



DISTRIBUTION FOCUS PROFILE

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THE DISTRIBUTION LANDSCAPE IS EXPANDING

Consumers want more, and they want it now. In response, the warehousing and distribution industry has evolved, shifting from simple inventory stockpiling to more dynamic operations. Distribution centers, the physical assets performing this push-through of product, dominate conversations on the future of industrial real estate as their impact on both market access and market share continue to grow.

The City of Schertz, Texas knows the challenges and opportunities of distribution operations within a community. As companies continue to invest in distribution, to meet growing demand and reduce 'dock to doorstep' wait times, it is helpful to assess the industry's performance, gauge challenges, and examine solutions available within Schertz.

REPORT INCLUDES

- Industry Profile
- Workforce Summary
- Location Comparison
- Schertz Distributors List
- Schertz Proximity To Market
- Education Data

Industry Profile: Overview

Workers & Establishments

The distribution industry is expanding; according to data from the United States Bureau of Labor Statistics, the industry employed 10.2 million workers in April 2018, up 50.8% from 2008. These individuals were employed in over 17.4 million establishments across the country. In Texas alone, there were 883,000 workers employed within the industry.

10.2M

WORKERS

Within the US Distribution
& Warehousing Industry

92.1%

POSITIVE

Outlook for Revenue
Growth Expectations

\$9.3B

REVENUE

For The Industry
First Quarter 2018

Outlook

As employment and revenue have grown, so too has distributor confidence in the industry's future. Modern Distribution Management's (MDM) annual Industry Outlook Survey showed high optimism among respondents, with 92.1% reporting expectations of strong to moderate revenue growth in 2018. Companies have good reason for a rosy attitude. Consumer spending is a strong measure of the health of distribution: when spending goes up, so does the need for quick and efficient means to get product into consumer hands. Consumer spending has been scaling up since the recession, to the point that 2017 saw it reach \$13.3 trillion, the highest it has been in the past decade.

Profitability

Increased consumer spending carries over to distribution industry profits. Profits drive the industry with surveyed businesses reporting their key business priorities are to (1) grow revenue and (2) increase profitability. Both goals are practical, given that the industry's revenues have kept a steadily upward pace from 2009 to 2017 (rising at a compound annual growth rate of 5.5%). Additionally, Q1 2018 revenues are \$9.3 billion, up 6.7% from the same quarter in 2017.

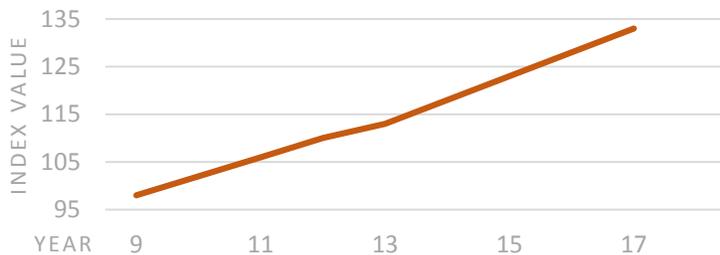
Rising Demand

Fueling distribution's profitability is the ongoing expansion of e-commerce. As manufacturers and wholesalers experience growing demand for their products, there is a corresponding rise in the need for additional warehousing space to close out the last leg of the delivery journey. Even with many retailers blurring the line between retail space/distribution/fulfillment center - internalization/in-house consolidation - using existing physical assets for new, adaptive purposes - demand for third party provider warehousing space continues to benefit from e-commerce. Infosys Consulting's 2018 Third-Party Logistics Study discovered that 66% of shippers continue to outsource their warehousing services. Given this high percentage, outsourced warehousing will likely remain a vital component of downstream manufacturing, wholesaling, and e-commerce operations for the near future.

DISTRIBUTION OUTLOOK IS POSITIVE, THANKS TO CONSISTENT PROFITABILITY AND THE EXPANSION OF E-COMMERCE

Industry Profile: Overview

FIGURE 1. KEY EXTERNAL DRIVERS OF THE DISTRIBUTION INDUSTRY



Consumer Spending

\$13.3 Trillion (Index Value for 2017)

Measures private household exchange of money for goods and services. When spending goes up, demand for distribution increases.



Freight Transportation Services Index

129 (Index Value for 2018)

Measures the annual output of the US transportation sector. When freight volumes rise, demand for distribution services rises (Year 2000 Average = 100).

Geographic Expansion

Tied to rising industry demand is an ongoing need for strategically placed facilities. Geographic expansion can bring new customers and market share gains, factors that have brought many distribution operations to Texas communities such as the City of Schertz.

While same day delivery is now the accepted norm thanks to the influence of e-commerce, the industry is already gravitating towards same hour drop off. This immediacy, tied to a desire for greater selection and immediate availability of product options, translates into the property/market consideration being one, if not the most, business-critical decision. Distributors require far more square footage to accommodate product than previously seen, especially when engaging in online sales.

Dan Letter, a managing director of capital deployment for Prologis, one of the largest global logistics real estate investment trusts, reports, "Online retailers need approximately 1.2 million square feet per billion dollars of online sales on average, which is three times the distribution center space required for traditional brick-and-mortar retailers." Beyond the physical site itself, the ability to move product quickly and efficiently is essential to the location decision. Interstate transportation corridors between major metropolitan areas are no longer a want for site selection, but a need.

**MARKETS MATTER: STRATEGIC SITE SELECTION DISCUSSIONS
INCREASINGLY FOCUS ON MARKET GROWTH POTENTIAL**

Industry Profile: Challenges

Location/Market Access

Distributors have been hit with rising costs, ranging from logistics to freight to labor. Maintaining or establishing new market access while balancing profit generation weighs heavily on companies, as indicated by their responses in the Industry Outlook Survey. For many, the costs of locating directly within a market are untenable; increasingly, distributors are looking to pro-business communities on the outskirts of metro markets with strong colocation of logistics services.

Building Age

For all the talk of the need for technological innovation within distribution facilities, the building surrounding operations is rarely a focus. CBRE, one of the world's largest commercial real estate services and investment firms, reports that the US has an aging warehouse inventory problem. While communities market their expansive industrial availability to distribution companies, it's not uncommon for RFI responses to include decade-old buildings in need of modern retrofitting. Of the roughly one billion square feet of warehousing space brought online in the past 10 years, this space accounts for only 11% of total US warehouse inventory. The other 89% is aging poorly, with the average age of those facilities standing at 34. With strong demand for modern facilities with large footprints, high ceilings, and proximity to major population centers, distributors rely on communities that have the available, up-to-date inventory necessary for their operations.

Labor & Education

Effective labor recruitment and retention strategies continue to elude companies. Staffing shortages translate into lost productivity as well as a variety of cascading effects throughout an organization's operations. With unemployment at a record low, employers find themselves pulling from a diminishing talent pool.



MARKET ACCESS



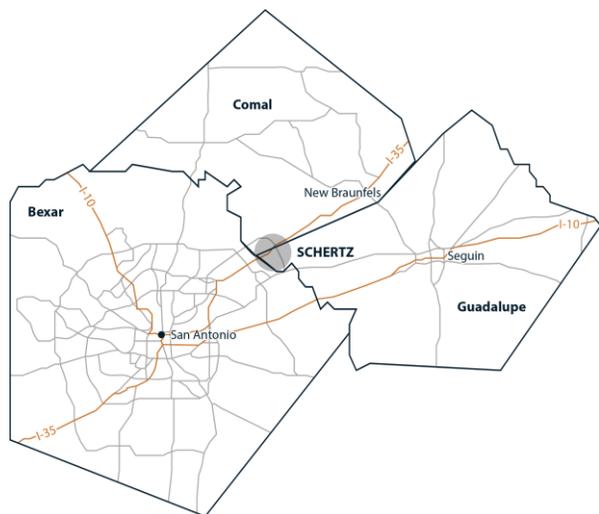
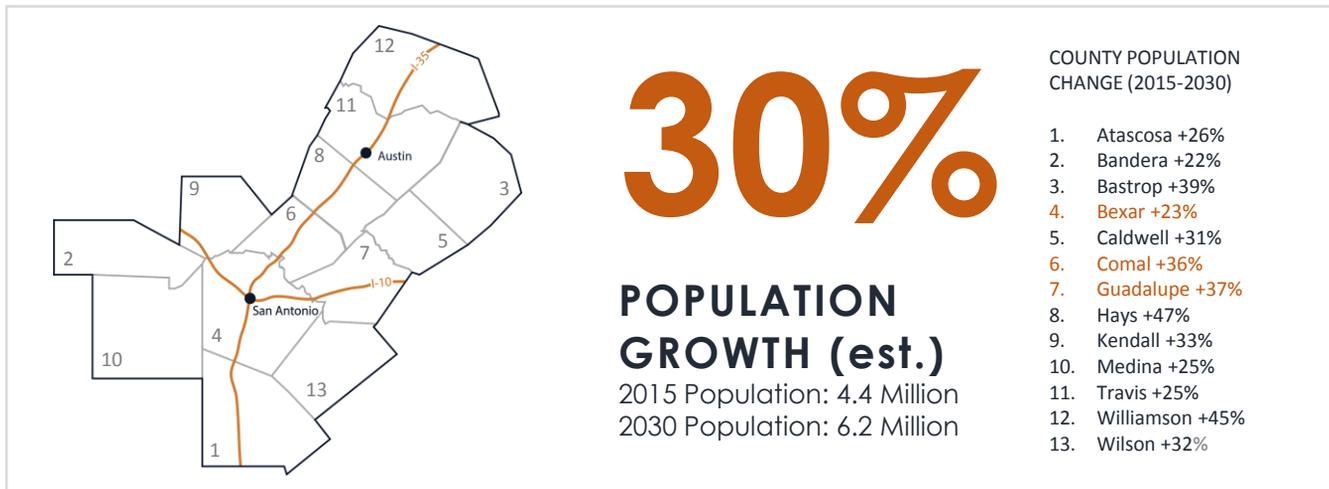
AGING BUILDINGS



LACKING LABOR

Industry Profile: Schertz Solutions

The City of Schertz offers multiple competitive advantages to distributors looking to expand market reach and solidify market share. Schertz offers solutions to distribution users and site selectors.



Location/Market Access

San Antonio is both the 7th largest in the United States with over 1.5 million residents as well as the fastest-growing (adding more than 60 people a day). Dustin Volz, Executive Vice President at JLL Capital Markets, asserts that “distribution users utilizing San Antonio as their hub can service about 20 million-plus people with deliveries. Development of new industrial properties in San Antonio reflects the metro’s move toward becoming a regional distribution center. Record demand from big box tenants is evidence that national users have taken notice of the logistic advantages provided by San Antonio’s location.”

Explosive population growth isn’t limited to this historic city; the region is booming. The San Antonio-Austin Corridor, an 80 mile stretch of Interstate 35 running between the two cities, is projected to grow 30% by 2030.



Distributors desiring a presence in the region have embraced Schertz as a lower cost alternative to San Antonio for several reasons: (1) Access to the same workforce pool as San Antonio while enjoying lower taxes and operational costs; (2) Multi-market access that offsets costs - companies can invest in one location and have access to two major metro markets as well as the emerging submarkets between them; (3) Access to Mexico-companies have the stability of the US market with the added benefit of international reach.

Industry Profile: Schertz Solutions

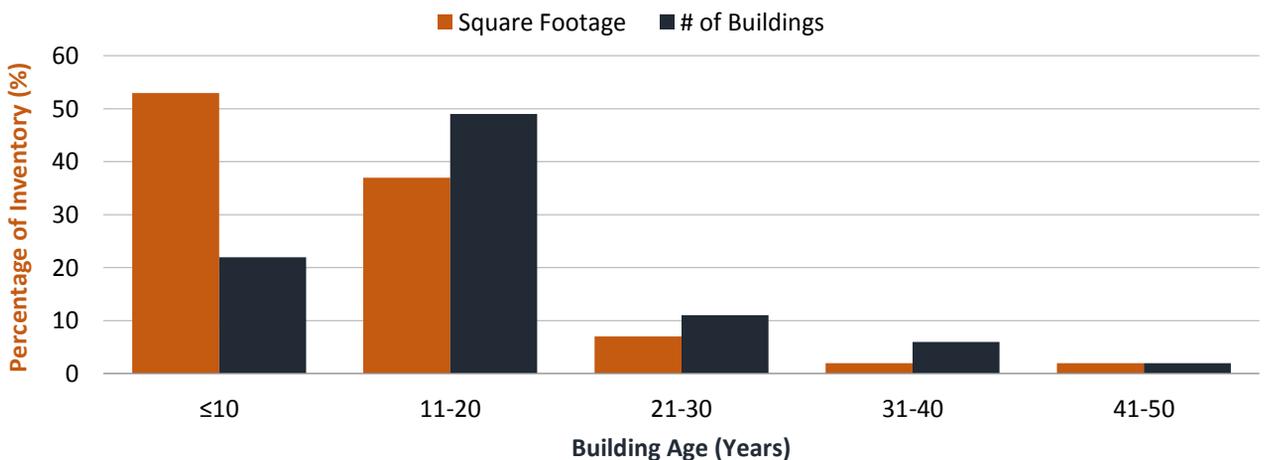
4.5M SQUARE FEET OF INDUSTRIAL SPACE THAT HAS BEEN ADDED TO SCHERTZ SINCE 2008

53% OF SCHERTZ' INDUSTRIAL SQUARE FOOTAGE IS LESS THAN OR EQUAL TO 10 YEARS OLD

Building Age

Schertz has a relatively young industrial building inventory, with new facilities coming on the market regularly. Distributors see Schertz' location as a strategic advantage and developers have taken note, building attractive, modern facilities to capture increased demand. 4.5 million square feet of industrial space (excludes office and retail) has been introduced in Schertz over the past decade; this represents 51% of Schertz' total industrial building footprint. In short, distributors can be confident Schertz' modern facility offerings fit their needs.

FIGURE 2: SHARE OF SCHERTZ INDUSTRIAL INVENTORY BY BUILDING AGE



Industry Profile: Schertz Solutions

Labor and Education

A growing population means a growing workforce. With more individuals moving to the area, distribution will benefit from this influx of talent. Currently, there are 32,900 workers employed in distribution within the San Antonio-New Braunfels Metropolitan Statistical Area (MSA). This number represents a 33.1% increase from the same period in 2008. When looked at on an annual basis for the previous decade, distribution labor in the MSA has experienced a compound annual growth rate of 4.1%.

Schools in the area recognize the importance of building workforce pipelines. The Schertz-Cibolo-Universal City Independent School District, one of the districts serving students in the community, continuously strives to identify workforce gaps and is investing heavily in targeted career clusters, including Transportation, Distribution, and Logistics. The region's colleges are also committed to technical and vocational training opportunities: one example, the Alamo Colleges, offers technical and critical skill courses in addition to their traditional academic programs. In short, there is a strong commitment on behalf of local education providers to develop existing talent while building pipelines to increase capacity.

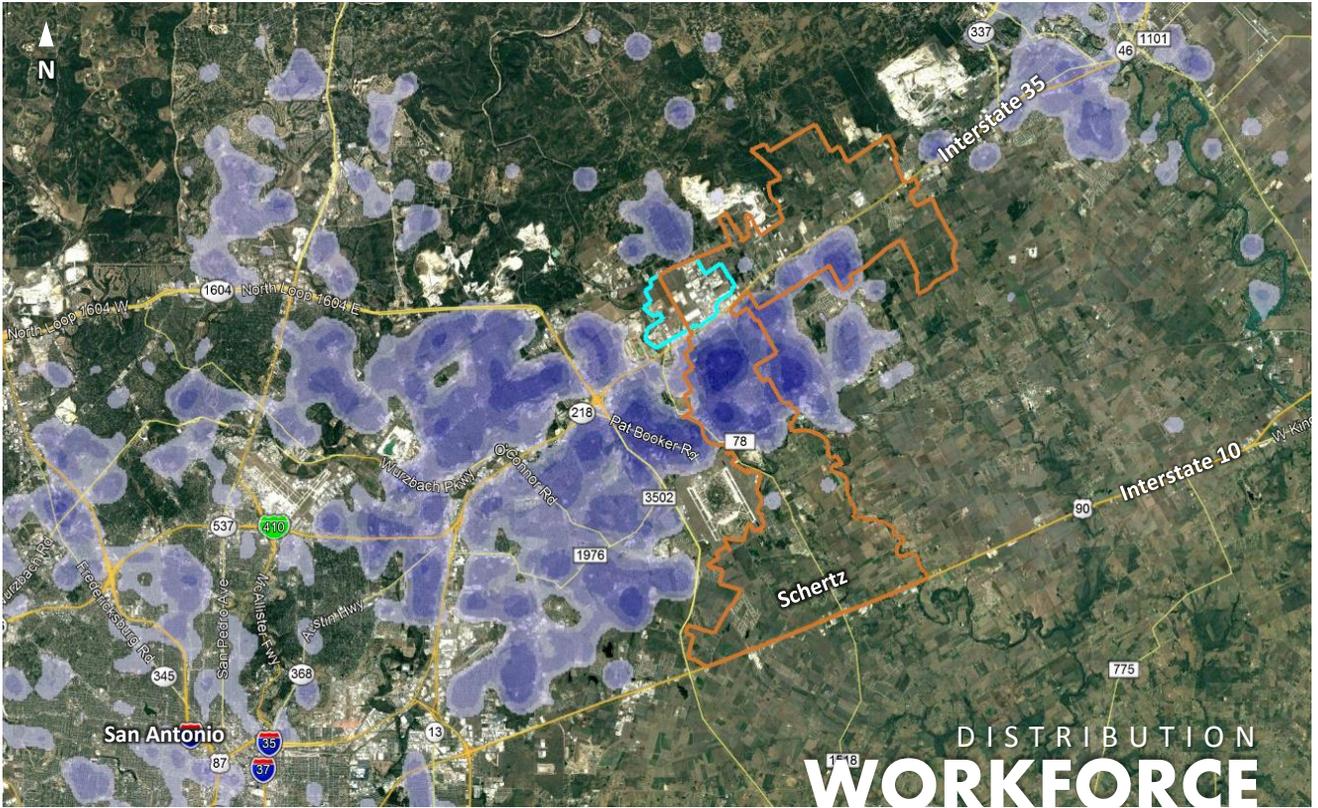
Finally, it's no secret that talent acquisition concerns are pushing the industry to modernize operations via technology. While this allows for higher and better use of limited staff, it comes with costs. The City of Schertz Economic Development Corporation, in its distributor retention and expansion efforts, can provide funding support to companies, lessening the pain of upgrades necessary to remain competitive in the industry. Labor will continue to provide challenges to the industry in the coming years. It is by seeking out communities such as Schertz that are committed to connecting industry with local work/education resources that companies can best prepare for this future.



DISTRIBUTION + SCHERTZ

The distribution industry is looking up and moving forward, buoyed by a rise in consumer spending, expansion of e-commerce, and a corresponding rise in profits. Opportunities within the industry will continue to prompt quality growth. Schertz distribution companies, both current and future, have numerous advantages and are well positioned to reap the benefits stemming from the industry's ongoing success.

Workforce: Overview

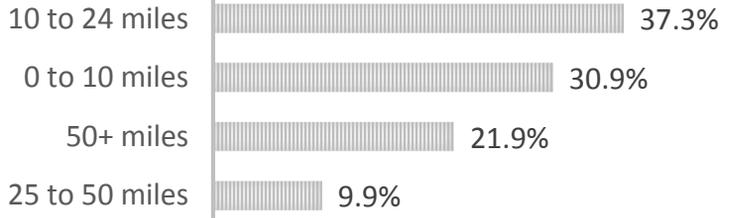


↑ **THEMATIC MAP:** Schertz' Tri County Industrial Area, the primary location of local distribution companies, is able to pull talent from many surrounding communities. This map shows where these Schertz warehouse and distribution workers live. The darker the purple, the more highly concentrated the amount of workers living in that area. The orange shape indicates Schertz' municipal boundary while the blue shape highlights the Industrial Area. The map highlights that much of Schertz' industrial labor lives near their place of work.

4,901 WORKERS ARE EMPLOYED IN TRI COUNTY INDUSTRIAL AREA

DRIVING DISTANCE

This chart shows how far these workers travel to reach the Industrial Area. 68% travel 24 or less miles. For a distributor, this means labor can be in close proximity to their facility.



1M+

LABOR FORCE

Within the San Antonio-New Braunfels MSA (2017)

33K

EMPLOYED

Within the MSA's distribution & warehousing industry (2017)

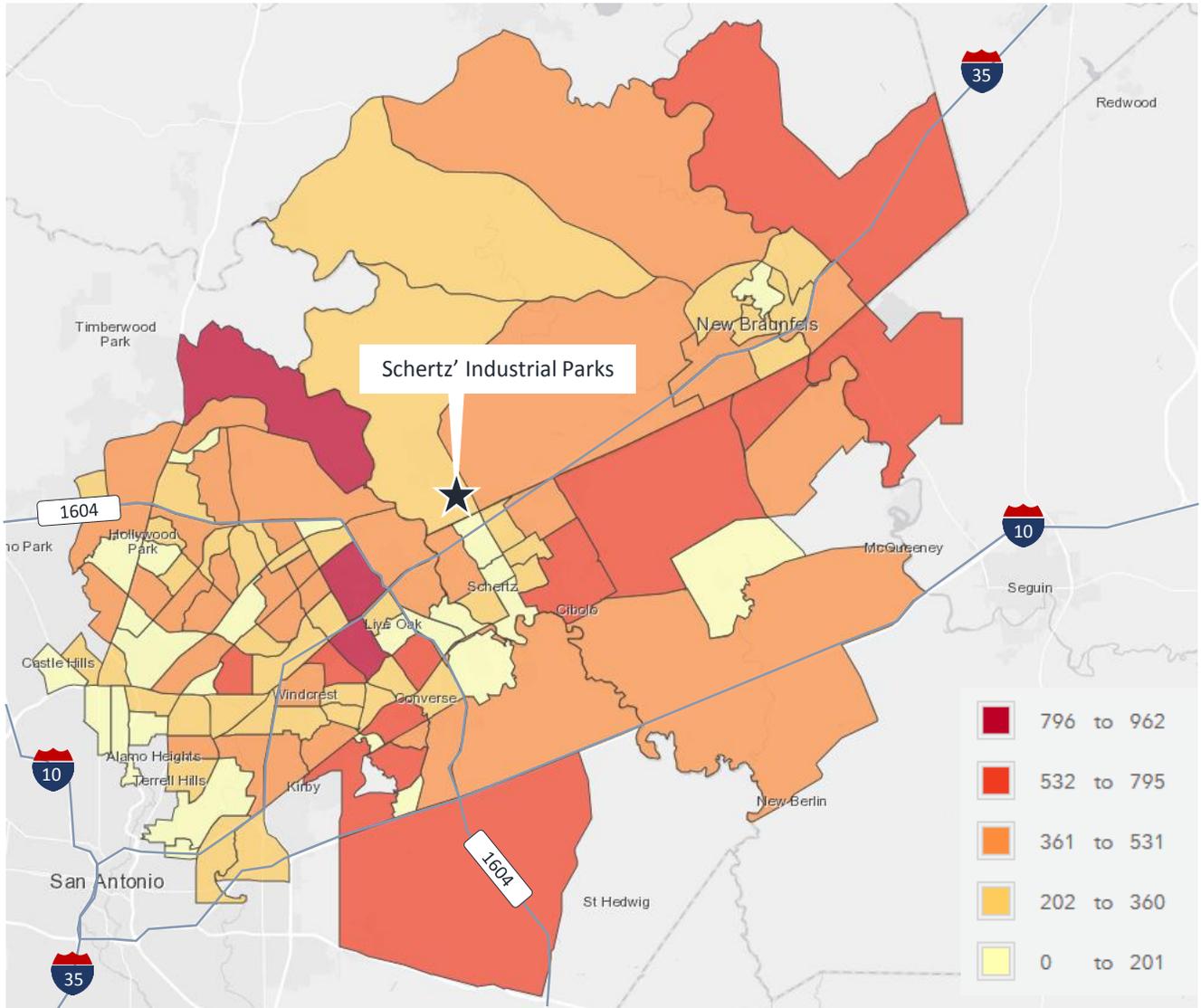
33%

INCREASE

In MSA industry employment from 4/2008 to 4/2017

Workforce: Labor Market Map

Schertz has a large pool of workers for distribution center employment in the industrial labor force.* There are over **30,000 targeted workers within a 20 minute drive time** of Schertz' industrial parks. Directly adjacent to this area are multiple census tracts with high counts of industrial industry workers.



↑ Number of industrial workers by census tract

This color-coded map shows individual census tracts, represented by the shapes that are outlined in black. Within these tracts, darker shading indicates that a higher number of workers living there are part of the industrial labor force.

*The **Industrial Labor Force** includes Transportation & Warehousing, Wholesale Trade, and Manufacturing workers

Comparison: Warehouse/Distribution Facility

↓ Rising costs can be offset by choosing a location that is more financially feasible. Operating costs within Schertz are competitive, particularly when it comes to Property Tax Rates.

LOCATION & WORKFORCE FACTORS		SCHERTZ	KATY	SAN MARCOS	LAREDO
Salaries (Median)	SOC Code				
Major Occupational Group					
Transportation & Material Moving	53-0000	\$30,264	\$33,218	\$30,077	\$27,206
Occupation Title					
First-Line Supervisors of Laborers	53-1048	\$56,950	\$59,363	\$57,138	\$45,261
Driver/Sales Workers	53-3031	\$22,630	\$26,083	\$21,091	\$28,163
Heavy and Tractor-Trailer Truck Drivers	53-3032	\$40,934	\$40,643	\$36,400	\$36,171
Light Truck or Delivery Services Drivers	53-3033	\$24,523	\$30,555	\$34,133	\$36,920
Transportation Inspectors	53-6051	\$93,808	\$56,784	\$98,114	\$41,267
Crane and Tower Operators	53-7021	\$46,010	\$54,080	\$50,939	-
Industrial Truck and Tractor Operators	53-7051	\$29,578	\$33,114	\$32,302	\$21,923
Cleaners of Vehicles and Equipment	53-7061	\$22,526	\$22,797	\$24,357	\$19,864
Laborers/Freight, Stock, Material Movers	53-7062	\$26,603	\$26,000	\$24,752	\$21,486
Machine Feeders and Offbearers	53-7063	\$32,115	\$29,120	\$27,144	-
Packers and Packagers	53-7064	\$20,634	\$21,528	\$23,130	\$22,880
Unionization					
Private Sector Union Membership		2.90%	2.20%	1.60%	1.70%
Tax Rates					
Property Tax (Per \$100 valuation)		\$2.262521	\$2.374956	\$2.541500	\$2.624826
Sales Tax Total		8.25%	8.25%	8.25%	8.25%

↓ Looking at several Texas MSAs reveals that the San Antonio-New Braunfels MSA continues to be a great place to locate. Below is a weekly wage comparison based on the warehousing & transportation industry.

METROPOLITAN STATISTICAL AREAS	2017, Q1	2018, Q1	WAGE CHANGE (%)
Austin-Round Rock [San Marcos]	\$887	\$961	8.34%
Laredo	\$1,142	\$1,196	0.29%
Houston-The Woodlands-Sugar Land [Katy]	\$1,729	\$1,734	2.83%
San Antonio-New Braunfels [Schertz]	\$978	\$1,026	4.91%



Amazon is an example of a major distribution user located in Schertz. Highlights include:

- **WHAT:** 1.26m square foot Fulfillment Center
- **WHY:** Prime location to serve the growing I-35 corridor and Texas population
- **EMPLOYMENT:** Over 1,000
- **WHEN:** 2013

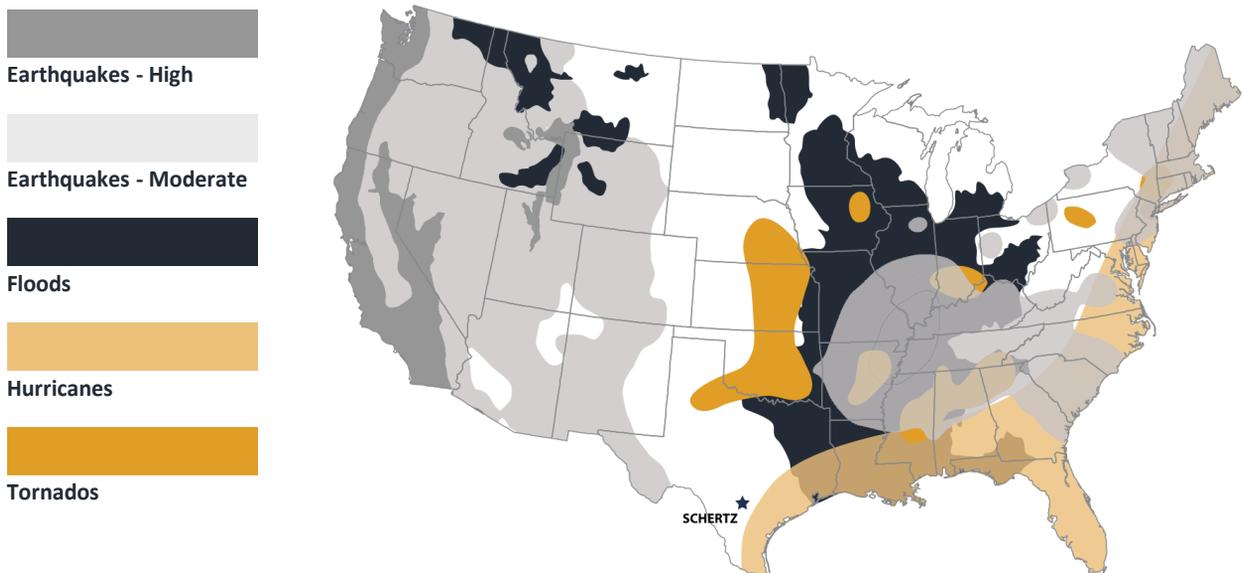
Comparison: Warehouse/Distribution Facility

↓ To help give an accurate view of salaries, shown is a range for each job based on experience as well as the median hourly. Also provided is the number of individuals within the MSA employed in each occupation.

Schertz-specific wage data	ENTRY LEVEL	EXPERIENCED	MEDIAN HOURLY	EMPLOYMENT
Major Occupational Group				
Transportation & Material Moving	\$9.82	\$20.16	\$16.71	34,754
Occupation Title				
First-Line Supervisors of Laborers	\$17.90	\$32.98	\$27.95	58,140
Driver/Sales Workers	\$8.22	\$15.46	\$13.04	27,128
Heavy and Tractor-Trailer Truck Drivers	\$14.12	\$26.12	\$22.12	46,007
Light Truck or Delivery Services Drivers	\$9.22	\$17.13	\$14.49	30,143
Transportation Inspectors	\$26.88	\$51.39	\$43.22	89,895
Crane and Tower Operators	\$16.00	\$25.98	\$22.65	47,119
Industrial Truck and Tractor Operators	\$10.62	\$16.75	\$14.71	30,587
Cleaners of Vehicles and Equipment	\$8.64	\$12.73	\$11.36	23,638
Laborers/Freight, Stock, Material Movers	\$10.11	\$16.15	\$14.13	29,400
Machine Feeders and Offbearers	\$10.72	\$18.39	\$15.83	32,928
Packers and Packagers	\$8.50	\$11.77	\$10.68	22,210

↓ WEATHER PATTERNS

Inclement weather can harm a business, either through unpredictability (slowing logistics operations) or destructive potential (costly repairs of damaged facilities and fleets). Choosing a location that allows for premium market access with limited exposure to the elements can make the difference.



Business Community: Schertz Distributors

↓ Shown is a list of distribution and warehouse companies located in Schertz, grouped by an industry they support. Note that these are generalized and companies may serve a variety of sectors.

AGRICULTURE/GROCERY

Animal Supply Company	Pet food distributor
Helena Chemical	Agricultural/specialty formulator and distributor
Mortellaro's Nursery	Commercial landscape and nursery distributor
Theis Distributing Co	Pet supply distributors
Winfield Solutions	Farm supplies merchant wholesaler



AUTOMOTIVE

AER Manufacturing Inc.	Used vehicle parts merchant wholesaler
Dealer Tire	Wholesale tire distributor
Discount Tire Company	Process returned and/or defective tires
DSI Performance	Winches/winch accessories distributor
Farrwest Environmental Supply	Aftermarket vehicle/environmental equipment
Frank Supply Company	Specialty automotive products wholesale
GCR Tire Center	Wholesale tire distributor
Hollingsworth Logistics Group	Packaging support for automotive industry
LKQ Automotive (Keystone)	After-market/used auto parts sales/distribution
Promomin Lubricants & Filters	Oil merchant wholesaler
Steelcraft Group	Distributor of automotive parts/accessories
Utility Truck & Equipment	Vehicle equipment distributor
Walton Distributing	Engine additive product distributor



BUSINESS SUPPORT

FNTG National Record Center	Records management and storage services
Safesite	Off-site records/media storage provider
SP Richards	Stationary/office supplies merchant wholesaler
The Richmond Advantage	Printer, restaurant, and janitorial supply distributor
VeriTrust	Information management support (records, data)



CONSTRUCTION

Advanced Lighting Technology	Electrical equipment merchant wholesalers
AnSCO & Associates	Telecom equipment (fiber optics) distributor
Aqua Metric	Utility meter component & system distributor
Boss Products	Fire suppression equipment distributor
Builders First Source	Motor/wiring/lighting merchant wholesalers
Building Specialties	Building materials/construction products distributor
City Electric Supply	Motor/wiring/lighting merchant wholesalers
Closter Equipment	Road equipment (rollers, pavers, etc) distributor
Dillard Associates	Plumbing/mechanical distribution
Goodman Networks	Telecom equipment (fiber optics) distributor
HD Supply	Facility management industry support
Main Glass & Mirror	Glass and mirror distributor
Nelsen Corporation	Water treatment systems & components distributor
Petrin	Insulation materials distributor
Swift-Train Company	Flooring/wood merchant wholesaler
Texas Plumbing Supply	Plumbing merchant wholesaler
Universal Forest Products	Industrial packaging/lumber product distributor
VRTX Technologies	Cooling water treatment system distributor
Wilsonart	Flooring/countertop distributor



Business Community: Schertz Distributors

↓ List of distribution and warehouse companies located in Schertz, continued

FOOD SERVICE & EQUIPMENT

Ace Mart Restaurant Supply	Restaurant equipment and supply wholesaler
Alamo Food Equipment & Supplies	Commercial kitchen equipment distributor
Berlin Packaging	Packaging/container distributor
Dispenser Services Of Texas	Juice and drink dispenser distribution
Gaucha Gourmet	Meat and meat product merchant wholesaler
Mondelez International	Kraft & Nabisco Foods product distributor
Quality Custom Distribution	Quick supply restaurant (QSR) industry support
Republic National Distributing Co.	Wine/alcoholic beverage merchant wholesaler
San Antonio Deli Provisions	Boar's Head brand meat merchant wholesaler
Schwan's	Direct-to-home and business food distributor
Sysco Central Texas	Food product wholesale distributor



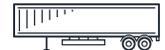
HEALTHCARE

McKesson	Logistics provider for pharmaceutical manufacturers
National Optical & Scientific	Microscopes and science lab supplies distributor
Stason Pharmaceuticals of Texas	Logistics provider for pharmaceutical companies



LOGISTICS

Armstrong Relocation	Logistics provider focused on relocation services
Berger Moving and Storage	Moving and logistics provider
FedEx Corporation - Freight	Less-than-truckload (LTL) distribution services
FedEx Corporation - Ground	Small parcel distribution services
Phoenix Group	Freight moving and logistics provider
Southeastern Freight Lines	Freight brokers and hauling services
WDS Logistics	Logistics provider focused on just in time delivery
XPO (Menlo Logistics)	Supports IT and datacenter industries



MANUFACTURING

IWS Gas and Supply of Texas	Welding supply distributor
Malin Integrated Handling	Forklift sales/refurbishment
North American Composites	Distribute resins used in fiberglass industry
Restex Composite	Distribute resins used in fiberglass industry
Vantage Pump & Compressor	Industrial air compressors/pumps distributor



OTHER SECTORS

Ace Audio Communications	Communication product/audio services distributor
Batesville Casket	Casket distributor
Summit Integration Systems	Audio-visual service distributor



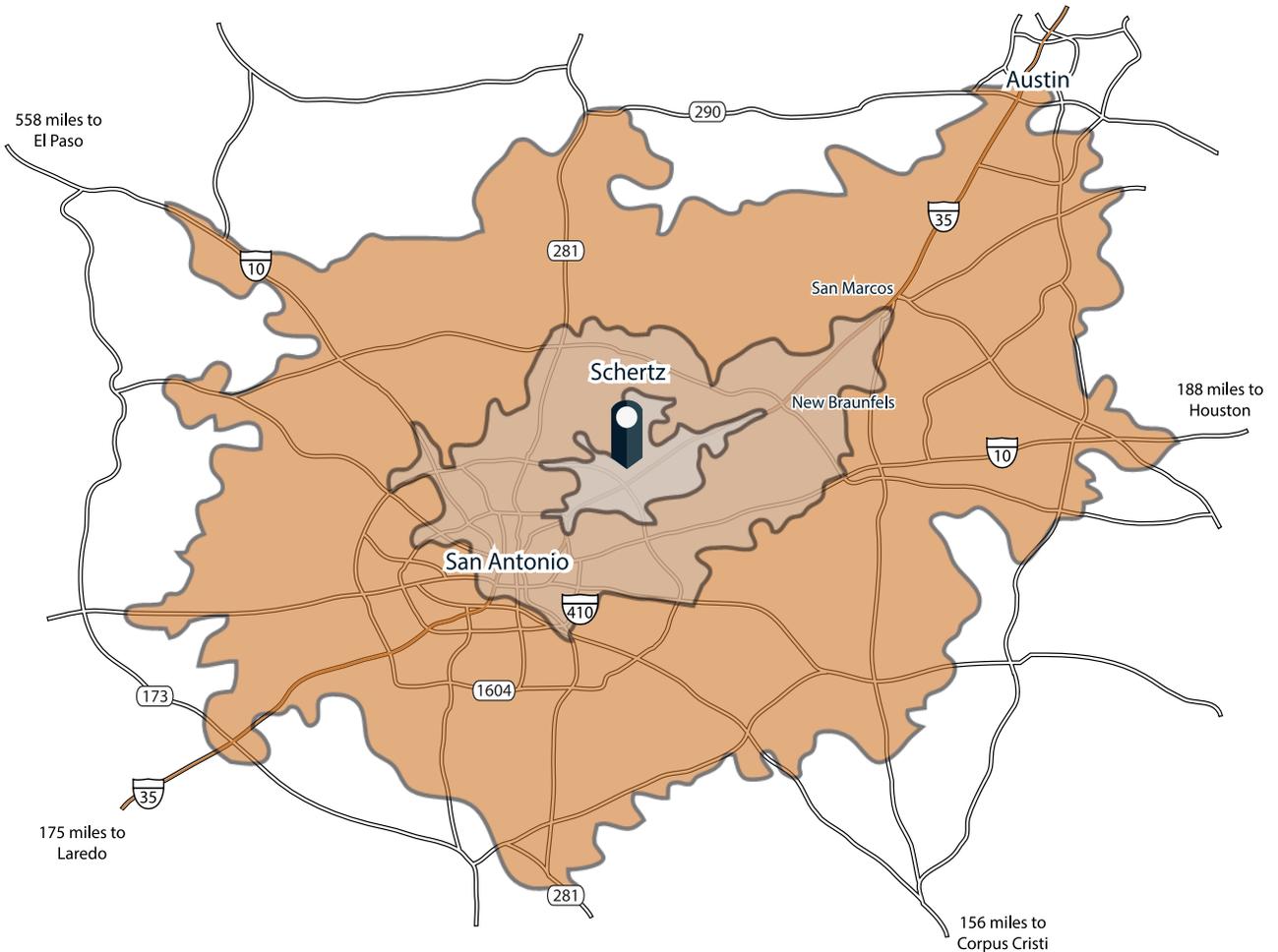
WHOLESALE/RETAIL

Amazon.com	Fulfillment services distributor
Arion Perfume & Beauty	Cologne and perfume (cosmetic) distributor
Chadwell Supply Texas	Wholesale appliance distributor
Rainbeau/JJ Mae	Women's clothing distributor
Scholastic Book Fairs	Book and educational material distributor



Proximity To Markets: Regional

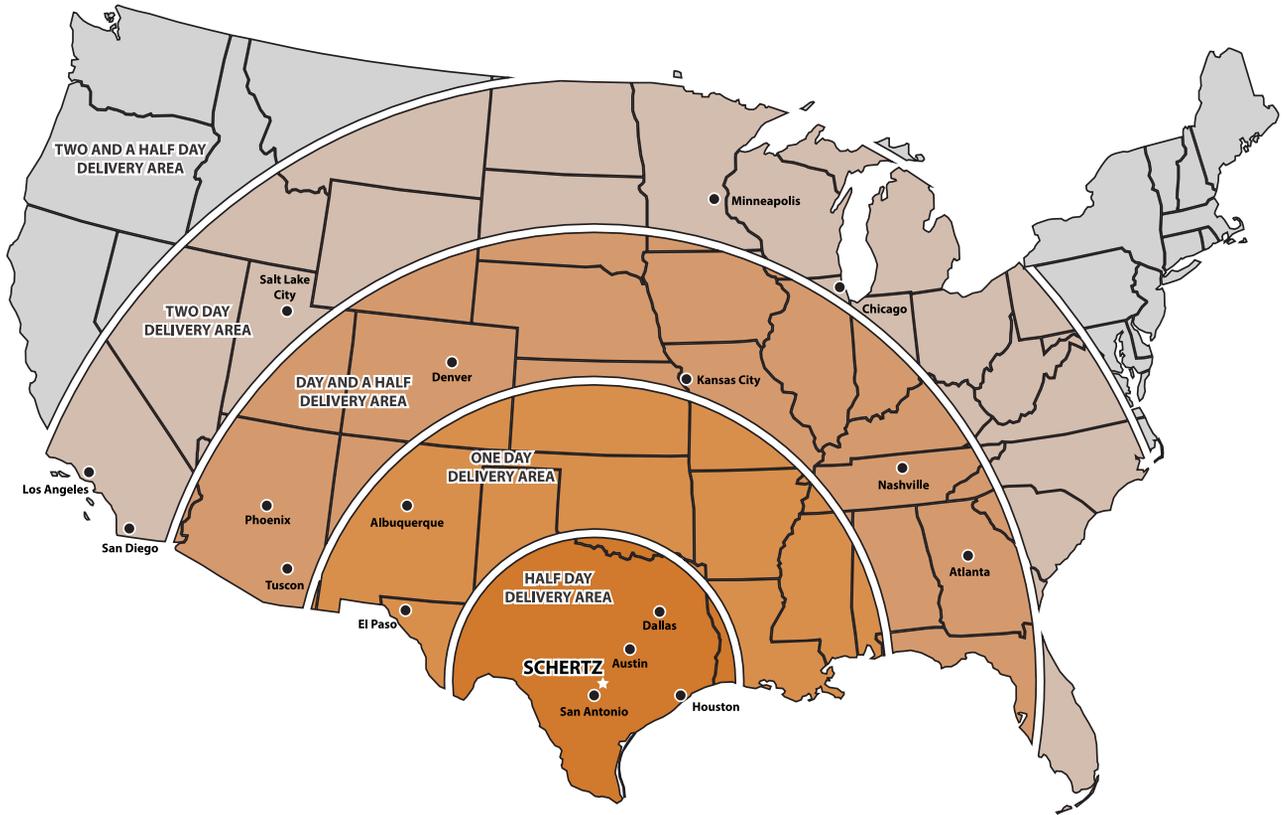
As consumer spending increases, so too does the need for warehousing/distribution services. Markets with large consumer counts offer great distribution potential. Schertz offers access to the entire San Antonio-Austin Corridor. This map shows drive time distances of 15, 30, and 60 minutes from Schertz.



DRIVE TIME	CUSTOMERS	DETAILS
15 Minutes	163,611	Easy access to the majority of San Antonio's bedroom communities and the heart of the San Antonio-Austin Corridor
30 Minutes	1,056,384	Ability to reach the majority of the San Antonio metroplex, as well as a significant portion of the San Antonio-Austin Corridor
60 Minutes	2,739,070	Ability to reach Austin, surrounding cities, and the communities running along the San Antonio-Austin Corridor

Proximity To Markets: By Road

The cost of transporting goods is reduced by using the interstates and highways that run directly through Schertz. Interstates 35 and 10 provide transportation opportunities for getting products distributed throughout the US and Mexico.



↑ This graphic is based on the distance a single trucker is legally allowed to drive in a 24 hour period.

Half A Day: Access to the major Texas markets (including Austin, Dallas, Houston, San Antonio) and parts of Mexico

One Day: Access to a variety of surrounding states (Oklahoma, New Mexico, Louisiana, Mississippi, Georgia, Missouri, Kansas, Colorado)

Day and Half: Access to over half of the United States along with multiple markets within Mexico

Two Days: Ability reach the majority of the markets within the United States as well as those in Mexico and Canada

From Schertz	Miles	KM
Austin	65	105
Chicago	1,226	1,973
Dallas	278	447
Denver	940	1,513
Houston	183	295
Kansas City	801	1,289
Las Vegas	1,286	2,070
Long Beach	1,368	2,202
Matamoros	296	476
Mexico City	878	1,413
New Orleans	529	851
Oklahoma City	452	727
Phoenix	989	1,592
Salt Lake City	1,315	2,116
San Antonio	22	35

Proximity To Markets: By Air

Schertz distributors have worldwide access thanks to nearby commercial airports that bridge the gap between regional, national, and international markets.



From San Antonio (SAT)	Flight Time
Atlanta (ATL)	2.5 hours
Dallas (DFW)	1.25 hours
Denver (DEN)	2.25 hours
Guadalajara (GDL)	2 hours
Houston (HOU)	1 hour
Kansas City (MCI)	2 hours
Mexico City (MEX)	2 hours
Los Angeles (LAX)	3 hours
Miami (MIA)	3 hours
Monterrey (MTY)	1 hour
Phoenix (PHX)	2.5 hours

↑ This graphic shows a selection of the nonstop flight destinations available via San Antonio-International Airport (SAT).

United States: Direct access to the majority of states across the country, including major ports of entry and intermodal facilities.

Mexico: Direct access to some of the most important markets within the country.

In addition to SAT, **Austin – Bergstrom International Airport (ABIA)** is located 65 miles away, an easy drive directly down Interstate 35.

Workforce: Education

From primary/secondary schools to traditional colleges to vocational programs for upskilling existing employees, Schertz businesses have great access to educational resources. Within a 20 minute drive time, there are **70** elementary schools, **18** middle schools, **20** high schools, and **11** academy/charter schools.

ALAMO COLLEGES DISTRICT: EDUCATION SPOTLIGHT

Composed of 5 campuses strategically arranged across San Antonio, the District works closely with the business community to produce graduates that fit the region's distribution needs.

Academic Programs

Through the Logistics and Supply Chain Management program, relevant certificates as well as an Associate of Applied Science degree are available. Graduates are prepared to become:

- Warehouse Operation Managers
- Freight Managers
- Dispatch Supervisors
- Fleet Managers

Technical and Critical Courses

The District's Corporate College focuses on technical and critical skill courses to build and grow distribution labor. Courses include:

- Intro to Logistics & Warehousing
- Certified Logistics Associate
- Intro to Business Logistics
- Distribution Center Management
- Transportation Management
- Supply Chain Management

Training can be done at the District's various campuses or at a businesses' place of operations. Approximately 3,750 employees completed Corporate College training programs in 2017.



# of Students Enrolled (Undergraduate)	
University of Texas - San Antonio	26,444
Texas State University	34,180
Texas A&M University - San Antonio	26,444
Trinity University	2,395
St. Mary's University	2,327
University of the Incarnate Word	5,994
Texas Lutheran University	1,359
Northeast Lakeview College*	3,860
St. Phillip's College*	12,050
San Antonio College*	19,385
Northwest Vista College*	16,752
Palo Alto College*	9,368
Schreiner University	1,249
Our Lady of the Lake University	1,342

*Indicates Alamo Colleges District campus

Data Dictionary, Sources, & Assumptions

Industry Overview data is from the U.S. Department of Labor's Bureau of Labor Statistics (BLS); U.S. Census; U.S. Department of Commerce's Bureau of Economic Analysis; U.S. Department of Transportation's Bureau of Transportation Statistics; Infosys Consulting, *2018 Third-Party Logistics Study: The State of Logistics Outsourcing*; Texas Real Estate Business, *Constraints in Austin Push Distribution South, Bolstering San Antonio Market*; Logistics Management, *State of Industrial Real Estate: It's crunch time*; CBRE, *Old Storage: Warehouse Modernization in Early Stages and Most US Warehouses Are Inadequate For E-Commerce Distribution, Despite Recent Construction Push*; and SEDC staff analysis.

Salary data is from the BLS, May 2017 Metropolitan and Nonmetropolitan Area Occupational Employment and Wage Estimates and Labor Market & Career Information Department, Texas Workforce Commission. Data is for May 2017 and presented at the MSA level. Salaries are annualized, based on a 40 hour workweek and 52 weeks. For more information on SOC Codes, visit O*Net.com.

Workers' compensation data is from National Academy of Social Insurance, *Workers' Compensation: Benefits, Coverage, and Costs, 2017*. Data is presented at state level and reflects net insurance costs per \$100 of payroll in 2015 by state.

Tax comparison chart sources by row: Corporate Income and Personal Income Tax data from the Tax Foundation. Sales Tax figures from individual city finance departments. All taxes current as of October 2018.

Union membership data is from unionstats.com.

Weather pattern visualization data is from the National Oceanic and Atmospheric Administration (NOAA), Red Cross, University of Miami's National Oceanographic Partnership Program, and U.S. Geological Survey.

Proximity to market by road visualization is based on ArcGIS Community Analyst and U.S. Department of Transportation Federal Motor Carrier Safety Administration data/regulations.

Proximity to market by air visualization is an adaptation of San Antonio International Airport's 54 Nonstop Destination map (sanantonio.gov/SAT/Airlines-Flights/Nonstops). Flight times are estimates from FlightConnection.com.

Workforce overview data is from BLS, State and Area Employment, Hours, & Earnings, and the U.S. Census' OnTheMap tool.

Labor Market Map data is from ArcGIS' Community Analyst program. Data is for 2018.

Student enrollment data is from the National Center for Education Statistics (IES, NCES). All data is for Fall 2017.

School Locator Map data is from the Texas Education Agency and the U.S. Department of Education's Integrated Postsecondary Education Data Systems (IPEDS) survey. Data is for the 2016-2017 school year.

Graduation photo courtesy of UTSA Public Affairs.

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