

GEORGIA LOGISTICS Industry Overview



GEORGIA LOGISTICS QUICK FACTS

Competing in today's fast-paced global marketplace often depends on who can deliver their goods most efficiently and reliably. Companies of every type and size must have effective means for receiving the raw materials they need and then shipping their products to their customers.

To fuel this competitiveness, Georgia provides an incomparable logistics and transportation infrastructure that saves both time and money by seamlessly connecting air and seaports with rail and roads. This creates a solid foundation for sustainable growth in an increasingly global marketplace. In addition, Georgia uniquely nurtures a culture of innovation that provides enhanced access for its companies in pursuing new opportunities.

EXISTING INDUSTRY PRESENCE

Georgia is home to nearly 11,000 providers of logistics services, from core transportation and facilities, to third-party logistics and software providers, and ranks as the fifth-largest overall logistics employer in the nation. Companies like Delta Air Lines, United Parcel Service, SAIA and Manhattan Associates are headquartered here, along with major players in logistics such as The Home Depot, Coca-Cola and Gulfstream. Additionally, every sector of logistics is supported by active trade associations in Georgia, and Atlanta is a popular location for several major logistics industry events.

AIR TRANSPORTATION

Home to the world's busiest passenger airport (90 million passengers per year) and world's largest carrier Delta Air Lines, Hartsfield-Jackson Atlanta International Airport is also recognized as the 11th-largest air cargo hub. The airport hosts 12 cargo-only carriers and has more than 1.5 million square feet of cargo handling space. It also serves six continents and allows business travelers to reach 80 percent of the U.S. market within two hours of flight time and any major North American city within four hours. Through Georgia's network of 144 public and private airports, companies can easily access locations statewide. atlanta-airport.com

GROUND TRANSPORTATION

On any given week, a combined 5.9 million tons of freight move across Georgia's 1,200 miles of interstate highways and 20,000 miles of federal and state highways. With 4,700 miles of rail, Georgia has the most extensive rail system and largest intermodal hub in the Southeast. Georgia is served by two class-1 railroads and 24 short-line companies.

80%

of U.S. market
under 2 days of
trucking

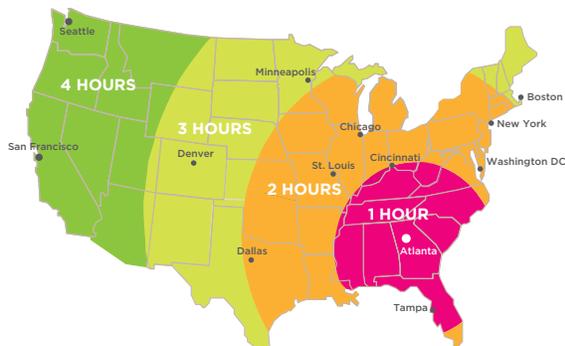
50/50

balance of
imports and
exports at GA
seaports

1M

logistics
connected
employees in GA

AIR TRANSIT TIMES



TRUCK TRANSIT TIMES





GEORGIA'S SEAPORTS

The seaports in Georgia include the Georgia Ports Authority's Savannah-based container terminal. Garden City Terminal is the largest single-operator container facility in North America, and also holds the title of fastest growing and fourth largest in total volumes. It serves more than 40 lines of steamships, has convenient intermodal connections, state-of-the-art cargo handling equipment and value-added services. Savannah is also responsible for moving 20 percent of the East Coast's overseas container cargo and is one of the few ports in the United States with two class-1 railroad facilities on terminal.

The Port of Brunswick is the sixth-largest automobile processing port in the nation and growing and is the second-largest grain facility on the East Coast. gaports.com

WAREHOUSING AND DISTRIBUTION

Four of the top 10 warehouse providers in North America are headquartered in Georgia, and 90 percent of the top 25 global third-party logistics providers (3PL's) have operations in Georgia. More than 48 retailers have warehouse locations in Georgia, with more than a dozen facilities each exceeding one million square feet. Within a two-and-a-half-hour radius of the Port of Savannah, area distribution centers represent more than 14 million square feet of warehousing and generate in excess of 500,000 TEUs annually.

WORLD CLASS TALENT AND LOGISTICS EDUCATION



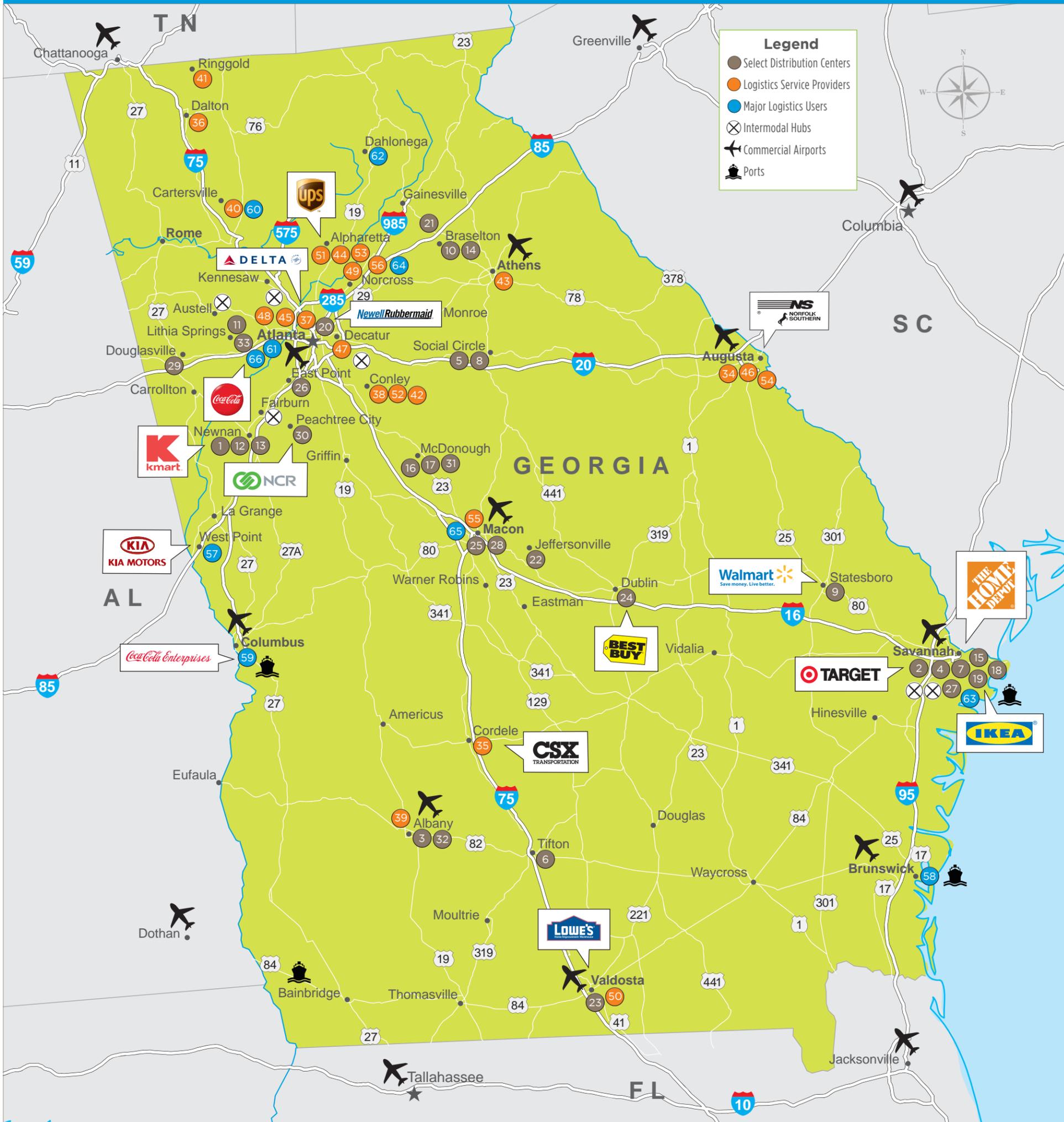
Georgia is home to 51 four-year colleges and universities and 35 technical colleges offering more than 100 different logistics-related courses, certificates and degree programs. Internationally ranked and recognized advanced degrees in logistics and supply chain management are offered through Georgia Tech's Supply Chain and Logistics Institute. With the nation's number one workforce training program, Quick Start, the state partners with companies to provide the specialized training world-leading logistics companies demand. georgiaquickstart.org

CENTER OF INNOVATION FOR LOGISTICS - "FUELING LOGISTICS COMPETITIVENESS"



Georgia recognizes logistics as a strategic industry and uniquely one whose multiple sectors affect almost every business every day. As an industry-focused component of the Georgia Department of Economic Development, the Center of Innovation for Logistics is the state's leading resource for fueling logistics competitiveness. The Center connects with all logistics sectors to provide a unique combination of access to technology leaders and university R&D, expert analysis of data and trends, cross-sector collaboration and provides a collective industry voice. The result is increased opportunities for industry growth and success. georgialogistics.org

GEORGIA'S LOGISTICS ECOSYSTEM



SELECT DISTRIBUTION CENTERS

COMPANY	CITY	SQUARE FOOTAGE
1 Kmart Corporation	Newnan	2,100,000
2 Target Corporation	Port Wentworth	2,000,000
3 Procter & Gamble Paper Products	Albany	1,700,000
4 Target Corporation	Midway	1,500,000
5 General Mills Southeastern D/C	Social Circle	1,500,000
6 Target Corporation	Tifton	1,500,000
7 Home Depot	Savannah	1,400,000
8 Solo Cup	Social Circle	1,300,716
9 Wal-Mart	Statesboro	1,200,000
10 Progressive Lighting	Braselton	1,000,000
11 Quaker Oats Co./Gatorade	Lithia Springs	913,000
12 Yamaha Motor Manufacturing	Newnan	900,000
13 PetSmart	Newnan	900,000
14 Haverty's Furniture	Braselton	808,000
15 ProBuild East	Pooler	800,000
16 Tyco Healthcare	McDonough	800,000
17 Nestle USA	McDonough	789,000
18 Pier 1 Imports	Savannah	785,000
19 IKEA	Port Wentworth	785,000
20 Newell Rubbermaid	Atlanta	784,900
21 Sear's	Pendergrass	772,000
22 Academy Sports	Jeffersonville	750,000
23 Lowe's	Valdosta	750,000
24 Best Buy	Dublin	748,000
25 Bass Pro Shops	Macon	720,000
26 Dick's Sporting Goods	East Point	657,200
27 Dollar Tree	Port Wentworth	600,000
28 Kohl's Corporation	Macon	588,000
29 JVC Co.	Douglasville	542,491
30 NCR Corporation	Peachtree City	500,000
31 Crown Distributing	McDonough	500,000
32 Bridgestone/Firestone	Albany	468,272
33 Staples	Lithia Springs	400,000

LOGISTICS SERVICE PROVIDERS

COMPANY	CITY
34 Norfolk Southern	Augusta
35 CSX	Cordele
36 Southeastern Freight Lines	Dalton
37 Delta Airlines	Atlanta
38 Old Dominion Freight Lines	Conley
39 Roadway Express	Lake Park
40 Trinity Rail Operations	Cartersville
41 Yellow Transportation	Ringgold
42 AAA Cooper Transportation	Ellenwood
43 Estes Express Lines	Athens
44 Ryder Integrated Logistics	Alpharetta
45 Manhattan Associates	Atlanta
46 FPL Food	Augusta
47 Allied Holdings	Atlanta
48 DSC Logistics	Atlanta
49 LXE Inc.	Norcross
50 FEDEX Freight	Valdosta
51 UPS Supply Chain Solutions	Alpharetta
52 BAH Brokerage	Conley
53 Infor Global Solutions	Alpharetta
54 Americold Logistics	Augusta
55 3PD	Macon
56 Saia	Duluth

note: Companies selected based on employment levels in Georgia.

MAJOR LOGISTICS USERS

COMPANY	CITY
7 Home Depot	Savannah
20 Newell Rubbermaid	Atlanta
30 NCR Corporation	Peachtree City
37 Delta Airlines	Atlanta
51 UPS	Alpharetta
57 KIA Motors	West Point
58 Georgia-Pacific	Brunswick
59 Coca-Cola Enterprises	Columbus
60 Shaw Industries	Cartersville
61 BlueLinx Holdings	Atlanta
62 Mohawk Industries	Dahlonega
63 Unisource	Savannah
64 Genuine Parts Co. (GPC)	Duluth
65 HD Supply	Macon
66 Coca-Cola	Atlanta

INTERMODAL HUBS

COMPANY	CITY
⊗ Husley Terminal - CSX	Atlanta
⊗ Inman Intermodal Yard - Norfolk Southern	Atlanta
⊗ John W. Whitaker Intermodal Terminal - Norfolk Southern	Austell
⊗ Fairburn Terminal - CSX	Fairburn
⊗ Mason Intermodal Container Transfer Facility - Norfolk Southern	Savannah
⊗ Chatham Intermodal Container Transfer Facility - CSX	Savannah

GEORGIA'S LARGEST WAREHOUSING AND DISTRIBUTION CENTERS

WAREHOUSE	SQUARE FOOTAGE	CITY	WAREHOUSE	SQUARE FOOTAGE	CITY
Schneider Logistics	2,500,000	Savannah	Dick's Sporting Goods	657,200	Atlanta
Kmart Corp	2,100,000	Newnan	Kenco Logistics Services/Whirlpool	657,000	Ellenwood
JCPenny Co.- Warehouse #9223-9	2,000,000	Forest Park	Flint River Services Inc	650,000	Albany
Wal-Mart #6061	2,000,000	Statesboro	Fred's Inc	650,000	Dublin
Target Corp Import Warehouse	2,000,000	Savannah	Georgia Cold Storage Inc	620,000	Americus
Cooper Tire & Rubber Co	1,800,000	Albany	Sugar Foods Corp	612,178	Villa Rica
Saddle Creek Corp	1,750,000	Atlanta	LG Electronics USA Inc	612,000	Alpharetta
Procter & Gamble Paper Products Co	1,700,000	Albany	Covidien	609,912	Atlanta
General Mills Southeast	1,500,000	Social Circle	Exel/The Clorox Co	607,650	Atlanta
Target Corp	1,500,000	Tifton	Bryan County -		
Target Corp	1,500,000	Midway	Pembroke Dev. Authority	605,000	Pembroke
Whirlpool Corp Regional	1,500,000	McDonough	United Stationers Supply Co	600,674	Suwanee
Home Depot Import	1,400,000	Savannah	ICON Health & Fitness	600,000	Port Wentworth
Solo Cup	1,300,716	Social Circle	Advanced Distribution Systems Inc	600,000	Morrow
APL Logistics Ltd	1,275,000	Lithia Springs	Nordic Cold Storage LLC	600,000	Atlanta
Publix Distribution & Manufacturing	1,200,000	Dacula	Dollar Tree Stores Inc	600,000	Port Wentworth
Wal-Mart #6054	1,200,000	LaGrange	Shaw Industries Inc	600,000	Ringgold
Wal-Mart #6010	1,200,000	Douglas	Kohl's Corp	588,000	Macon
Wal-Mart Food	1,100,000	Monroe	Exel/Scott's Lawn Care	585,489	Fairburn
Schneider Logistics	1,050,000	Savannah	Exel Logistics	585,000	Kennesaw
Home Depot Import	1,008,000	McDonough	Capital Cargo Inc (CCI)	575,000	Savannah
Progressive Lighting Inc	1,000,000	Braselton	FedEx Logistics/Goodyear		
Toys R Us/Babies R Us	999,900	McDonough	Tire & Rubber Co	570,000	McDonough
Macy's Inc	966,640	Stone Mountain	Phillips-Van Heusen Inc.	561,000	Austell
Service First Logisitcs Corp	950,000	Atlanta	GLOVIS Georgia LLC	558,131	West Point
Quaker Oats Co/Gatorade	913,000	Atlanta	DSC Logistics /		
DSC Logistics Inc/Kellogg's	903,000	Atlanta	J.M. Smucker's Company	556,800	Fairburn
Yamaha Motor Manufacturing Corp	900,000	Newnan	MetroPorts	550,000	Savannah
PetSmart Distribution	900,000	Newnan	Acuity Brands Lighting	550,000	Conyers
DSL Logistics	897,000	Macon	Executive Bonded Warehouses	550,000	East Point
Haverty's Furniture	808,000	Braselton	Cardinal Logistics Management	550,000	Buford
Tyco Healthcare	800,000	McDonough	Home Depot	544,838	Braselton
ProBuild East	800,000	Pooler	JVC Co of America	542,491	Kennesaw
Nestle USA Inc	789,000	McDonough	M&W Distribution Services	530,000	Atlanta
Pier 1 Imports	785,000	Port Wentworth	Maytag Corp	527,000	Lithia Springs
IKEA	785,000	Savannah	Costco Wholesale	525,000	College Park
Newell Rubbermaid	784,900	College Park	AmeriCold Logistics LLC	522,000	Atlanta
Del Monte Fresh Produce	780,000	Forest Park	Sears Logistics Services	520,570	Braselton
Marshalls-TJ Maxx	780,000	Decatur	Walgreen Co	518,400	Pendergrass
Kmart Corp	780,000	Forest Park	GENCO Distribution System/PETCO		
Sears Logistics Services	772,000	Conyers	Animal Supplies	506,240	Braselton
Exel/Continental Tire			Carter's Inc	505,000	Atlanta
North America Inc	758,488	Barnesville	USCO Logistics	504,000	McDonough
Lowe's	750,000	Valdosta	Oneida Ltd.	500,000	Ellabell
Academy Sports and Outdoors	750,000	Jeffersonville	NCR Corp. Worldwide Parts Center	500,000	Peachtree City
Jacobson Companies Inc	750,000	Forest Park	Aldi	500,000	Jefferson
Best Buy	748,000	Dublin	Georgia Crown Distributing	500,000	Fort Benning
GE Appliance Warehouse	725,000	College Park	AllSouth	500,000	Atlanta
Exel/Goodyear Kelly	710,451	Stockbridge	Shippers Warehouse Inc.	500,000	Jonesboro
Bluelinx Corp	700,000	Atlanta	AmeriCold Logistics LLC	500,000	Atlanta
Mohawk Home	700,000	Calhoun	Sysco Food Services of Atlanta LLC	500,000	Atlanta
Bonded Service Warehouse Inc	700,000	Atlanta	MSC Industrial Supply Company	500,000	Mableton
Ocean Link Inc	700,000	Savannah	Outsource Logistics LLC	500,000	Valdosta
Matson Global	680,000	Savannah	Quebecor World	500,000	Evans
Carlisle Tire & Wheel Co	676,000	McDonough	Haband Co Inc.	500,000	Eatonton
Home Depot	657,600	Valdosta	Port City Logistics Inc.	500,000	Savannah



THE GEORGIA BUSINESS ADVANTAGE NO COST SERVICES FOR YOUR COMPANY

Companies seeking a competitive edge in an increasingly global marketplace will find world-class support and resources through the industry-focused teams of the Georgia Department of Economic Development. Representing decades of experience, expertise and thought leadership within the logistics sector, our staff can provide:

- Extensive site and building services, including pre-selected sites
- Comprehensive location data, including community demographics, supplier industry reports, maps and regional wage data
- Coordination with community officials regarding project needs, existing utilities and specific site requirements
- Access to workforce training
- Information on business cost environment, taxes and available incentives
- Access to advanced academic intellectual talent and research
- Coordination of traffic and highway requirements
- Coordination with the Georgia Ports Authority to identify project specific shipping and logistics requirements
- Unique cross-industry connections, cutting-edge technology insight and expertise through Georgia's Center of Innovation for Logistics



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