

An Industry Cluster Development Approach to
Market Design



Maryland Market Center

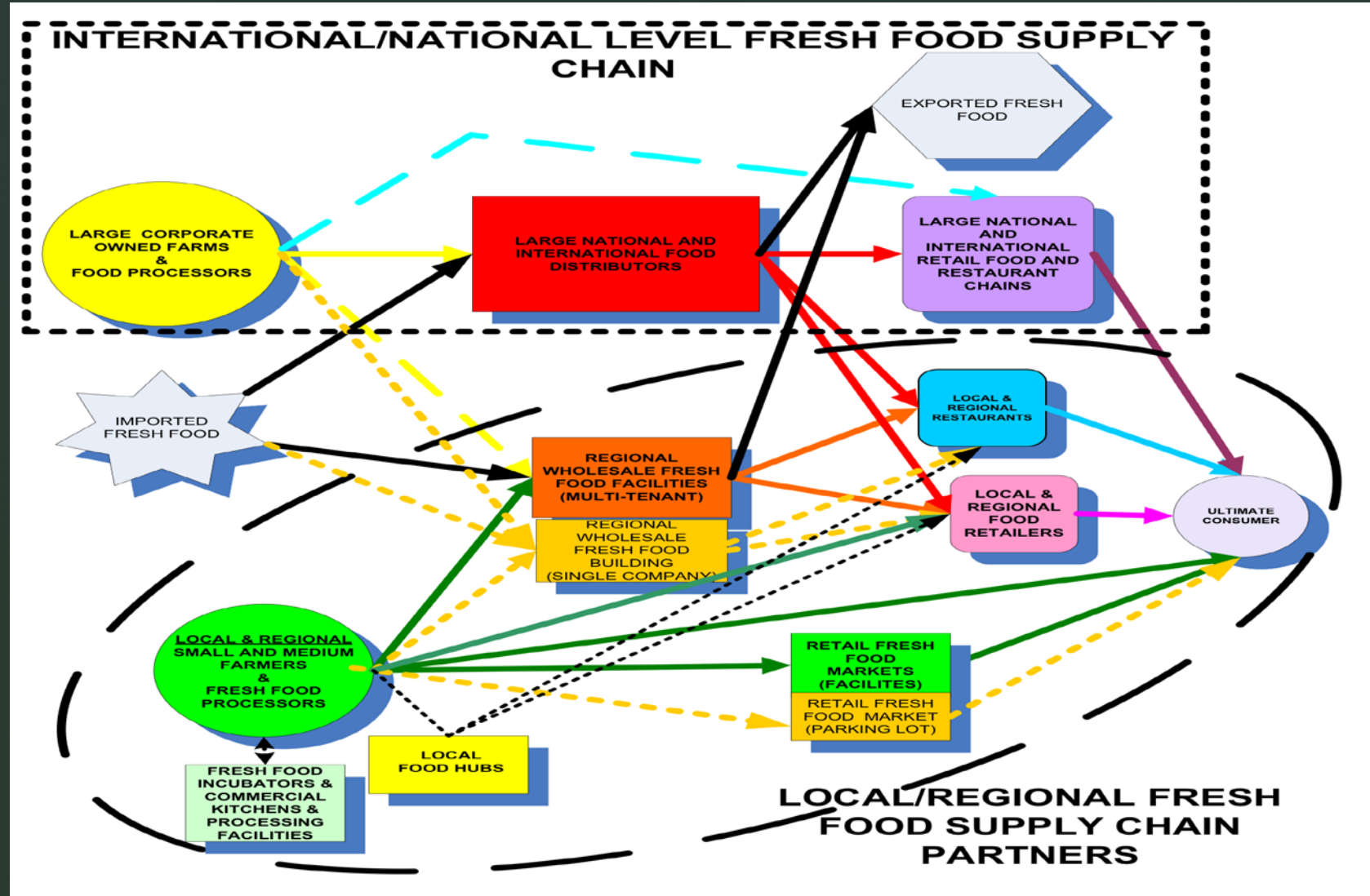
➤ The Current Food Supply Chain System :

“Has become *stratified* Creating New
Challenges and Opportunities

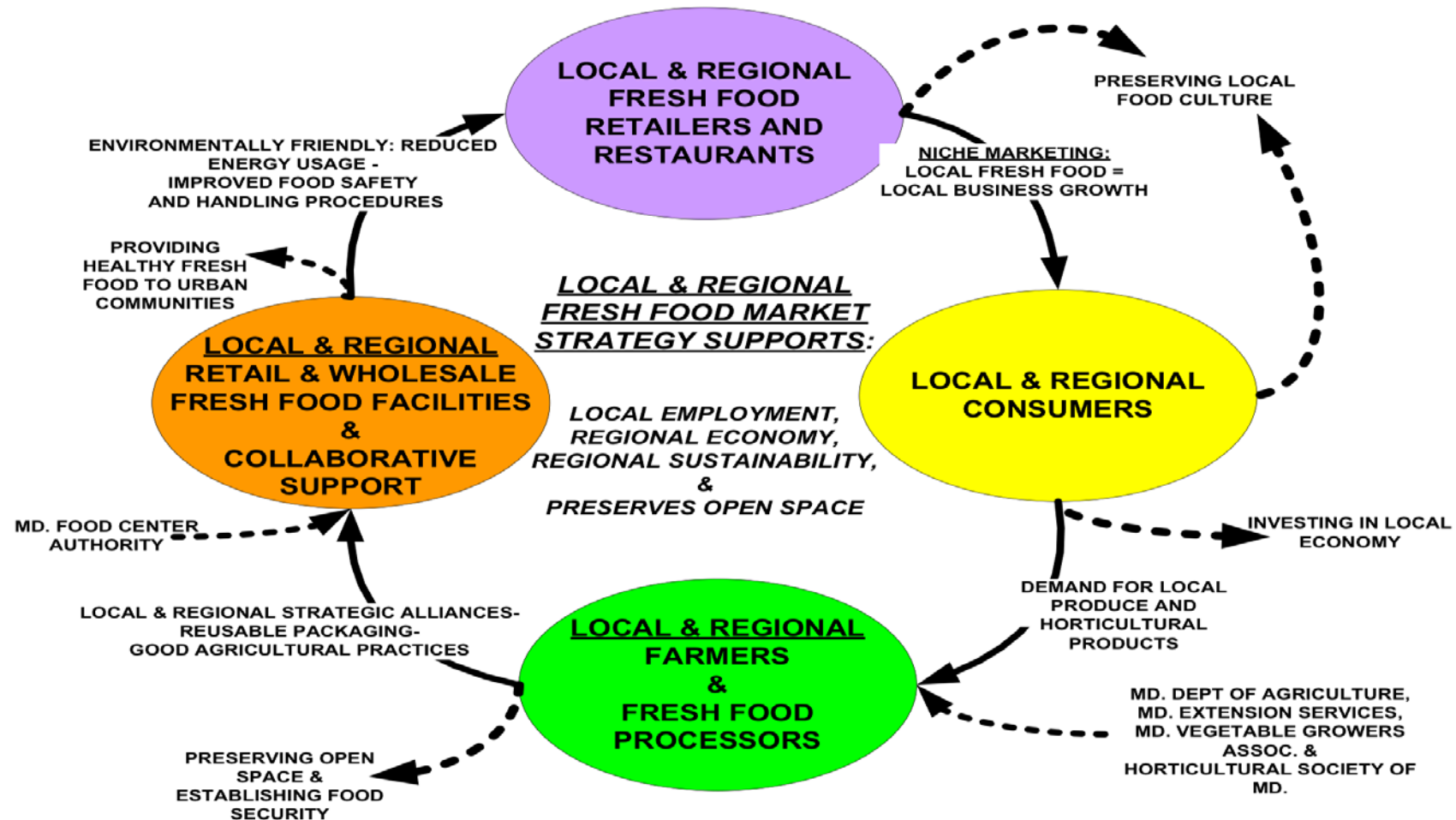
For

**Local Fresh Food
Distribution”**

OPPORTUNITIES FOR THE LOCAL/REGIONAL FRESH FOOD SUPPLY CHAIN PARTNERS



LOCAL & REGIONAL FRESH FOOD SUPPLY CHAIN PARTNERSHIP CONCEPT

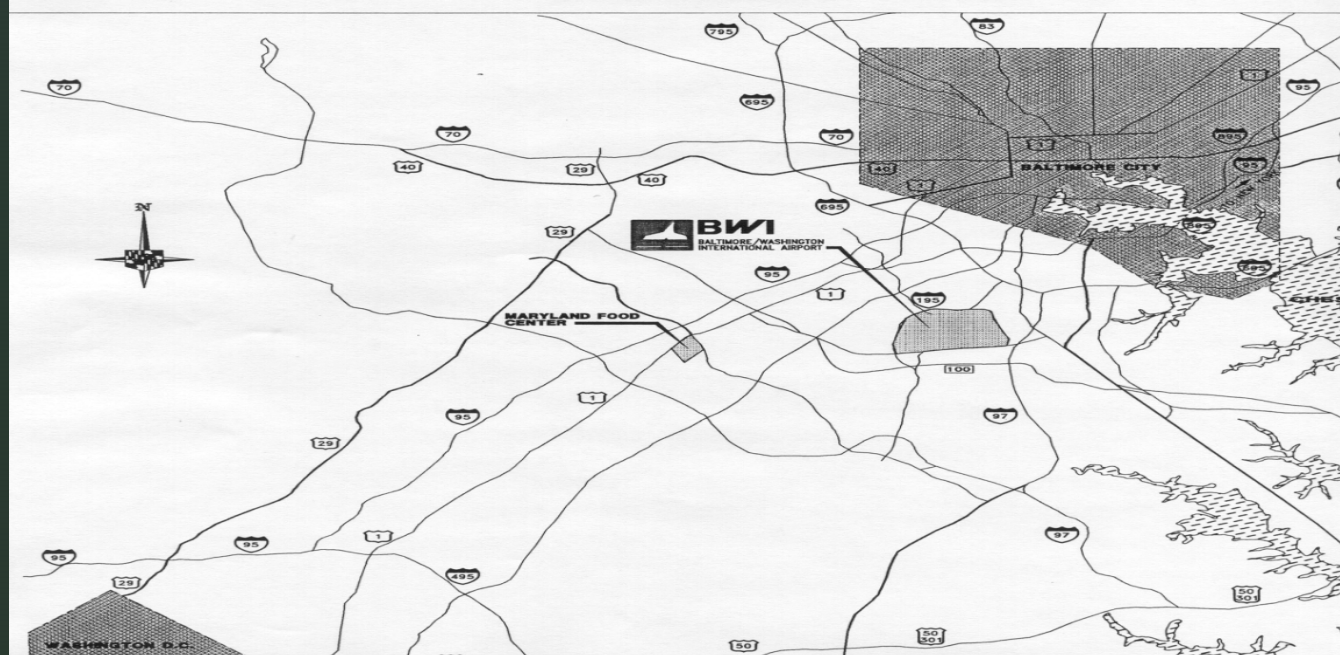


Maryland Market Center (MMC): A “Cluster Approach” to developing a more effective local & regional fresh food supply chain partnership

- Firm Level Benefits
 - Access to markets otherwise unavailable
 - Pooling of intellectual and physical assets
 - Improved market feedback
 - Rapid access to specialized capital
- Community Benefits
 - Sustainable growth in tax base
 - High return on targeted investments
 - Supportive of business development policies
- Economy Wide Benefits
 - Enhanced human capital skills
 - Improved “know-how” networks
 - Improved service and supply networks

Maryland Market Center Location

- Maryland Market Center is located in the Maryland Food Center, in Howard County, midway between Baltimore and Washington, D.C., at the intersection of Maryland Routes 1 and 175. This location, just off I-95, is in close proximity to BWI Airport and the Port of Baltimore, and is currently the heart of the Maryland Food Center Authority's operations. This location provides easy access to the Greater Baltimore/Washington D.C. Metropolitan area.



MMC Supports All Stages of Growth

1

- Pre-concept to Start-up
 - product development support
 - Specialized business development services
 - Scalable real-estate
 - Logistics and distribution

2

- Established, slow growth companies
 - Cost management
 - Regulatory compliance
 - Employment training

3

- Expanding, high growth companies
 - New product development
 - Brand Development
 - Flexible real-estate environments
 - Strong asset base

4

- Declining or exiting firms
 - Workforce transition
 - Asset disposal
 - Debt workouts
 - Acquisition support

Core Industries at the MMC

- Prepared and fresh produce, seafood, meat, and poultry
- Canned and prepared foods
- Craft beverages
- Various baked goods and pasta
- Dairy and ice cream manufacturing
- Pet food manufacturing
- Confectionery and candy processing
- Flowers and Plants

MMC Cluster Rejuvenation Strategy – Two Sites with Two Purposes

MMC Site A – Existing Seafood Market

- Real estate focusses on industry diversification and entrepreneurship
 - Building 1 – Distribution and processing
 - Building 2 – Full value chain, multi-industry
- Program enhancements leverage outside resources
 - Broaden recruitment of early stage business
 - Develop formal relationships with regional food incubators
 - Deal flow
 - Tenant Services

MMC Site B –Existing Produce Market

- Real estate development focuses on supply chain purpose
 - New multi-user high-cube full cold chain compliant facility to re-engage large retail and institutional customers
 - New gate house for improved traffic flow
 - New customer service building
 - Dock improvements
- Services Expansion
 - Trucker-jobber integration
 - Organic waste management
 - Common facility food safety certification

Maryland Market Center

Site Locations

Legend

- MMC Site A
- MMC Site B





Site A Design Concept

- Site A is a development concept that proposes to recast the MFCA's market system as an entrepreneurial development center.
 - Value chain integration
 - Broad industry participation
- The MMC offers an all new design program that supports full value chain development with multiple industry involvement.
 - Flex building options
 - Scalable real estate solutions
 - Compatible with modern food safety requirements

Maryland Market Center - Site A



Site A, Phase 1

- Building 1
 - 70,000 sf high cube
 - Multi-tenant
 - Seafood
 - Meat
 - Cold storage
- Demolition of vacated end-units at existing Seafood Market Bldg.



Site A, Phase 2

- Building 2
 - Multi-tenant
 - Retail
 - Processing
 - Training
 - Flex warehouse
 - Multi-industry
 - Scalable real estate solutions



Site B Design Concept

- ▶ Enhance the “Street Market” buying patterns
 - Retain common docks
 - Maintain dock to store-front ratios
 - Improve buyer access
 - Reduce dock conflict
- Support GlobalGAP & SQF compliance with facility and operational improvements
 - Adaptive reuse opportunities for cold chain implementation
 - Achieve market certification at SQF 2000 level 1
- Create overflow storage and expansion capacity
- Maintain tight cost control on operations and improvements
- Improves customer experience
 - Reduces bottlenecks on Assateague Ave
 - Provides convenience services
- Create inducements to attract more trucker-jobbers
- Improve dock conditions
 - Resurface dock
 - Reduce use of permanent storage on docks
- Maintain small business supportive environment

Maryland Market Center - Site B



New Multi-User Cold Chain Warehouse

- Common Cold Storage Building
 - Common warehouse use
 - Cold chain compliance
 - End-to-end inventory control
 - GlobalGAP/BRC
 - Cross dock and packing services
 - Privately tenanted space



New Customer Service Center

- Market Administration
- Customer convenience services
 - Vending/food service
 - Restrooms
 - Covered curb height docks
- Trucker-Jobber staging
 - Bullpen style offices
 - Locker rooms

- Brisbane Fresh Center



New Gatehouse Improvements

- Expanded inbound gate capacity
 - Three inbound lanes
 - Improved signage
 - Enhance security features
- Installation of exit only gate
- Tenant Services





THANK YOU!
Q&A