Resources” links on the home pages at:
 - ❑ floridajobs.org
 - ❑ selectflorida.org
- ❑ Visit floridajobs.org home page and click on the 2023 Florida Manufacturing Report button.



Thank you!

alex.kelly@commerce.fl.gov

floridajobs.org
selectflorida.org



KEY FACTORS TO IMPROVING PRODUCTIVITY

ADVANCED TECHNOLOGIES

Greater use and development of advanced technologies.

WORKFORCE EDUCATION

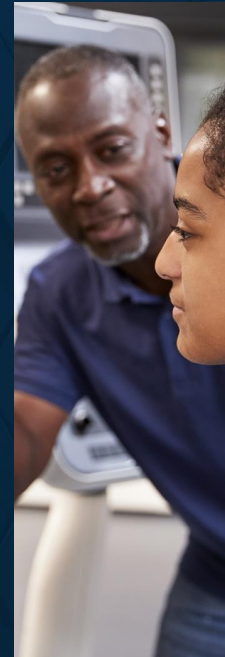
Increase the skills of the incumbent workforce, and the talent pipeline.

GROWING & ATTRACTING BUSINESS

Increase number and share of high value, high trade industries.

SUPPLY CHAINS

Increase the value contribution of our supply system to high value, high trade sectors, both domestically and internationally.



Expanding Capacity at Florida's Distribution Hub

JANUARY 2025



Energy



Fertilizer



Building Materials



Cruise



Containers



Refrigerated



Automobiles

Florida's largest and most diversified port

- 35 million tons of cargo a year, 5000 acres
- Diverse mix of bulk, break-bulk & containers
- Huge and expanding local market
- Energy products gateway for Central Florida
- Major fertilizer export port
- Hub for shipbuilding & repair center
- Major cruise homeport
- Expanding container gateway for distribution centers & manufacturers
- Diverse lines of business = solid financial performance: Fitch 'A' Rating & Positive Outlook
- \$34.6 B of economic impact supporting 192,201 jobs



PORT
TAMPA BAY™

REROUTE YOUR THINKING™

Terminal Operating Efficiencies:

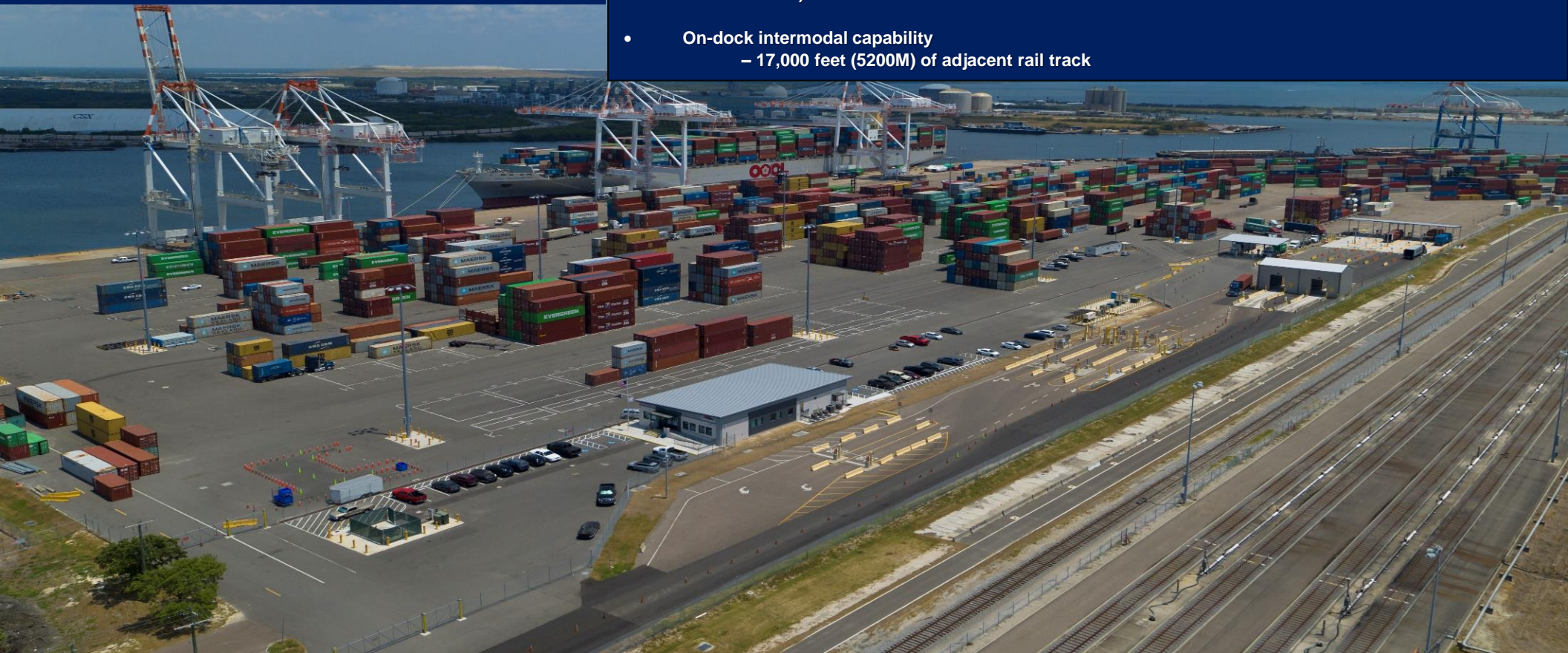
- High vessel productivity
- Fast turnaround times
- Truck drivers do 3-4 round trip deliveries/day

NO CONGESTION

NO WAITING

PTB Container TEUs up 28% for first 6 months of FY 2024

- Terminal expansion :
 - 3 STS gantry cranes recently added for total of 5, plans to acquire 2 more
 - New gate system 6-lanes inbound 3 outbound with optical character recognition & weigh in motion scale
 - Expansion of paved storage to 100 acres (40 hectares) to be completed 2024
 - Berth extension to 4,500 feet (1400 meters) to be completed 2026
 - On-dock rail-served trans-load warehouse facility planned for 2026
 - Future deep draft project underway increasing from current 43 to 47- foot depth (13.1 to 14.3 meters)
- On-dock intermodal capability
 - 17,000 feet (5200M) of adjacent rail track



FLORIDA IS THE FASTEST GROWING STATE IN THE US AND THE I-4 CORRIDOR IS THE FASTEST GROWING REGION OF FLORIDA

- Florida population: 23 million
- Forecasted to reach 28M by 2030 and 32M by 2040
- Three Tampa Bay counties are among the fastest growing in the country: Polk, Hillsborough and Pasco
- According to the US Census Florida ranks #1 in the country for total net migration with 444,484 people moving here from 2021 – 2022
- Surpassed NY as the 3rd largest state
- 15th largest economy in the world
- Over 1,200 people a day moving to Florida
- Tourism: 140 million annual visitors



TAMPA

ORLANDO

LAKELAND

Tampa Bay/Orlando I-4 Corridor

- Largest concentration of distribution centers in Florida
- Over 550 million square feet of DC space

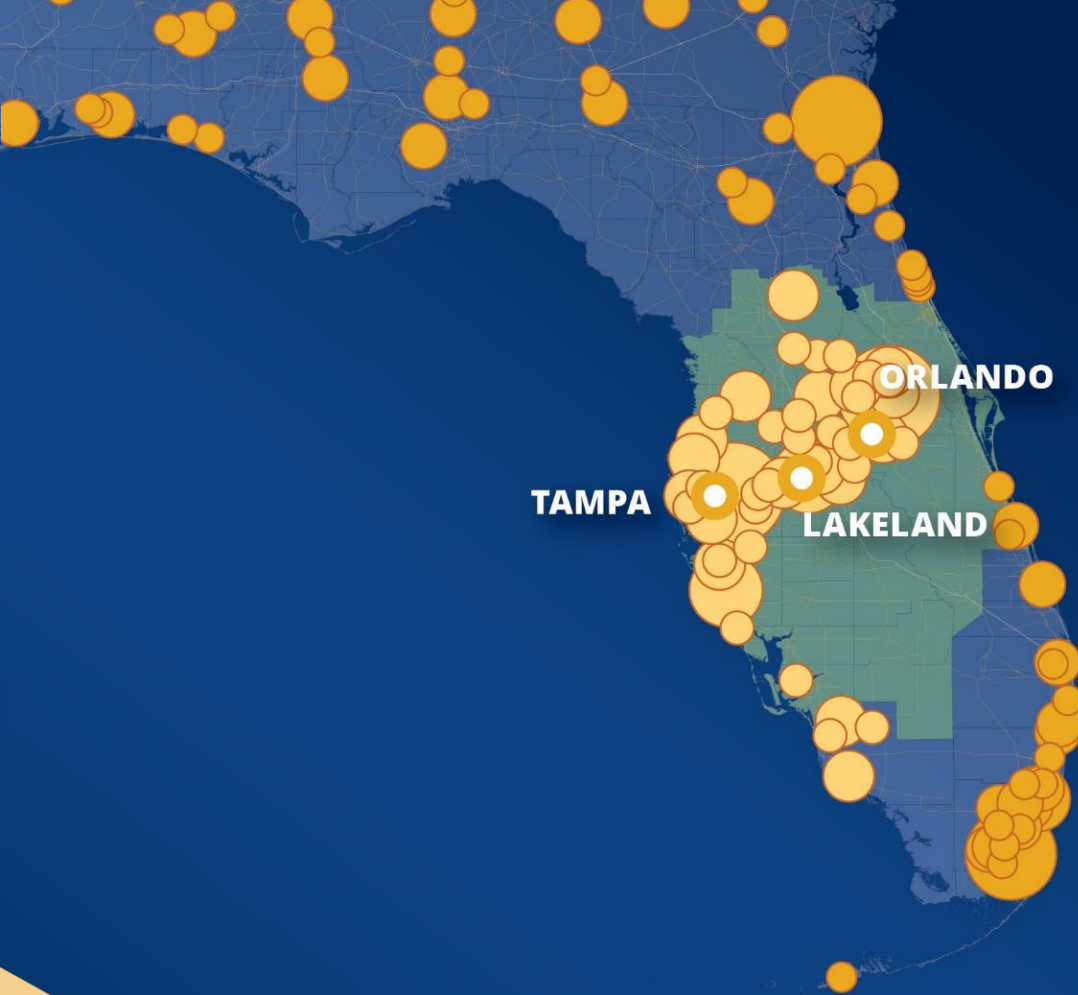


PORT
TAMPA BAY™

REROUTE YOUR THINKING™

Executive Shippers Council – Local Tampa Market





New Distribution Centers in the region:

City Furniture – 1.2M SF Plant City

Dollar Tree – 1.5 M SF Ocala

Target – 1.4M SF Pasco County

Lowes – 1.2 M SF Plant City

Ace Hardware – 710K SF Lakeland

Sysco Foods – 500k SF Plant City

Home Depot – 400K SF building materials DC in Gibsonton

Plus: Recent additional expansion by Rooms to Go, iGas, Dollar General, Publix, Haverty's, Samsung, Fanatics, Refresco, El Dorado, and others



PORT
TAMPA BAY™

REROUTE YOUR THINKING™

RENDERING OF CONTAINER TERMINAL BUILDOUT & ON-DOCK TRANS-LOAD WAREHOUSE

COLD STORAGE WAREHOUSE

NEW EXPANSION TRANS-LOAD WAREHOUSE FACILITIES

ON-DOCK RAIL

NEW EXPANSION 30 ACRES

EXISTING 67 ACRES

NEW EXPANSION BERTH 214 1300 FT

BERTH 213 1300 FT

BERTH 212 760 FT

BERTH 210/211 1200 FT



Supply Chain Strategy: Cost Savings Using Northbound Backhaul Capacity



Savings: **Proximity to I-4 Corridor – Florida’s Distribution Hub** – means **multiple round-trip deliveries/per day versus east coast port routings. Savings of \$1500/container** by routing via Tampa versus via east coast ports

Northbound trucking advantages: **80% of domestic trucks leave Florida empty. Northbound trucking rates 40-50% less than southbound = opportunity for major cost savings efficiencies and environmental impact**

Also, supports sustainability environmental initiatives by reducing CO2 emissions, with the reduction of millions of empty truck miles off the highways.

Match-back opportunity: **Deliver imports to South Florida from Tampa and return with export loads.**

Port Tampa Bay Intermodal Rail



On-Dock

- On-dock unit train capacity
17,000 linear feet of track
- Less than 200 yards from Ports America container terminal
- Ready to activate

Near Dock

- CSX Tampa Terminal
- 5 miles (13 minutes drive) from Port Tampa Bay
- Multiple daily departures throughout CSX Network

- CSX Greenway: Direct reefer rail TOFC service from Tampa to Northeast express 4-day transit
- Daily departures from CSX Tampa Terminal to NY, NJ, PA, MD, CT (via North Bergen, NJ)
- Cargo trans-loaded on-dock from ocean containers to CSX dedicated fleet of 53 foot refrigerated trailers
- JB Hunt also offering 53 foot dry and refrigerated TOFC service from Tampa & Winter Haven, FL to/from destinations across the U.S.

CSX Greenway Premium Express Service

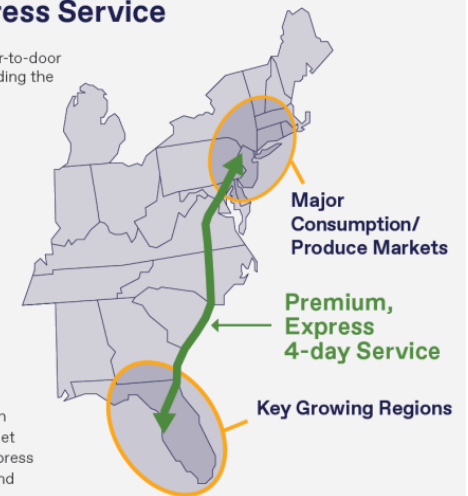
The CSX Greenway network offers a premium, four-day, door-to-door connection between the Southeast and the Northeast, including the key growing regions and major consumption markets in:

- Jacksonville, FL
- Miami, FL
- Plant City, FL
- Tampa, FL
- Vidalia, GA
- Vineland, NJ
- Hunts Point, NY
- Philadelphia, PA

Opportunities to expand to more high-demand areas

Discover the CSX Greenway advantage for yourself.

With just one call, streamline your logistics management with a dedicated truck-like service that delivers the value of rail. Get consistent capacity for your business growth, a premium express service and an expert team that works directly with you to find the best solution for your supply chain. CSX Greenway is your simplified solution. csxgreenway@csx.com



CSX GREENWAY

Refrigerated

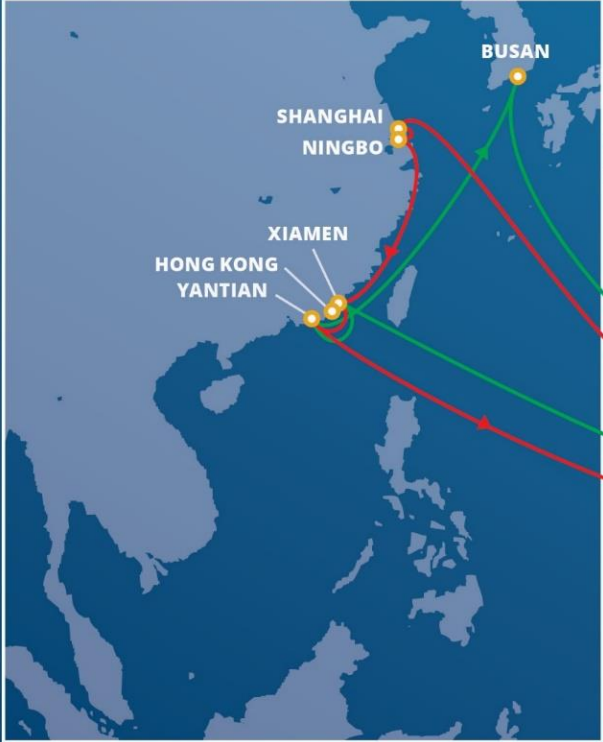
On-dock Cold Storage

135,000 SF state of the art facility:

- On site CBP Ag inspection and fumigation services
 - 250 reefer plugs
 - Food grade glycol refrigerant throughout
 - Cross dock container yard connectivity w/ truck capacity
 - Adjacent berth with dedicated mobile harbor crane
 - Uninterrupted cold chain solution
 - Non-union operation
 - 2 Gottwald Mobile harbor cranes
-
- Dole weekly service from Honduras and Guatemala
 - Seatrade from Costa Rica
 - Linea Peninsular from Progreso, Mexico



Expanding Global Container Service Connections

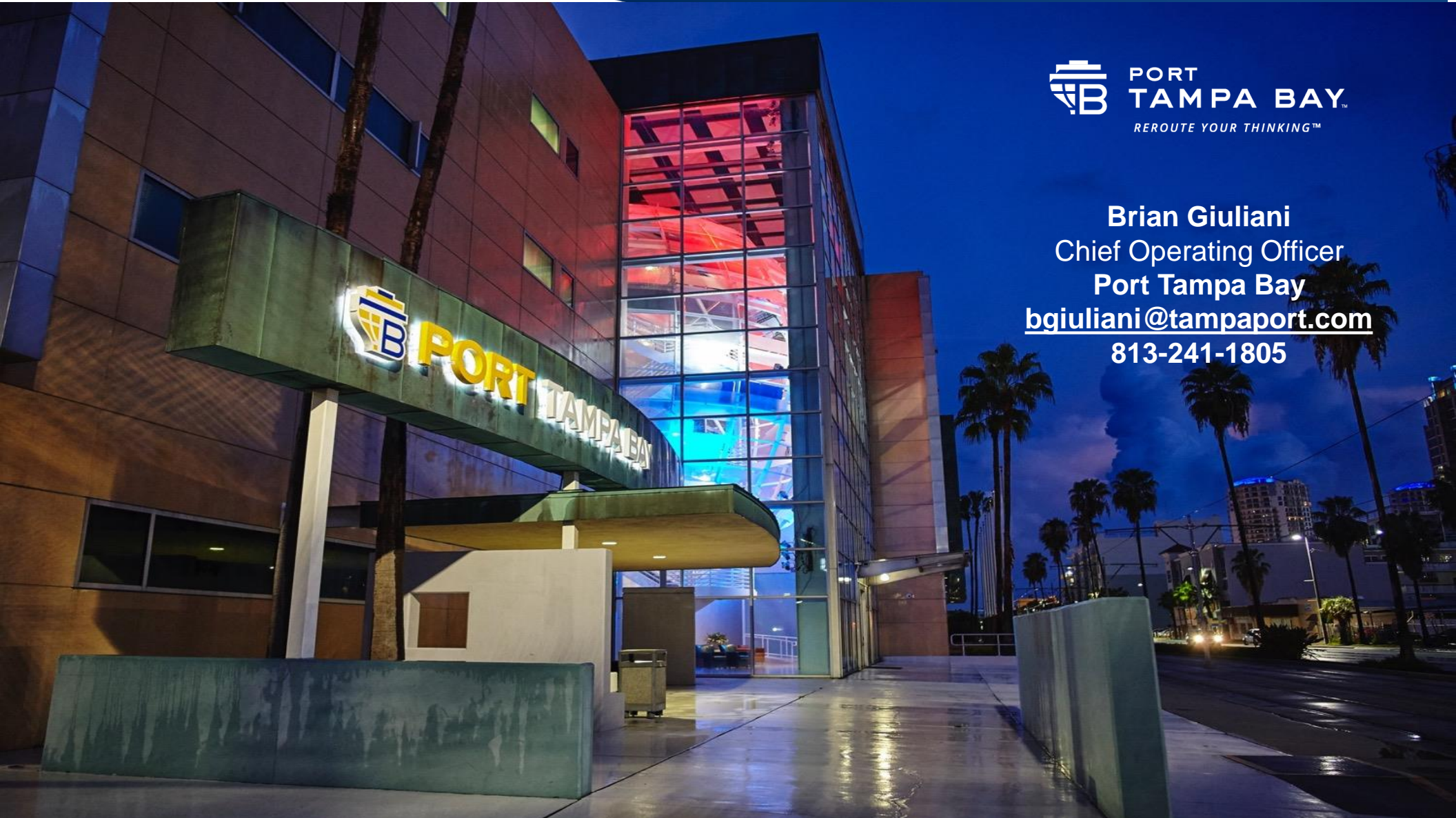


- SEACAT LINE — SEALAND
- COSCO / CMA CGM / EVERGREEN / OOCL
- ZIM / MSC / MAERSK — DOLE — LINEA PENINSULAR





Brian Giuliani
Chief Operating Officer
Port Tampa Bay
bgiuliani@tampaport.com
813-241-1805



The Florida Senate

APPEARANCE RECORD

Deliver both copies of this form to Senate professional staff conducting the meeting

MANUFACTURING

Bill Number or Topic

2/4/25

Meeting Date

COMMERCE/TOURISM

Committee

Amendment Barcode (if applicable)

Name J. Alex Kelly

Phone (850) 445-6399

Address 107 E MADISON STREET

Email Alex.Kelly@commerce.fl.gov

Street

TAIHAHAJEE, FL

32399

City

State

Zip

Speaking: For Against Information OR Waive Speaking: In Support Against

PLEASE CHECK ONE OF THE FOLLOWING:

I am appearing without compensation or sponsorship.

I am a registered lobbyist, representing:

I am not a lobbyist, but received something of value for my appearance (travel, meals, lodging, etc.), sponsored by:

While it is a tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this hearing. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard. If you have questions about registering to lobby please see Fla. Stat. §11.045 and Joint Rule 1. [2020-2022 Joint Rules.pdf \(flsenate.gov\)](#)

This form is part of the public record for this meeting.

S-001 (08/10/2021)

The Florida Senate

APPEARANCE RECORD

Deliver both copies of this form to
Senate professional staff conducting the meeting

4-4-25

Meeting Date

Bill Number or Topic

COMMERCE

Committee

Amendment Barcode (if applicable)

Name KEVIN CARR

Phone 240-344-7155

Address 201 E. PINE STREET

Email KEVIN.CARR@FLORIDAMAKES.COM

Street

ORLANDO

FL

32801

City

State

Zip

Speaking: For Against Information **OR** Waive Speaking: In Support Against

PLEASE CHECK ONE OF THE FOLLOWING:

I am appearing without compensation or sponsorship.

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S-001 (08/10/2021)

The Florida Senate

APPEARANCE RECORD

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2/4/25

Meeting Date

MANUFACTURING

Bill Number or Topic

Commerce

Committee

Amendment Barcode (if applicable)

Name

BAYNE BEECHER

Phone

941-223-2830

Address

6233 35th Ave E

Email

bbeecher@pgtindustries.com

Street

PALMETTO

FL

34221

City

State

Zip

Speaking:

For

Against

Information

OR

Waive Speaking:

In Support

Against

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S-001 (08/10/2021)

The Florida Senate

APPEARANCE RECORD

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MANUFACTURING (DRAFT)

Bill Number or Topic

2/4/25

Meeting Date

Commerce

Committee

Amendment Barcode (if applicable)

Name ANDREW KOSSOWSKI

Phone 305-323-8449

Address 9310 ULMERTON RD, BLDG-3-100

Email ANDREW@VETERANSMETAL.COM

Street

LARGO, FLA

33771

City

State

Zip

Speaking: [X] For [] Against [] Information OR Waive Speaking: [] In Support [] Against

PLEASE CHECK ONE OF THE FOLLOWING:

[X] I am appearing without compensation or sponsorship.

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S-001 (08/10/2021)

The Florida Senate

APPEARANCE RECORD

2/4/25

Meeting Date

P.A.S

Bill Number or Topic

Commerce Tourism

Committee

Deliver both copies of this form to Senate professional staff conducting the meeting

Amendment Barcode (if applicable)

Name

BRIAN GIULIANI

Phone

561-491-7122

Address

1101 Channelside Dr

Email

lhenhart@tampabay.com

Street

Tampa

FL

33602

City

State

Zip

Speaking:

For

Against

Information

OR

Waive Speaking:

In Support

Against

PLEASE CHECK ONE OF THE FOLLOWING:

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S-001 (08/10/2021)



THE FLORIDA SENATE

Tallahassee, Florida 32399-1100

COMMITTEES:

Fiscal Policy, *Chair*
Finance and Tax, *Vice Chair*
Appropriations Committee on Health and
Human Services
Commerce and Tourism
Criminal Justice
Regulated Industries
Rules

JOINT COMMITTEES:

Joint Committee on Public Counsel Oversight
Joint Legislative Budget Commission

SENATOR JOE GRUTERS

22nd District

January 31, 2025

Chair Tom Leek
510 Knott Building
404 South Monroe Street
Tallahassee, FL 32399-1100

Chair Leek,

I would like to request an excused absence from the Commerce and Tourism Committee meeting scheduled on Tuesday, February 4th due to a prior engagement.

Thank you for your consideration of this request.

Regards,

Joe Gruters

REPLY TO:

- 381 Interstate Boulevard, Sarasota, Florida 34240 (941) 378-6309
- 413 Senate Building, 404 South Monroe Street, Tallahassee, Florida 32399-1100 (850) 487-5022

Senate's Website: www.flsenate.gov

BEN ALBRITTON
President of the Senate

JASON BRODEUR
President Pro Tempore

CourtSmart Tag Report

Room: SB 110

Case No.:

Type:

Caption: Senate Commerce Committee Judge:

Started: 2/4/2025 8:30:08 AM

Ends: 2/4/2025 10:15:02 AM

Length: 01:44:55

8:30:07 AM Chair Leek calls the meeting to order
8:30:18 AM Roll call
8:30:26 AM Quorum announced
8:30:51 AM Chair Leek with opening comments
8:31:06 AM Introduction of Members
8:32:42 AM Introduction of Staff
8:33:03 AM Tab 1, Brief Overview of Committee's Jurisdiction by Staff Director, Todd McKay
8:34:36 AM Chair Leek with comments
8:35:12 AM Tab 2, Panel Discussion on Florida Manufacturing
8:36:02 AM Presentation by Mr. J. Alex Kelly, Secretary of Commerce
8:54:19 AM Chair Leek with comments
8:55:17 AM Question
8:55:21 AM Senator Davis
8:55:31 AM Mr. Kelly
8:57:08 AM Comment
8:58:02 AM Senator Wright
8:59:08 AM Question
9:00:04 AM Senator Arrington
9:00:26 AM Mr. Kelly
9:02:57 AM Chair Leek
9:03:03 AM Mr. Kelly
9:04:37 AM Chair Leek
9:05:38 AM Mr. Kelly
9:06:41 AM Chair Leek
9:06:46 AM Mr. Kelly
9:07:04 AM Chair Leek
9:07:07 AM Mr. Kelly
9:09:41 AM Chair Leek with comments
9:09:51 AM Presentation by Mr. Kevin Carr
9:21:14 AM Chair Leek with comments
9:22:29 AM Comment
9:22:41 AM Senator Wright
9:25:27 AM Mr. Carr
9:27:03 AM Chair Leek with comments
9:27:22 AM Presentation by Mr. Bayne Beecher
9:36:45 AM Chair Leek with comments
9:37:48 AM Question
9:37:52 AM Senator Davis
9:38:00 AM Mr. Beecher
9:40:29 AM Chair Leek with comments
9:40:35 AM Presentation by Mr. Andrew Kossowsui
9:49:42 AM Chair Leek with comments
9:49:58 AM Comment
9:50:00 AM Senator DiCeglie
9:51:18 AM Mr. Kossowsui
9:51:48 AM Chair Leek with comments
9:52:55 AM Presentation by Mr. Brian Giuliani, Chief Operating Officer with Tampa Bay
10:05:57 AM Chair Leek with Comments
10:06:06 AM Question
10:06:10 AM Senator Wright
10:06:15 AM Mr. Giuliani
10:06:34 AM Chair Leek with comments

10:08:42 AM Comments
10:08:44 AM Senator Wright
10:10:21 AM Senator Yarborough
10:12:29 AM Senator Arrington
10:13:01 AM Senator Smith
10:14:35 AM Chair Leek with comments
10:14:41 AM Senator Arrington moves to adjourn
10:14:48 AM Meeting adjourned