Welcome to Savannah
Georgia’s Freight Movement: Mode Share*

- 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
*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
- CSX Railroad
- Delta Airlines
- Georgia Motor Trucking Assoc.
- The Home Depot
- Norfolk Southern Railroad
- Southern Freight
- UPS
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?

Source: 2007 TRANSEARCH data.
Statewide Perspective:

Trucks Stopped per Square Mile

Legend

- Interstates

Number of Trucks Stopped Per Square Mile

- < 100
- 100 - 200
- 200 - 300
- 300 - 500
- 500 - 1,000
- > 1,000

Source: FHWA/ATRI Freight Performance Measurement ("FPM") Database
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”

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

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

For **Rail Intermodal**, the rail connection between Savannah Port & metro ATL is critical...  

**Rail Carload** freight is vital to Georgia’s bulk-oriented export industries (e.g. kaolin clay, agriculture/wood products...).
# Top U.S. “Freight Metros”

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

* "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.
# Air Cargo Gateways: Metro Atlanta’s Economic Potential

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

Economic Case Studies

Growth in Freight-Intensive Sectors

Source: economy.com
Case Study: Forest Products

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

Source: GaTrees.org, 2014
**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

- Select Long-Haul Interstate Capacity Expansions
- Improve Key Interstate Interchanges
Georgia’s Freight & Logistics Plan: Interstate Strategy
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

Environmental Impact Statement
Terminal Project, Jasper County

The U.S. Army Corps of Engineers (Corps), Charleston Environmental Impact Statement (EIS) to assess the environmental effects associated with the construction of Jasper Ocean Terminal (JOT) in Jasper County, South Carolina, between the Georgia Ports Authority (GPA) and the Port of Savannah. According to the JOT Joint Venture, the project is proposed to develop a state-of-the-art marine container terminal on the Savannah River. The EIS will address JOT and a range of reasonable project alternatives on waters of the United States pursuant to Section 403 of the Rivers and Harbors Act (RHA) and Section 404 of the Clean Water Act (CWA).

Request to Initiate NEPA
Determination to Prepare EIS
Public Scoping
Alternatives and Impact Analysis
Draft Environmental Impact Statement
Public Hearing / Public Comment Period
Final Environmental Impact Statement
Record of Decision (ROD)
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)*

Source: Interviews w/ Class 1 RRs, Transearch data, Team analysis
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

Legend
- Statewide Freight Corridor
- Freight Rail Yards
- Sea Port

*Industrial Facilities by Number of Parking Spaces:
- 55 - 125
- 126 - 350
- 351 - 1000

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

Revised: October, 2015
Georgia Transportation Funding Act (TFA)
Georgia Per Capita Transportation Spending

Source: Dr. Carolyn Bourdeaux, Georgia State Univ. “A Briefing On Georgia’s Budget: The Big Picture” 1-18-17
Georgia’s *Transportation Funding Act* (TFA)
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

Legend:
- Completed GRIP Corridor
- GRIP Corridor
- Interstate Route
- County Boundary

* All color-coded routes are projects with construction phases in the 10 year plan.

www.GARoads.org
Regional Resource Information
www.georgia-logistics.com

REGISTRATION NOW OPEN FOR THE
2017 GEORGIA LOGISTICS SUMMIT

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.
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
REGION 12 - ROAD FREIGHT
BRYAN • BULLOCK • CAMDEN • CHATHAM • EFFINGHAM • GLYNN • LIBERTY • LONG • MCINTOSH • SCREVEN

TOTAL MILES OF ROADWAY
8,075

TOP 5 COMMODITIES
BY VALUE

2013 INBOUND
1) Motor Vehicles: $4,762,465,733
2) Dressed Poultry, Frozen: $3,891,590,035
3) Petroleum Refining Products: $2,737,235,195
4) Paper: $2,544,412,030
5) Plastic Mter or Synth Fibers: $1,951,309,803

2013 OUTBOUND
1) Motor Vehicles: $9,024,453,045
2) Motor Vehicle Parts or Accessories: $3,385,001,391
3) Petroleum Refining Products: $2,375,576,888
4) Womens or Childrens Clothing: $2,029,149,095
5) Constr Machinery or Equipment: $1,814,110,404

2020 PROJECTED INBOUND
1) Live Poultry: $3,358,641,949
2) Motor Vehicles: $2,883,270,854
3) Petroleum Refining Products: $1,100,935,914
4) Processed Poultry or Eggs: $822,178,374
5) Motor Vehicle Parts or Accessories: $709,753,166

2020 PROJECTED OUTBOUND
1) Petroleum Refining Products: $5,102,566,243
2) Processed Poultry or Eggs: $2,638,518,080
3) Live Poultry: $2,438,054,890
4) Dressed Poultry, Fresh: $2,007,057,159
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: $69,048,388,679

**REGION 12 - RAIL FREIGHT**

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

---

**TOP 5 COMMODITIES BY VALUE**

<table>
<thead>
<tr>
<th>2013 INBOUND</th>
<th>2013 OUTBOUND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Fek Shipments:</td>
<td>1) Fek Shipments:</td>
</tr>
<tr>
<td>$16,808,798,509</td>
<td>$15,459,064,692</td>
</tr>
<tr>
<td>2) Motor Vehicles:</td>
<td>2) Electrical Transformers:</td>
</tr>
<tr>
<td>$2,982,955,107</td>
<td>$661,909,846</td>
</tr>
<tr>
<td>3) Gum or Wood Chemicals:</td>
<td>3) Misc. Industrial Organic Chemicals:</td>
</tr>
<tr>
<td>$1,400,671,155</td>
<td>$584,421,969</td>
</tr>
<tr>
<td>4) Fiber, Paper or Pulpboard</td>
<td>4) Chemical Preparations, NEC:</td>
</tr>
<tr>
<td>$1,142,945,706</td>
<td>$506,936,085</td>
</tr>
<tr>
<td>5) Soybean Oil or By-Products:</td>
<td>5) Misc. Indus Inorganic Chemicals:</td>
</tr>
<tr>
<td>$799,625,740</td>
<td>$494,793,018</td>
</tr>
</tbody>
</table>

---

**RAIL TONNAGE**

<table>
<thead>
<tr>
<th></th>
<th>2013 INBOUND</th>
<th>2013 OUTBOUND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Fek Shipments:</td>
<td>1) Fek Shipments:</td>
<td></td>
</tr>
<tr>
<td>$16,808,798,509</td>
<td>$15,459,064,692</td>
<td></td>
</tr>
<tr>
<td>2) Motor Vehicles:</td>
<td>2) Electrical Transformers:</td>
<td></td>
</tr>
<tr>
<td>$2,982,955,107</td>
<td>$661,909,846</td>
<td></td>
</tr>
<tr>
<td>3) Gum or Wood Chemicals:</td>
<td>3) Misc. Industrial Organic Chemicals:</td>
<td></td>
</tr>
<tr>
<td>$1,400,671,155</td>
<td>$584,421,969</td>
<td></td>
</tr>
<tr>
<td>4) Fiber, Paper or Pulpboard</td>
<td>4) Chemical Preparations, NEC:</td>
<td></td>
</tr>
<tr>
<td>$1,142,945,706</td>
<td>$506,936,085</td>
<td></td>
</tr>
<tr>
<td>5) Soybean Oil or By-Products:</td>
<td>5) Misc. Indus Inorganic Chemicals:</td>
<td></td>
</tr>
<tr>
<td>$799,625,740</td>
<td>$494,793,018</td>
<td></td>
</tr>
</tbody>
</table>

---

**RAIL TONNAGE**

<table>
<thead>
<tr>
<th></th>
<th>2013 INBOUND</th>
<th>2013 OUTBOUND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Fek Shipments:</td>
<td>1) Fek Shipments:</td>
<td></td>
</tr>
<tr>
<td>$16,808,798,509</td>
<td>$15,459,064,692</td>
<td></td>
</tr>
<tr>
<td>2) Motor Vehicles:</td>
<td>2) Electrical Transformers:</td>
<td></td>
</tr>
<tr>
<td>$2,982,955,107</td>
<td>$661,909,846</td>
<td></td>
</tr>
<tr>
<td>3) Gum or Wood Chemicals:</td>
<td>3) Misc. Industrial Organic Chemicals:</td>
<td></td>
</tr>
<tr>
<td>$1,400,671,155</td>
<td>$584,421,969</td>
<td></td>
</tr>
<tr>
<td>4) Fiber, Paper or Pulpboard</td>
<td>4) Chemical Preparations, NEC:</td>
<td></td>
</tr>
<tr>
<td>$1,142,945,706</td>
<td>$506,936,085</td>
<td></td>
</tr>
<tr>
<td>5) Soybean Oil or By-Products:</td>
<td>5) Misc. Indus Inorganic Chemicals:</td>
<td></td>
</tr>
<tr>
<td>$799,625,740</td>
<td>$494,793,018</td>
<td></td>
</tr>
</tbody>
</table>

---

**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**

---

REGION 12 - OCEAN FREIGHT

TOP 5 COMMODITIES
BY TEU-CONTAINER VOLUME

<table>
<thead>
<tr>
<th>INBOUND</th>
<th>OUTBOUND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Gypsum; Anhydrite; Plasters:</td>
<td>1) Wood Sewn or Chipped Length:</td>
</tr>
<tr>
<td>197,937</td>
<td>61,271</td>
</tr>
<tr>
<td>2) Pebbles, Gravel, Etc:</td>
<td>2) Miscellaneous Car:</td>
</tr>
<tr>
<td>89,374</td>
<td>45,634</td>
</tr>
<tr>
<td>3) Palm Oil &amp; Its Fractions:</td>
<td>3) Packets of Wood; Pellets of Wood, Etc:</td>
</tr>
<tr>
<td>55,458</td>
<td>33,119</td>
</tr>
<tr>
<td>4) Containers For One or More Modes of Transport:</td>
<td>4) Preparations Used in Animal Feeding:</td>
</tr>
<tr>
<td>43,634</td>
<td>24,656</td>
</tr>
<tr>
<td>5) Sulphuric Acid; Oleum:</td>
<td>5) Cane or Beet Sugar &amp; Chemically Pure Sucrose, Solid Form:</td>
</tr>
<tr>
<td>42,759</td>
<td></td>
</tr>
</tbody>
</table>

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

OUTBOUND OCEAN FREIGHT
OCEAN EXPORT TONS: 336,930
OCEAN EXPORT VOLUME: 16,680

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

- 1 HOUR
- 2 HOURS
- 3 HOURS
- 4 HOURS
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
Geasche Technical College

REGION 12 - CONTACT
Alyce Thornhill, Regional Project Manager - athornhill@georgia.org
Kathy Oxford, International Trade Manager - koxford@georgia.org

GEORGIA DEPARTMENT OF ECONOMIC DEVELOPMENT CONTACTS:
Brittany Holtzclaw, Director of Logistics, Energy, Agribusiness and Food Team - bholtzclaw@georgia.org
Mary Waters, Deputy Commissioner for International Trade - mwaters@georgia.org
Mary Ellen McClanahan, Director of Entrepreneur & Small Business - memclanahan@georgia.org
Jannine Miller, Director of the Center of Innovation for Logistics - jmiller@georgia.org
THANK YOU

Tom McQueen, AICP
GDOT Office of Planning
(404) 631-1785
tmcqueen@dot.ga.gov

www.dot.ga.gov/Freight