



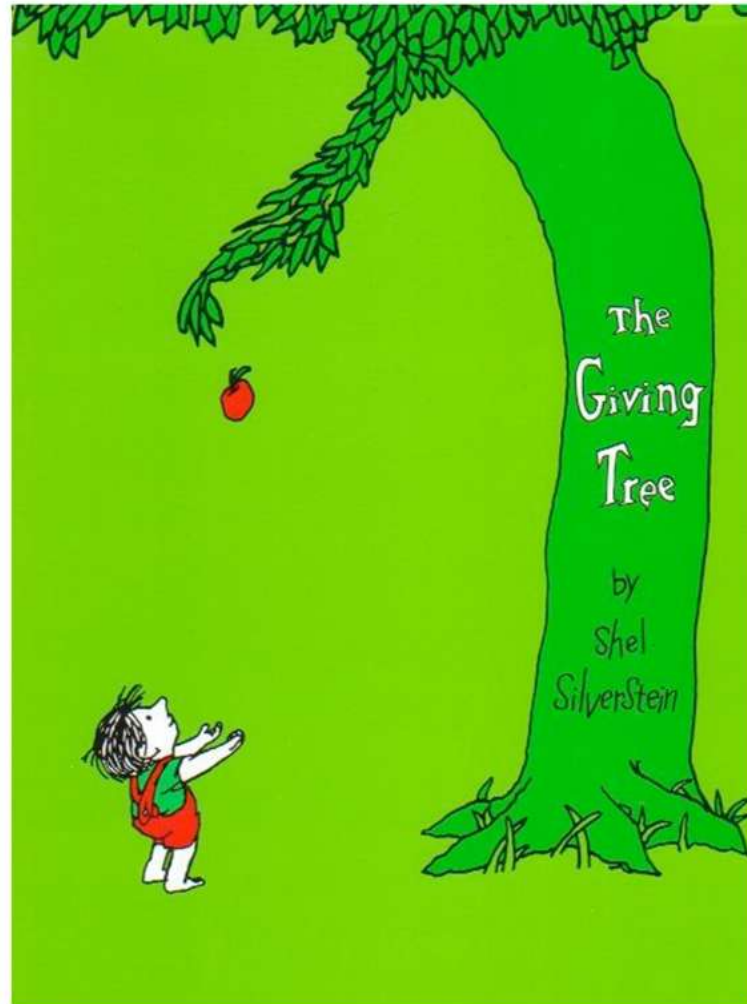
The Value of Gateways

Bruce Lambert

Executive Director

Institute for Trade and Transportation Studies

What are We Often Saying



How Does One Look at Freight Activity?

- Inventory Functions
- Engineering
- Operational Reliability
- Economical and Financial
- Safety and Security
- Markets
- Jobs

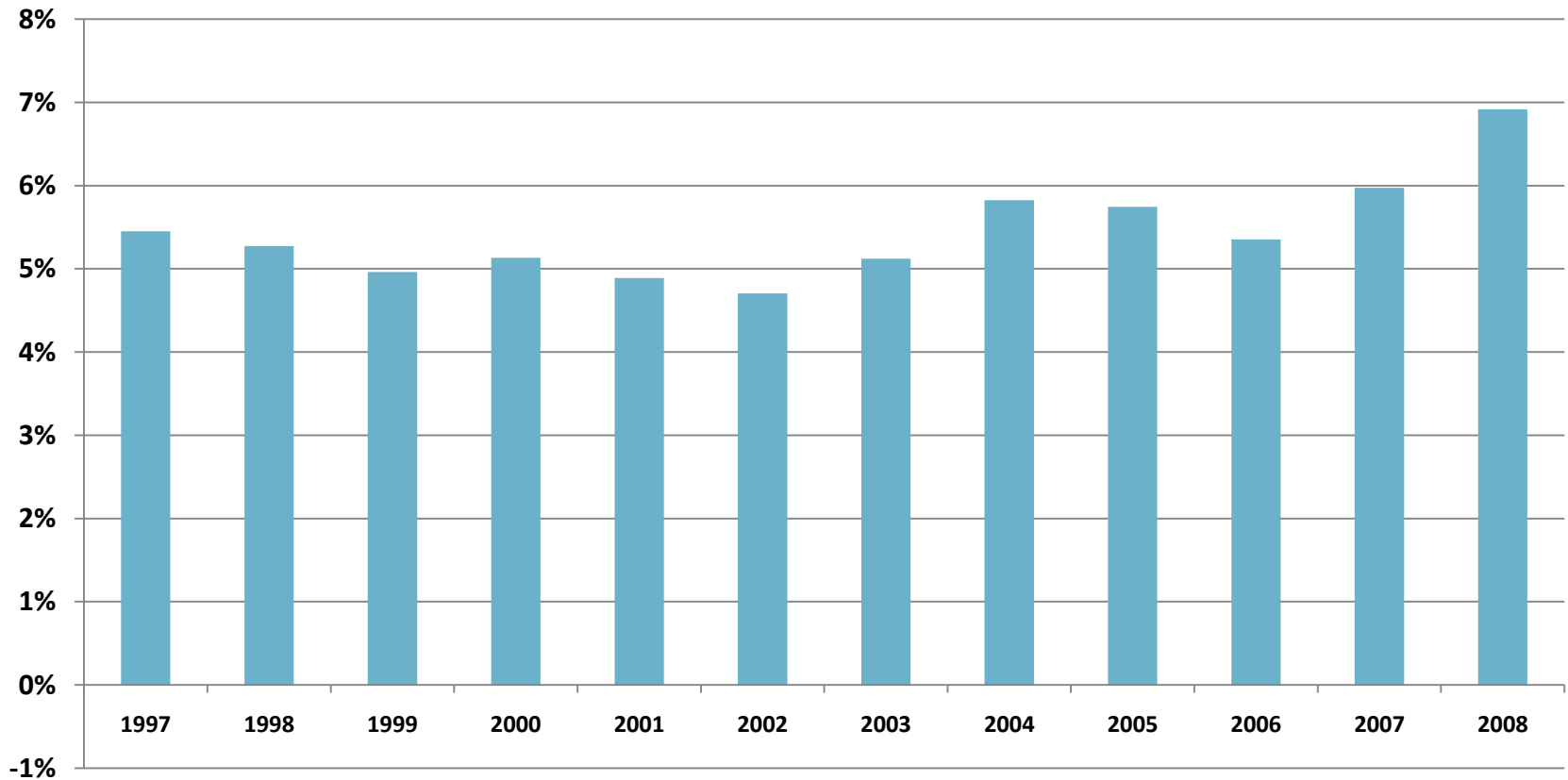


Globalization means what...

- Corporate Headquarters
- Imports
- Foreign Direct Investment
- Exports

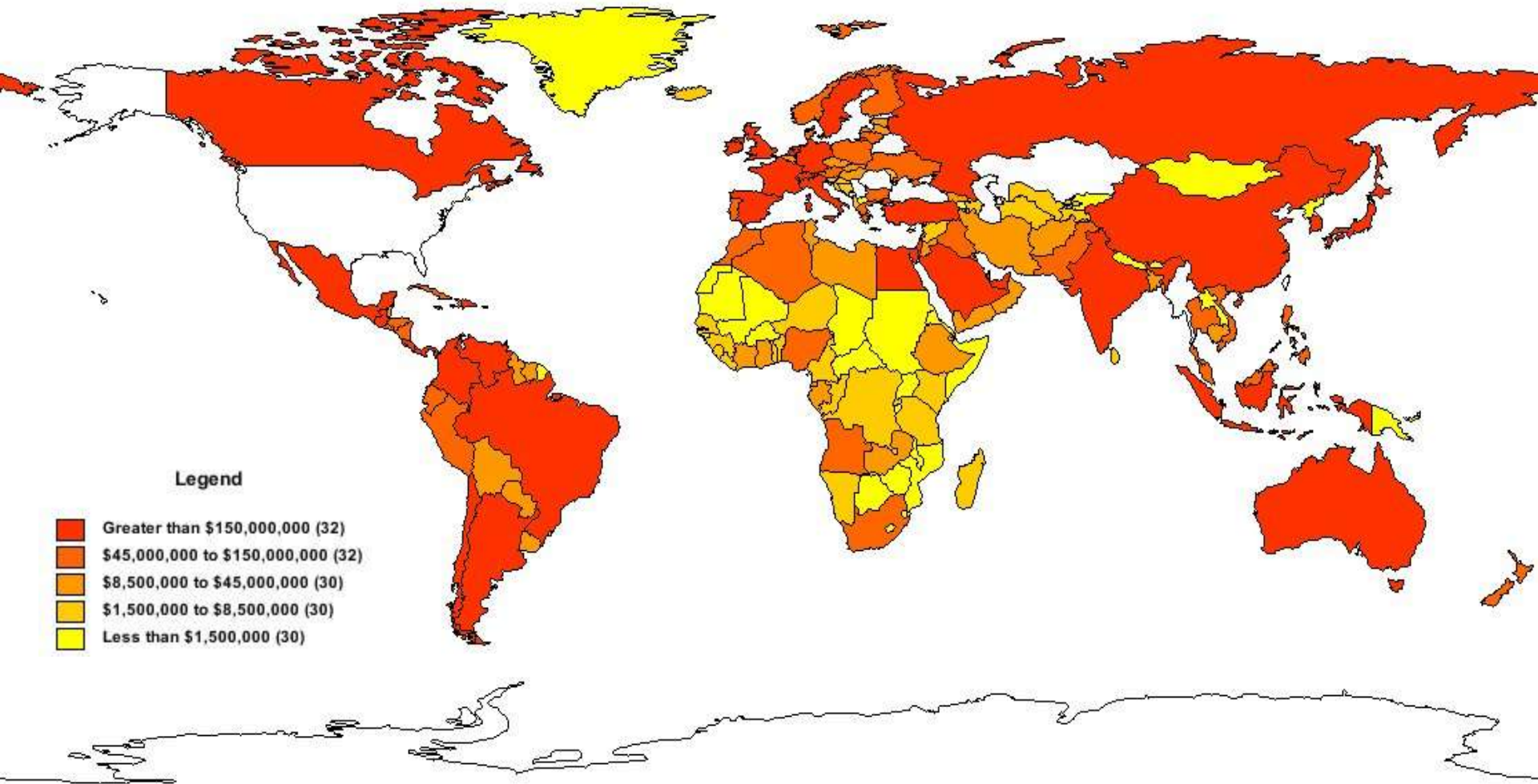


Georgia Exports as Share of State GDP 1997 -2008

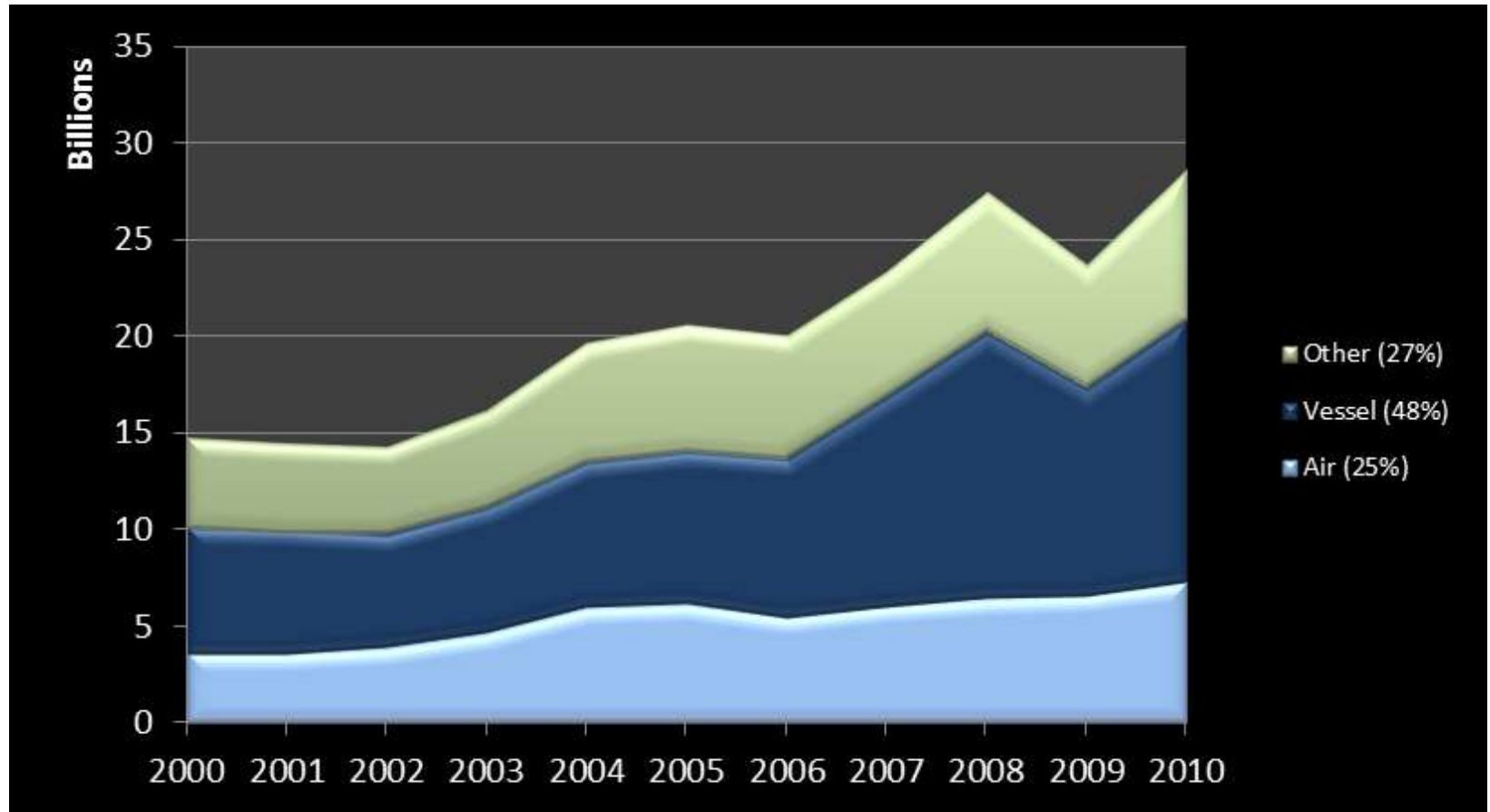


Source: Bureau of Economic Analysis, U.S. Dept. of Commerce & WISERTrade State Exports

Georgia State Exporter Destinations, 2008 (Wisertrade)

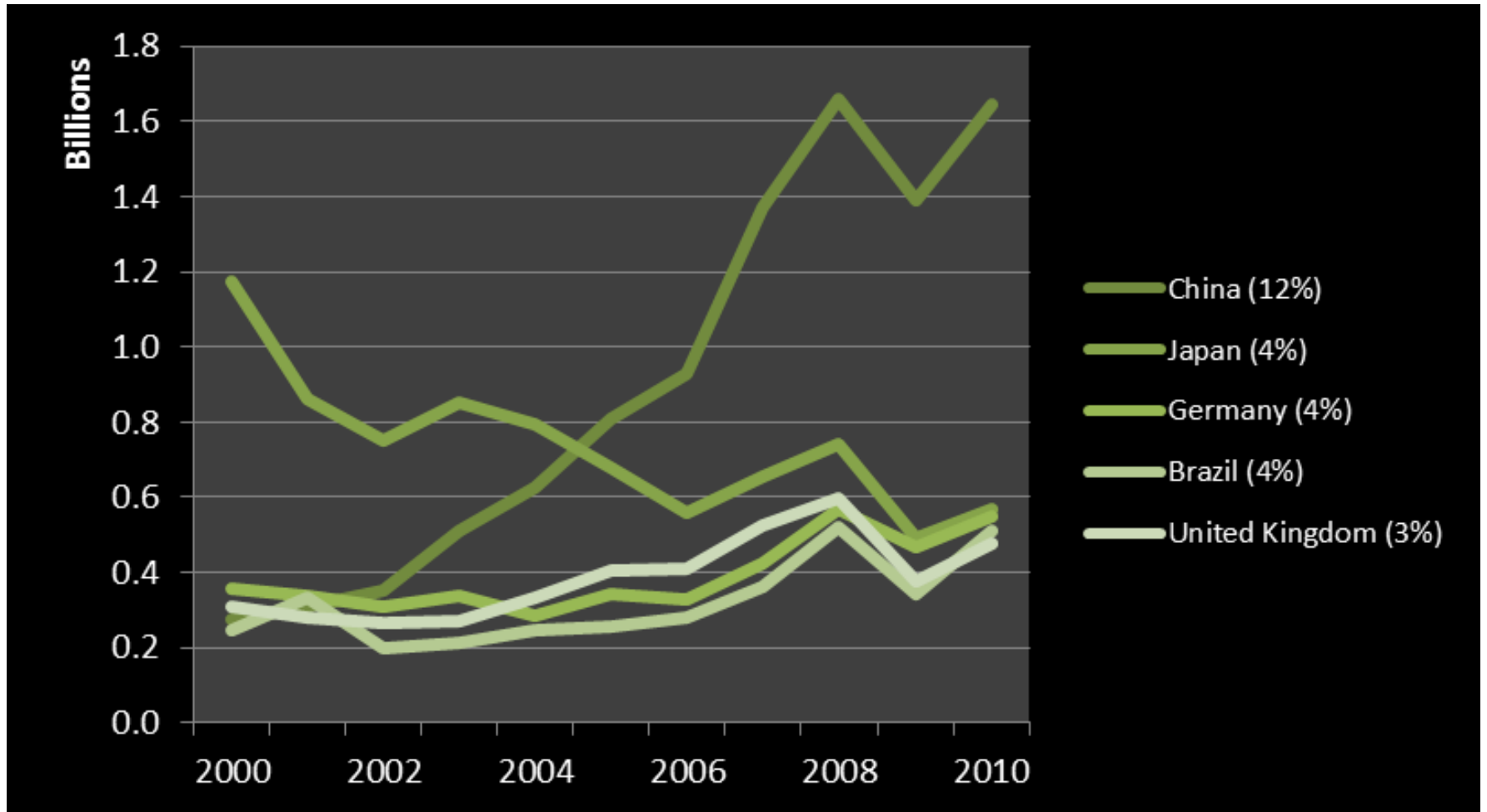


Georgia Shipments by Origin, Trade by Mode, 2000-2010

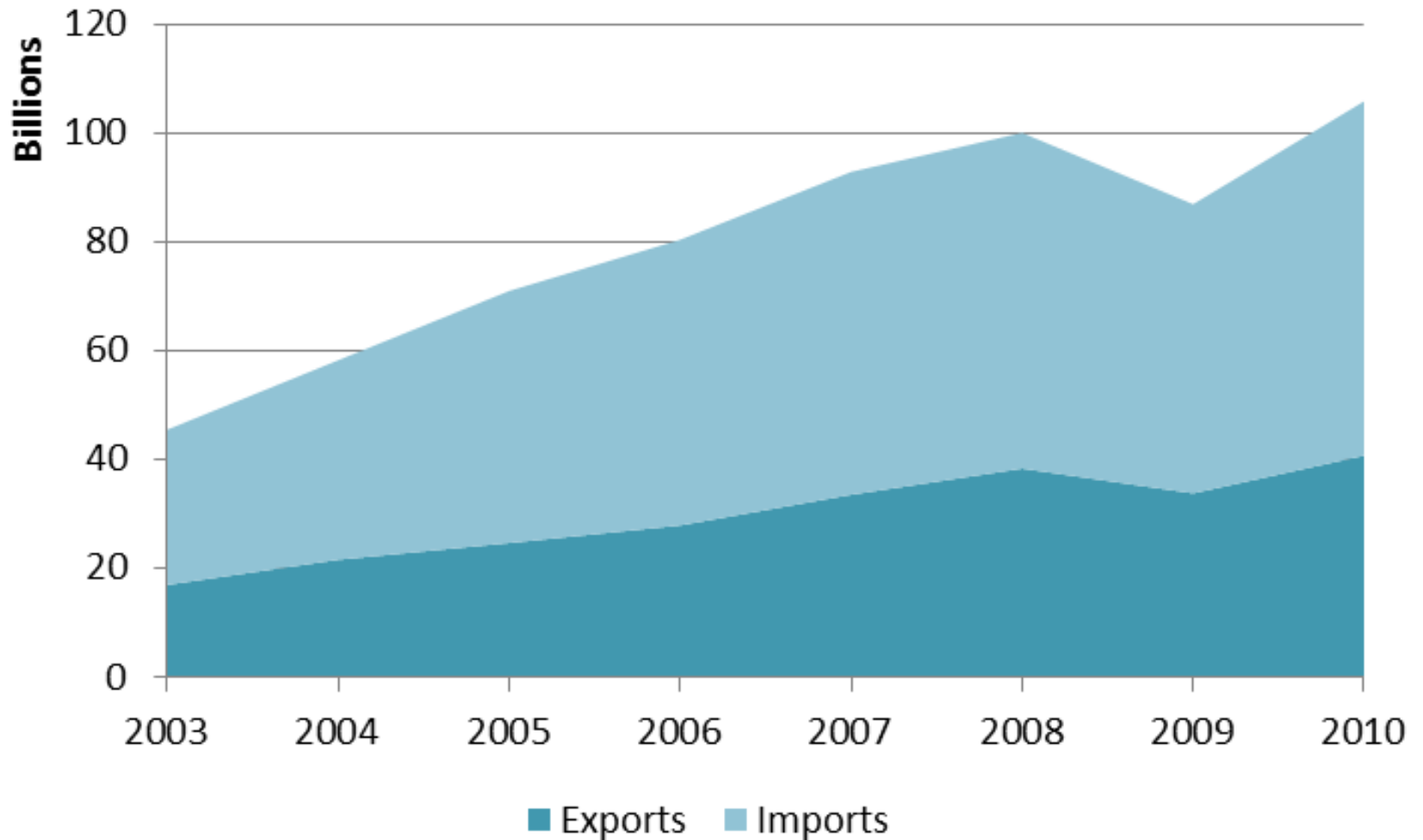


Georgia Shipments of Origin, Top Five Destinations, 2000-2010

(Vessel Shipments - \$13.7 Billion)



Total Trade through Georgia Gateways, 2003-2010 (dollars)

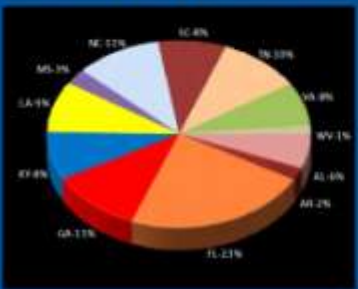


Draft

**Exports by 3-Digit Zip Code
2008 (Full Year)**



Percentage of State MSA Exports compared to Entire 12 State Region



Legend

2008 Exports (\$ USD)

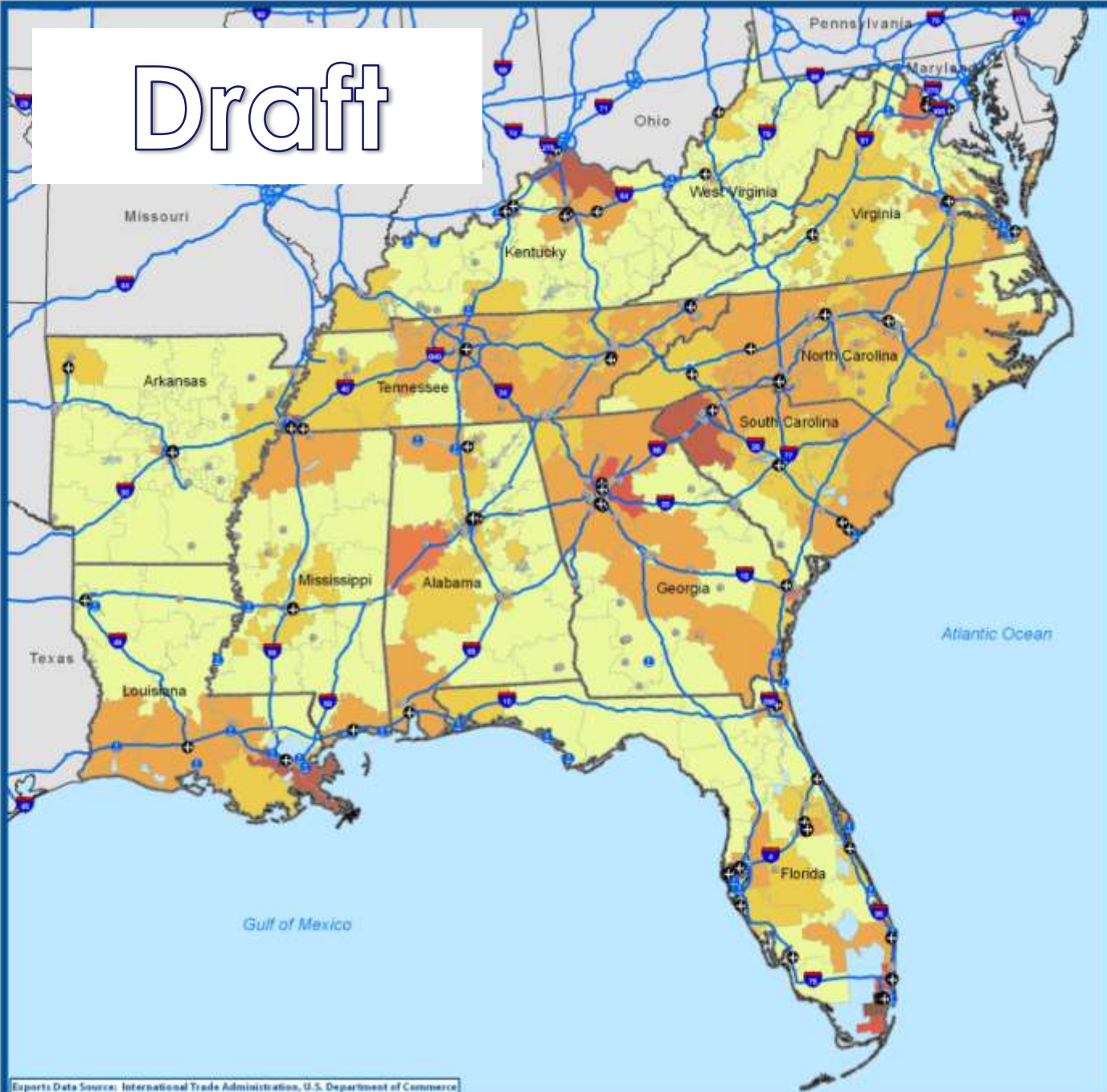
- 0 - 500 million
- 500 million - 1 billion
- 1 billion - 3 billion
- 3 billion - 5 billion
- 5 billion - 8 billion
- 8 billion - 12 billion
- 12 billion - 18 billion
- 18 billion - 23 billion

Intermodal Facilities

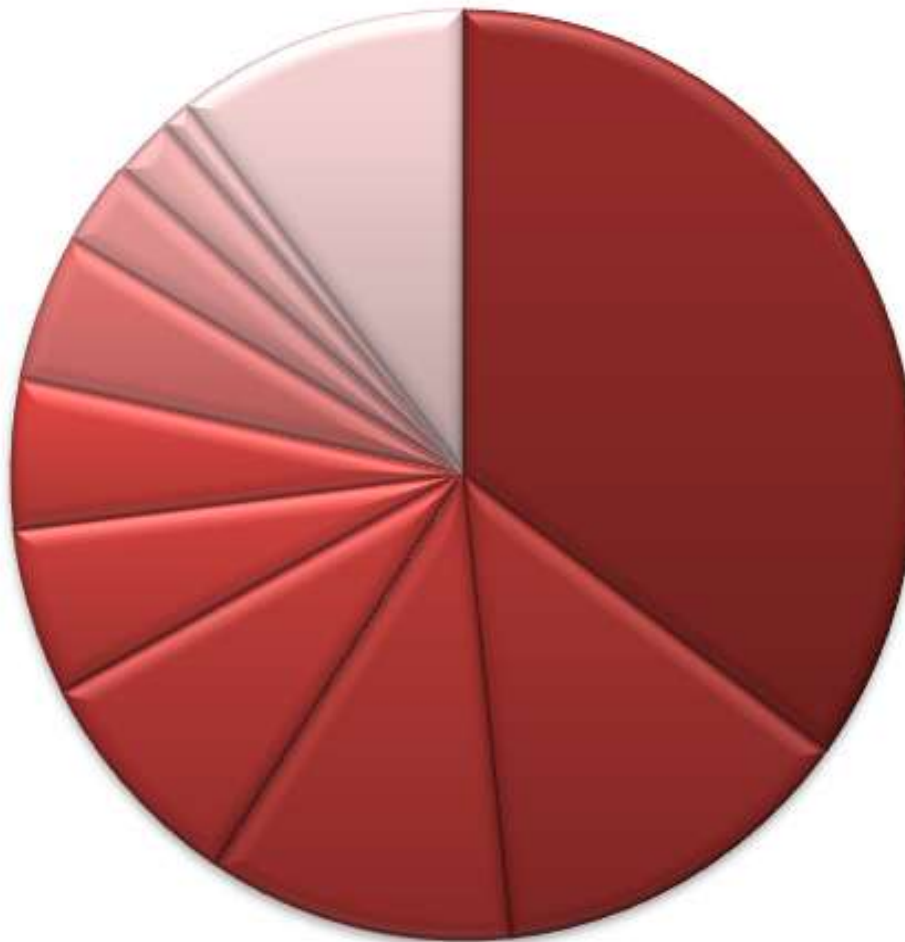
- Air
- Port
- Rail



0 25 50 100 Miles

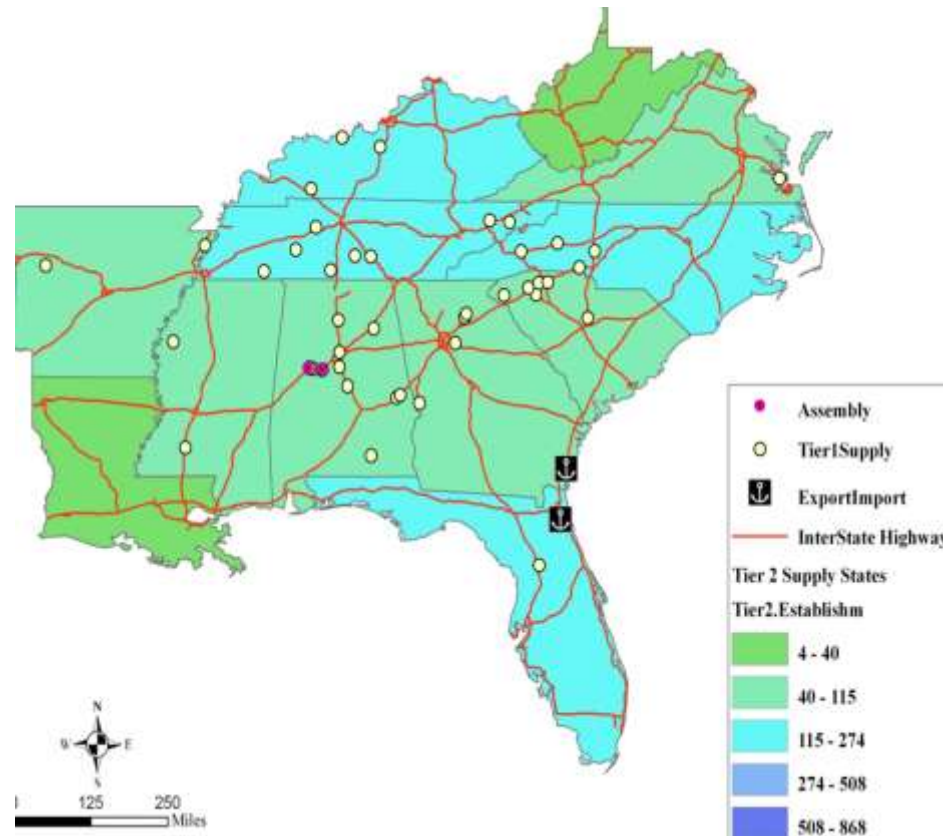


Georgia Gateways- Exports by Origin, 2010 (Vessel Shipments- \$27 Billion)

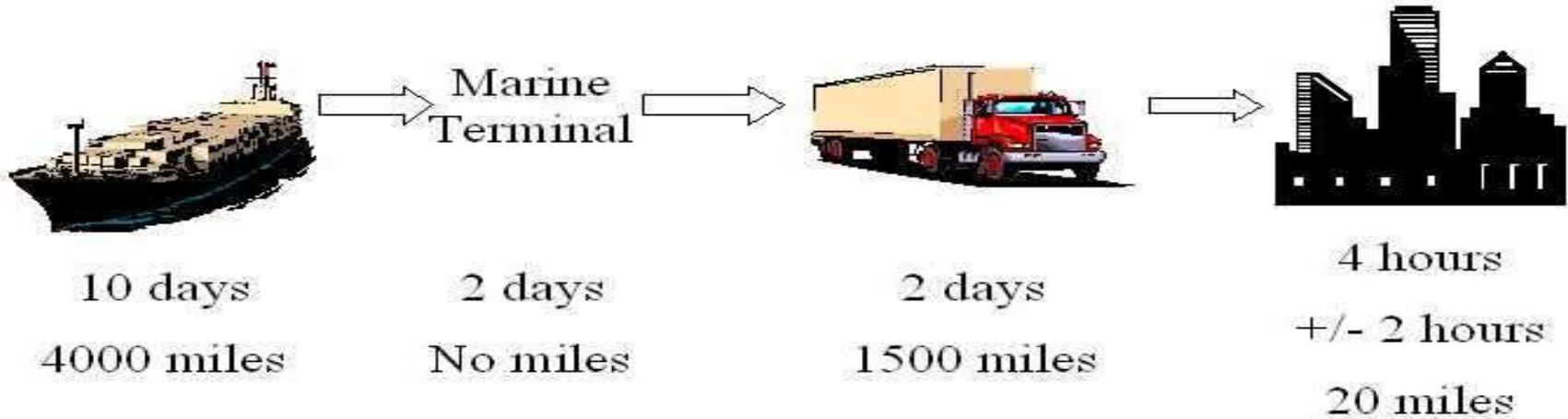


- Georgia (35%)
- Alabama (13%)
- Tennessee (11%)
- South Carolina (8%)
- Florida (6%)
- North Carolina (5%)
- Illinois (5%)
- Kentucky (3%)
- Mississippi (2%)
- Arkansas (1%)
- Other (10%)

“The Message”



Where is the National Priority?



Corridors will be more important in the future

- Panama Canal Expansion
- Dryport/port centric projects
- Transparency and Security
- Logistics and economic development

- Concerns:
 - Will we choke on congestion first?
 - Equipment Interoperability

Benefits of debate

- Ports and hinterlands
- Exports to trade markets
- Regional transportation needs

- But who is listening?
 - Shippers
 - Public
 - Decision Makers





Where do we go from here...

Heartland Intermodal Corridor Scan, Sept 2010



Some Considerations

What do “WE” want

- Relinking Transportation to industrial development
- Perception of value of capital stock
- Economic development = jobs

What must “WE” balance

- Everyone more engaged in parts of the debate
- System’s use not fully understood
- “Others Have It” syndrome
- Scale and Densities
- Aging Infrastructure vs. Capacity
- Manage Expectations

Thank you

Bruce Lambert
Executive Director
Institute for Trade and Transportation Studies
540-455-9882
bruce@ittsresearch.org



Visit ittsresearch.org for more information
Newsletter
Statistics
Freight In the Southeast Conference