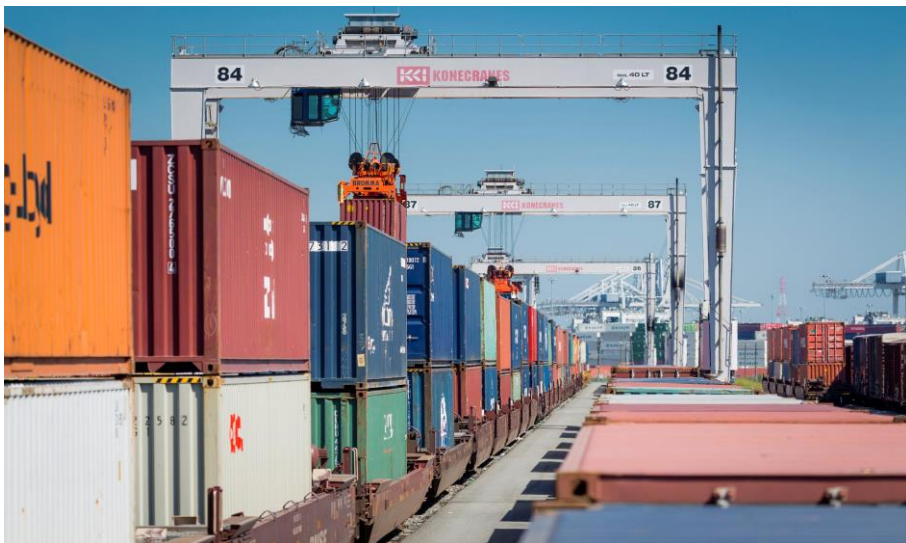


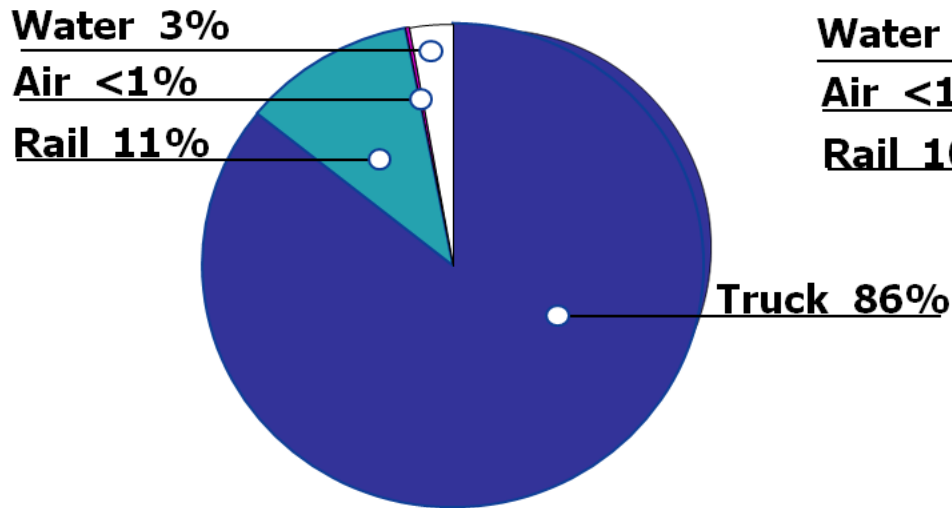
Welcome to Savannah



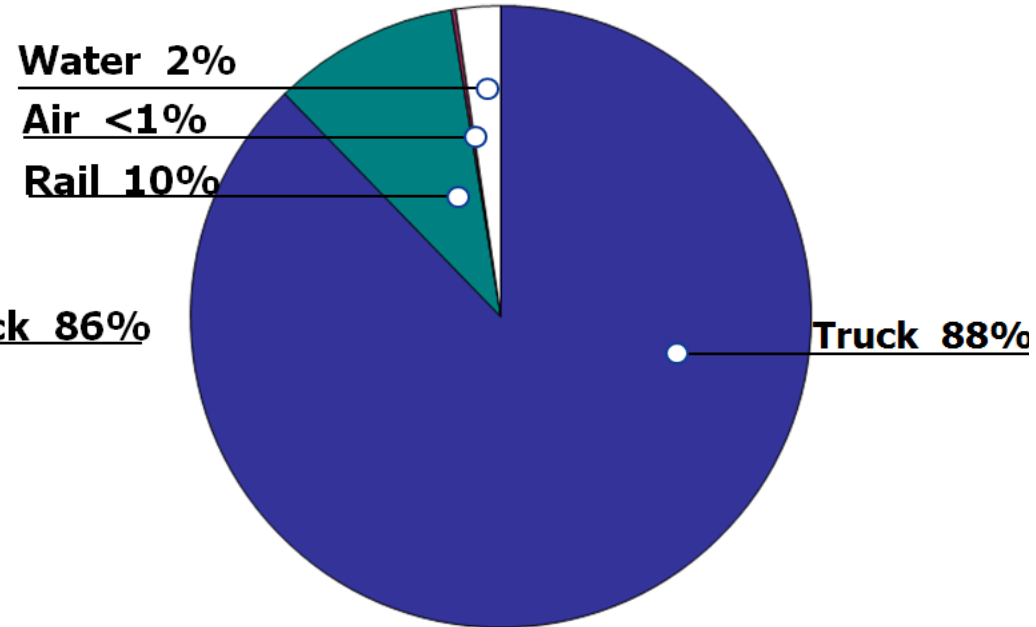
Tom McQueen, AICP

Georgia's Freight Movement: Mode Share*

Year 2004



Year 2035



- Trucks carry 86% of freight
- Freight volumes increase 260% by 2035
- Truck traffic could grow 2X car traffic

* By tonnage

Georgia's Freight & Logistics Plan



Georgia's Freight & Logistics Plan

Broad Business-Focused Outreach

Public Sector

- » **Office of the Governor***
- » Georgia Ports Authority
- » Georgia Dept. of Economic Development
 - Logistics Innovation Center***
- » Hartsfield Jackson International Airport
- » Georgia Assoc. of MPOs

Private Sector

- | | |
|---------------------------------|-----------------------------|
| » Coca-Cola | » The Home Depot |
| » CSX Railroad | » Norfolk Southern Railroad |
| » Delta Airlines | » Southern Freight |
| » Georgia Motor Trucking Assoc. | » UPS |

Georgia's Freight & Logistics Plan

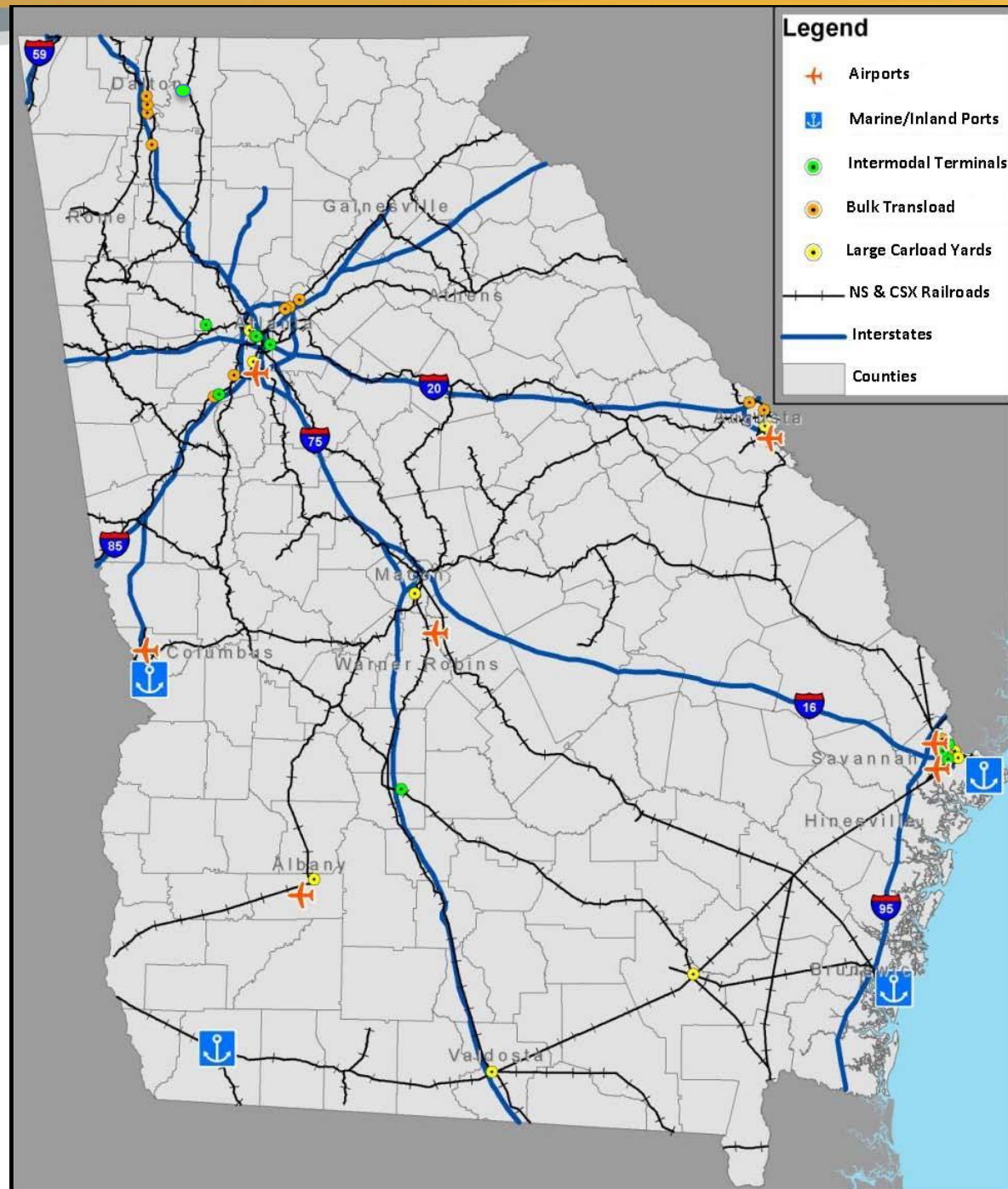
Making the Business Case

If Georgia can regain its historical 21% market share of the Southeast's freight-related industries...

... that would translate into additional \$20 Billion in economic activity over the next 10 years.

Freight System Assets

- **Metro Atlanta**
 - » Distribution hub for many truck-based logistics operators
 - » **Hartsfield Jackson: 10th busiest U.S. air cargo airport (in 2013)**
 - » Southeast rail hub for two “Class One” railroads (CSX & NS)
- **Georgia’s newest intermodal yard under development (Murray Co.)**
 - » **2nd-newest in Cordele** (direct connection to Savannah Port via shortline RR’s)



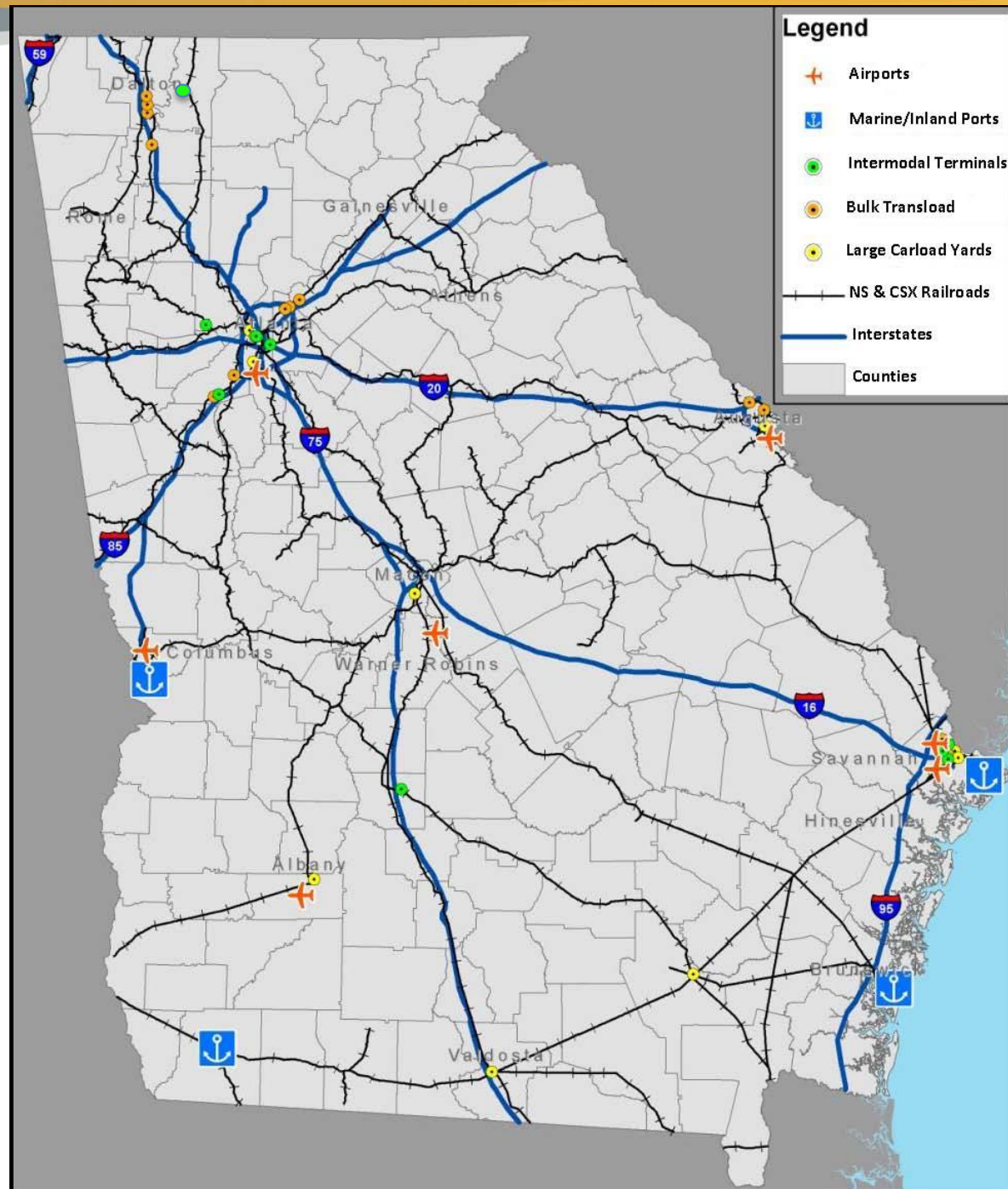
Freight System Assets *(cont'd.)*

Port of Savannah

- » Largest & fastest-growing U.S. container port
- » 4th-busiest U.S. container port
- » #3 U.S. container exporter, by tonnage (after L.A. & Houston)
 - » “Balanced” trade

Port of Brunswick

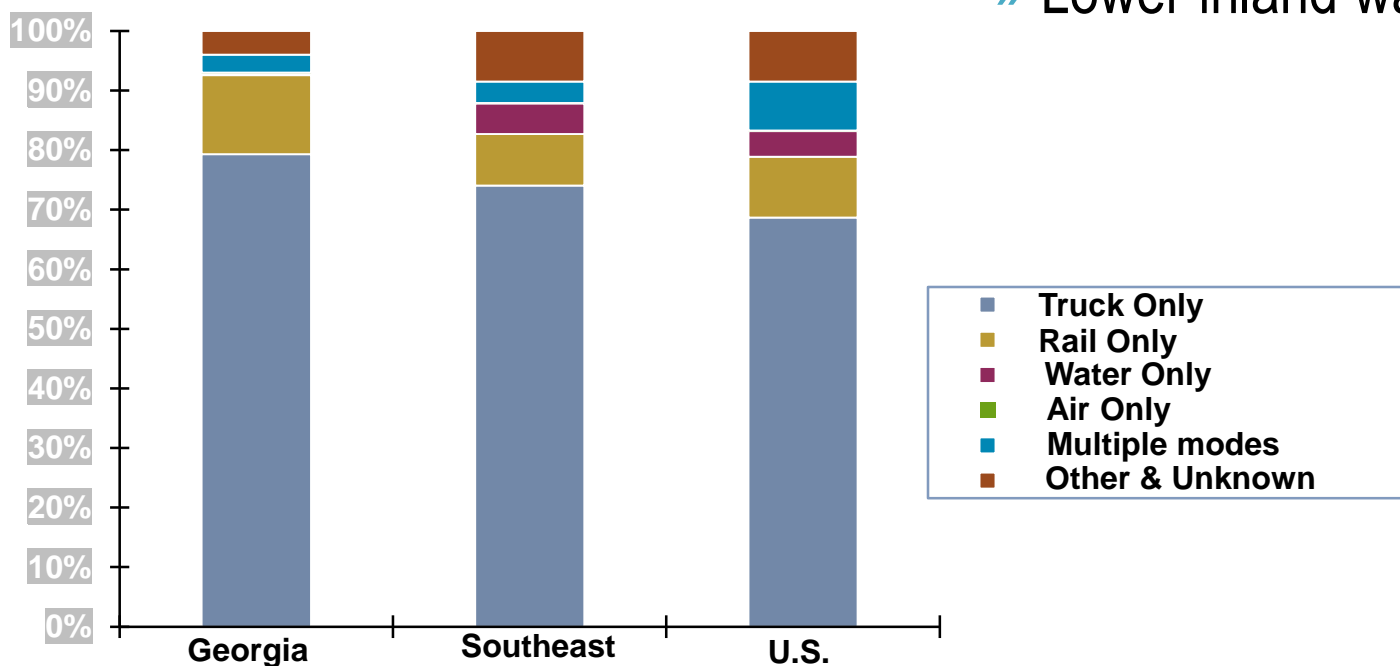
- » 1st in U.S. new auto imports
- » #2 for total vehicle imports & exports in U.S.



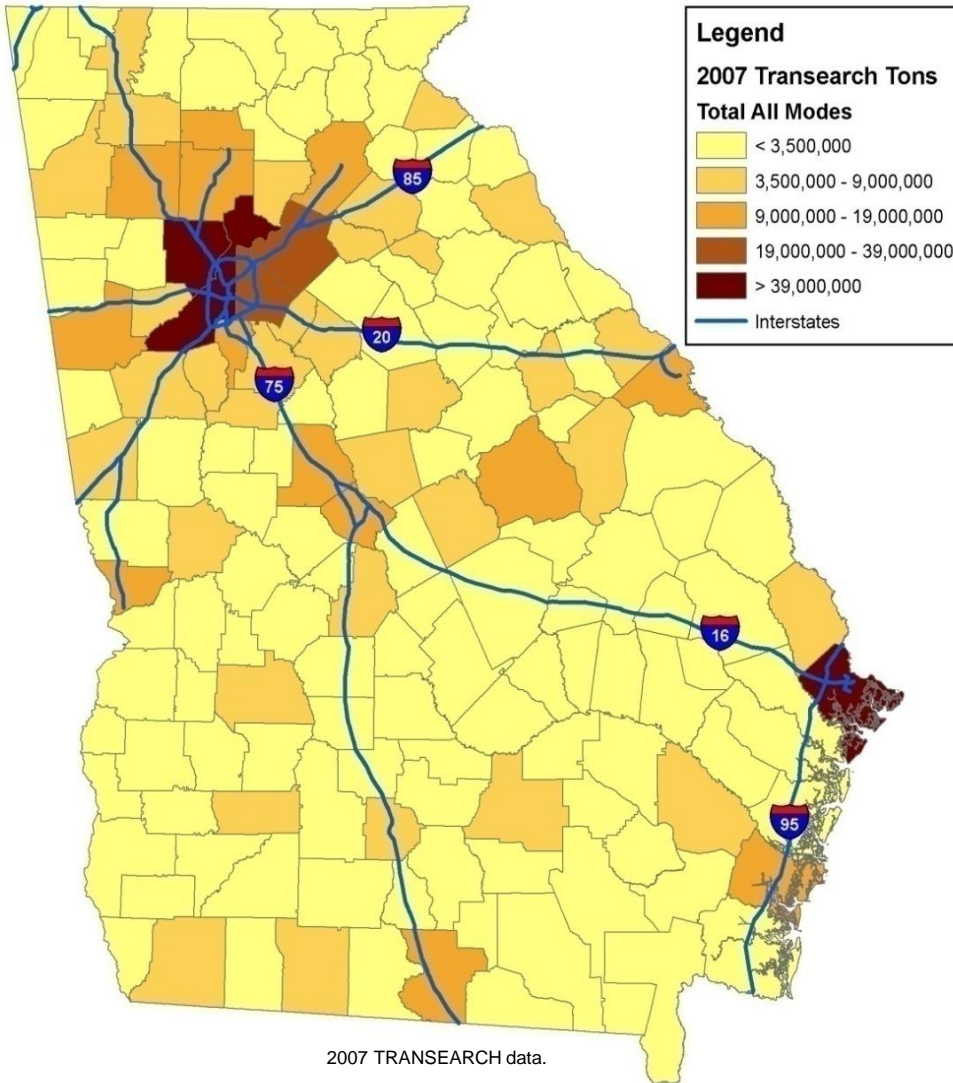
Statewide Perspective: *Freight Mode Distribution*

Georgia's modal distribution:

- » Higher truck mode share
- » Higher rail carload mode share
- » Lower inland waterway flows share



Statewide Perspective: *Georgia's Primary Freight "Hubs"*

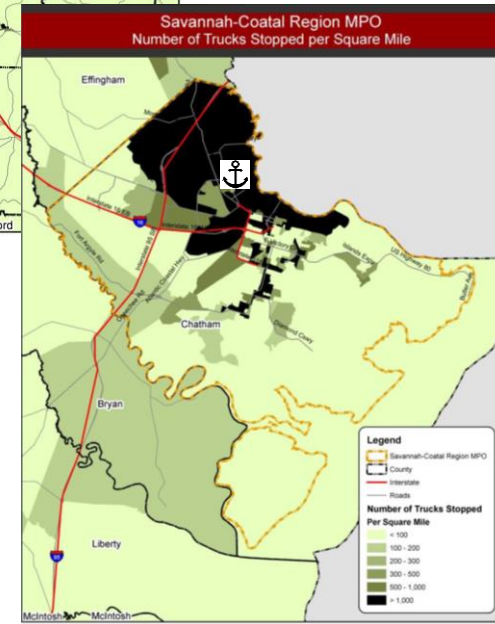
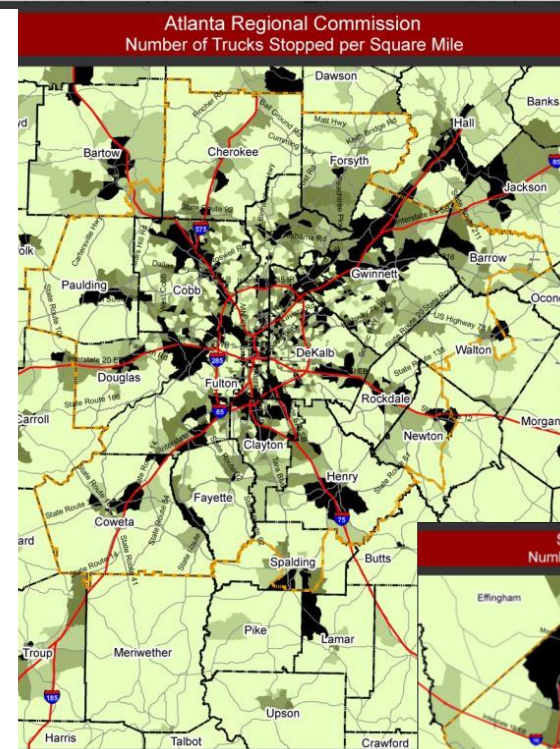
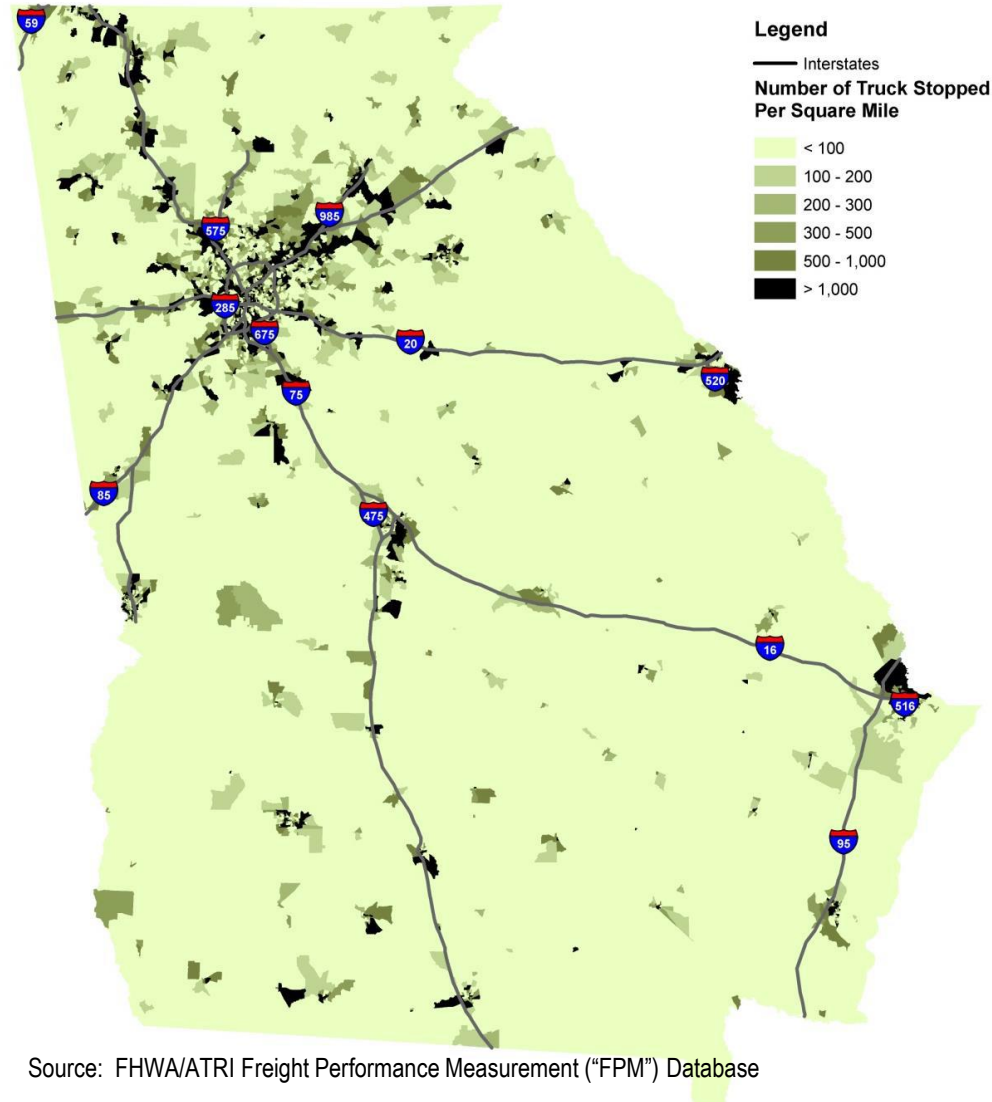


Most freight flows
concentrated in two
regions

- » Atlanta metro
- » Savannah metro

Economic Relationships?

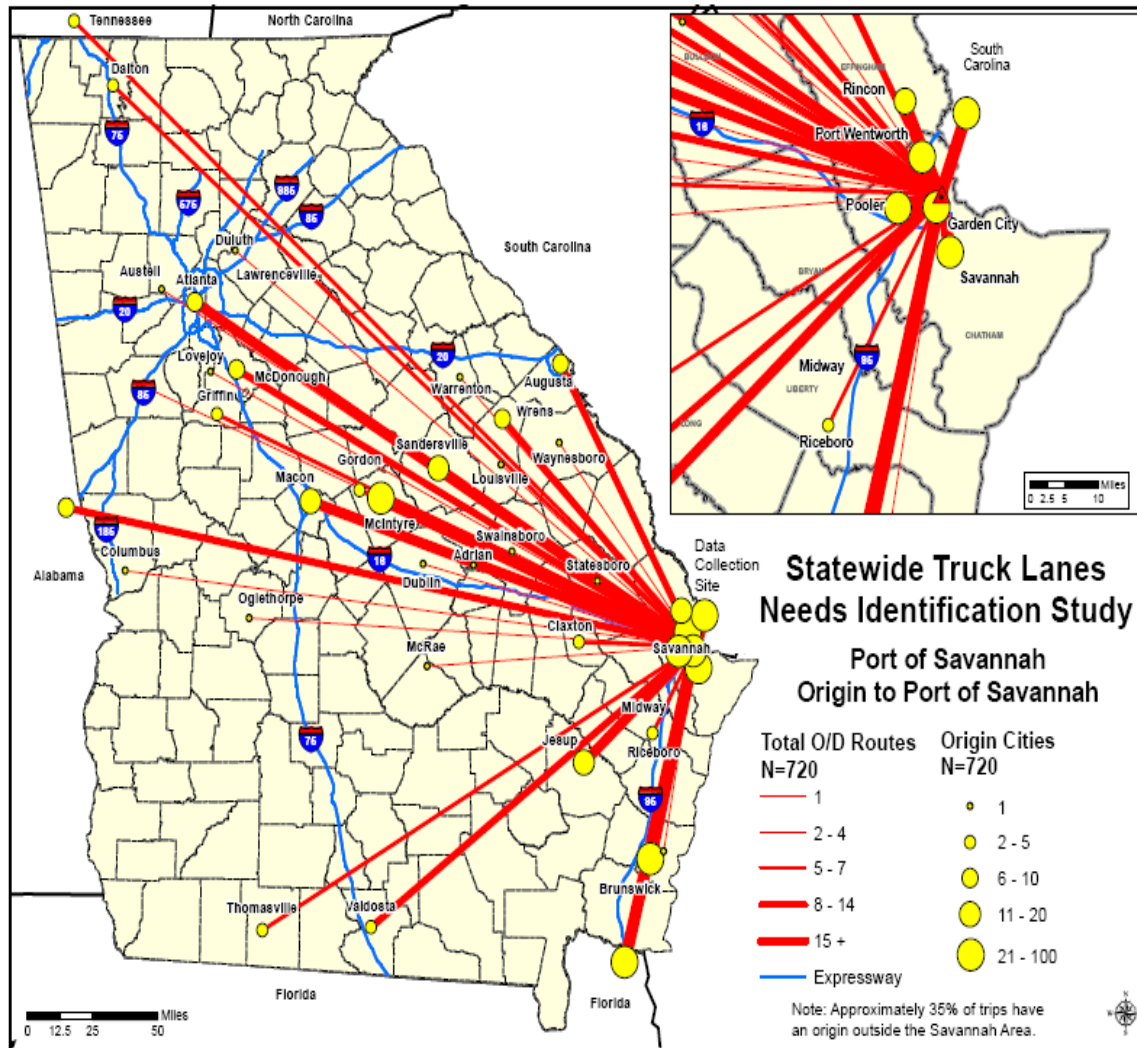
Statewide Perspective: *Trucks Stopped per Square Mile*



Port of Savannah



Port of Savannah: *Truck Origin-Destination Patterns*



Generates 8,000+ daily truck trips

60% to/from Savannah region warehouses

» Later distributed across the state and Southeast

Local- and long-haul roads are critical

Port of Savannah's RAIL "Trading Partners"

Trading Partner	Rail Intermodal Tons	Percent of Total
Metro Atlanta	1,056,240	33%
Tennessee	889,600	28%
Florida	375,240	12%
North Carolina	234,800	7%
Rest of U.S.	636,288	20%
Total	3,193,168	100%

Trading Partner	Rail Carload Tons	Percent of Total
Rest of Georgia	5,181,072	50%
North Carolina	775,212	8%
Florida	731,932	7%
Virginia	583,613	6%
Atlanta	305,872	3%
Rest of U.S.	2,732,460	26%
Total	10,290,161	100%



Top U.S. “Freight Metros”

Metro Regions	Total Freight Tonnage Moved (millions)
Houston	976,088
L.A.-Long Beach	860,836
Chicago*	636,160
San Francisco/Oakland	431,578
Atlanta*	428,103
New Orleans	406,461
Dallas/Ft. Worth*	361,445
New York	344,832
Miami	324,128
Seattle	294,384

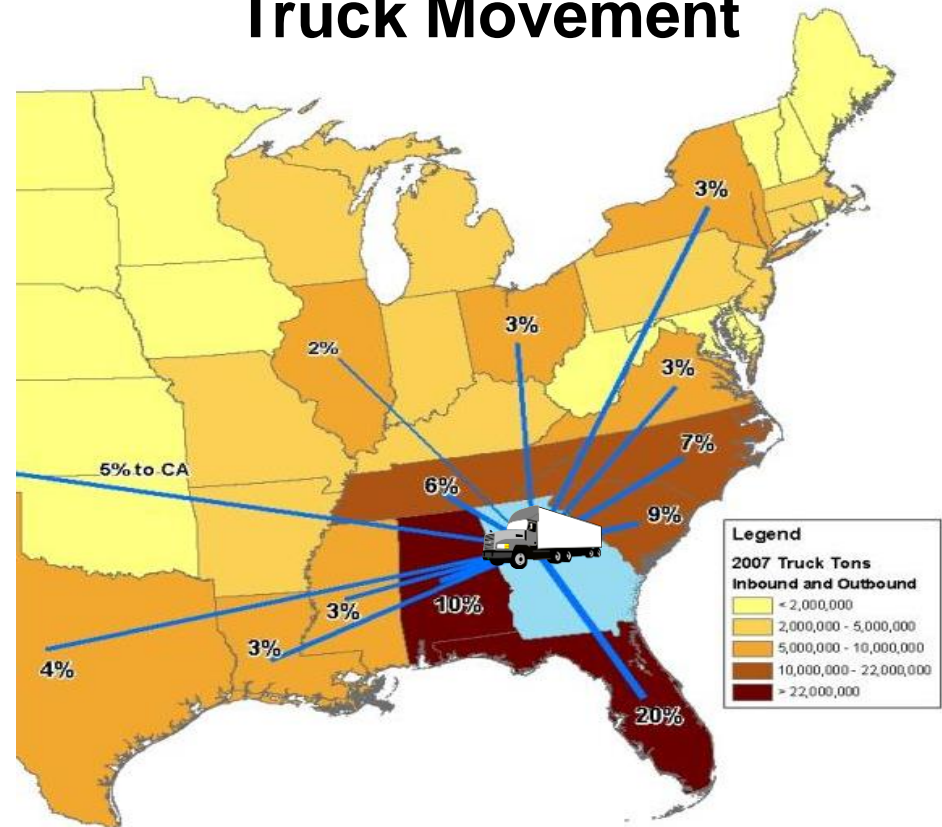
* "Inland port" regions

➡ Metro Atlanta: 2nd largest “inland port” region in U.S.

Metro Atlanta's U.S. Trading Partners: *Economic Relationships with Larger Region*

- » Truck: Almost $\frac{2}{3}$ of all truck tonnage goes to/from the Southeast
- » Rail: Most freight rail to/from AL, KY, VA, LA, IL & throughout the U.S.

Truck Movement



Air Cargo Gateways: *Metro Atlanta's Economic Potential*

Airport	Market Type	*Tons (mil.) 2011
Memphis, TN	FedEx Integrator Hub	3.7
Anchorage, AK	Trans-Pacific Transfer Operations	2.0
Louisville, KY	UPS Integrator Hub	1.9
Miami, FL	Latin America Gateway	1.6
Los Angeles, CA	Asian Gateway	1.5
New York/Kennedy, NY	European Gateway; some Asia	1.1
Chicago/O'Hare, IL	Central U.S Core, General International Gateway	1.0
Indianapolis, IN	FedEx Secondary Hub	0.9
Newark/Liberty, NJ	FedEx Secondary Hub	0.8
Atlanta, GA	Delta & Southwest Hubs	0.6



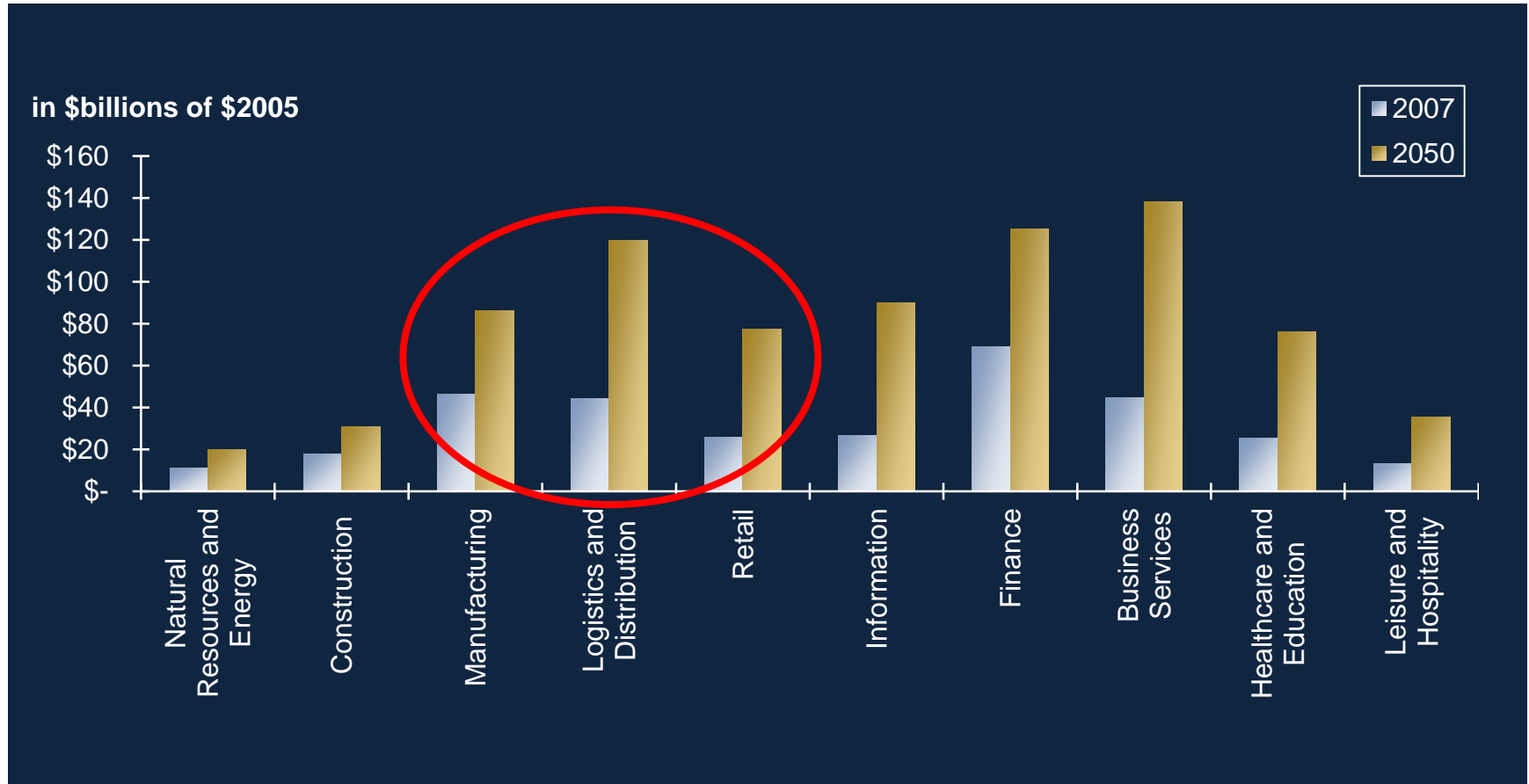
Asiana Air Cargo @ Hartsfield-Jackson



Air Cargo Germany @ Hartsfield-Jackson

Georgia's Freight & Logistics Plan:

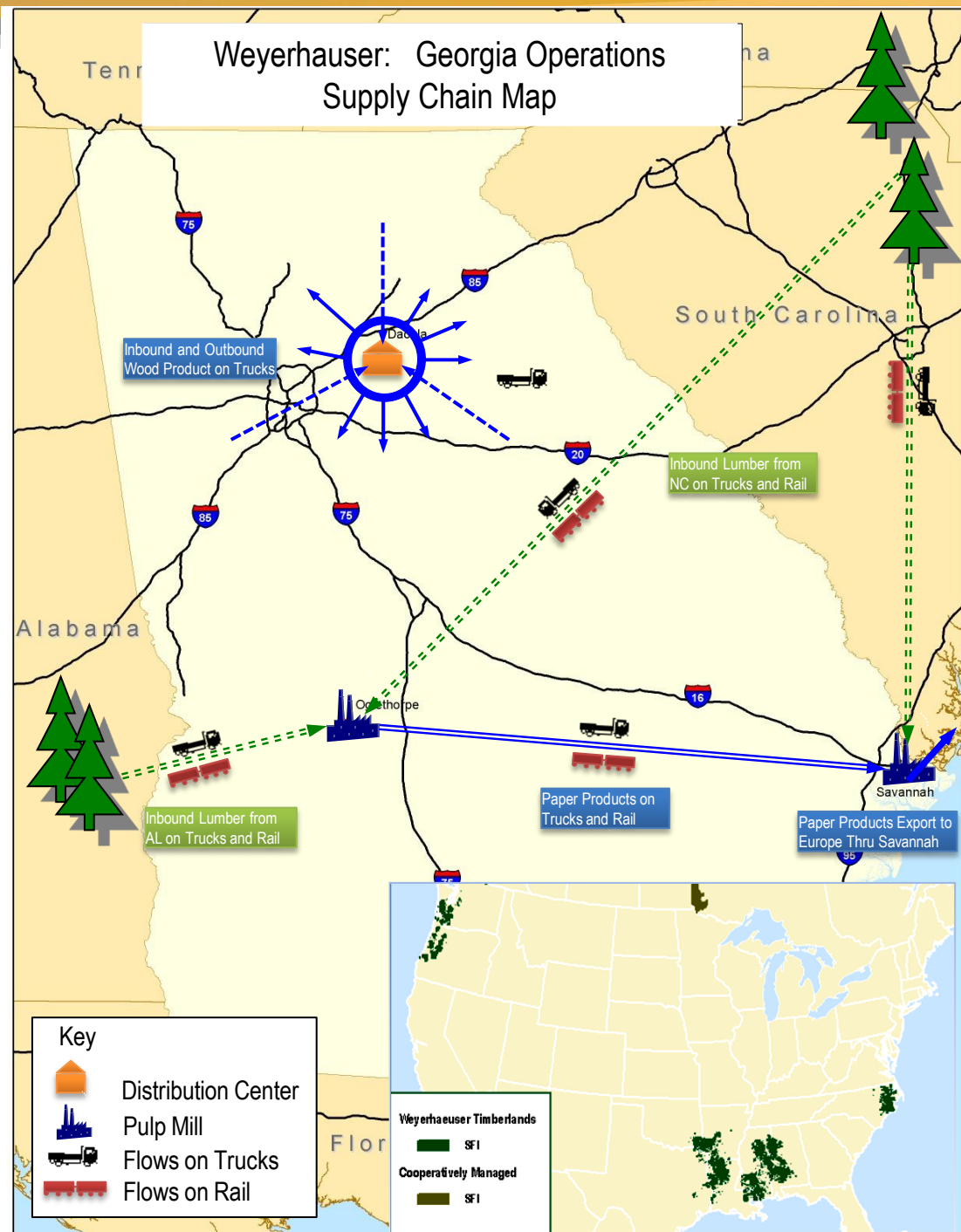
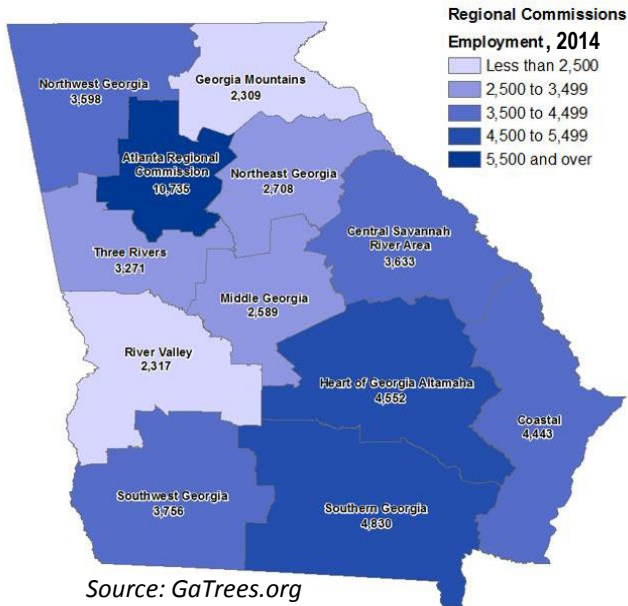
Economic Case Studies



Growth in Freight-Intensive Sectors

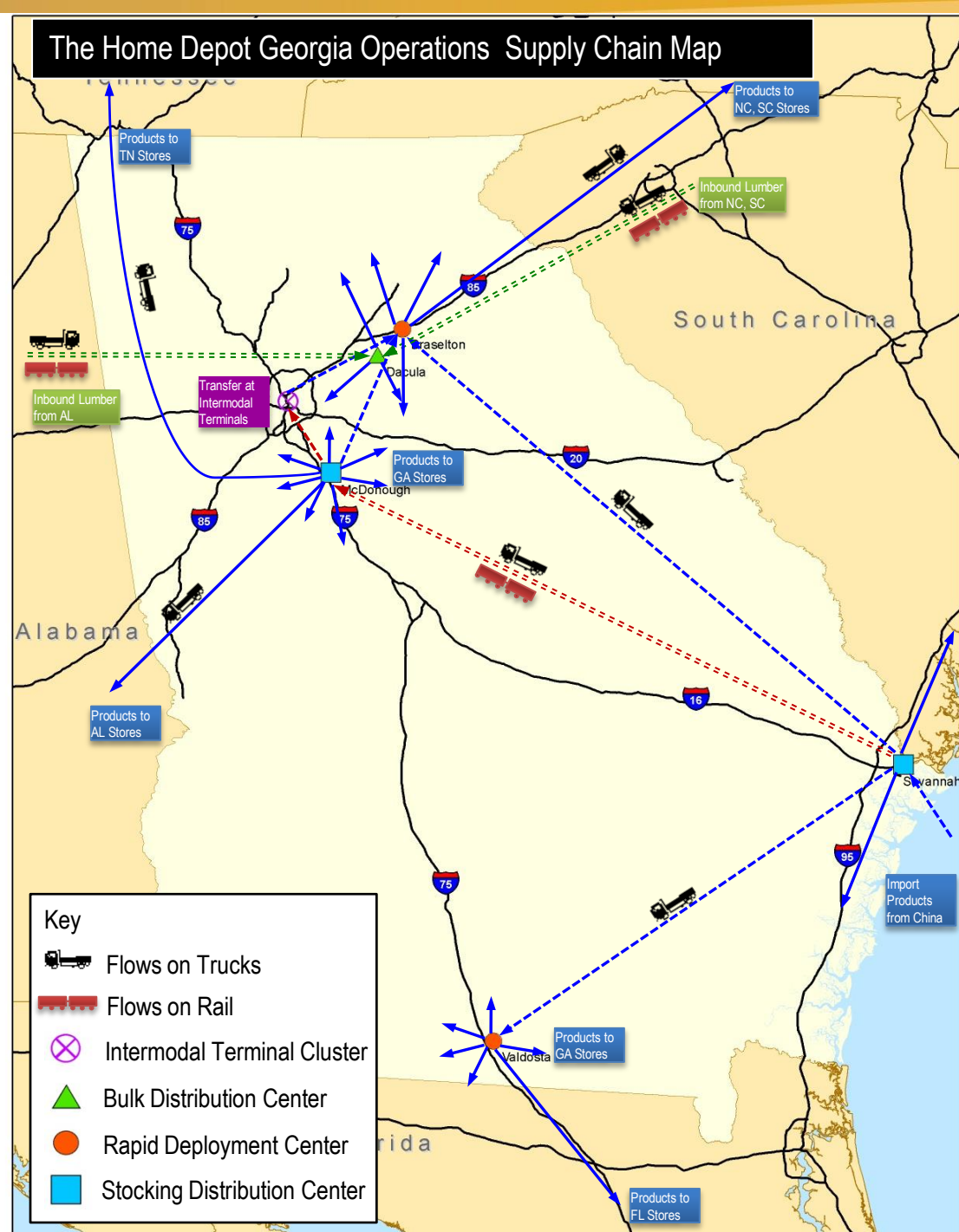
Case Study: Forest Products

- Annual value to Georgia's economy: \$28.7 Bil. (2014)
- 25% of State's total manufacturing output



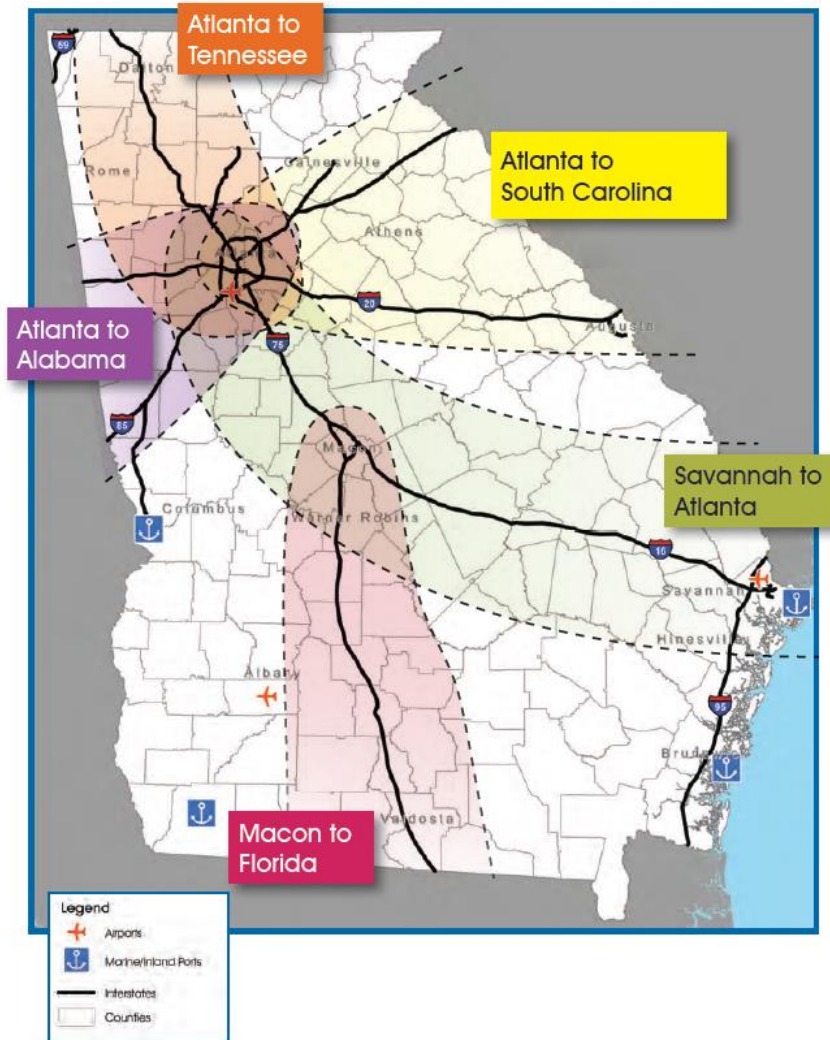
Case Study: Retail

- The Home Depot has stores in U.S., Canada and Mexico
- Imports 20% of product through Port of Savannah
- Rapid Deployment & Stocking Centers supply retail stores in Southeast
- Bulk Distribution Center
 - » lumber & building materials for retail stores



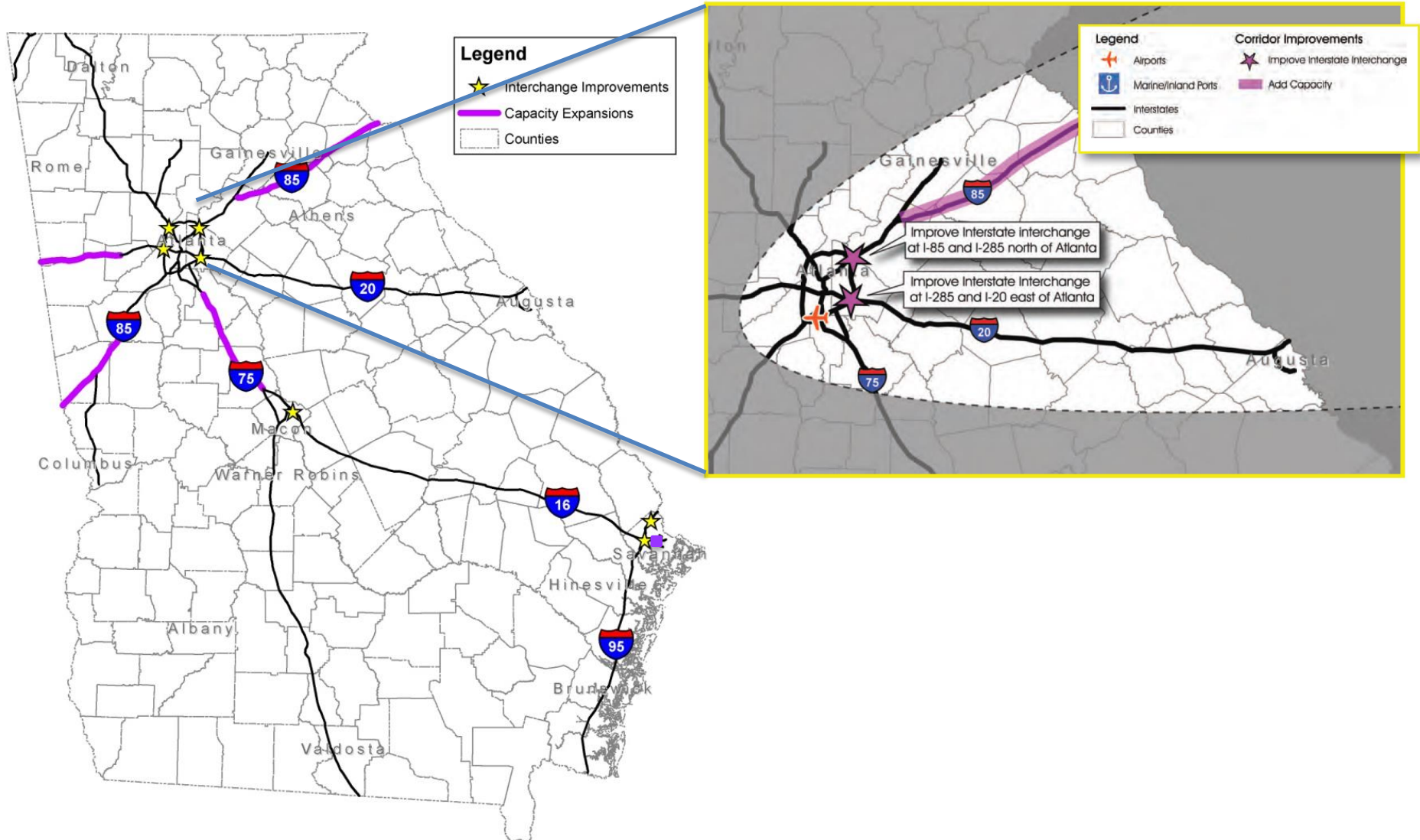
Georgia's Freight & Logistics Plan: *Highway Strategy*

Strategic Highway Corridors



- Select Long-Haul Interstate Capacity Expansions
- Improve Key Interstate Interchanges

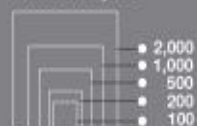
Georgia's Freight & Logistics Plan: *Interstate Strategy*



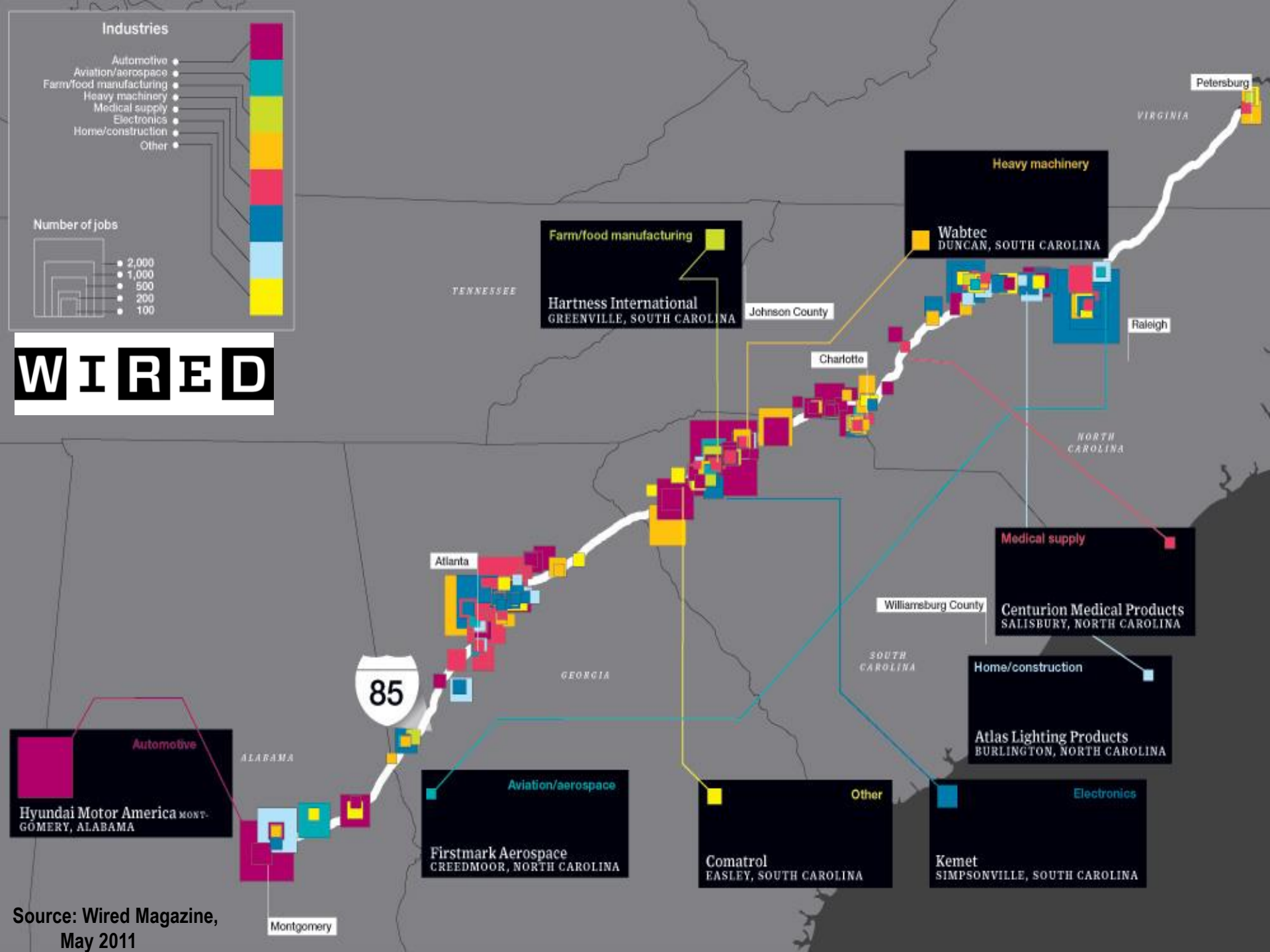
Industries

- Automotive
- Aviation/aerospace
- Farm/food manufacturing
- Heavy machinery
- Medical supply
- Electronics
- Home/construction
- Other

Number of jobs

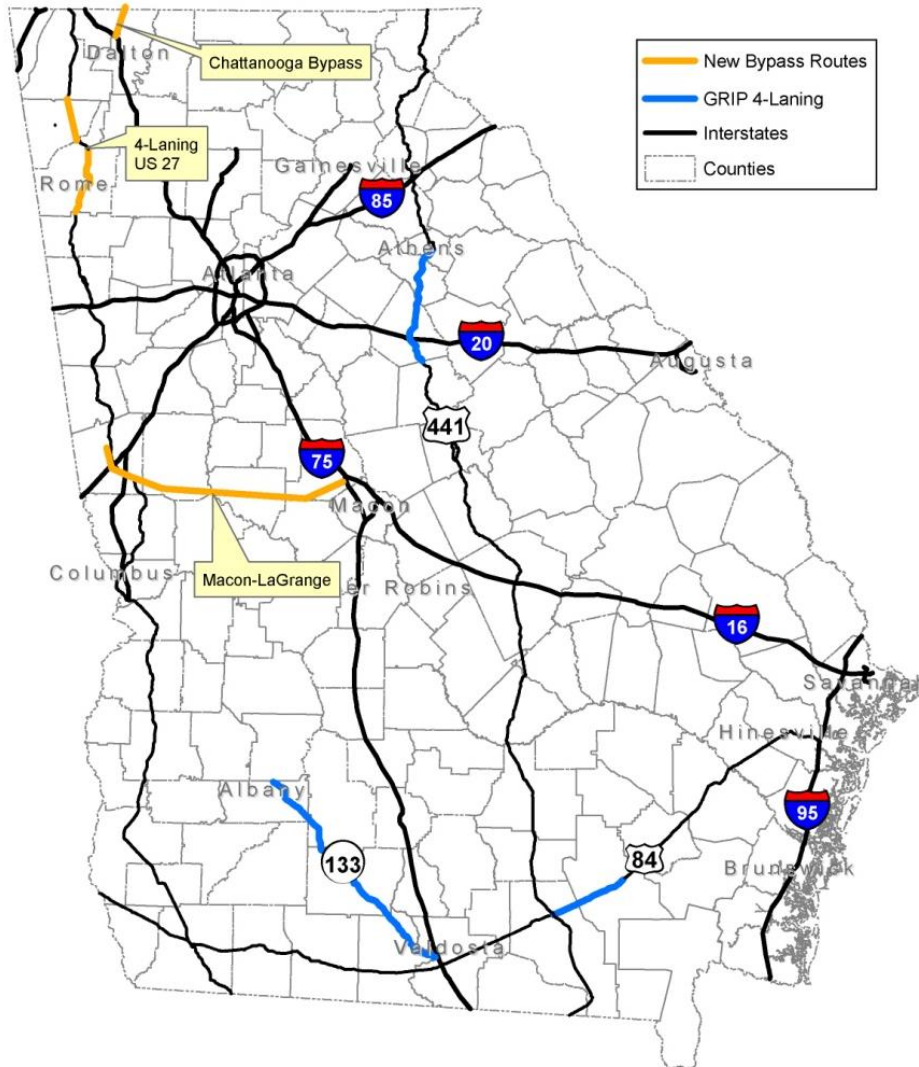


WIRED



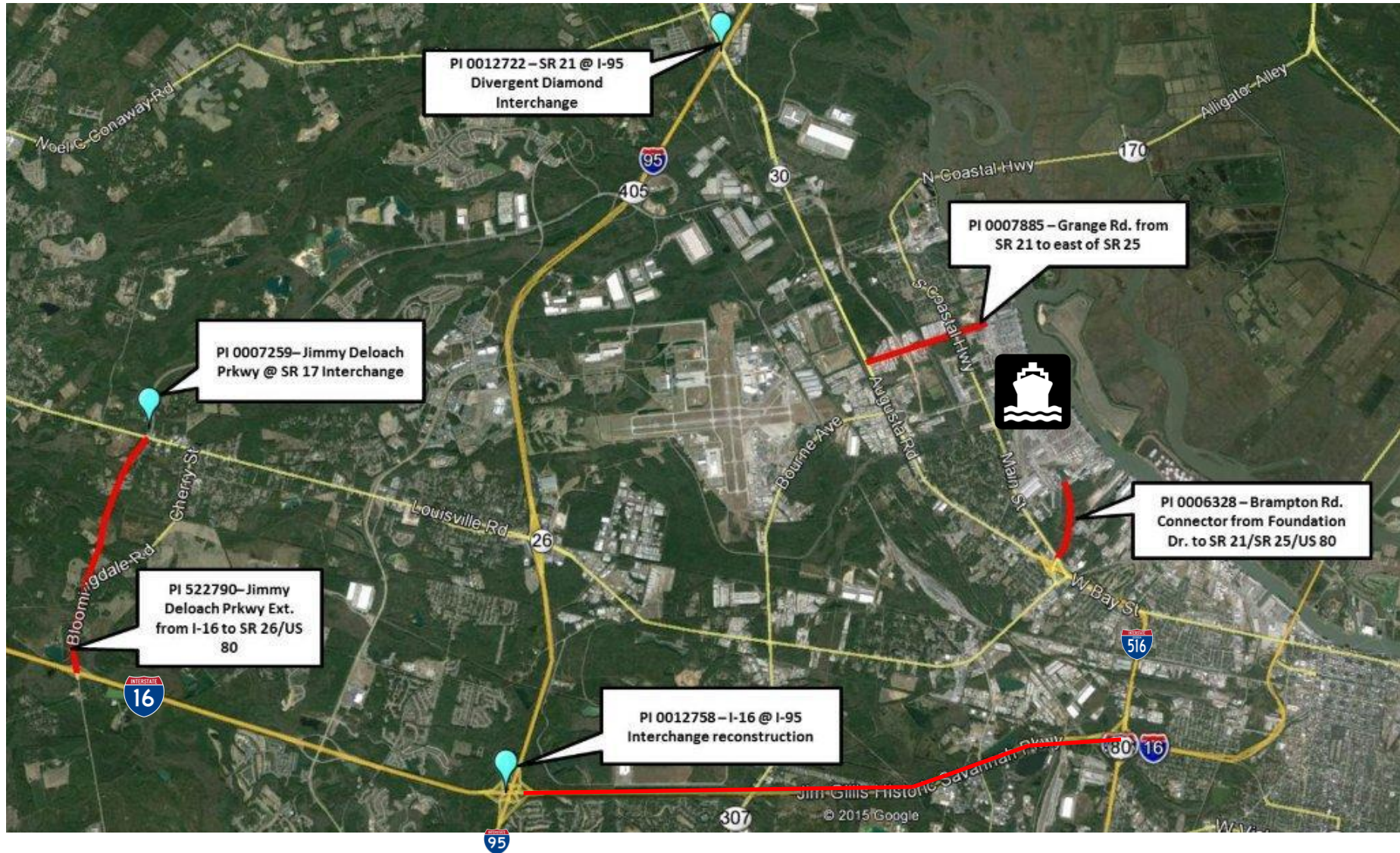
Source: Wired Magazine, May 2011

Georgia's Freight & Logistics Plan: *Non-Interstate Strategy*



- Improve “bypasses” (alternates)
- Improve select rural & small urban corridors
 - Rural 4-laning
 - Safety improvements
- Last-mile connectors
 - State Route 6 “truck-friendly” lane (metro Atlanta)
 - In/Out of Savannah Port

“Last-Mile” Investments to Port of Savannah



Georgia's Freight & Logistics Plan: *Marine Strategy*

- Deepening the Port of Savannah is the top freight priority
- Developing the Jasper Ocean Terminal is important in the longer-term

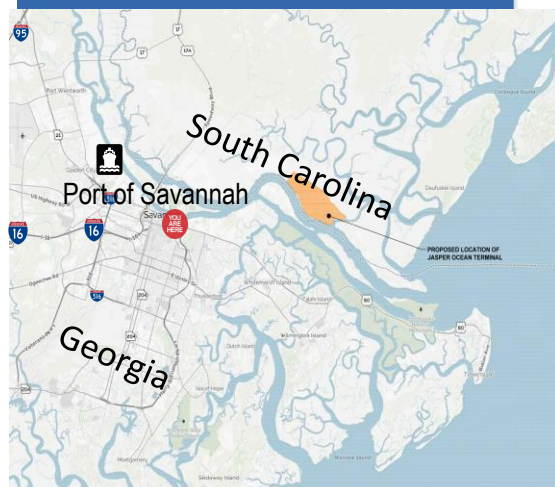


Jasper Ocean Terminal

www.jasperoceanterminaleis.com

Jasper Ocean Terminal Project EIS

Charleston District and Savannah District



- ▶ Home
- ▶ Proposed Project
- ▶ Document Library
- ▶ NEPA Process
- ▶ Public Involvement
- ▶ Public Comment
- ▶ Mailing List Signup

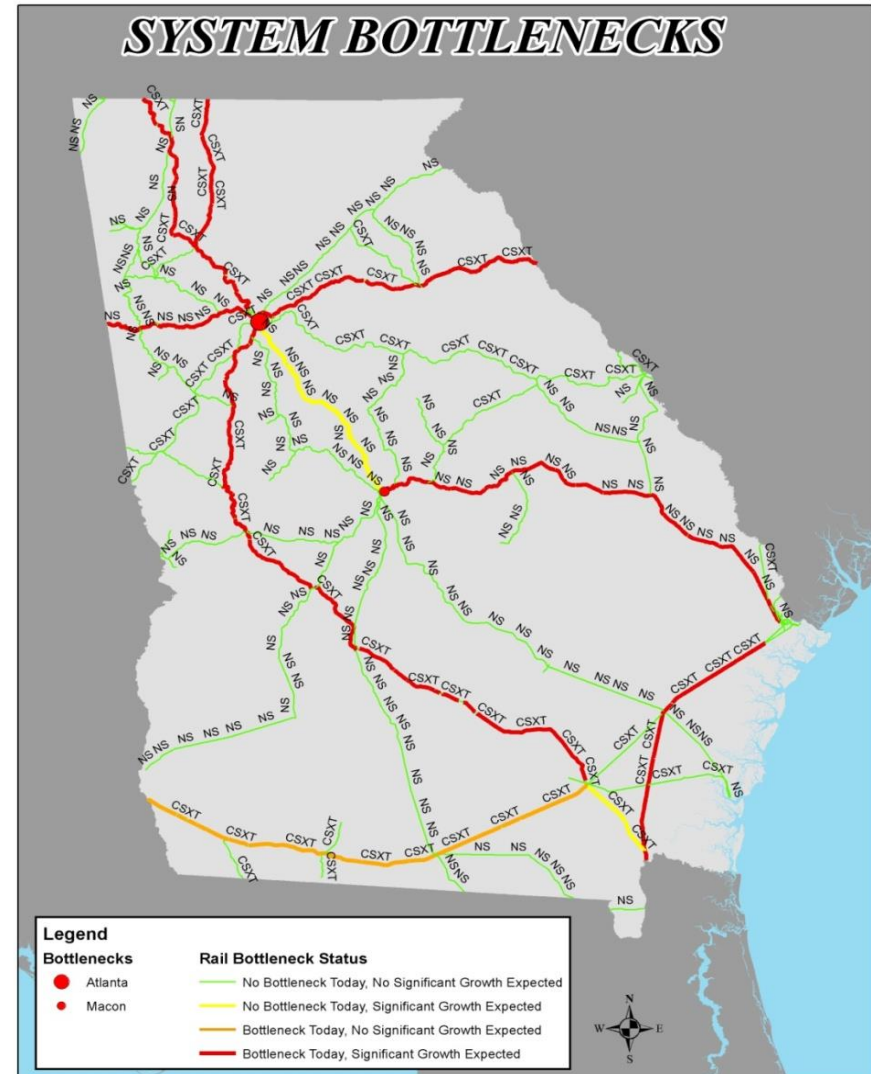
Environmental Impact Statement Terminal Project, Jasper County

The U.S. Army Corps of Engineers (Corps), Charleston District, is preparing an Environmental Impact Statement (EIS) to assess the environmental effects associated with the construction and operation of the Jasper Ocean Terminal (JOT) in Jasper County, South Carolina. The JOT is a proposed state-of-the-art marine container terminal located on the Savannah River. According to the JOT Joint Venture, the terminal is expected to experience limitations and inefficiencies in the demand for containerized cargo within the terminal designed to accommodate 7 million Twenty-Foot Equivalent Units (TEU) equivalent to approximately 35-years of the forecast.

In accordance with the National Environmental Policy Act (NEPA), the Corps is preparing the EIS. The EIS will assess the environmental effects of the JOT and a range of reasonable project alternatives on waters of the United States pursuant to Section 10 of the Rivers and Harbors Act (RHA) and Section 404 of the Clean Water Act (CWA).

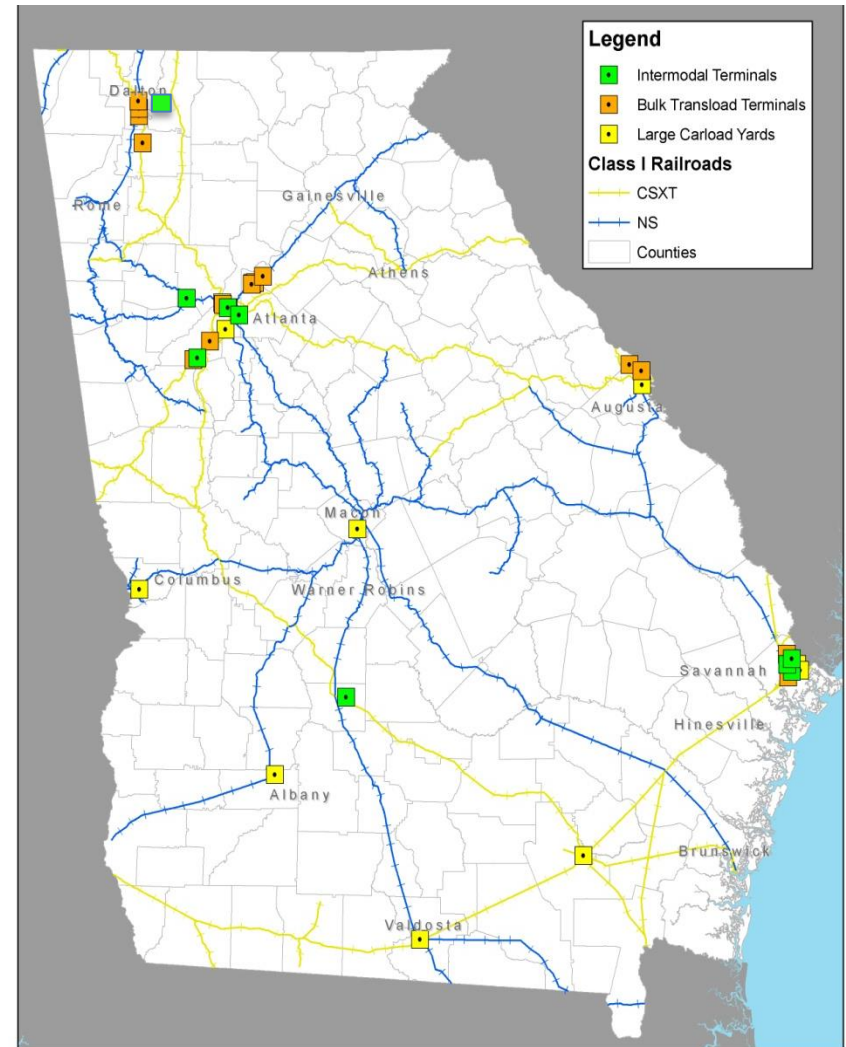
Georgia's Freight & Logistics Plan: *Rail Strategy*

- Expand line haul capacity
 - Double-tracking
 - Lengthen sidings
- Upgrade to 286k lb. weight limit
- Ensure vertical clearance for “double-stack” trains
(*i.e. bridge underpasses*)

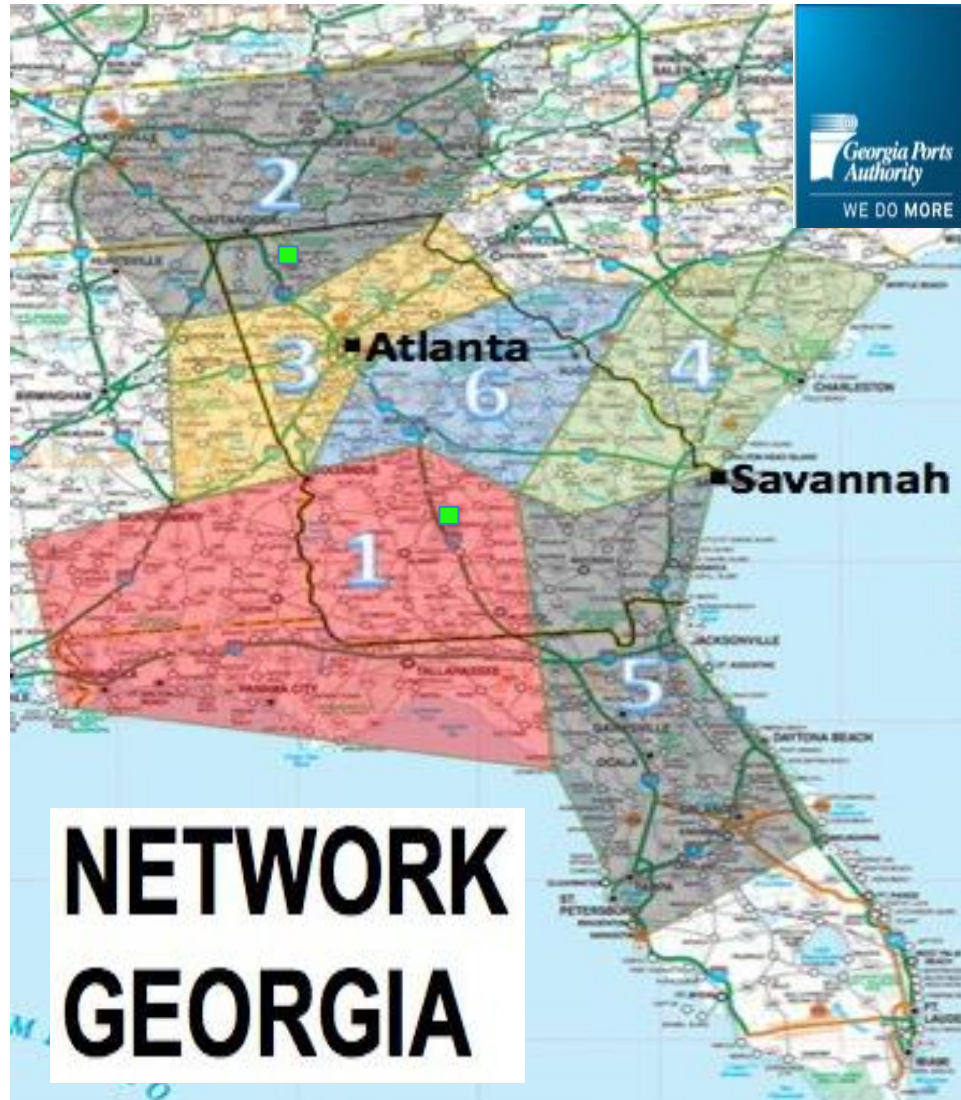
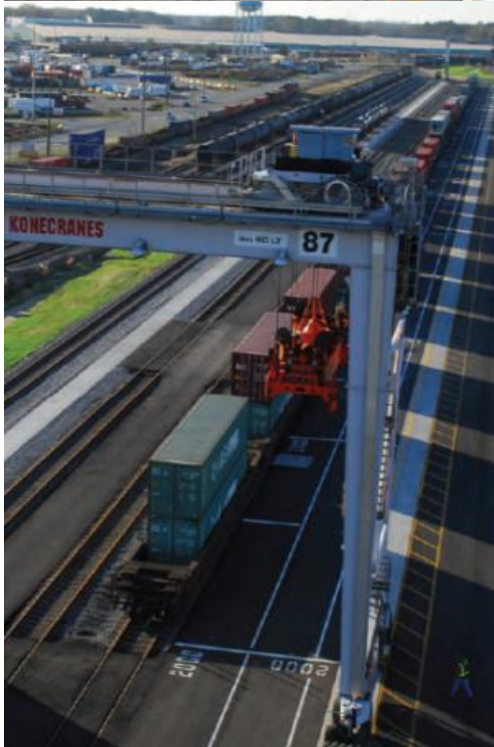


Georgia's Freight & Logistics Plan: *Rail Strategy* (cont'd.)

- Investigate expansion of bulk & carload rail terminals in metro Savannah & Atlanta
- Consider expansion of intermodal terminals in metro Savannah & Atlanta
 - Existing terminals in urban areas are constrained
 - Recent and planned expansions...
- Support continued development of newest intermodal facilities near in Murray County and Cordele
 - Pursue **“Network Georgia”**



Georgia's Freight & Logistics Plan: *Rail Strategy* (cont'd.)



Georgia's Freight & Logistics Plan: *Air Cargo Strategy*

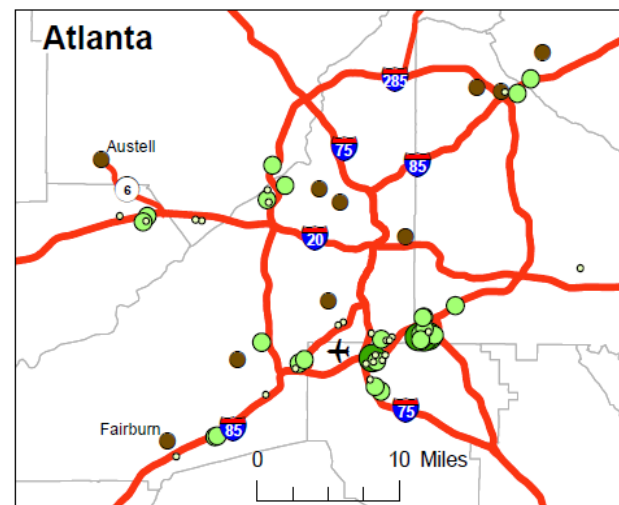
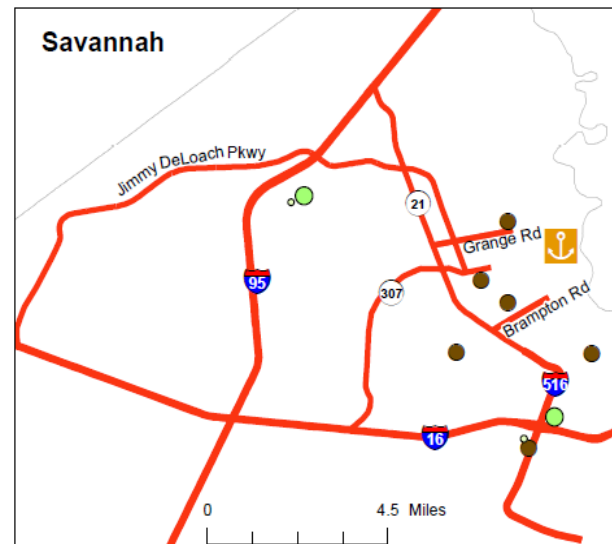
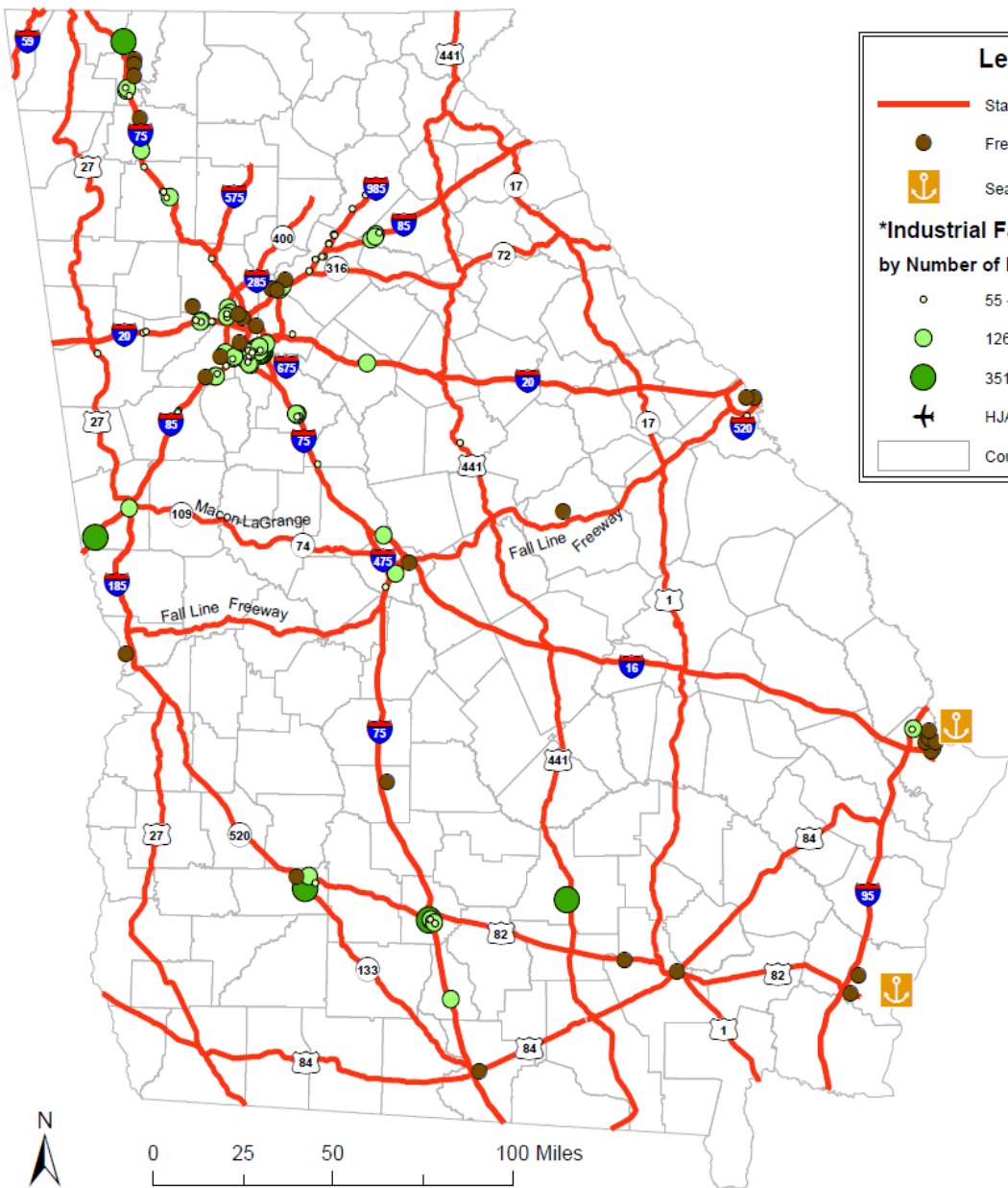
- Additional air cargo warehouse space at Hartsfield Jackson
 - 95% of Georgia's air cargo volume uses this airport
- Extend runway at Southwest Georgia Airport in Albany
 - UPS has a primary sort facility



Georgia Statewide Freight & Logistics Action Plan



Georgia's Statewide Designated Freight Corridors



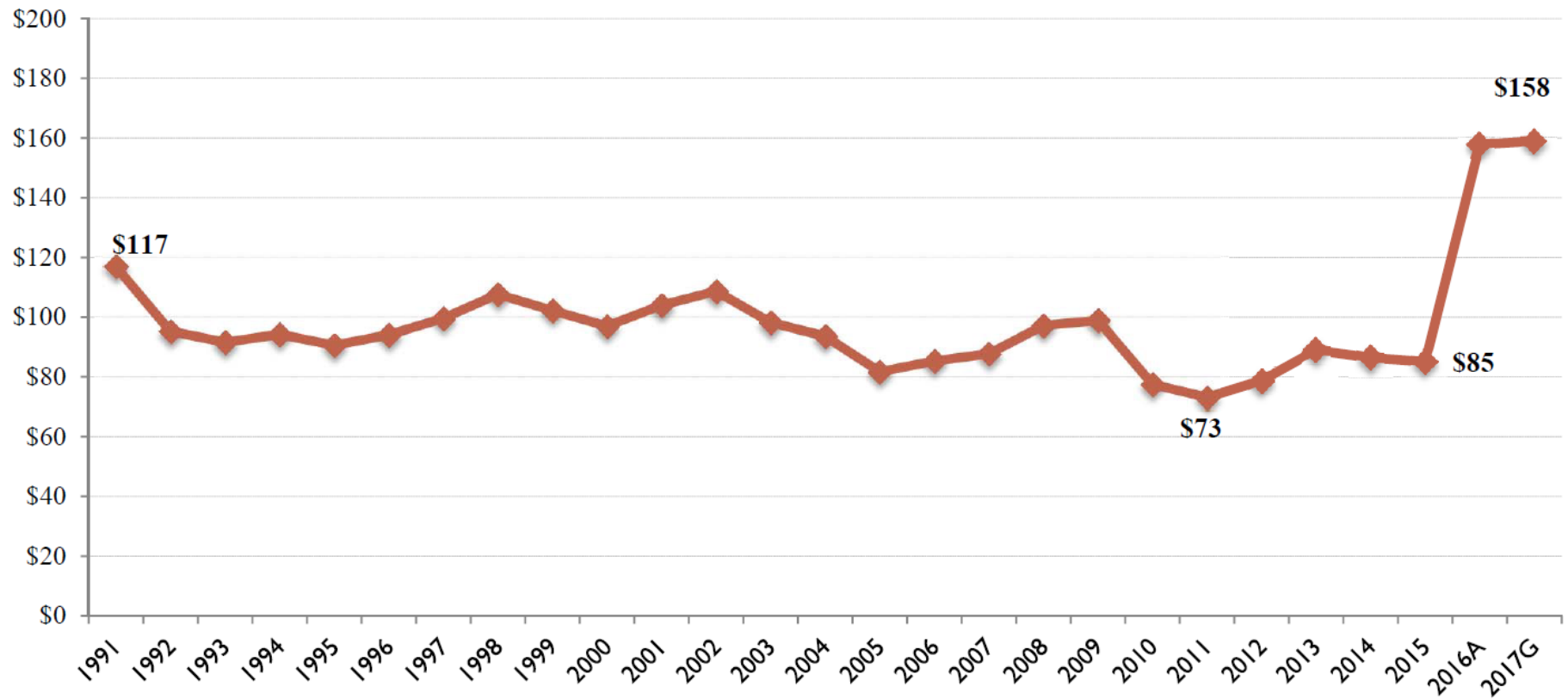
*Source: Georgia Statewide Freight & Logistics Plan, GDOT, 2012

Georgia Transportation Funding Act (TFA)



May, 2015

Georgia Per Capita Transportation Spending

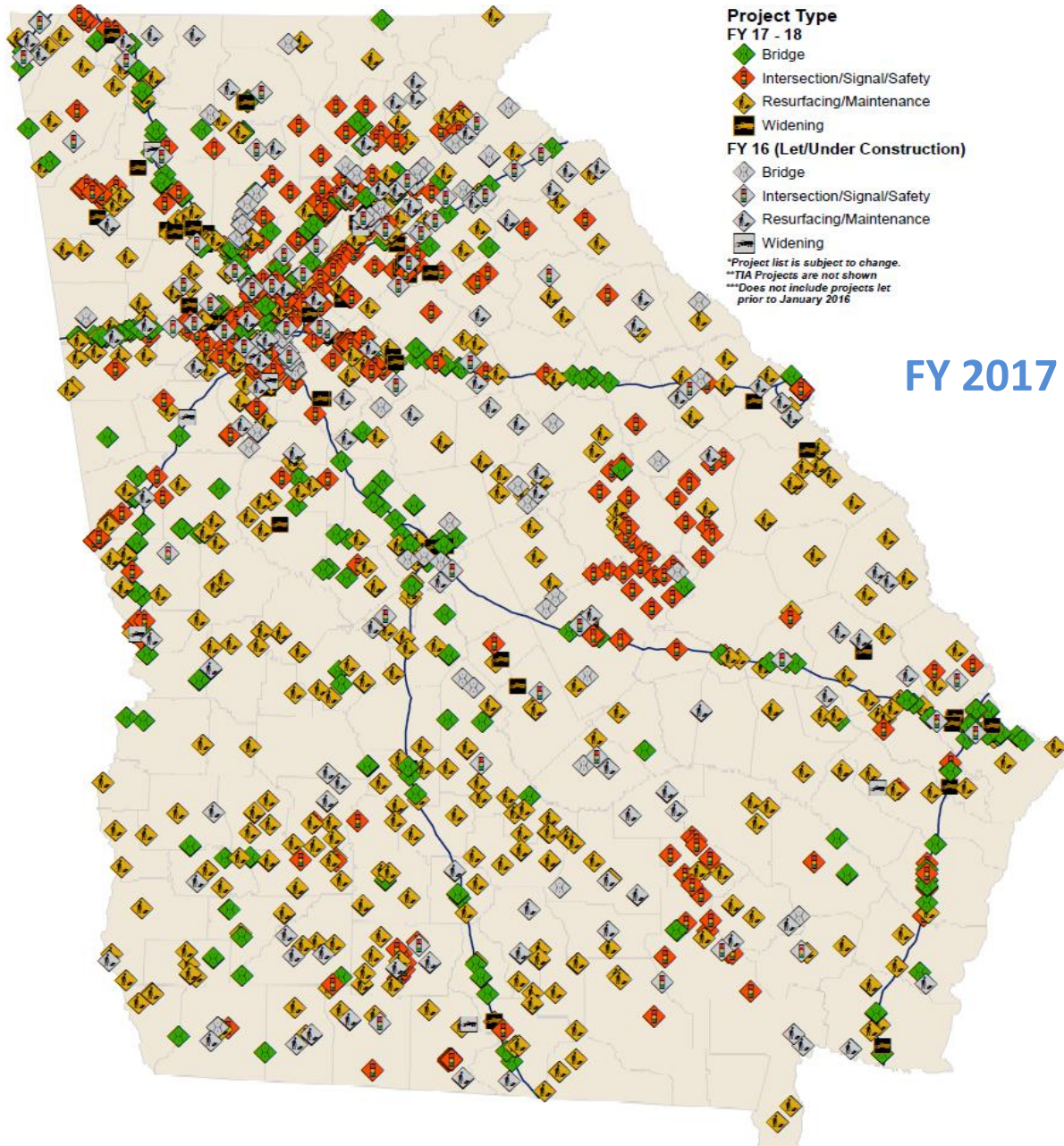


Georgia's *Transportation Funding Act* (TFA)



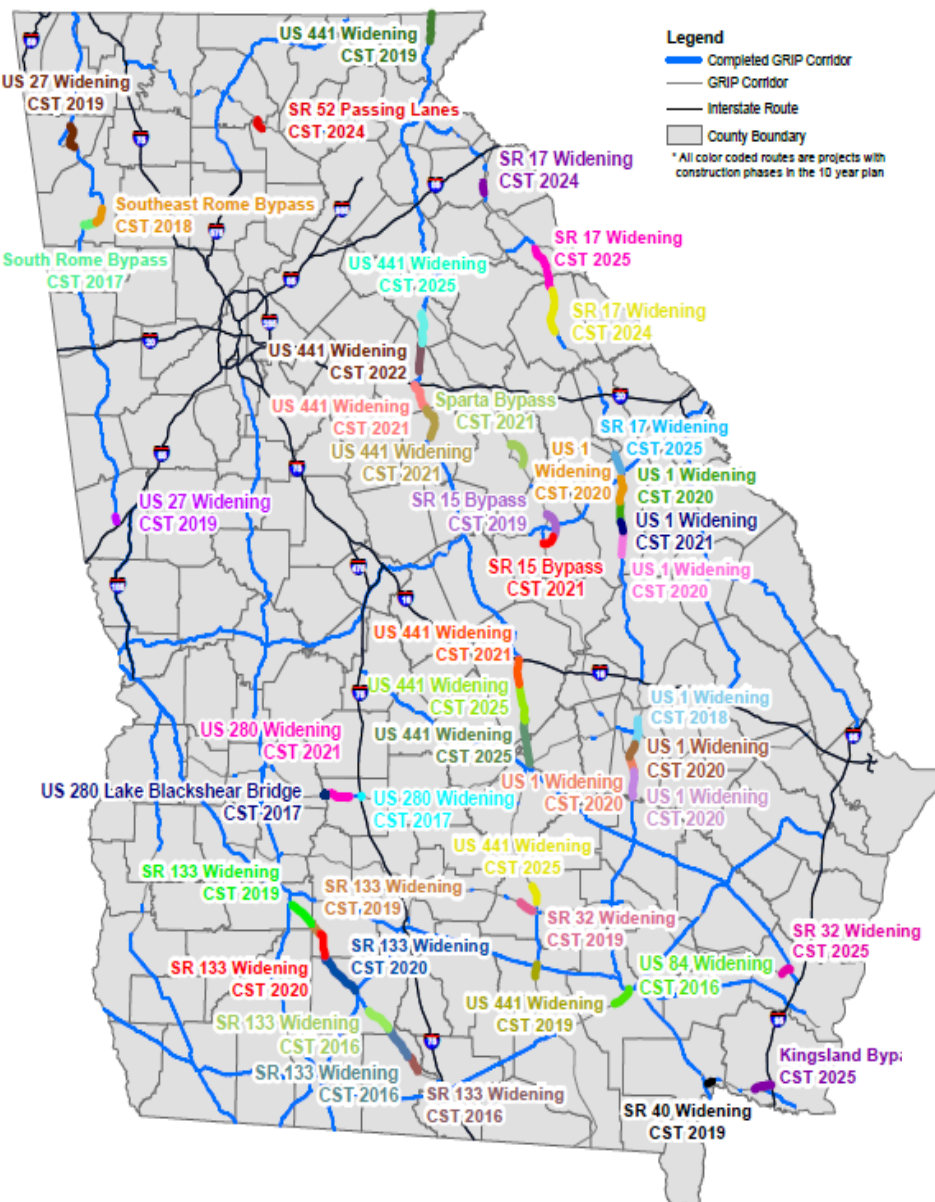
January, 2016

Georgia's Transportation Funding Act (TFA)

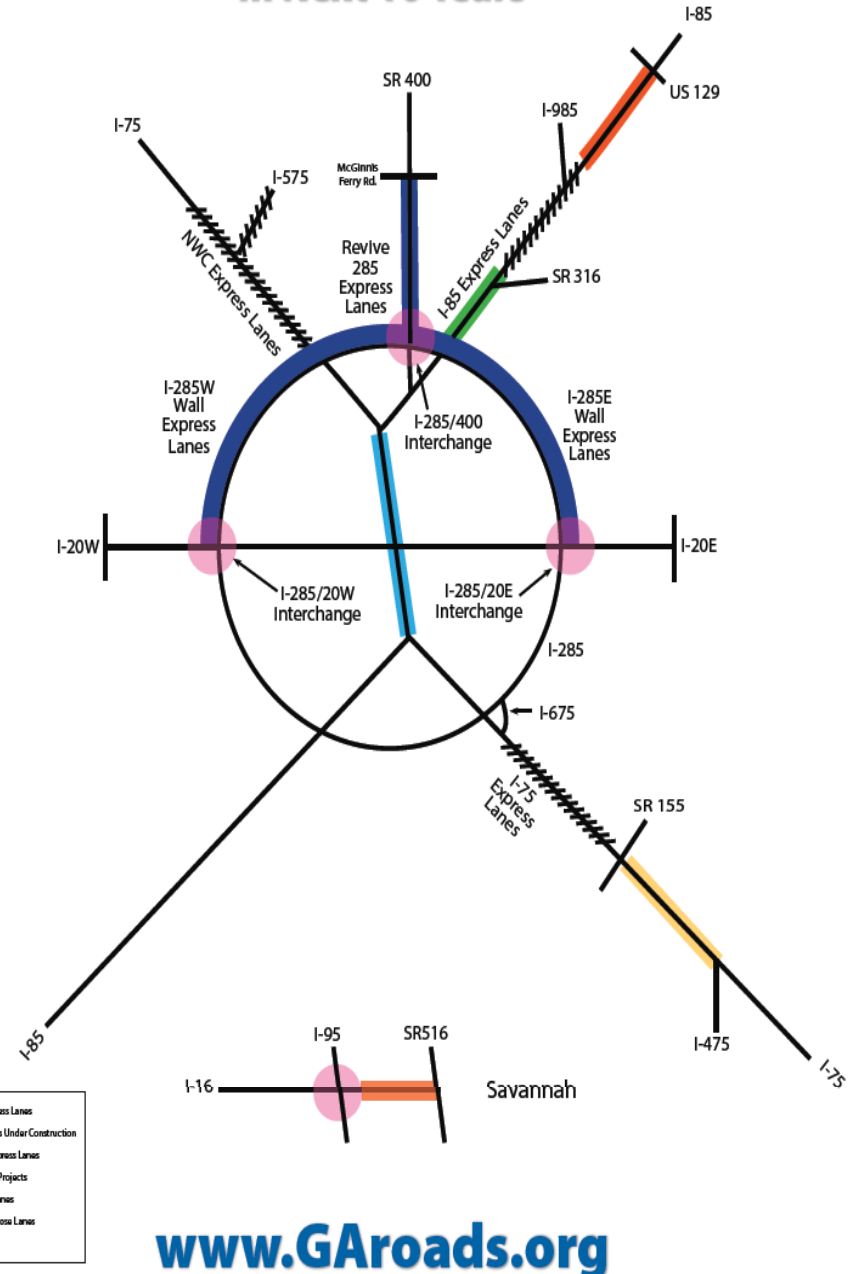


FY 2017 & 2018: \$2.9 B

Freight, Mobility, GRIP in 10 Year Plan (2016-2025)



Major Mobility Investments In Next 10 Years



Regional Resource Information

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REGISTRATION NOW OPEN FOR THE 2017 GEORGIA LOGISTICS SUMMIT



Centers of Innovation > Logistics

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LOGISTICS

Georgia companies rely on the state's logistics infrastructure and services to handle and haul more than \$900 billion of cargo each year.

This is because Georgia has unparalleled options for cost-effective intermodal transportation – ocean, truck, rail, and air – as well as reliable connections to suppliers and customers, and the technology and workforce that make efficient logistics possible.

The Center of Innovation for Logistics helps companies take advantage of the state's world-class logistics industry, so that they can improve supply chain efficiencies, support growth, and increase global competitiveness. The Center connects companies to the technical industry expertise, collaborative research, and partnerships that cargo-owning companies need.

The Center understands all segments of the logistics industry, and provides a truly impactful forum for companies to network, address logistics challenges, and share knowledge.



GEORGIA
LOGISTICS
SUMMIT

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JANNINE MILLER

Director
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REGIONAL FACT SHEETS

As logistics-enabled companies look to locate or expand their operations, the best practices in site selection include knowing the logistics infrastructure and services available in the area.

For companies considering Georgia, these Regional Fact Sheets provide logistics information about the state overall, as well as a deep dive into the logistics ecosystem of each region.

Included is a wide variety of data indicating how much cargo is moved in the area as well as what businesses in each region can rely on for their operational success – Georgia’s statewide network of nationally-ranked roadways, easy-to-access rail services, rapid connections to our coastal seaports, air cargo shipments through the world’s busiest airport, warehousing and distribution center facilities, and even locations of schools that provide logistics education courses.

Please click the links below to download a high-resolution .PDF file.

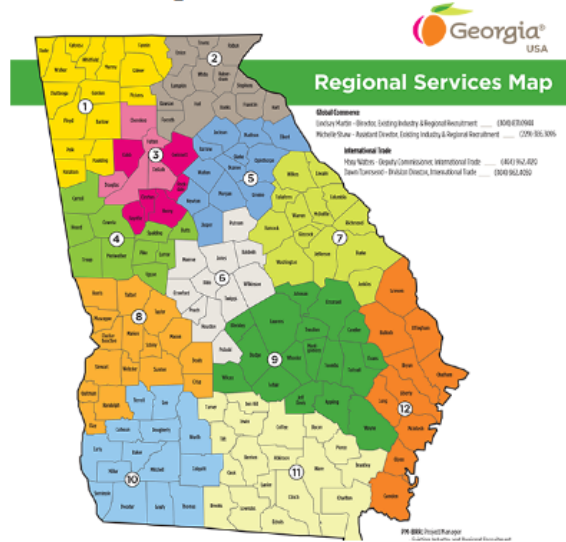
 [2016 Logistics Fact Sheet Region 1](#)

 [2016 Logistics Fact Sheet Region 2](#)

 [2016 Logistics Fact Sheet Region 3](#)

 [2016 Logistics Fact Sheet Region 4](#)

 [2016 Logistics Fact Sheet Region 5](#)



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UPCOMING EVENTS

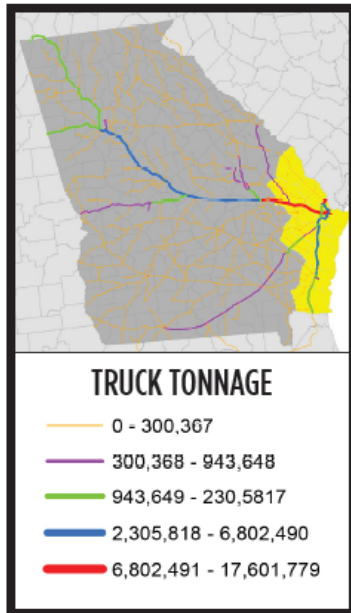
16 [2017 Georgia Logistics Summit](#)
May 16-17, 2017
Georgia World Congress Center

[More events](#)

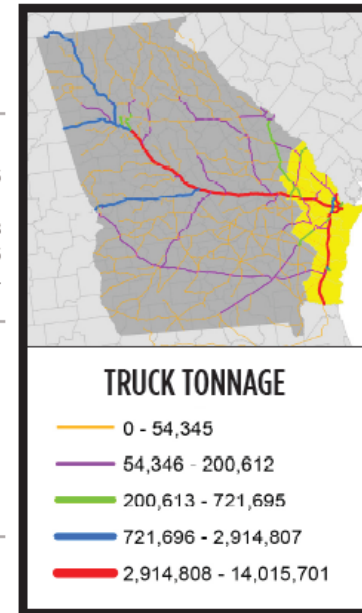
**REGION 12 - ROAD FREIGHT**

BRYAN • BULLOCH • CAMDEN • CHATHAM • EFFINGHAM • GLYNN • LIBERTY • LONG • MCINTOSH • SCREVEN

TOTAL MILES OF ROADWAY
8,075

**TOP 5 COMMODITIES**
BY VALUE

2013 INBOUND		2013 OUTBOUND	
1) Motor Vehicles:	\$4,762,465,733	1) Motor Vehicles:	\$9,024,453,045
2) Dressed Poultry, Frozen:	\$3,891,590,035	2) Motor Vehicle Parts or Accessories:	\$3,393,001,391
3) Petroleum Refining Products:	\$2,737,235,195	3) Petroleum Refining Products:	\$2,373,576,888
4) Paper:	\$2,544,412,030	4) Womens or Childrens Clothing:	\$2,029,149,095
5) Plastic Mater or Synth Fibers:	\$1,851,309,803	5) Constr Machinery or Equipment:	\$1,814,110,404
2020 PROJECTED INBOUND		2020 PROJECTED OUTBOUND	
1) Live Poultry:	\$3,358,641,949	1) Petroleum Refining Products:	\$5,102,566,243
2) Motor Vehicles:	\$2,883,270,854	2) Processed Poultry or Eggs:	\$2,638,518,080
3) Petroleum Refining Products:	\$1,100,935,914	3) Live Poultry:	\$2,438,054,890
4) Processed Poultry or Eggs:	\$822,178,374	4) Dressed Poultry, Fresh:	\$2,007,057,459
5) Motor Vehicle Parts or Accessories:	\$709,753,166	5) Dressed Poultry, Frozen:	\$1,673,001,584

**INBOUND TRUCK FREIGHT**

TRUCK INBOUND TONS: 27,649,143
 TRUCK INBOUND VOLUME: 2,290,792
 TRUCK INBOUND VALUE: \$48,294,436,060

OUTBOUND TRUCK FREIGHT

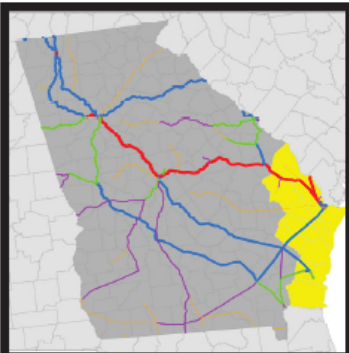
TRUCK OUTBOUND TONS: 22,740,169
 TRUCK OUTBOUND VOLUME: 2,330,649
 TRUCK OUTBOUND VALUE: \$69,946,388,679

Data source: IHS 2013. Inbound road data reflects North American freight moving into the State of Georgia.
 Outbound road data reflects North American freight moving out of the State of Georgia.



REGION 12 - RAIL FREIGHT

BRYAN • BULLOCH • CAMDEN • CHATHAM • EFFINGHAM • GLYNN • LIBERTY • LONG • MCINTOSH • SCREVEN



RAIL TONNAGE



TOP 5 COMMODITIES

BY VALUE

2013 INBOUND

1) Fak Shipments:	\$16,808,798,509
2) Motor Vehicles:	\$2,982,955,107
3) Gum or Wood Chemicals:	\$1,400,671,155
4) Fiber, Paper or Pulpboard	\$1,142,945,706
5) Soybean Oil or By-Products:	\$799,625,740

2013 OUTBOUND

1) Fak Shipments:	\$15,459,064,692
2) Electrical Transformers:	\$661,909,846
3) Misc. Industrial Organic Chemicals:	\$584,421,969
4) Chemical Preparations, NEC:	\$506,936,085
5) Misc. Indus Inorganic Chemicals:	\$494,793,018

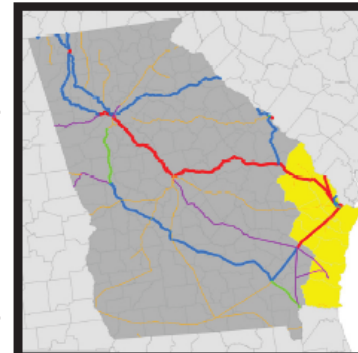
INBOUND RAIL FREIGHT

RAILCAR INBOUND TONS:	22,268,431
RAILCAR INBOUND VOLUME:	491,667
RAILCAR INBOUND VALUE:	\$29,397,093,130

OUTBOUND RAIL FREIGHT

RAILCAR OUTBOUND TONS:	7,701,013
RAILCAR OUTBOUND VOLUME:	319,106
RAILCAR OUTBOUND VALUE:	\$21,248,460

OVER 29,969,444 TONS OF PRODUCT ARE MOVED THROUGH REGION 12 VIA RAIL,
THE EQUIVALENT TO TAKING 1,026,351 TRUCKS OFF THE ROAD



RAIL TONNAGE



Data source: IHS 2013. Inbound rail data reflects North American freight moving into the State of Georgia.
Outbound rail data reflects North American freight moving out of the State of Georgia.



REGION 12 - OCEAN FREIGHT

TOP 5 COMMODITIES BY TEU-CONTAINER VOLUME

INBOUND		OUTBOUND	
1) Gypsum; Anhydrite; Plasters:	197,937	1) Wood Sawn or Chipped Length:	61,271
2) Pebbles, Gravel, Etc:	89,374	2) Miscellaneous Car:	45,634
3) Palm Oil & Its Fractions:	55,458	3) Packets of Wood; Pallets of Wood, Etc:	33,119
4) Containers For One or More Modes of Transport:	43,634	4) Preparations Used in Animal Feeding:	24,656
5) Sulfuric Acid; Oleum:	42,759	5) Cane or Beet Sugar & Chemically Pure Sucrose, Sold Form:	22,802

INBOUND OCEAN FREIGHT

OCEAN IMPORT TONS: 792,137
OCEAN IMPORT VOLUME: 27,018

OUTBOUND OCEAN FREIGHT

OCEAN EXPORT TONS: 336,930
OCEAN EXPORT VOLUME: 16,690

1 CONTAINER FLOWS BETWEEN THE PORT AND REGION 12 EVERY 8.6 MINUTES

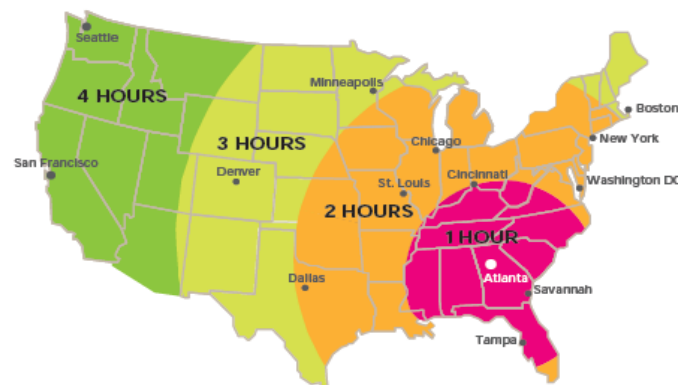


GEORGIA AIR CARGO

HARTSFIELD-JACKSON ATLANTA INTERNATIONAL AIRPORT

- ATL handles 98% of the State's annual air freight volume
- World's busiest passenger airport, with 2,500 arrivals and departures and 250,000 passengers per day
- Over 80% of U.S. consumers are within a 2 hour flight time from Atlanta
- 10th largest airport in the U.S. for cargo, and 31st in the world
- Is the only air cargo perishable complex of its size in the Southeast
- Foreign Trade Zone #26 is directly connected to the airport, and is a U.S. Fish and Wildlife port of entry

AIR TRANSIT TIMES





REGION 12 - LOGISTICS INDUSTRY

LOGISTICS PROVIDERS

OF PROVIDERS: 438
TOTAL PROVIDER EMPLOYMENT: 10,804
PROVIDER SALES TOTAL: \$1,806,630,000

LOGISTICS USERS

LOGISTICS USER TOTAL: 2,031
LOGISTICS USER EMPLOYMENT: 39,619
LOGISTICS USER SALES: \$15,887,723,000

REGION 12 - EDUCATION

- Georgia's statewide network of two- and four-year colleges and universities respond to meet the rapidly changing workforce demands in the logistics industry
- The Technical College System of Georgia has a targeted fast-track certification program, as well as a number of Associate of Applied Science degree programs in logistics and supply chain management
- More than 100 logistics-related courses, certificates, and degree programs are available across Georgia

TOP THREE SCHOOLS WITH LOGISTICS PROGRAMS

Georgia Southern University
Savannah Technical College
Geechee Technical College

REGION 12 - CONTACT

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