

GEORGIA'S LOGISTICS ECOSYSTEM

Georgia Freight and Logistics Commission
August 14, 2019

Center of Innovation for Logistics

Focused Industry Sectors

- Supply Chain Technology
- Logistics Support for Cargo Owners
- Workforce Development

Industry Support

- Connections to resources
- Customized analysis and insight
- Learning and networking opportunities



Georgia by the Numbers

8th largest state by population (10.4M)

9th largest state by GDP (\$601.1B in 2018)

FY 2018 Economic Development results:

Agribusiness/Food Processing

\$954M in investment – 2,300 jobs

Automotive

\$197M in investment – 1,200 jobs

Logistics/Distribution:

\$769M in investment – 6,000 jobs

Manufacturing: \$2.2B in investment – 6,600 jobs



7th Largest Importing State and the 11th Largest Exporting State in the US

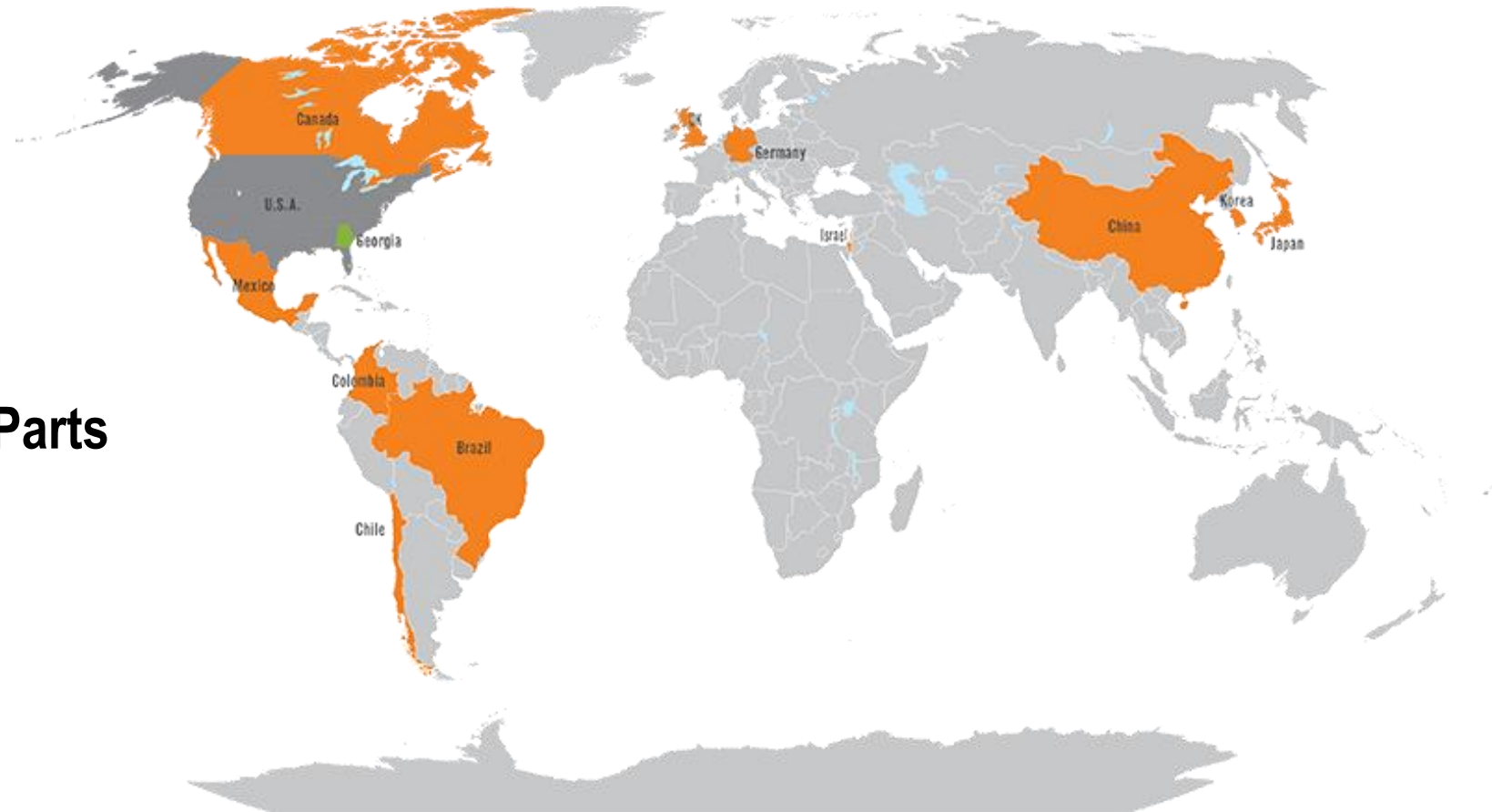
Total Trade with World
\$139.3 billion

Total Exports to World
\$40.5 billion

Total Exports to World

- 1. Civilian Aircraft, Engines & Parts**
- 2. Motor Vehicles**
- 3. Kraft Paper and Paperboard**
- 4. Chemical Woodpulp**
- 5. Turbojets**

GA has an international presence in 12 strategic markets



Georgia's Logistics Industry 2018

181K direct logistics industry jobs

15K establishments

\$60.7B in economic output

\$33.5B in state GDP

\$2.7B in state and local tax revenue

One in every 14 jobs in GA (**362K**) owes its existence to the state's logistics industry



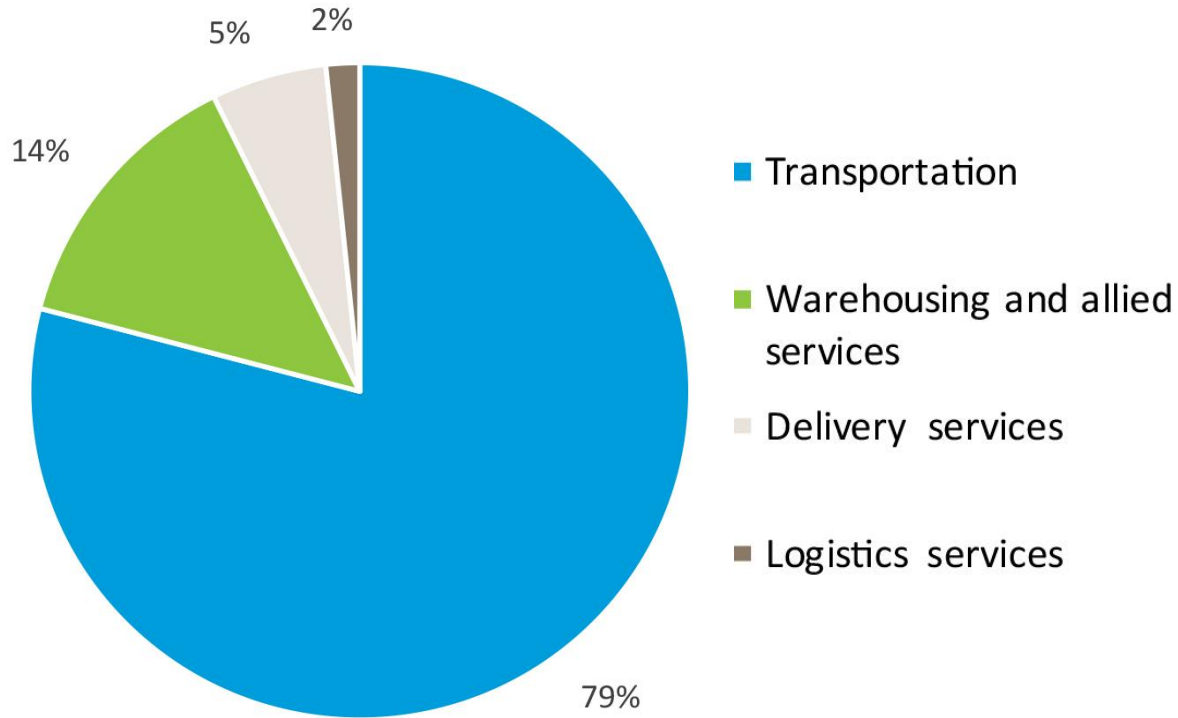
IN MOTION

A STUDY OF GEORGIA'S
Logistics Industry in 2018

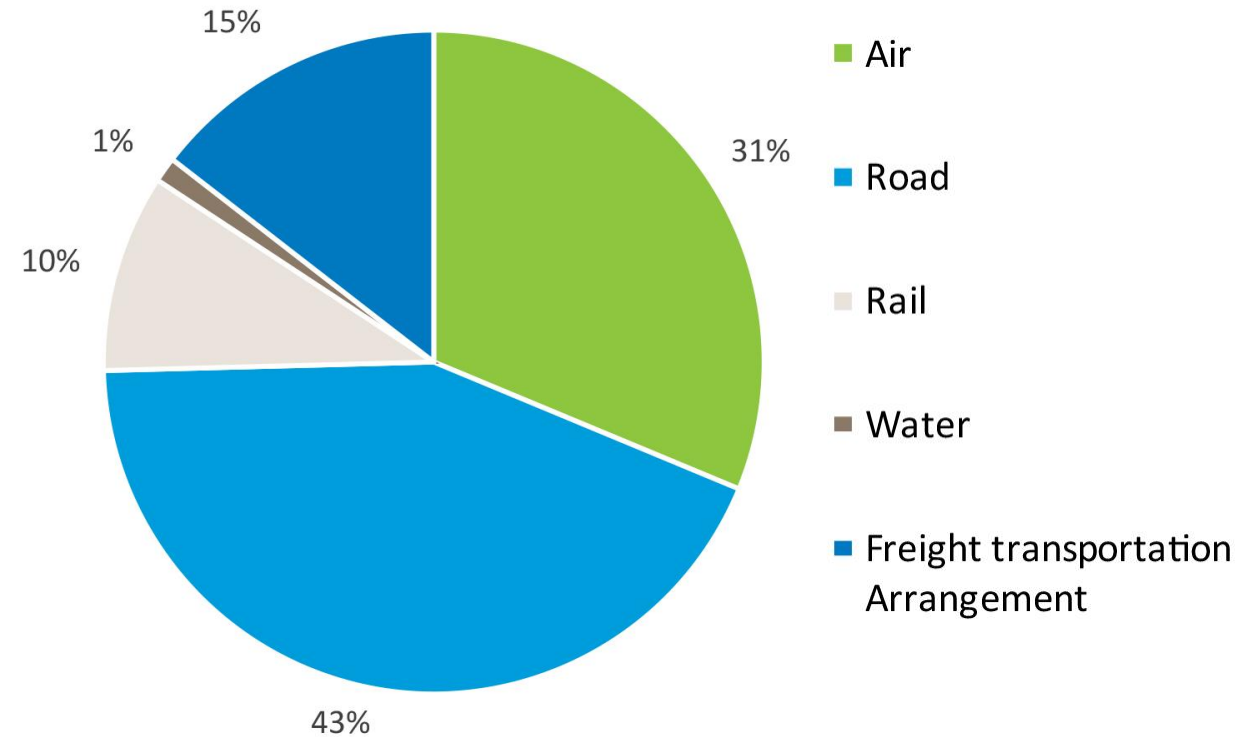


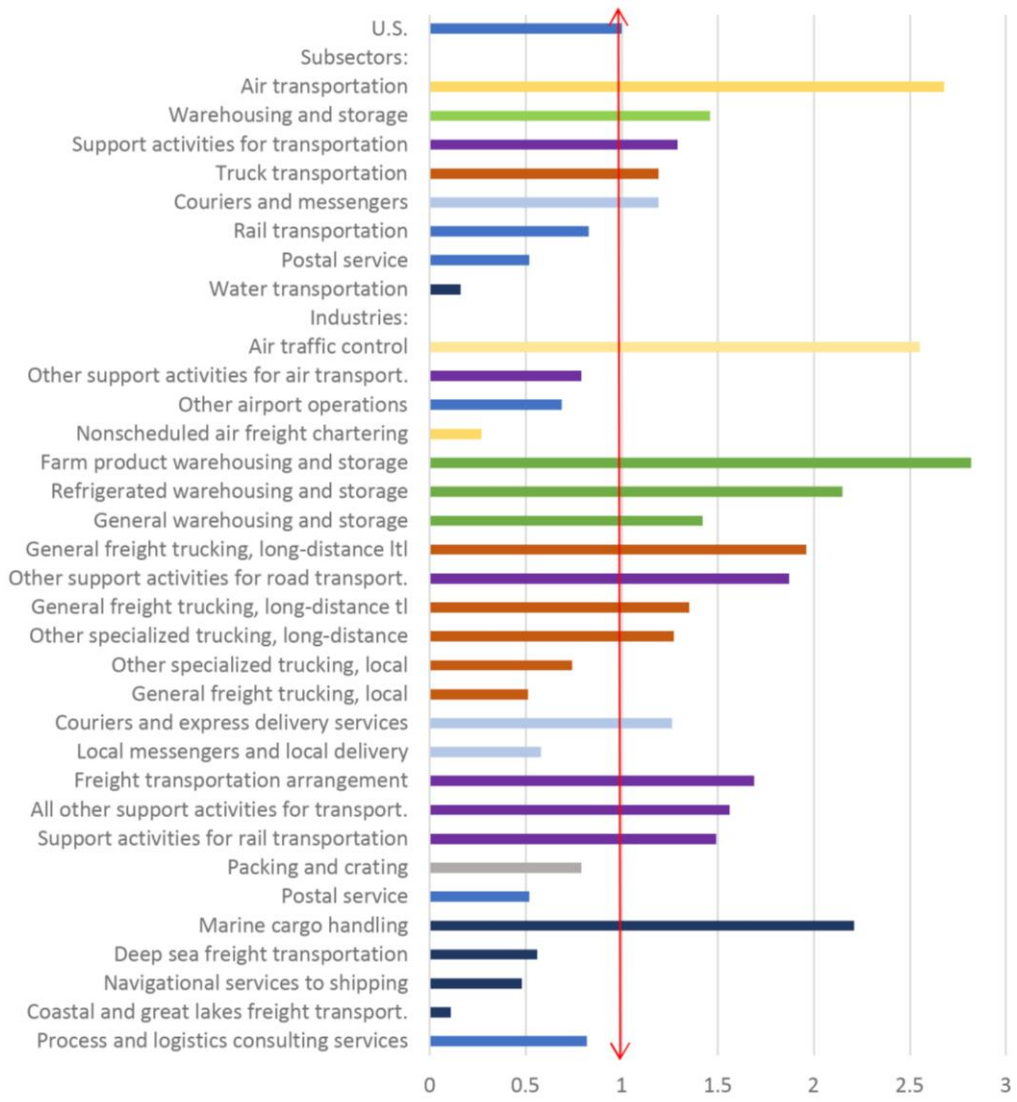
Private Sector Logistics Employment

Logistics Employment by Sector



Transportation Employment by Subsector





Employment Concentration

- Georgia exceeds U.S. average in most industry categories.
- Logistics industry employment as a whole grew by **30%** between 2010 and 2017.

*Values greater than 1 indicate employment share exceeding the U.S. average, values smaller than 1 indicate employment concentration below U.S. average.

Warehousing

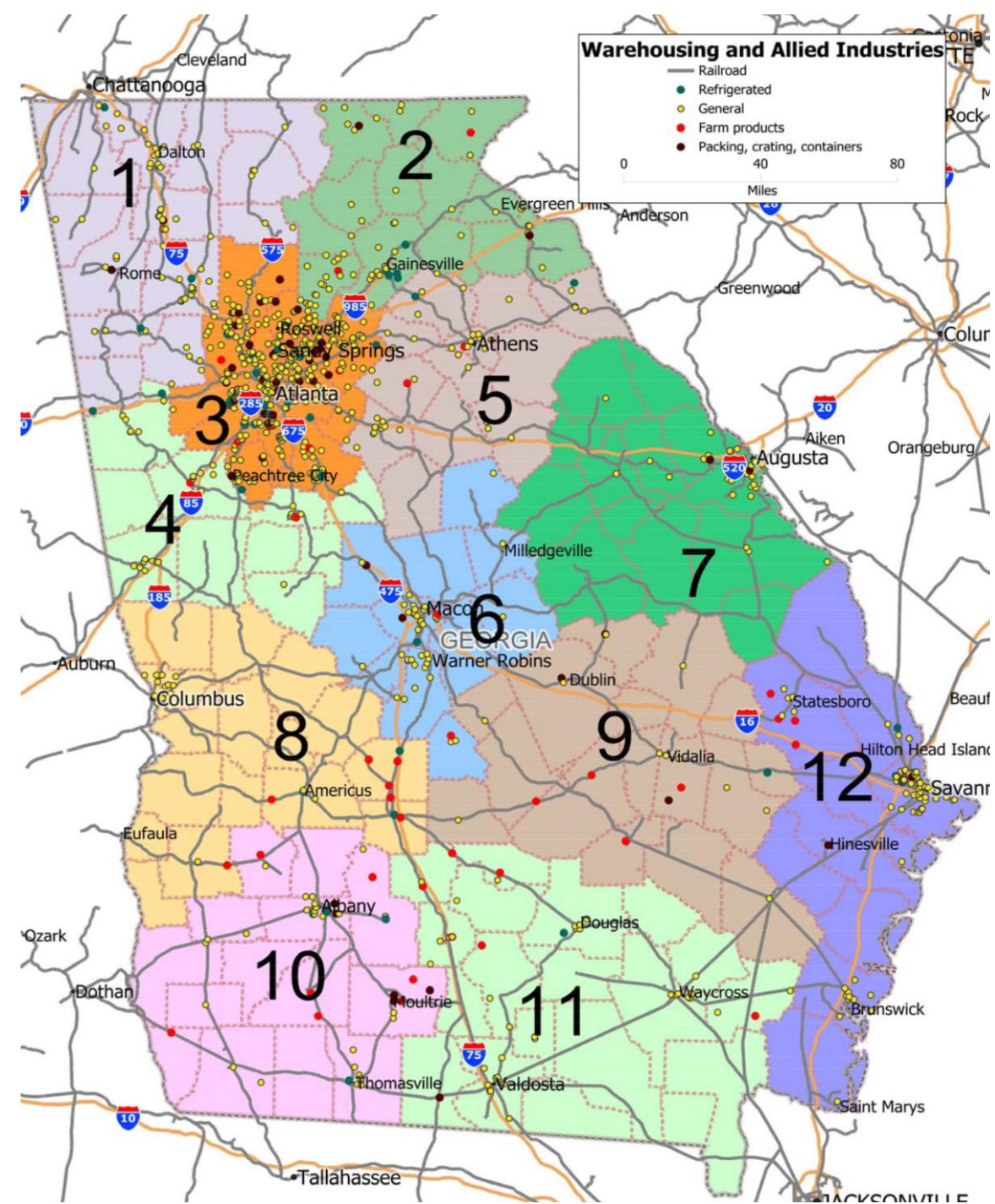
More than **800 million** square feet statewide

Atlanta is largest warehousing market in the SE and 6th largest in US

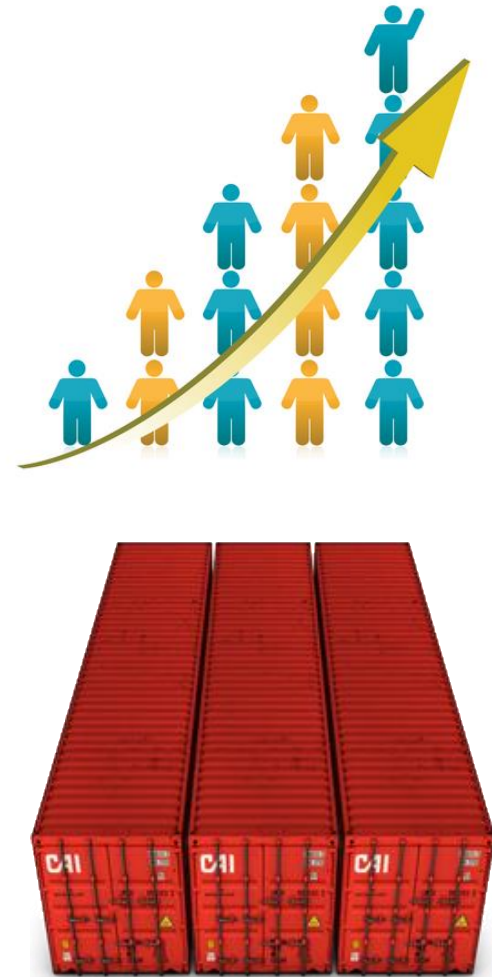
Warehousing employment is the fastest growing segment: **70%** growth between 2010 and 2017.

Top three regions by employment:

1. Atlanta (Region 3)
2. Coastal (Region 12)
3. South Central GA (Region 11)



- Georgia's population will increase **by 23%** in 2040
- Freight growth to increase **by 30%** statewide by 2045
- **56%** increase in Metro Atlanta by 2040
- E-commerce sales are **~10%** of total U.S. retail sales and estimated to grow at a CAGR of **12%** in the next 5 years





Future of Mobility

- More efficient movement of goods
- Optimization through data
- Autonomous and connected vehicles
- Emphasis on last-mile delivery



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