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E-Commerce and Logistics Cluster Report

TexAmericas Center – Texarkana MSA – Texas

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3.7 E-COMMERCE, CALL CENTER, FULFILLMENT, WHOLESALE & LOGISTICS CLUSTER OF BUSINESSES AND SERVICES

Conway Data reported a total of 249 Warehouse/ Distribution (DC) projects located or expanded into the Four States Region of Arkansas, Louisiana, Oklahoma, and Texas from March 2016-February 2017. A few of the existing companies operating in the Greater Texarkana area include: Lowe's Home Improvement RDC, Defense Logistics Agency – Red River, United Parcel Service, United States Post Service, Federal Express, Federal Express Freight, Fastenal Fulfillment Center, Frito-Lay, Coors Distributing Co., Anheuser-Busch Distributing, Truman Arnold Corporation, BWI Co., Wholesale Electric, Eagle Distributing, Elliott Electrical Supply, Global Star Medical, IV Tags, Rowe Casa Organics, Abernathy Distribution, 54 Logistics, Contractor's Tools.com, Reliance Refrigeration and Restaurant Supplies, Bolisa Snacks, William George Co., Pop Pop Factory, RE Michael Co., Quality Wholesale, Bill Doran, Borden Dairy Supply, Solar Supply, Texarkana C Store Wholesale, Alon Foods Group, A&E Quality Films, Darragh Contractor Supply, Baker Distributing Company, Coburn's of Texarkana, Red River Wholesale, Gemaire Distributors, Queen City Wholesale, PVF Industrial Supply, Inc., Auto-Chlor System, Larsen Leaves, Three States Floral Wholesale, 3N1 Office Products Inc., Ben E Keith Foods, Billie Jo Beef, Memotronics, Magic Cast Products, King Invo Stone, General Wholesale, Lo Ranch, Imperial/Harrison Trading Co LLC, Dealers Electrical Supply, Govtire LLC, Holcim Us Inc., Twitty Nursery, H & R Distributors, Blair-Hill Nursery, Discount Plants, and more.

TexAmericas Center and the Texarkana area offers several advantages for placing a logistics, warehouse, and other forms of supply chain management facilities:

- **Strategic Location:** Texarkana's location in the Central Time Zone, near where three interstates converge at the Texas-Arkansas border provides a strategic position within the southern United States. It is centrally located, in a right-to-work state, offering easy access to major markets in the region, including Dallas, Houston, Little Rock, Shreveport and more. This central location makes it an ideal hub for distribution and logistics activities. Further, any product leaving other Texas MSA's going to the Midwest, Northeastern and much of the Eastern Seaboard must come through Texarkana, so our transportation costs are much lower than anywhere else in the state.
- **Transportation HUB Infrastructure:** Texarkana benefits from well-developed transportation infrastructure, including three interstate highways (Interstate 30 Interstate 49 and Interstate 369), railways, airports, and access to waterways. This infrastructure facilitates the efficient movement of goods and materials, making it easier to manage supply chains and distribution networks.
- **Multimodal Connectivity:** Texarkana has multimodal transportation facilities, including rail yards and transload facilities, which enable the seamless transfer of

goods between different modes of transportation. This enhances logistics efficiency and reduces transit times for shipments moving through the area.

- **Skilled Workforce:** Texarkana boasts a skilled, low labor cost workforce with experience in logistics, warehousing, inventory management, and supply chain operations in a Right-To-Work state. Local universities, vocational schools, community colleges, and training programs offer specialized training tailored to the needs of the logistics industry, ensuring a reliable and available workforce.
- **Business-Friendly Environment:** Texarkana provides a supportive business environment with favorable tax policies, incentives, and resources for business development. Local governments often actively support logistics initiatives, making it easier for companies to establish and expand logistics and warehouse operations.
- **Access to Suppliers and Customers:** Texarkana's central location and transportation infrastructure provide easy access to suppliers and customers across the region. This proximity streamlines supply chain operations, reduces transportation costs, and improves responsiveness to customer demands.
- **Cost Competitiveness:** Texarkana offers a lower cost of doing business compared to larger metropolitan areas, including lower operating costs, affordable real estate, and competitive wages. This cost advantage enhances the profitability and competitiveness of logistics and warehouse facilities located in the area.
- **Quality of Life:** Texarkana provides a high quality of life for residents, with access to amenities such as parks, recreational facilities, cultural attractions, excellent educational resources, and affordable housing options. A favorable living environment can attract and retain skilled workers, contributing to the success of logistics and warehouse operations.

Overall, the combination of strategic location, transportation infrastructure, skilled workforce, business-friendly environment, access to suppliers and customers, cost competitiveness, and quality of life makes Texarkana an attractive location for placing a logistics, warehouse, and supply chain management facility.

3.7.1 Wholesale, Warehousing, Trucking and has a Strong Labor Pool and Room to Grow.

- In 2017, 22% of the workforce in the Texarkana MSA was employed in the Trade, Transportation and Utilities industry, with an average of 13,400 employees.
- The transportation, wholesale and support industries employ over 7,954 workers in the Texarkana region. Jobs in the Merchant Wholesalers and Durable Goods sector have grown by 3% (2014-2019), the LQ is 1.2 times the US Average, there are 183 companies located in the region in this sector and 10 new companies set up operations between (2014-2019).

Jobs in the General Freight Trucking, Long-Distance, Truckload sector have a LQ of 3.5 times the US average and Specialized Freight Trucking, Long-Distance and Truckload sector has a LQ of 3.8 times the US average. Jobs in the Support Activities for Transportation sector have grown by 5% (2014-2019), the LQ is 1.7 times the US Average, there are 32 companies located in the region in this sector and 4 new companies sat-up operations between (2014-2019).

- Garner Economics, LLC reported the Texarkana, TX-AR MSA to have a 1.61 LQ in Transportation & Warehousing Industry (NAICS 48-49) with 3,136 employees (12-month average ending March 2016) and a 2.82 LQ in Heavy and Tractor-Trailer Truck Drivers (SOC code 533032) with 1,950 employees (2015 employment).

3.7.2 Manufacturing & Transportation/ Logistics

Because the Texarkana region is such a strategic and central location and boasts a well-developed transportation infrastructure, it has a high concentration of manufacturing and support companies. The production of goods and proximity to major transportation routes has created an efficient movement of raw materials, component products, and finished goods. It has pushed the integration of logistics (intermodal, freight services, and global access) into all advanced technologies; the logistics industry helps drive regional development and contributes to the overall competitiveness of our community. Texarkana also offers access to an available, skilled workforce with experience in manufacturing, logistics and related supply-chain industries.

- **Rail Services**

- Texarkana is served by Union Pacific Railroad, which operates a large rail yard in the area. In total over 125 trains pass through the region each day.
- TexAmericas Center is targeting industries that ship much of their product by rail, such as plastics, steel manufacturing, building products and materials, automotive manufacturing and support, agricultural product processing and shipping, heavy equipment manufacturing and food products processing.
- The Greater Texarkana region, especially on the Texas-side, is well known for its Rail Transportation Support Services, specifically Rail Car Maintenance.

- **Air Cargo and Freight:**

The Texarkana Regional Airport serves as a hub for air freight transportation for the Texarkana area. There is currently no regularly scheduled air cargo or freight service; however, in coordination with the Texarkana Regional Airport Authority service can be arranged on an as

needed basis. In 2025 the airport will be breaking ground on a 500' runway extension and a 5" overlay will be put in place to strengthen the runway for widebody operations. This improvement is anticipated to be completed in Spring of 2027. The new strength of 459/F/B/X/T would allow for the air cargo critical aircraft, B747-8F with max weight 775,000 lbs., to safely land and take off from our airport. Aircraft rescue, firefighting equipment, and agents are at the minimum level or greater required for ARFF Index B.

- **Global Supply Chain**

Supply chains are the arteries of the highly connected and interdependent global trade system. The networks between a company and its suppliers that produce and distribute goods to the final consumers — are hugely beneficial, creating value and contributing to lower consumer and production costs and increasing economic efficiencies. Texas has a dominant share in the supply chains of the following industries: Chemical Manufacturing, Food Processing, Rare Earth Minerals, Semiconductors, and international trade especially involving Maquiladoras.

- **Interstate Logistics**

- **Over 40 Trucking Companies:** Companies like Swift Transportation, J.B. Hunt Transport Services, TSD Logistics Inc, Woodfield, Manna Transportation Services, Inc., Excalibur Transportation Group, Inc., TX NewCo LLC, Livingston Trucking, Inc., ABF Freight System, Inc., Cardinal Transport, Wagner Express Trucking Inc., Old Dominion Freight Line, Central Transport, FedEx Freight, XPO, Con-Way Freight, Coleman International Trucking LLC, Clark Transportation Services, and Schneider National have terminals or facilities in the Texarkana area.
- **Parcel Delivery:** Carriers like UPS, FedEx Ground, A & T Delivery inc., Texarkana Hot Shot Services, and the United States Postal Service (USPS) operate in the area, providing parcel delivery services.
- The logistics sector in the Texarkana area provides immense infrastructure and operations support to other key sectors. Strong transport infrastructure provides easy access to both national and international markets, allowing efficient transportation at low costs. Our location in the heart and crossroads of America is a major advantage in warehousing and the distribution of goods and products. We have the transportation infrastructure to seamlessly feed your supply chain and move your products. Just ask FedEx, Lowes Home Improvement, Americold, JB Hunt, Tri-National, TSD Logistics, Woodfield, Estes, and others.

3.7.3 Global Trade

- **Logistics And Global Supply Chain Management**

- Garner Economics, LLC ranked the Texarkana, TX-AR MSA in the “20 Fastest Growing Regions for Value of Goods Exported, 2010-2015” in March of 2017.
- The Texarkana region is in the perfect location to take advantage of the opportunities in Global Logistics and Supply Chain Management. The existing logistics and distribution industry in the region is flourishing for good reasons. The transportation assets of the region are evident – access to the road system, the rail system, multiple airports, and river & seaports within acceptable drayage distances. The TexAmericas Center is centrally located in the Four States Region of Arkansas, Louisiana, Oklahoma, and Texas and is within 500 miles of 23 of the largest MSA's in the USA, including 10 of the fastest growing in America! Texarkana's location is also in the center of the North America, Midwest and Midsouth markets with access to a large population, in fact 10 million more than Dallas' 500-mile market and over 2,200,000 businesses. Additionally, the Texarkana region has a skilled workforce for this cluster, as well as the educational programs feeding the industry. The logistics and supply chain management industry are broad, including transloading, Third-Party Logistics Services, Freight Forwarding, Warehousing, Wholesaling, E-Commerce, and Supply Chain Planning Segments.

3.7.4 Texarkana Logistics Advantages:

- **Strategic Location:** Texarkana is situated at the border of Texas and Arkansas, making it geographically central in the southern United States and North America. This location provides access to major transportation routes, including highways, railroads, airways and riverways. Located as close as possible to the geographic and population center of the USA and still located within Texas. Connected and located halfway between Americas' East Coast and West Coast. Connected to international borders with Mexico and Canada, and within 300 miles to international seaports on the Gulf Coast.
- **Transportation Infrastructure:** Texarkana has well-developed transportation infrastructure, including interstate highways, a major railroad yard, an airport capable of handling cargo flights and the multimodal capabilities at TexAmericas Center.
 - Located where I-30, I-49, I-369(I-69), US 71, US 59, US 67 and US 82 converge.

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- The Texarkana Region is less than four hours by rail from the Port of Houston. Two railroads serve Texarkana, they are the Union Pacific (UP) and the Kansas City Southern (KCS):
 - The UP connects Texarkana to the Ports on the Gulf of Mexico, Red River and Arkansas River, the countries of Mexico and Canada, and transcontinental Manifest and Intermodal unit trains. The UP operates a rail yard in Texarkana and has a non-operating interchange switch with the KCS; however, they do switch in Shreveport.
 - The KCS is destined for Midwest and Canadian railheads and south to Houston, the Gulf and Mexico and Mexico.
 - These facilities facilitate the movement of goods domestically and could be utilized for international trade as well.
 - **Proximity to Ports:** While not directly located on the coast, Texarkana is within a reasonable distance to major seaports such as Houston, Texas, and New Orleans, Louisiana, as well as Inland port in the Dallas-Fort Worth and Memphis Area. This proximity allows for efficient access to global shipping routes. Border crossings support global supply chains by facilitating the movement of people and goods between neighboring countries. Trade between Texas and Mexico represents a significant contribution to the state economy, and the cross-border trade of intermediate goods (components of final products) is an integral part of many industries' supply chains. The five Hidalgo County border crossings are part of the 11 land ports along Texas' 1,254-mile-long border with Mexico. The top 10 commodities traded across Texas' international bridges are electronics, machinery, petroleum, fresh produce, Nuts, optic & medical equipment, vehicles, plastics, furniture & bedding, and iron or steel products.
 - **Foreign Trade Zone #258:** TexAmericas Center is the grantee for Foreign Trade Zone (FTZ), #258. All of TexAmericas Center sits within FTZ #258. All of TexAmericas Center's property has been approved through the Alternative Site Framework and the Central Campus is an approved FTZ location. By reducing costs, FTZs level the playing field and improve U.S. competitiveness. FTZs can help businesses reduce production-, transaction-, and logistics-related costs by lowering or eliminating effective duty rates, allowing special entry procedures, and encouraging production closer to the market.

Specifically:

- No duties on imported goods that are later re-exported.
- Delayed payment of duties on goods that enter the U.S. market.

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- Manufacturing-specific benefits, with case-by-case approval by the FTZ board, that can include reduction of duties if a lower tariff rate applies to the finished product leaving the zone that the tariff rates that would have applied on foreign components (“inverted tariff”).
 - Elimination of duties on waste, scrap, and rejected or defective parts.
 - Reductions in merchandise processing fees: zone users may be able to file a single customs “entry” (and pay a single fee) per week rather than making multiple entries during a week.
 - **United States-Mexico-Canada Agreement (USMCA)**
 - Companies enjoy the benefits of the USMCA.
 - The interstates and US highways running through Texarkana were designated as NAFTA Corridors under the implementation of the North American Free Trade Agreement (NAFTA) in the 1990s.
 - The United States-Mexico-Canada Agreement (USMCA) enacted in 2020 seeks to build on the success of NAFTA by addressing unfair currency practices with high standards to protect against competitive devaluations and increase transparency. It includes for the first time, articles to protect the environment – improve air quality, reduce, and prevent marine litter, and support sustainable forest management. The USMCA protects intellectual property rights with enforcement powers. The agreement also eases restraints on access to capital and minimizes the limits to where data can be stored and processed. This allows for faster and safe cross border transactions while protecting against cybersecurity threats.

3.7.5 Supply Chain Management

- Texarkana's strategic location and well-developed transportation infrastructure is unmatched for distribution, market research and competitive and affordable transportation costs. The area is centrally located, allowing businesses to reach domestic and international locations with ease and affordability. Texarkana generally offers lower operating costs compared to larger cities, including lower real estate costs, including taxes, for all types of facilities, as well as lower labor costs. Texarkana offers access to skilled workers, particularly in areas such as logistics, warehousing, and transportation management. Depending on specific supply chain networks, being located in Texarkana may provide proximity to key customers or suppliers,

reducing transportation costs and lead times for certain products or materials. This can contribute to overall cost savings in Supply Chain Management activities, especially those related to our clusters and Best-Fit Industries. Additionally, lower operating costs compared to larger cities can make it attractive for businesses looking to optimize their SCM operations. The Texarkana area is becoming a “who's who” of top logistics and distribution location often being compared to a fledgling Indianapolis. The growing number of manufacturing and distribution operations located here means there is a large pool of workers who understand the distribution business.

3.7.6 Packaging

- Ollson & Associates ranked the Texarkana Region and specifically TexAmericas Center as an 8 out of 10 for the attraction and long-term success of the Freight Packaging and Logistics sector in their 2017 Market Viability study.
- Texarkana's strategic location offers proximity to suppliers of packaging materials, reducing transportation costs and lead times. Texarkana area packaging manufacturers are all about creating packaging materials and solutions involving designing, developing, and producing packaging that meets specific needs. You will be able to choose from suitable materials, like cardboard, plastic, steel, wood, and create different types of packaging, such as boxes or containers. The goal is to protect the products and make them easy to handle and transport. Texarkana packaging companies ensure that products are well-packaged and ready to reach customers in the best possible condition. They have experience in all forms including: Paper, Bopp & Woven Poly Bags, Tubes And Cores, Adhesives, Corrugated, And IBC, Recycled Materials, Jerrycans, Pallets, Steel Drums, and more
- **Access to Raw Materials and Suppliers & Local Packaging Companies:** The Texarkana area is a good location for packaging operations because of access and availability of raw materials required for packaging, as well as access to suppliers of packaging materials and equipment. Texarkana has a mix of local packaging companies that offer a range of packaging services, including primary, secondary, and tertiary packaging solutions. These companies specialize in various industries such as food and beverage, consumer goods, pharmaceuticals, or industrial products.
- **Contract Packaging Services:** Contract packaging companies in the Texarkana area provide outsourced packaging solutions to businesses that may not have the facilities or expertise to package their products in-house. Texarkana has contract packaging providers offering

services such as assembly, labeling, shrink wrapping, blister packaging, and more.

- **Packaging Suppliers:** Texarkana has suppliers of packaging materials and equipment. These suppliers can provide a variety of packaging materials such as bags, boxes, cartons, containers, tapes, labels, packaging machinery and more.
- **Custom Packaging Solutions:** Depending on your specific packaging needs, you may require custom packaging solutions tailored to your products and branding requirements. Some packaging companies in Texarkana offer custom packaging design and manufacturing services to meet these needs.
- **Availability and Capacity:** The availability and capacity of packaging operations or contractors in Texarkana will vary based on factors such as market demand, seasonal fluctuations, and the size of the local packaging operator; however, there is an assortment of companies that range in size and capabilities. Ask TexAmericas Center to research and reach out to local packaging companies to assess their availability and capacity to accommodate your requirements.

3.7.7 E-Commerce

- TexAmericas Center and the Texarkana can be a viable location to run an e-commerce business, but its suitability depends on various factors specific to your company's business model, target market, and operational needs. Here are some considerations to help you evaluate our location for your e-commerce business:
- **Strategic Location:** Texarkana's central location in the southern United States can offer strategic advantages for an e-commerce business serving customers across multiple states, regions, and time zones. Its proximity to major transportation routes, including interstate highways and airports, can facilitate efficient shipping and delivery to customers.
- **Access to Transportation Infrastructure:** Texarkana boasts well-developed transportation infrastructure, including highways, railroads, and an airport. This infrastructure supports efficient inbound supply chain logistics for sourcing products and outbound distribution logistics for fulfilling customer orders.
- **Cost of Operations:** Texarkana generally offers lower operating costs compared to larger metropolitan areas, including lower real estate, utility, and tax structure costs for warehousing and fulfillment centers,

as well as lower labor, logistics, and sales tax costs. These can contribute to considerable cost savings for e-commerce businesses.

- **Labor Availability:** Texarkana offers access to an available of workforce skilled workers for various roles important to an e-commerce operation, with relevant skills and experience including order fulfillment, customer service, digital marketing, and others. Texas is a Right-To-Work state.
- **Market Access:** Texarkana's strategic location offers access to consumer markets in nearby cities and regions, as well as opportunities for reaching customers through online channels and digital marketing strategies.
- **Technology Infrastructure:** Texarkana provides access to reliable high-speed internet connectivity and technology infrastructure essential for running an e-commerce business such as website hosting, online transactions, and digital marketing efforts.
- **Regulatory Environment:** Texarkana's regulatory environment is conducive to conducting e-commerce business operations including lower taxation, no business licenses, and easy compliance with consumer protection laws.
- The wholesale industries for Farm Supplies, Farm & Garden Equipment, and Construction & Mining Machinery are strong and growing in the Texarkana region. Jobs in the Farm Supplies Merchant Wholesalers sector have an LQ of 3.3 times higher than the US average. Jobs in the Farm and Garden Machinery and Equipment Merchant Wholesalers sector have an LQ of 2.1 time the US average, and Jobs in the Farm and Garden Machinery and Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers sector have an LQ of 2.0 time the US average.

3.7.8 Third-Party Logistics:

Logistically speaking, TexAmericas Center has it all. Texarkana's central location and strategic interconnection of rail, road, air, river, and IT transportation assets make the community a global transportation and business hub. TexAmericas Center has chosen to leverage its ability to deliver high-quality, value-added logistics services at a low cost against this comprehensive transportation network. TexAmericas Center can support your manufacturing, warehouse/distribution, and rail logistics needs by providing third party logistics (3PL). TexAmericas Center can be your single source, final-mile provider for solutions to the entire spectrum of your supply chain needs. This includes shipping, receiving, warehousing, inventory control, and other value-added logistics and light manufacturing services to save you

time and money while giving you the ability to scale and gain from our experience and expertise. We can help you optimize and control virtually every nuance of your supply chain. TexAmericas Center's 3PL solutions give you greater flexibility, more control, and less headaches, all with a low capital commitment. Our warehousing, distribution, and fulfillment services can be customized to meet your company's needs, which can change from day to day.

Ollson & Associates ranked the Texarkana Region and specifically TexAmericas Center as a 10 out of 10 for the attraction and long-term success of this sector specifically Public Storage and Warehousing in their 2017 Market Viability study.

3.7.9 Call Center

TexAmericas Center and the Texarkana region is an attractive location for call & service centers for several reasons:

- **Central Location:** Texarkana's position on the border of Texas and Arkansas places it in a central location and time zone within the United States. This central positioning allows call centers to efficiently serve customers across multiple time zones, maximizing operational hours and flexibility.
- **Bilingual Population:** Texarkana's proximity to the border with Texas and its diverse population due to the presence of the Red River Army Depot, Defense Logistics Agency, Texas A&M University – Texarkana, University of Arkansas – Texarkana and other entities provides access to bilingual talent, which can be valuable for call centers serving customers who speak multiple languages.
- **Skilled Workforce:** Texarkana offers access to a diverse and skilled workforce, including individuals with experience in customer service, sales, and communication as well as certain specialized fields in a Right-To Work state. Local educational institutions may also offer training programs tailored to call center operations, providing a pipeline of qualified candidates for employment. The cost of labor is about 80% of typical markets; the difference of a dollar-per-hour labor savings can offset a difference in cost per square-foot for needed rehab of existing buildings.
- **Transportation and Telecommunications Infrastructure:** The region benefits from a well-developed transportation and Telecommunications infrastructure, including major highways, long haul fiber and multiple metro fiber networks. This infrastructure facilitates the movement of goods, data, and people, making it easier for employees to commute to call center facilities, connect to others globally and for companies to distribute products, services, or materials as needed.

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- **Cost of Living:** Texarkana has a lower cost of living compared to larger metropolitan areas, which can translate to lower operating expenses for call center businesses. This affordability can be advantageous for companies seeking to establish or expand their operations while minimizing overhead costs.
 - **Business-Friendly Environment:** Texarkana provides a business-friendly environment with supportive local governments, potentially favorable tax incentives, and access to resources for business development.
 - **Near Plug-N-Play Industry Appropriate Facilities:** TexAmericas Center can provide access to real estate options that will represent no more than 10% of the total project costs. Call centers fit more people, as many as eight (8) agents per 1,000 square feet (sf) as compared to a maximum of four (4) employees per 1,000 sf in conventional offices. Call centers usually need seven (7) parking stalls per 1,000 sf, or, to use real estate terminology, a parking ratio of 7:1. The parking ratio for call centers is generally double that of conventional office buildings. TexAmericas Center will work with the company to estimate leasehold improvements because just as converting former retail properties is a cost-effective solution, TexAmericas Center has about 1,000,000 square feet of space it intends to rehabilitate for occupancy and this space may be a preferred option to redesign and reconstruct completely new facilities within and parking areas outside. This supportive ecosystem can encourage the establishment and growth of call & service centers in the area.
 - **Quality of Life:** Texarkana offers a relatively high quality of life, with access to amenities such as parks, cultural attractions, excellent educational resources, and affordable housing. This can be appealing to employees working in call centers, contributing to employee satisfaction, retention, and productivity.

Overall, the combination of central location, transportation and telecommunications infrastructure, cost of living, skilled workforce, business environment, quality of life, and access to bilingual talent makes Texarkana a favorable location for call centers looking to establish or expand their operations.

The current location quotient for Call Center employment for the greater Texarkana area is .81 and the unemployment rate is 5.1%.

Call Centers currently operating in the area include: Hart Hanks, Red River Credit Union, and others.



Whether you are looking to expand your business, your current lease is expiring, you are planning a move to Texas, or you have considered leaving the mid-south region, talk to us first!

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