GEORGIA CHAMBER FOUNDATION

in partnership with GEORGIA TRANSPORTATION ALLIANCE

Infrastructure of the Future

Q1 Quarterly Economic Report 2024

GEORGIA CHAMBER

GEORGIA TRANSPORTATION ALLIANCE

Q1 Quarterly Economic Report:

Infrastructure of the Future

Sustaining Georgia's Current & Future Competitive Advantage in Freight and Logistics Infrastructure

Georgia needs $84 billion over the next 25 years **to meet current needs and support future growth** of our freight and logistics system.

Key Drivers

By 2050, Georgia's population is projected to increase by nearly 2.5 million people[1] and Georgia's workforce is expected to grow by 3.1 million jobs[2]. This incredible growth puts increased demands on Georgia's freight and logistics infrastructure which transports personal goods for families, raw materials to Georgia businesses, and moves products across the state and nation.

Annual Georgia based freight tonnage will increase 91% by 2050[3].

Congestion costs for Georgia based traffic are projected to increase more than 100% by 2050[4].

Manufacturing is expected to grow by 77% by 2050[5].

Agriculture is expected to grow by 43% by 2050[6].

Distribution freight flows are expected to more than triple from 2019 to 2050[7].

Top Challenges

Each day, Georgia's statewide congestion costs reach over $15 million[8], and the shortage of truck parking in the state poses challenges for freight movement on on-time delivery. Georgia's ports and inland terminals are handling high volumes of cargo creating substantial delays. The aviation system plays a critical role, but congested roadways around the airports hampers distribution. Rail is projected to absorb a significant portion of the increased freight volumes, but improvements are needed to ensure the system can support increased capacity and remain resilient.

The Opportunity

Georgia's world-class freight infrastructure is critical to our economic competitiveness. This infrastructure was developed through several decades of public and private investment. The forecasts of freight tonnage shown in 2050 present a challenge if Georgia is to support the predicted level of growth, but also a clear economic opportunity.

Current Operations

Georgia's multimodal transportation system includes 125,508 miles of roadway, 3,288 miles of Class I rail, 1,012 miles of Class III rail, two deepwater ports, two inland ports and one in development, five intermodal rail yards, and nine commercial airports. Together, freight intensive industries make up approximately 40 percent of total Georgia employment.

The Georgia Freight Advisory Committee ranked workforce as their top concern. Specific needs include supporting an adequately trained and educated workforce[9], sustaining high participation in the labor force, and continuing to support industries and occupations in which Georgia is a leader.

Industry Insights

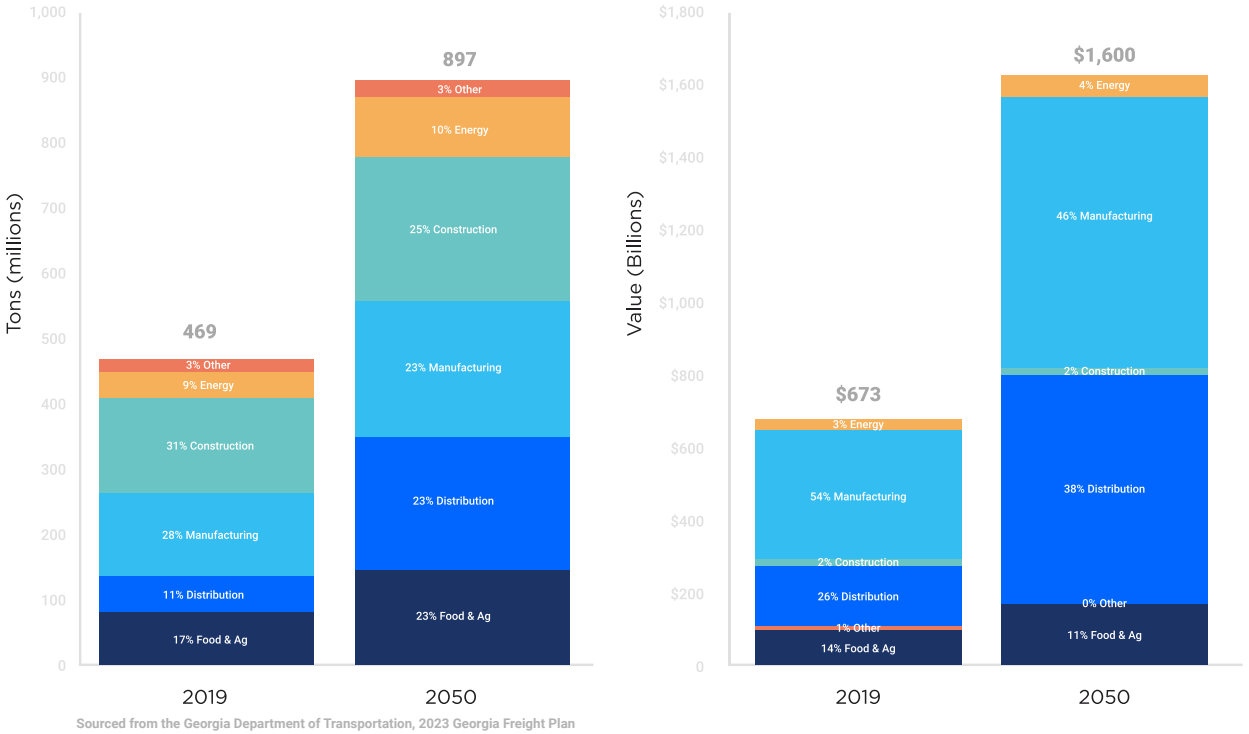
Current data provides a forecast of cargo and freight needs in five key sectors[10]

- **Food & Agriculture**
- **Distribution**
- **Manufacturing**
- **Construction**
- **Energy**

Manufacturing, Distribution, and Food and Agriculture accounted for 94 percent of of 2019 freight totals by value and are forecasted to account for 95 percent of the total in 2050. The total value of the freight flows will increase from $673 billion dollars in 2019 to over $1.6 trillion dollars in 2050.

Distribution, Manufacturing, and Food and Agriculture are the principal sources of Georgia's growth in freight. The performance of the freight transportation system in service to these three growing industries is crucial to Georgia's economy and the economic opportunity it provides to the people of the state.

Freight Flows by Industry Group (2019 and 2050)



Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Truck Cargo Growth 2019 to 2050 for Key Industries

Growth by Tons

Agriculture **80%**

Distribution **300%**

Manufacturing **57%**

Construction **54%**

Energy **113%**

Growth by Value

Agriculture **87%**

Distribution[11] **247%**

Manufacturing **103%**

Construction **19%**

Energy **217%**

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Manufacturing commodities are concentrated around Northwest Georgia and Georgia's ports. Distribution traffic moves the third highest annual tonnage in Georgia but has the fastest growth rate through 2050. Freight flows are expected to more than triple from 2019 to 2050. Distribution flows are centralized around Metro Atlanta and along the regional distribution routes where costs are highest. Food and agriculture commodity movements are mostly concentrated in Northeast Georgia, Metro Atlanta, and Southwest Georgia, with the need to move goods between rural areas and Metro Atlanta.

Future Growth: Trends to Watch

E-commerce

E-commerce and facility expansion is steadily changing the Georgia freight distribution network. E-commerce requires three times the warehouse space to move the same volume as traditional retail, resulting in additional warehouse and real-estate needs. The requirement of more space has significant implications for the future of freight and logistics in Georgia.

Port of Savannah

Savannah is leading the East Coast port market share growth for containerized import and export volumes as these gateway shifts occur. Increased freight activity necessitates new surface transportation infrastructure to ensure an efficient flow of goods.

Advanced Technology

Changes in technology are rapidly occurring. While this offers the potential for increased efficiency, reliability, and speed, the shift will embed delays and requires coordination of the private sector.

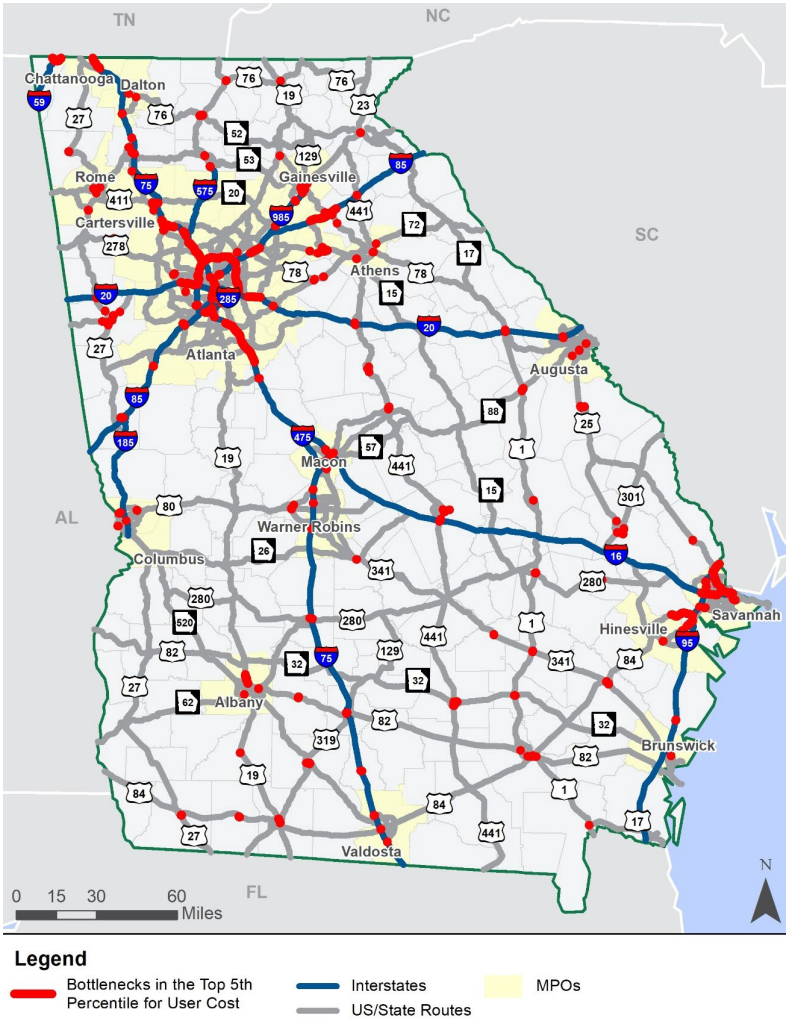
Highways

Economic Growth Projection: By 2050, vehicle miles traveled is projected to increase by 27%. Freight is expected to increase by 37% and passenger will increase by 26%[12].

Highway freight performance is measured by speed and reliability. Reduced speed and reliability equal congestion, and increased congestion inflates costs. Concentrations of congestion are bottlenecks, which leads to prime generators of elevated costs in Georgia's freight system.

Top Takeaway: The impact of congestion and costs is increasing.

ATRI noted that Georgia is home to **9 of the top 100 bottlenecks** and **3 of the top 10 overall worst congestion points** in the nation[13].



There are more trucks on the road as e-commerce takes off and the Port of Savannah grows. The estimated miles driven by trucks jumped 52% statewide and 84% in metro Atlanta from 2019 to 2021[14]. Overall, truck parking trends align with the Interstate system, with higher densities of truck parking focused in urbanized areas, in proximity to ports, and along state boundaries. The largest clustering of the truck parking is within the Atlanta Metropolitan Area. Outside of that, Brunswick and Savannah host the next largest clusters[15].

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

The top 20 bottleneck clusters in the Atlanta region are listed in the table below and map included. In total, these bottlenecks represent 105 centerline miles of roadway that generate $3.50 million in user costs to trucks and shippers each day. All top 20 bottleneck locations are projected to experience at least 85 percent growth in truck traffic from 2019 to 2050[16].

Top 20 Bottlenecks in Urban Atlanta-Region

Rank	ID	Bottleneck Name	Total Miles	Average Daily Truck Volume	Congestion Costs in 2019 ($/day)	Growth in Truck Volumes (2019 to 2050)
1	92	Appling	18.8	18,132	747,825	98.0%
2	91	I-75 SB from Hudson Bridge Rd to Mt Zion Blvd	10.5	17,595	431,064	103.0%
	51	I-285 Top End	8.5	21,570	283,500	93.6%
4	54	I-285 from Memorial Dr and I-20 East Interchange	7.7	20,861	233,927	105.4%
5	42	I-75 SB from I-285 North interchange to Roswell St	7.6	13,261	215,306	113.9%
6	46	I-85 SB from Beaver Ruin Rd to GA-316	6.8	13,415	202,133	118.0%
7	53	I-285 from Church St to Lavista Rd	6.5	19,658	196,274	114.5%
8	69	I-75/I-85 NB from I-75/I-85 South Split to John Lewis Freedom Pkwy	4.6	16,401	184,704	156.0%
9	52	I-285 from I-85 to Peachtree Industrial Blvd	3.8	19,378	143,384	100.5%
10	81	I-75 NB from Tara Blvd to I-285 South Interchange	2.7	18,786	128,096	107.1%
11	73	I-20 WB from Evans Mill Rd to Panola Rd	3.8	12,863	125,801	97.4%
12	72	I-20 EB from Fulton Industrial Blvd to Thornton Rd	4.5	11,494	115,695	101.2%
13	61	I-285 CCW at I-75 North Interchange	3.6	22,206	103,790	91.6%
14	59	I-285 CCW from S Cobb Dr to I-20 West Interchange	4.1	12,256	98,666	92.7%
15	58	I-285 at Riverdale Rd	2.4	37,667	83,451	97.7%
16	60	I-285 CW from Atlanta Rd to Paces Ferry Rd	2.2	23,161	70,113	87.8%
17	67	I-75 SB from I-75//I-85 North Split to Howell Mill Rd	1.4	10,492	45,382	172.0%
18	90	GA-74 from I-85 to Roosevelt Hwy	1.4	4,196	39,191	112.0%
19	63	Dr Luke Glenn Garrett Jr Memorial Hwy	0.8	3,954	32,925	91.5%
20	70	I-85 SB at I-75/I-85 South Split	0.4	16,615	20,511	158.0%
Totals			104.8	--	3,501,737	--

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Top Takeaway: Georgia needs additional truck parking

Truck parking shortages are a national concern and Georgia faces the same challenges. Federal regulations limit the number of hours of service (HOS) for truck drivers based upon commercial activity type and required rest breaks at specific intervals. Shortages have been exacerbated by the growth of e-commerce and the accompanying warehouse, distribution, and fulfillment centers and overall growth at the Ports of Savannah and Brunswick. The deficiency in truck parking spots causes safety concerns and issues with efficient flow of goods and services[17].

Long Haul

Long haul drivers are on the road for days or weeks traveling across the country. They need more amenities than drivers who are home regularly.

Staging

Truck drivers picking up and delivering freight at manufacturers, warehouses, and distribution centers need to park nearby to await an appiontment, often in busy urban areas.

30 min Break

As part of the Federally mandated 30-minute break, the driver must be off duty, meaning they are no longer working and will not have to move the truck for any reason.

Emergency

Drivers may be impacted by an incident that has closed or severely congested the roadway. Their original itinerary is disrupted, and parking is needed immediately.

Time Off

Independent drivers do not have a company facility for off-duty parking. They need a place to park while off-duty, but ordinances may prohibit parking at their home.

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Top Takeaway: Improving safety on Georgia's roadways must be a top priority

Traffic crashes in Georgia imposed a total of $26 billion in economic costs in 2022. The state's traffic fatality rate is higher than that of the national average. In fact, traffic fatalities began to increase in 2020 even as the vehicle travel levels decreased. From 2019 to 2022 the number of fatalities increased 20% while vehicle travel decreased by 4%[18].

Rural areas tend to have higher speed and higher severity crashes, while urban areas typically have a higher volume of less severe crashes. Truck-involved crashes in rural counties across the state are typically more severe. Efforts to improve roadway safety at rail crossings inlcude installation of new or upgraded train activated warning signals, signing and pavement marking updates, and eliminating at grade crossings[19].

Strategies and Solutions

- Mitigate bottlenecks through interchange improvements, utilization of managed lanes, investing in commercial vehicle lanes, and improvements to the truck network.
- Explore solutions to increase public and private truck parking.
- Increase safety through improvements in driver, pedestrian, and bicyclist behavior as well as

Rail

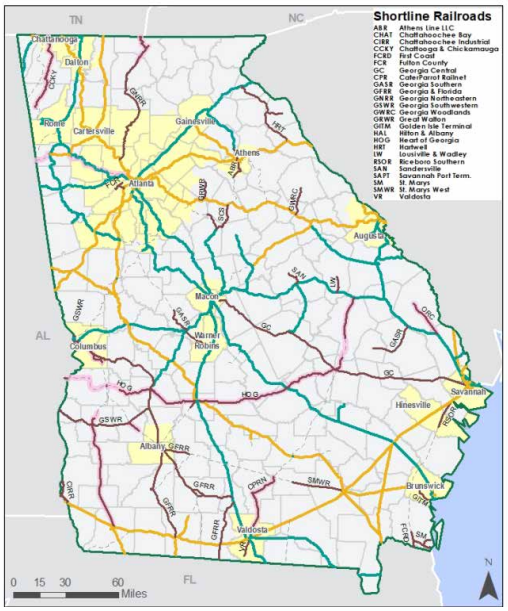
Economic Growth Projection: By 2050, warehouse and distribution tonnage by rail will more than double[20].

Georgia's existing rail network includes 4,607 miles of track, making it the seventh largest network in the country. Georgia is home to 28 freight railroads, 2 Class- 1s being CSX and Norfolk Southern as well as 26 short-line railroads. Georgia railroads move 190 million tons of freight in Georgia annually[21].

Top Takeaway: Rail is an integral part of increasing Georgia's overall freight capacity.

As Georgia highways see increased volumes, rail plays an even more important role. Shifts in freight movement to rail will allow for greater growth to be managed. However, if the state's rail infrastructure is to be able to absorb future increases in freight, capacity and connectivity must be enhanced. Georgia railroads carry on average 9 to 10 million tons of freight per route mile, thus the average mile of rail carries about 17 times the freight volume of the average mile of roadway[22].

On average, rail transportation saves industries 23% in shipping costs as compared to trucking. Furthermore, it would have taken approximately 2.1 million additional trucks to handle the 38.4 million tons of freight that originated by rail in Georgia in 2021. Rail is an invaluable part of our freight network. Investments in the rail network to improve resiliency and capacity will allow more industries to ship commodities utilizing the rail system[23].



Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Modal Share of Freight Passing through Georgia to/from Florida (2017)

Mode	Tons (thousands)	Percent
Rail	32,466	43%
Truck	40,209	53%
Water	1,661	2%
Air	383	1%
Other	761	1%
Pipeline	0	0%
Total	75,480	100%

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Strategies and Solution

- Complete gaps in the existing rail network to provide new access for industries and open transfer opportunities between individual railroad owners
- Improve capacity and speeds on short line railroads which play a critical first-last mile role in the freight network.

Address current rail system deficiencies including

- Inadequate weight limits on some rail segments
- Lack of double tracking on some heavily traveled segments
- Inadequate vertical height on some lines to allow for double stacking of cars
- Inadequate traffic control facilities

Sea and Inland Ports

Economic Growth Projection: By 2050, Georgia ports are projecting increases in Twenty-Foot Equivalent Units (TEUs) in yard and berth from 6 million to over 20 million for both[24].

Sea Ports

In 2021, Georgia's two seaports at Savannah and Brunswick moved a combined 5.6 million twenty-foot equivalent container units (TEUs) and nearly 670,000 Roll-On/Roll-Off volumes, primarily consisting of passenger vehicles and heavy machinery[25].

The Port of Savannah's Garden City Terminal is the largest single terminal in North America and the fourth busiest container port in the United States. In 2021, the Port of Savannah moved a record 5.6 million TEUs, an increase from 4.44 million TEUs in 2020 and 4.48 million TEUs in 2019. Compared to 2011, trade through the Port of Savannah has expanded by 90 percent in a single decade[26].

Top Takeaway: Increasing capacity at the Port of Savannah is a top priority

The Georgia Ports Authority continues to increase the Port's capacity through infrastructure projects and container yard expansions, increasing the state's competitiveness. For example, by 2025 the annual container yard capacity will increase from 6 million TEUs to 9.5 million TEUs. Additionally, with the completion of the Mason Mega Rail Terminal, intermodal capacity has been increased by 30% and the terminal is now the largest intermodal port terminal in North America.

In 2021, the Port of Brunswick's Roll-On/Roll-Off volumes of vehicles and heavy machinery grew by 11 percent over 2020 and by 6 percent over 2019 to a total of 650,000 units[27].

The Georgia Ports Authority has plans to[28]

- Expand Garden City Terminal
- Build a new terminal on Hutchison Island to handle larger ships
- Upgrade Ocean City Terminal capacity
- Expand automobile roll on- roll off operations in Brunswick
- Develop future inland ports

Inland Ports

The Georgia Ports Authority (GPA) uses inland ports to improve intermodal rail service between Savannah and inland markets.

Top Takeaway: Investing in Georgia's inland ports will continue to provide innumerable benefits to shippers, consumers, and communities as freight increases in Georgia.

Inland ports are advantageous to shippers, as they shorten the truck trip. They can also be advantageous to local jurisdictions as they attract new industries, jobs, and warehouse and distribution development and potentially relieve highway congestion.

The Appalachian Regional Port is a 42-acre dry terminal that handles container cargo and has import/export capacity of 1,670 TEUs[29].Customers of this inland port are able to clear customs[30] at the inland port instead of in Savannah and they are able to avoid the risk of congestion on metro Atlanta Interstates. The location is strategically positioned near the epicenter of Georgia's carpet and flooring industry as well as automobile and tire manufacturers.

The Port of Bainbridge is a 67-acre river terminal that handles dry bulk cargo. The site has a total of 93,000 square feet of warehouse and transit shed storage space, front end loaders, forklifts with 9,000-pound lift capacity, and a dry bulk unloader[31]. Bainbridge is conveniently located on the Apalachicola-Chattahoochee-Flint Waterway, or Tri-Rivers System. The facility is equipped to handle a variety of bulk cargo via barge traffic, including nitrogen solution, gypsum, ammonium sulfate, urea, cottonseed and cypress bark mulch[32].

The new Northeast Georgia Inland Port in Gainesville will benefit major manufacturers in the area and will serve as a new distribution point for the Atlanta market. The Northeast Georgia Inland Port facility is anticipated to be 104 acres and provide a direct link to the Port of Savannah via Norfolk Southern rail. In its initial stage, the terminal will have 9,000 feet of track. At full build out, the terminal will have 18,000 feet of rail and capacity for 150,000 container lifts per year. The U.S. Department of Transportation awarded the Georgia Ports Authority $46.9 million in federal funds; the project was one of 24 selected to receive federal funding out of 157 applications. Port construction is anticipated to take place between 2022 and 2024[33].

Rail service times are anticipated to be faster than those between Savannah and the Appalachian Regional port because of shorter mileage between the two. The Northeast Georgia inland port will benefit poultry producers and manufacturers with a new competitive option for shipping and, like its counterpart in Murray County, avoid the risk of truck delays in Metro Atlanta[34].

Strategies and Solutions

- Expand the Port of Savannah's Garden City terminal.
- Development of a new terminal for the Georgia Ports Authority on its property on Hutchison Island. This facility would be able to handle the largest container ships in the world.
- Upgrade capacity and infrastructure at the Ocean terminal capacity and infrastructure to ensure it can handle increased volumes.
- Expand roll on- roll off operations at Port of Brunswick, especially to handle increased volumes due to the Hyundai plant.
- Future inland ports potentially serving northeast and western Georgia.

Air

Economic Growth Projection: Based on City of Atlanta projections, total air cargo tonnage at Hartsfield Jackson Atlanta International Airport is expected to exceed 1.4 million tons by 2031. By 2040, annual air cargo tonnage is forecasted to nearly double its 2019 level[35].

Over the next 20 years, airports in Georgia, currently served by an integrated express air cargo carrier, are expected to see air cargo tonnage double[36].

Fast Facts

- Economic impact of Georgia's airports was over $73.7 billion.
- Industry supported more than 450,502 jobs with an annual payroll of $20.2 billion.
- $196.5 million in direct aviation-related tax revenues to the State[37].
- Seven of Georgia's airports transport cargo, and demand for airport freight services increased in 2021 as overall freight demand grew[38].
- Hartsfield Jackson International Airport ranks 16th nationally for freight tonnage handled.
- Southwest Georgia Regional Airport carried the 2nd largest amount of freight tonnage for Georgia airports.

Freight Transportation by Georgia Airports 2021

Airport Location 2021 Freight/mail	Location	2021 Freight/mail (tons)	U.S. Rank
Hartsfield-Jackson Atlanta International (ATL)	Atlanta	4,895,000	16
Southwest Georgia Regional (ABY)	Albany	300,000	99
Savannah/Hilton Head International (SAV)	Savannah	80,000	149
Columbus Airport (CSG)	Columbus	2,030	368
Augusta Regional at Bush Field (AGS)	Augusta	115	535
Athens/Ben Epps (AHN)	Athens	24.3	589
Middle Georgia Regional (MCN)	Macon	13.1	612

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Transporting cargo by air is typically reserved for high value/low weight materials, perishable goods, and time sensitive items because it can be more expensive, but is much faster.

International Inbound

Top 10 Commodities	Value (millions)
Electronics	$4,583
Motor Vehicle	$3,869
Parts	$1,566
Machinery	$1,385
Precision	$434
Instruments	$408
Transport	$385
Equipment	$381
Textiles/Leather	$318
Misc. Manufactured Products	$1,204
Other Commodities	$14,851
Total	$14,851

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

International Outbound

Top 10 Commodities	Value (millions)
Machinery	$4,003
Transport Equipment	$2,350
Electronics	$1,219
Precision Instruments	$1,044
Articles-Base Metal	$699
Nonmetal Mineral Products	$636
Base Metals	$460
Motor Vehicle Parts	$395
Chemical Products	$238
Pharmaceuticals	$228
Other Commodities	$14,851
Total	$12,069

Sourced from the Georgia Department of Transportation, 2023 Georgia Freight Plan

Air volumes with destinations in Georgia totaled 1.5 million tons in 2019. Almost all volumes came through Atlanta, with a majority of 1.0 million tons destined for the Atlanta region and 400,00 tons to the Rest of Georgia region[39].

Top Takeaway: Hartsfield Jackson Atlanta International Airport is poised for incredible growth in cargo capacity, but strategic investments are needed.

Hartsfield-Jackson has three main air cargo which cover approximately 6.4 million square feet, or 147 acres. The Airport plans to expand its cargo building space. The site set for this expansion is approximately 40 acres. These plans also include improvements for trucks maneuvering around the airport.

Within Georgia, Southwest Georgia Regional Airport in Albany and the Savannah/Hilton Head International Airport in Savannah are the second and third most heavily used airports for freight cargo, respectively[40].

Top Takeaway: Growing demand from businesses across the state also means more investments are needed in Georgia's other airports that service air cargo to remain competitive.

A recent GDOT study identified 878 air cargo demand-generator locations throughout Georgia. This includes distribution centers, fulfillment centers and facilities for aerospace manufacturing, automotive manufacturing, medical device manufacturing and pharmaceutical manufacturing. The analysis showed that 86 percent of all demand-generators are now within a 60-minute drive-time of an airport with scheduled air cargo service provided by an integrated express carrier. Changing technology, growing demand, and the need to provide customers with reasonable pick-up and drop-off times all indicate that air cargo carriers may expand their operations in Georgia. The study found that $103.7 million is needed to ensure Georgia's airports can maximize their potential[41].

Strategies and Solutions:

- Alleviate bottlenecks on interstates leading to Hartsfield Jackson International Airport's cargo facilities.
- Increase participation in the cargo community system. This tool improves cargo efficiency and visibility and helps prioritize shipments that need to move faster than others. Currently, the system is voluntary, and lack of participation has lead to delays, reducing the effectiveness.
- Continue to develop international freighter service to grow Atlanta's reputation as a global cargo hub. Competitor airports, like Miami, have these services and are importing nine times the volume of air cargo as Hartsfield Jackson Atlanta International Airport.
- Monitor development of unmanned aerial vehicles. This is an evolving area with FAA oversight, and operations as well as vehicles are still being created. The opportunity exists to better provide first and last mile delivery as well as the unique ability to reach certain markets, especially in rural communities. However, the type of investment needed to support growth has yet to be fully determined.
- Ensure investments are made at all of Georgia's airports that service air cargo to better serve businesses and consumers while keeping the state competitive.

To learn more about the efforts of the Georgia Chamber of Commerce and Georgia Transportation Alliance to increase investments in freight and logistics infrastructure, **click here**.

Read more at **www.gachamber.com**.

Endnotes

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