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

Top 5 Export Products
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
Private Sector Logistics Employment

Logistics Employment by Sector

- Transportation: 79%
- Warehousing and allied services: 15%
- Logistics services: 5%
- Delivery services: 2%
- Other: 1%

Transportation Employment by Subsector

- Air: 15%
- Road: 43%
- Rail: 10%
- Water: 5%
- Freight transportation arrangement: 15%
Employment Concentration

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