



MATS 2050 Freight Plan

Stakeholder Advisory
Committee Meeting

May 29, 2024

Agenda

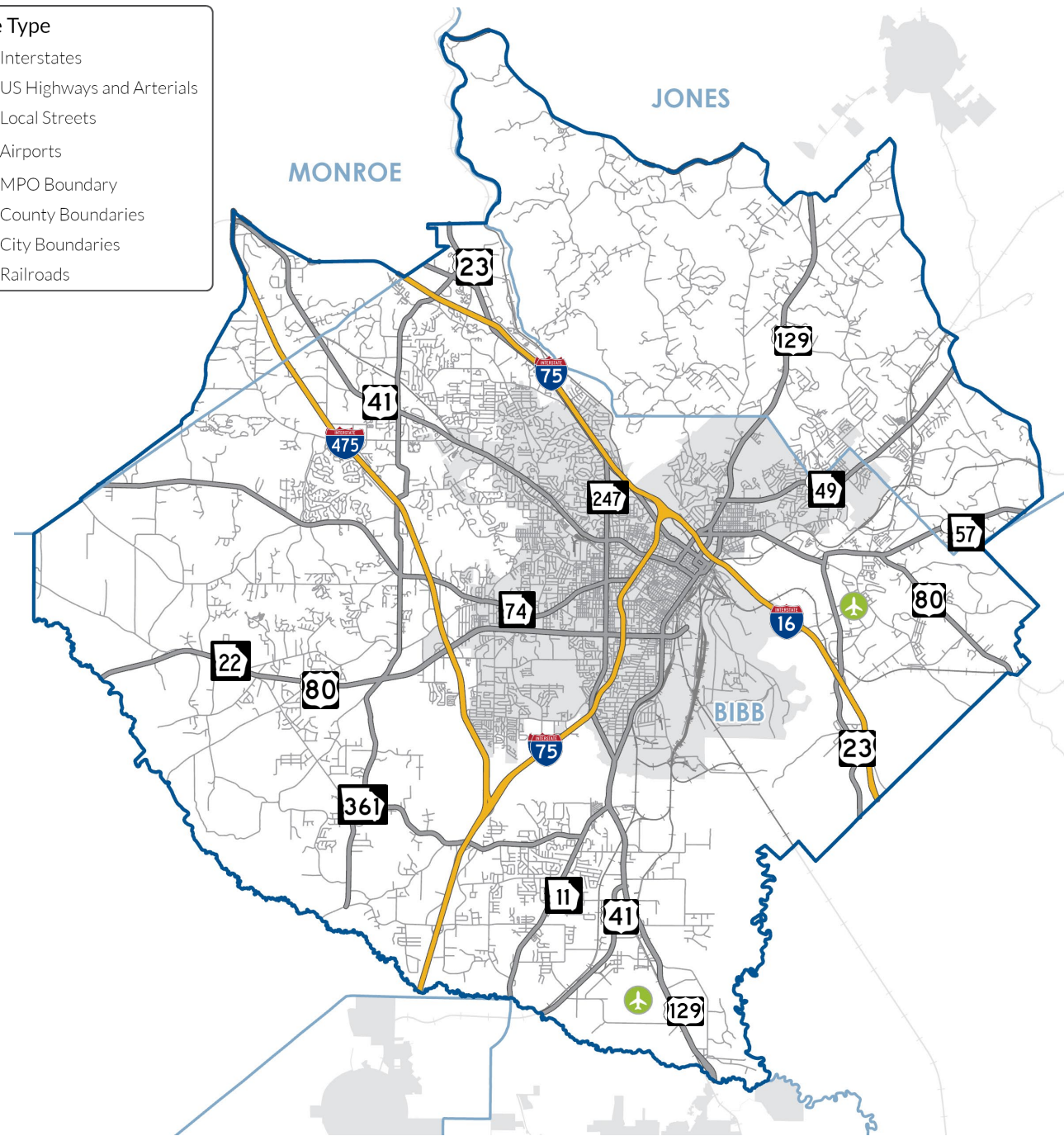
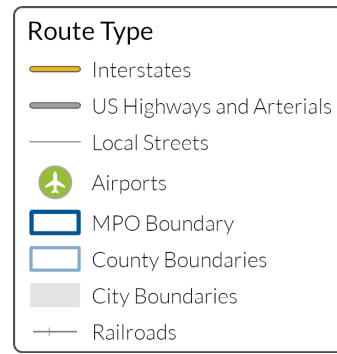
- Project Refresher
- Overview of Existing Conditions
- Stakeholder Engagement
- Discussion and Questions
- Next Steps



Project Refresher

Study Area

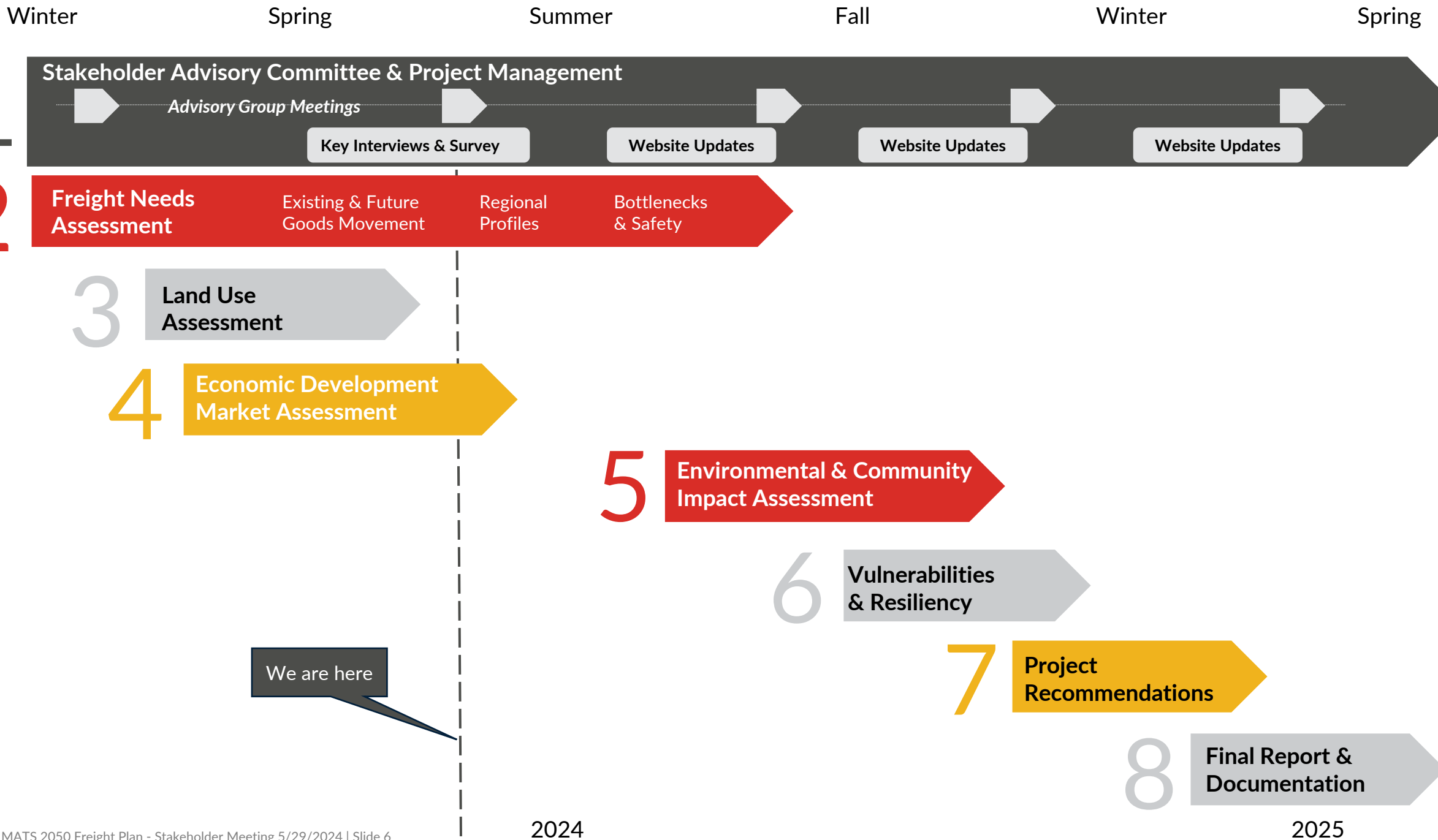
- Macon Area Transportation Study (MATs) Metropolitan Planning Organization (MPO)
- Includes Macon-Bibb County, Southwest Jones County, Southeast Monroe County
- I-16, I-75, I-475, and other major roads
- Approx. 171,000 residents in 2020, anticipated to grow to 178,000+ by 2050



Objectives

- Analyze freight handling capabilities within the region
- Forecast future freight activity and growth through 2050
- Assess freight network needs – including strengths, weaknesses, opportunities, threats, vulnerabilities, and community impacts
- Coordinate with ongoing freight related studies and projects
- Identify potential projects, improvements, and strategies to facilitate efficient movement of goods





Guiding Questions

- *What are the projected future freight needs? Where are **bottlenecks and safety concerns**?*
- *How can the region **prepare for an anticipated increase in freight traffic** both within the region and from neighboring regions and states?*
- *What strategies can be employed to **reduce negative impacts on the surrounding community**?*
- *What types of **investments and policies** can the Macon region undertake to improve freight mobility and safety?*
- *How can the Macon region work with **GDOT, railroad companies, freight operators, and other stakeholders to improve mobility, safety, the local economy, and quality of life** moving forward?*



Existing Conditions Overview

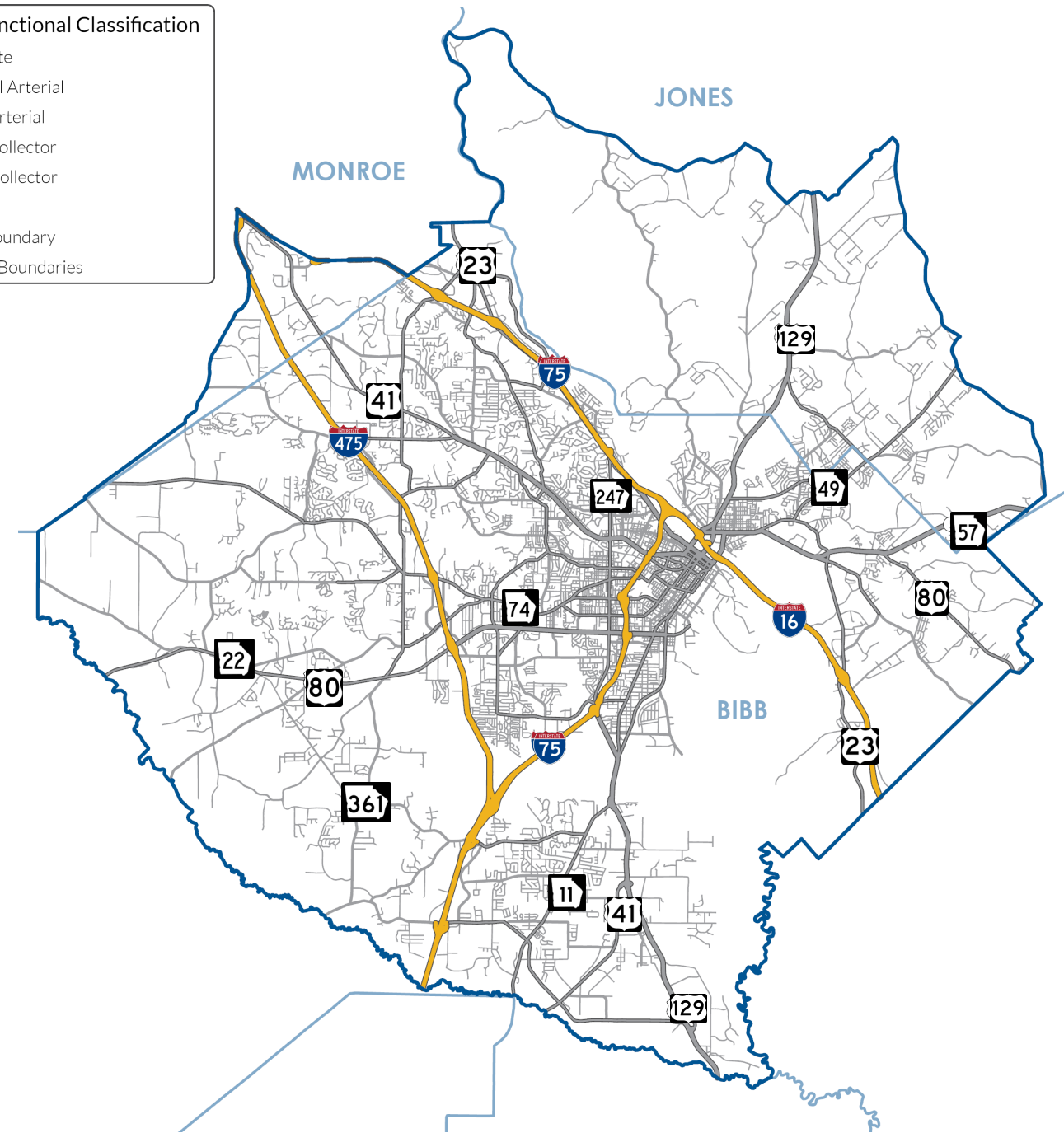
Functional Classification

Interstates and arterial roadways carry the greatest volume of traffic, including freight traffic – they provide connections across and outside of the region (~260 mi)

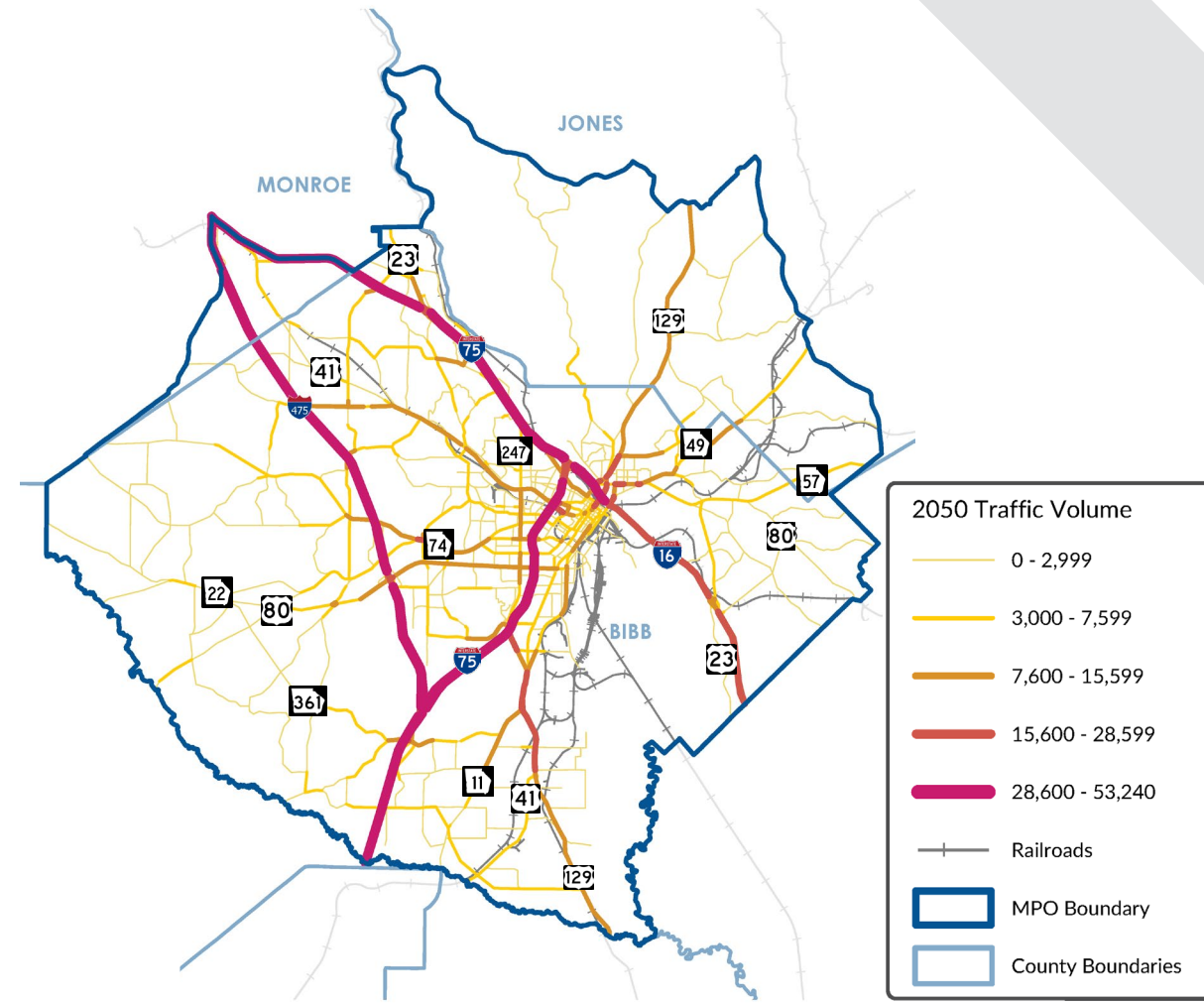
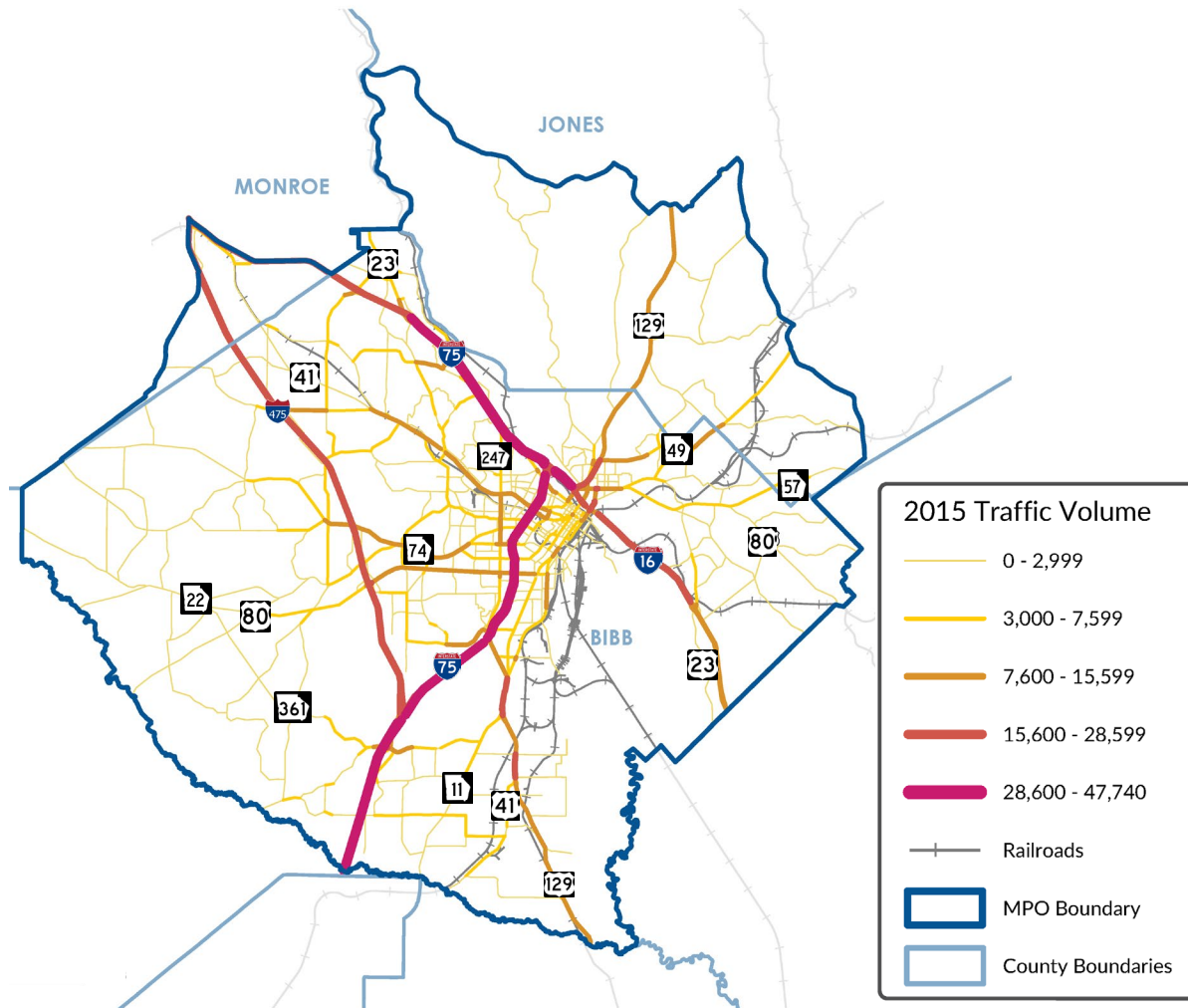
Local roads and collector roads provide access to distribution centers, warehouses, and other freight generators (~1,222 mi)

Roadway Functional Classification

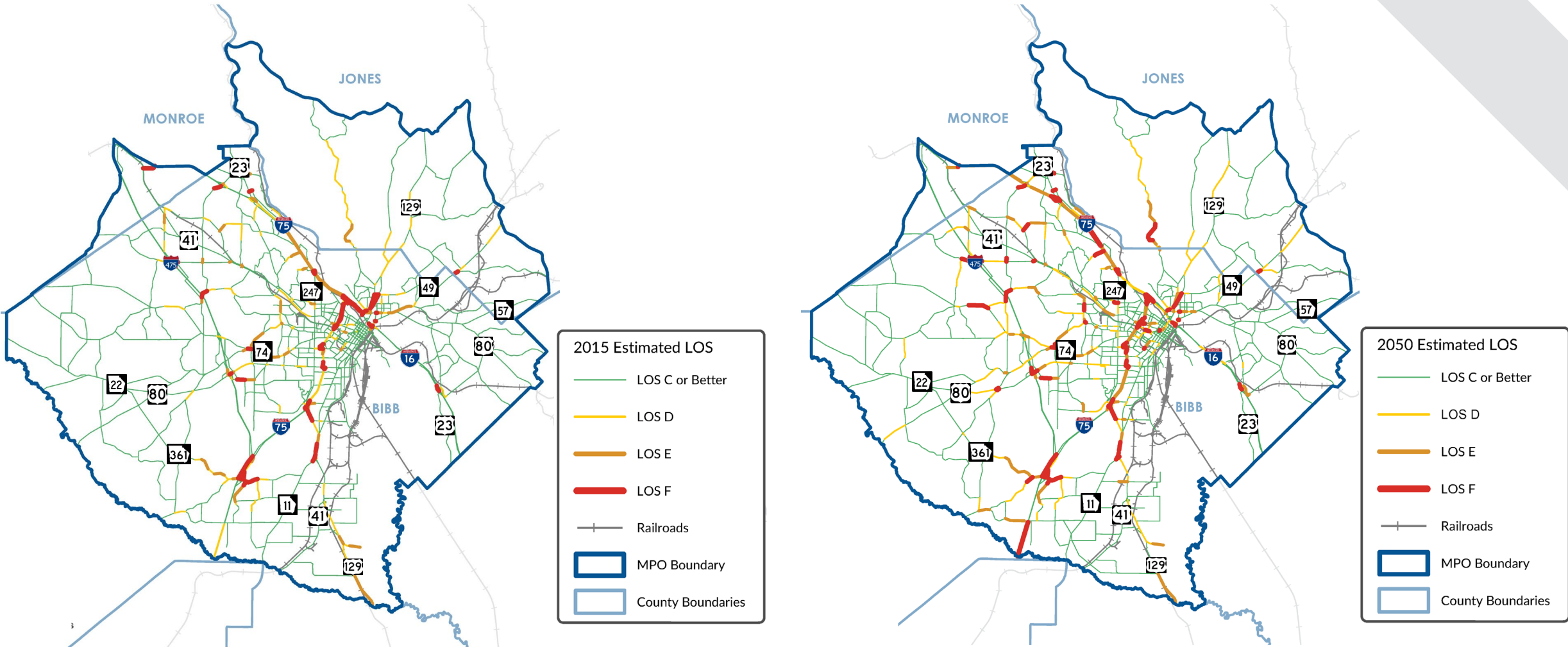
- Interstate
- Principal Arterial
- Minor Arterial
- Major Collector
- Minor Collector
- Local
- MPO Boundary
- County Boundaries



Traffic Volume (2015 and 2050)



Level of Service (2015 and 2050)

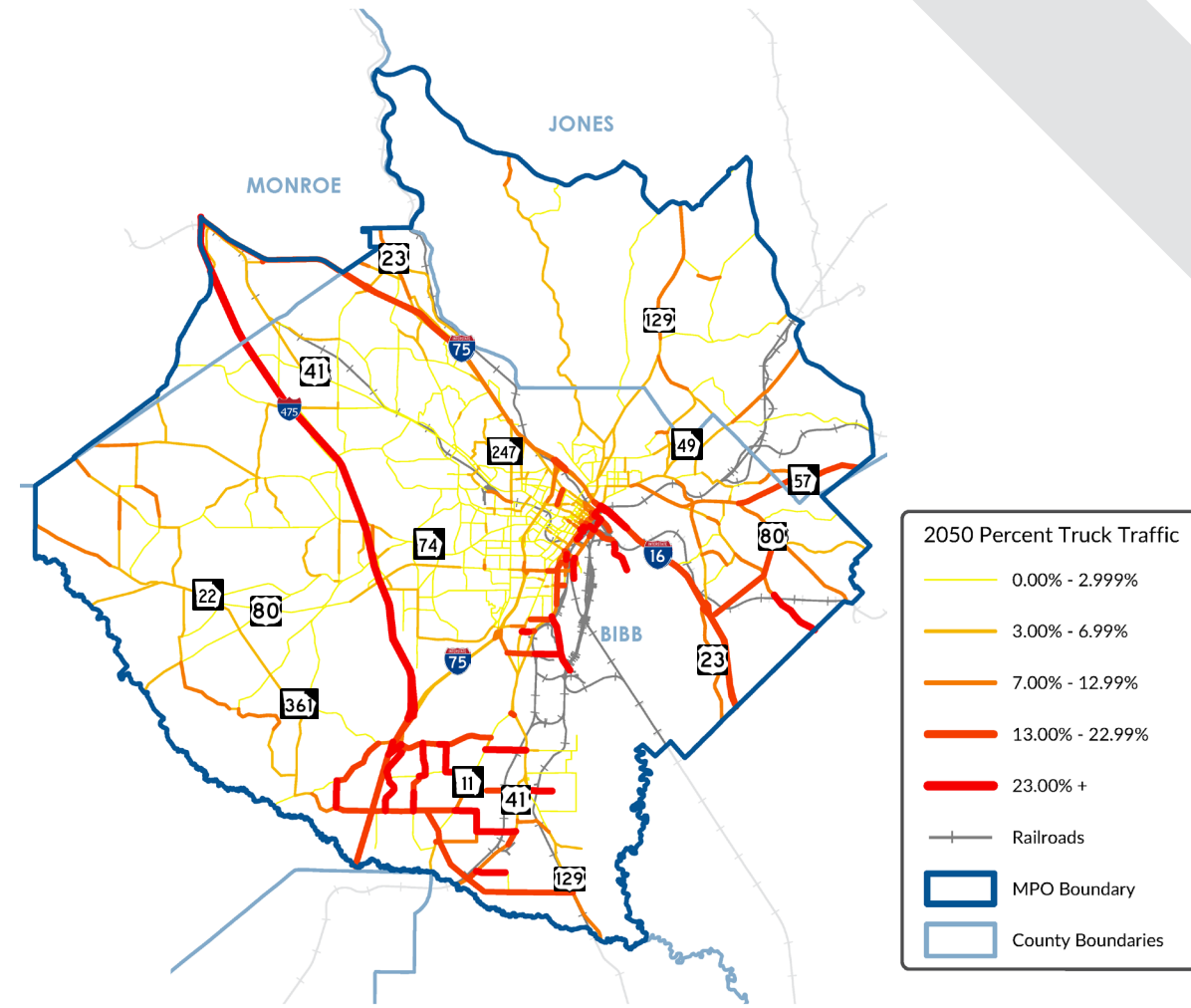
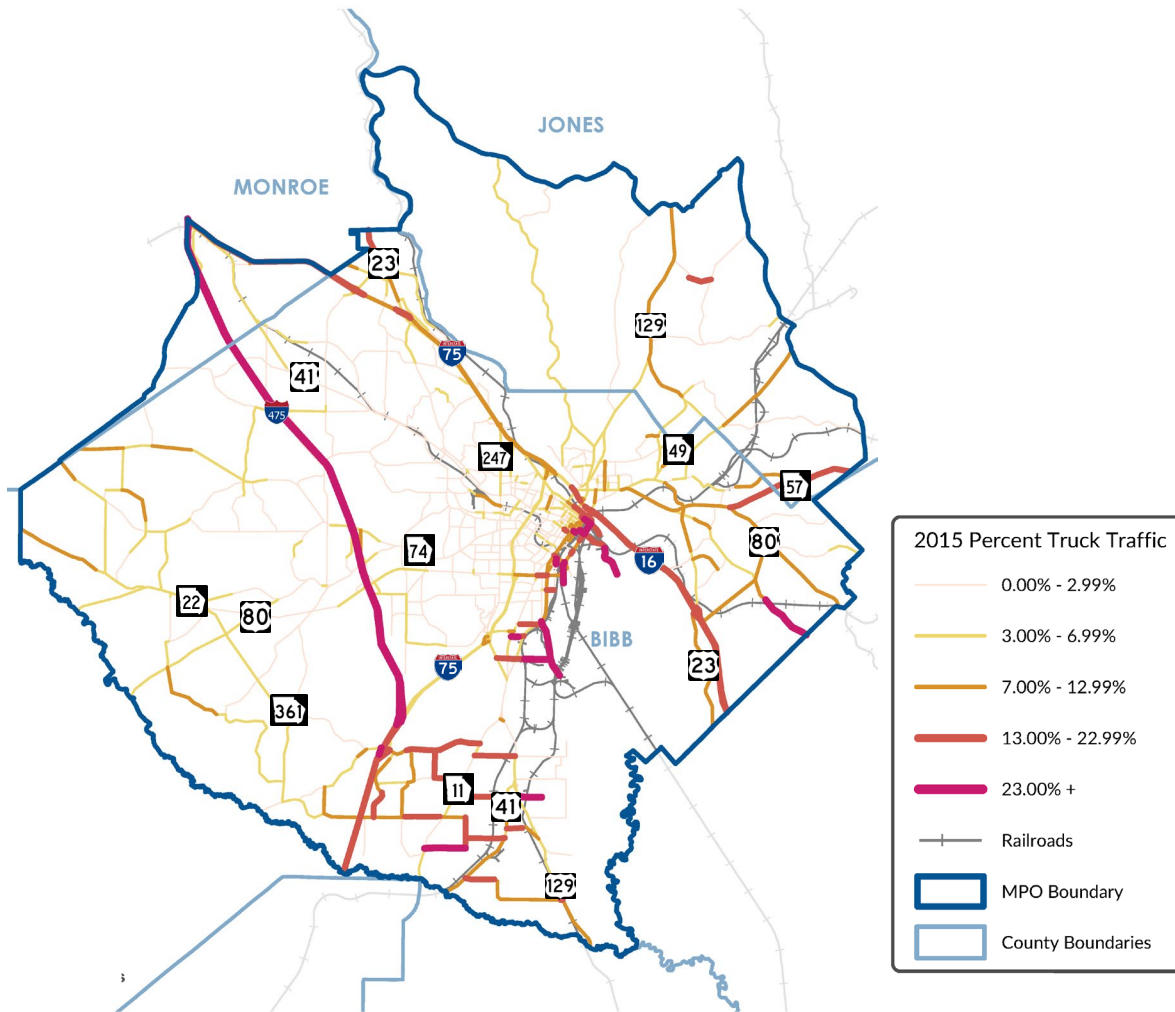


Source: GDOT Regional Travel Demand Model

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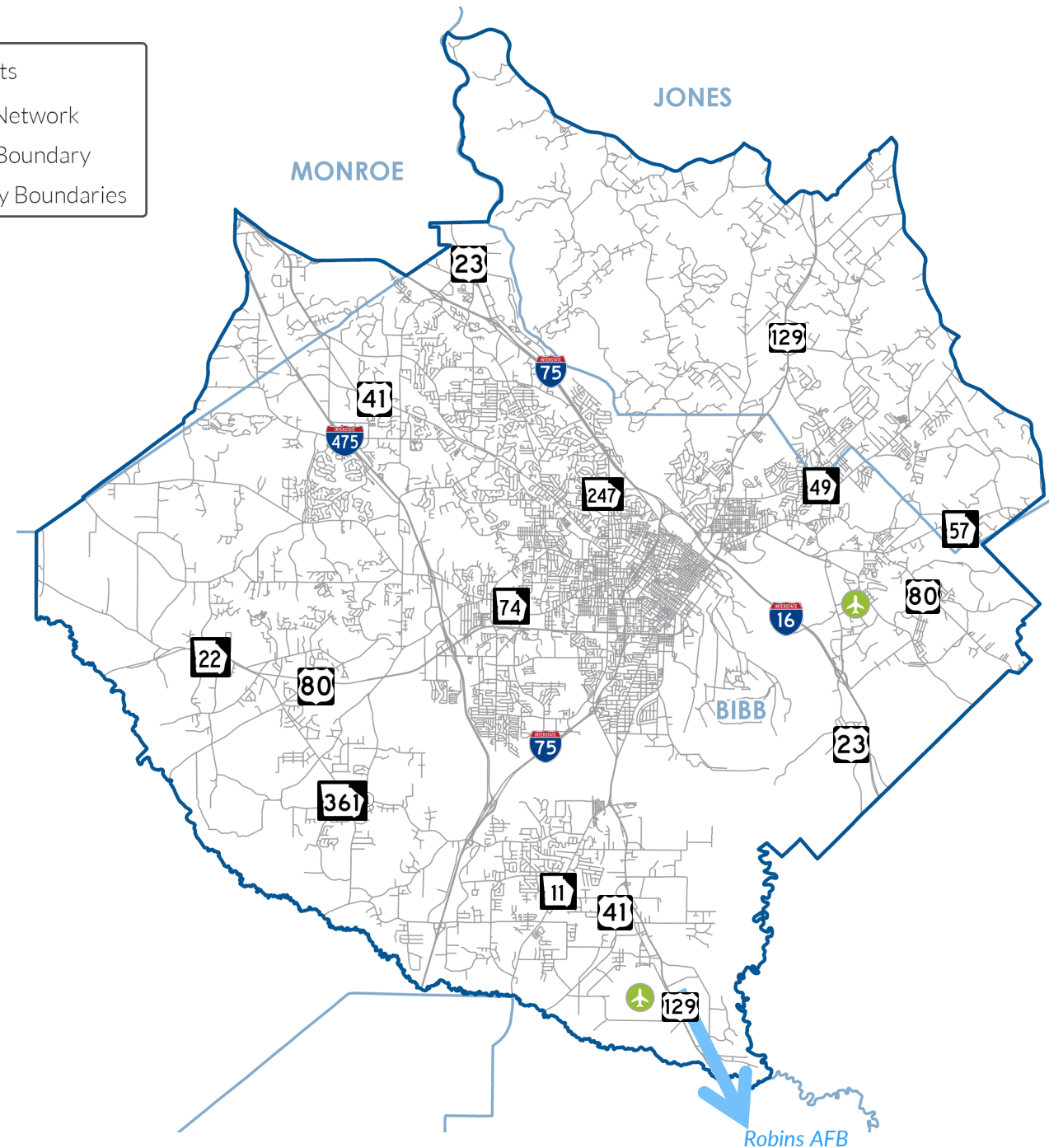
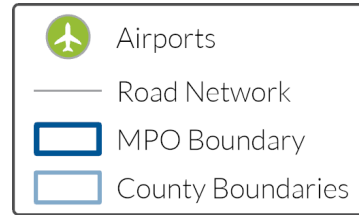


JONES



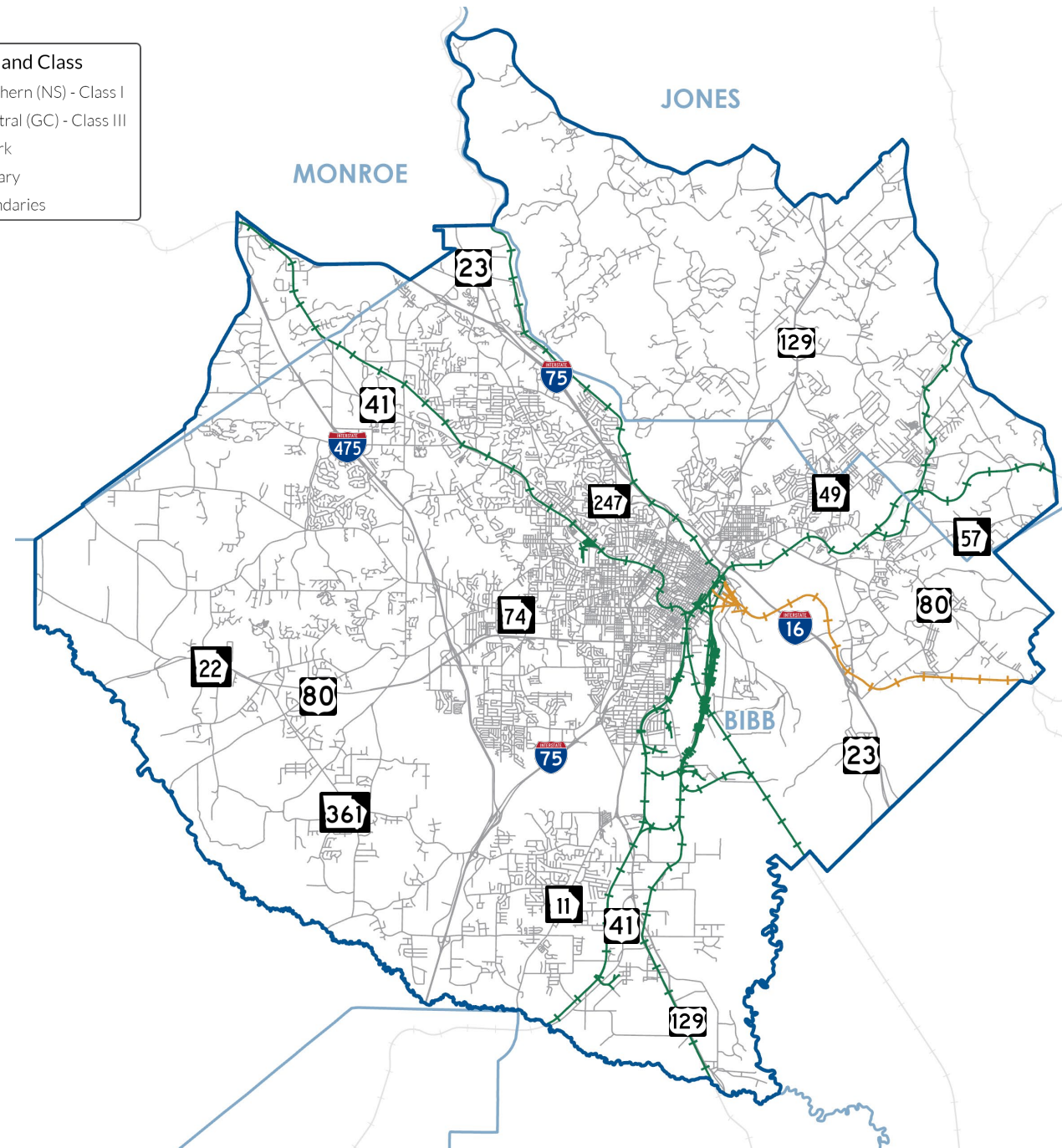
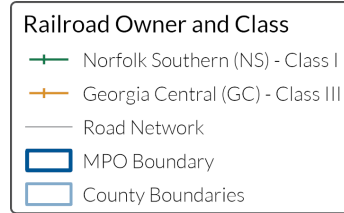
Airports

- Macon Downtown Airport (general aviation) – one runway
- Middle Georgia Regional Airport (commercial service) - two runways
 - No scheduled air cargo service, but accommodates commercial airline belly-hold
- Robins Air Force Base – just outside the study area



Railroads

- Facilitates freight movement between Port of Savannah and Atlanta
- Class I – Three lines north of Macon and three to the south (Norfolk Southern)
- Class III – One line east of Macon (Georgia Central Railway)
- Brosnan Yard – moves over 10,000 railcars per week



- ## Are there places you've seen unauthorized truck parking?

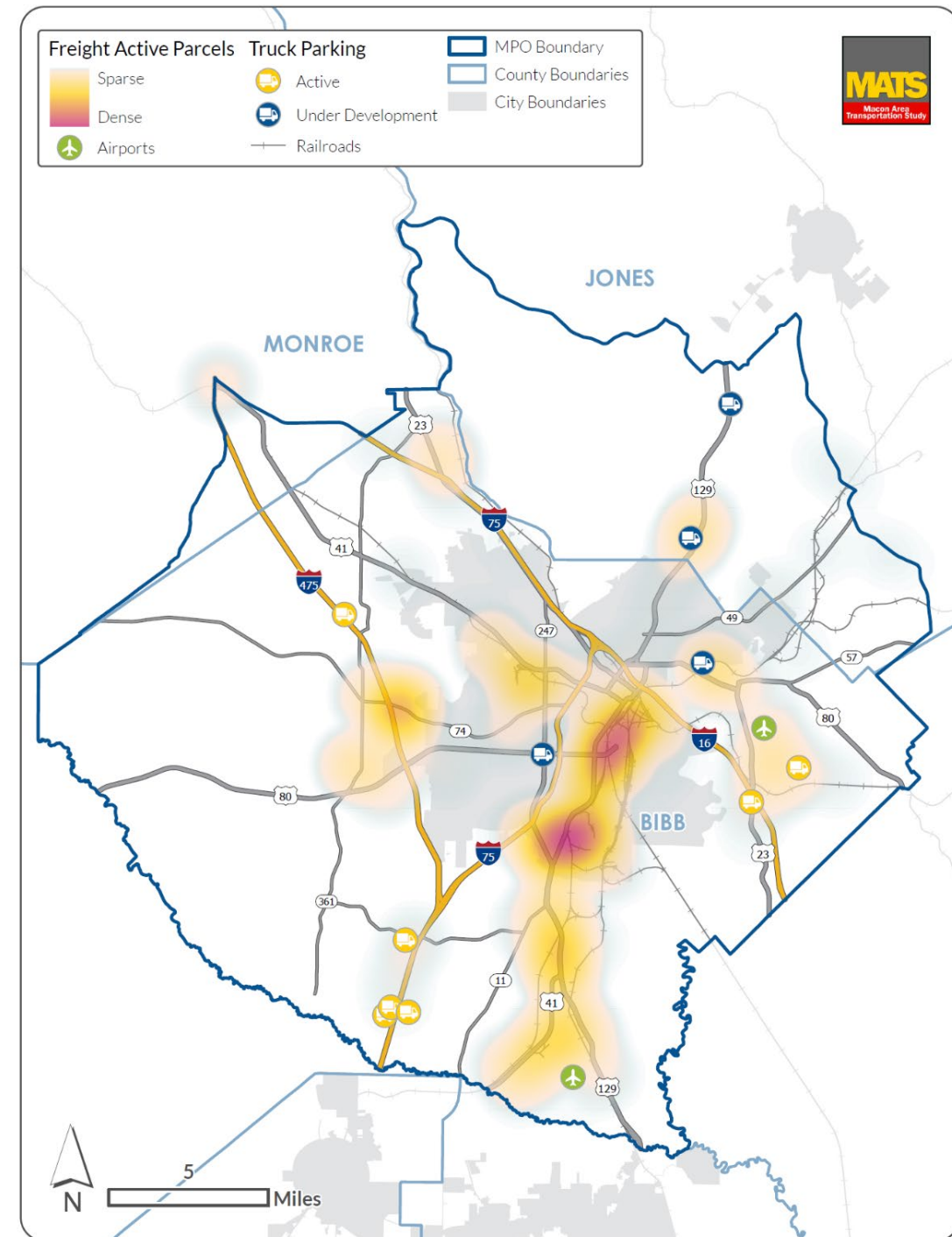


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Freight-Oriented Land Uses

- Primarily in central and southern Bibb County, including City of Macon
- Jones County – Near Postell and Ruby Quarries
- Adjacent to I-75, I-16, I-475, US 41 and US 129
- Primarily manufacturing, warehouses, distribution centers
 - Also includes some agricultural, auto dealerships, and other commercial property

Source: Macon-Bibb County, Jones County, Monroe County, Consultant Team Analysis



Local Examples of Warehouses/Industrial Uses

Irving Consumer Products (1897 Allen Road)

- Built 2019
- 700,000 SF rentable building area (RBA)
- Manufacturing



Local Examples of Warehouses/ Industrial Uses

Southern Warehouse Services (2501 Weaver Road)

- Built 2000
- 11+ acres
- Distribution facility



Local Examples of Warehouses/ Industrial Uses

Graphic Packaging International (100 Graphic Packaging International Way)

- Built 1955
- 35 + acres
- Manufacturing



Local Examples of Warehouses/ Industrial Uses

Amazon Fulfillment Center (6803 Skipper Road)

- Built 2018
- 95+ acres
- Warehouse



Local Examples of Warehouses/Industrial Uses

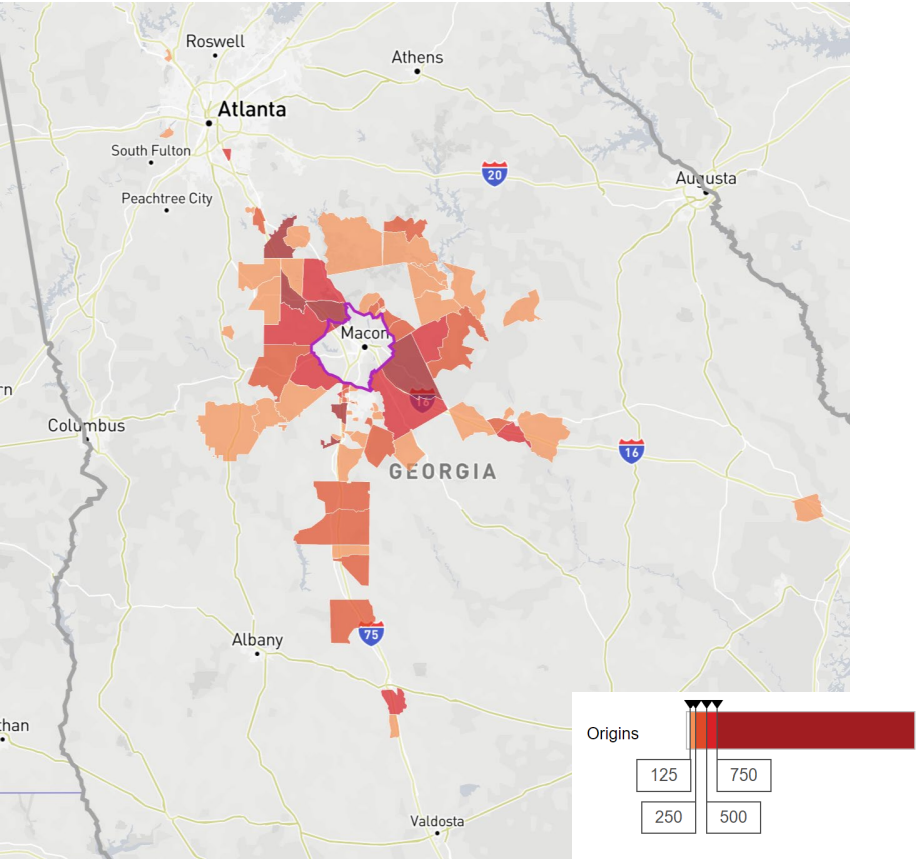
[Kumho Tire \(3051 Kumho Parkway\)](#)

- Built 2016
- 130+ acres
- Manufacturing

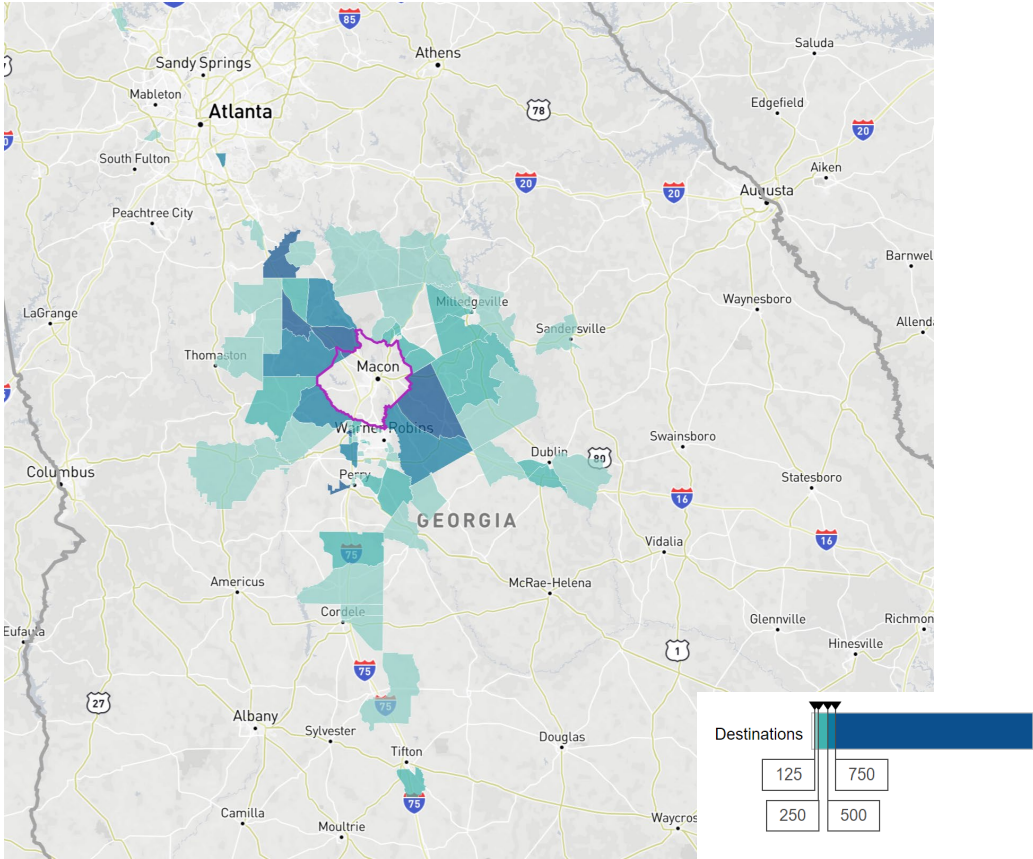


Freight Origins and Destinations (Zones)

Trips to MATS from other areas

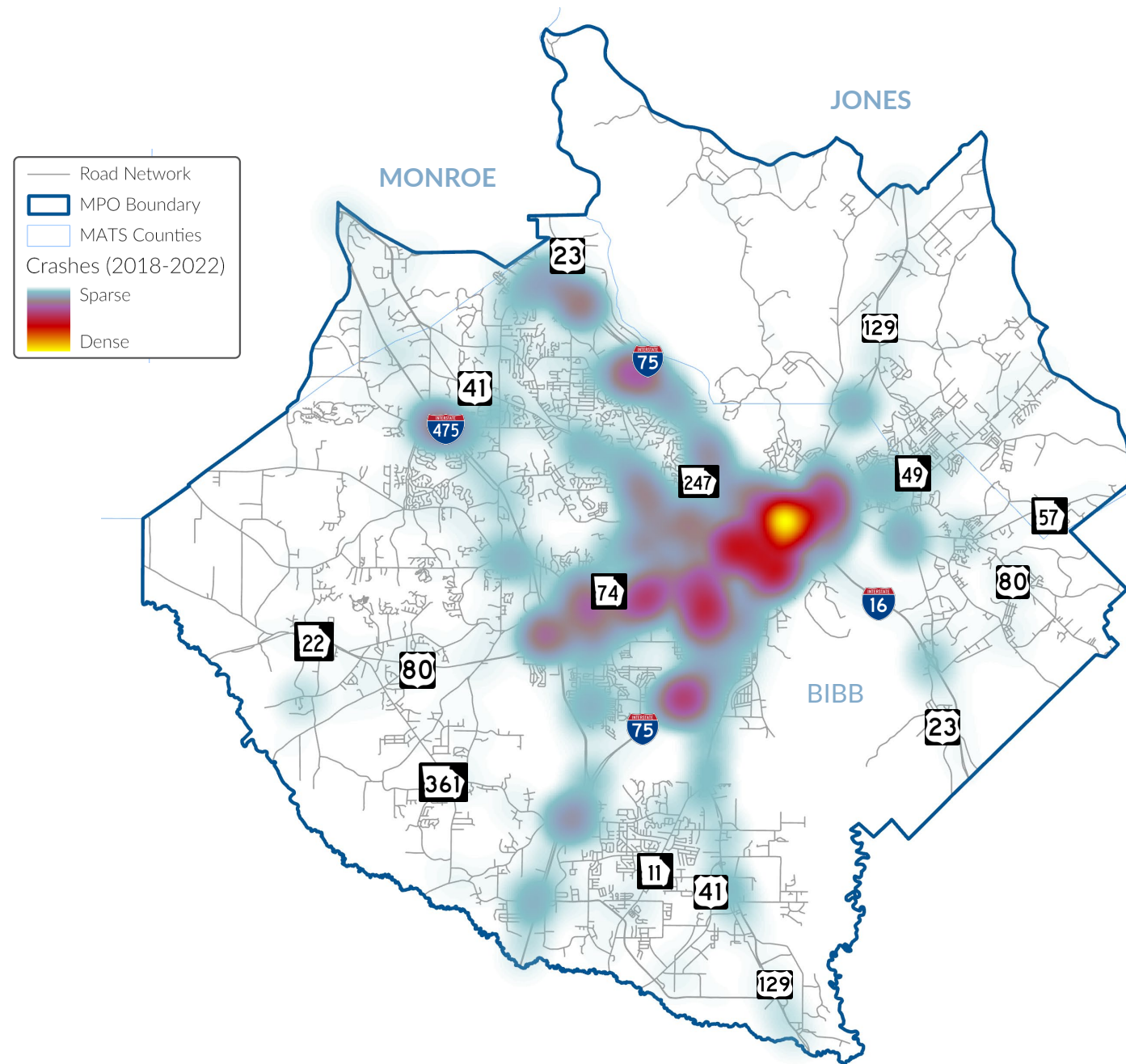


Trips from MATS to other areas



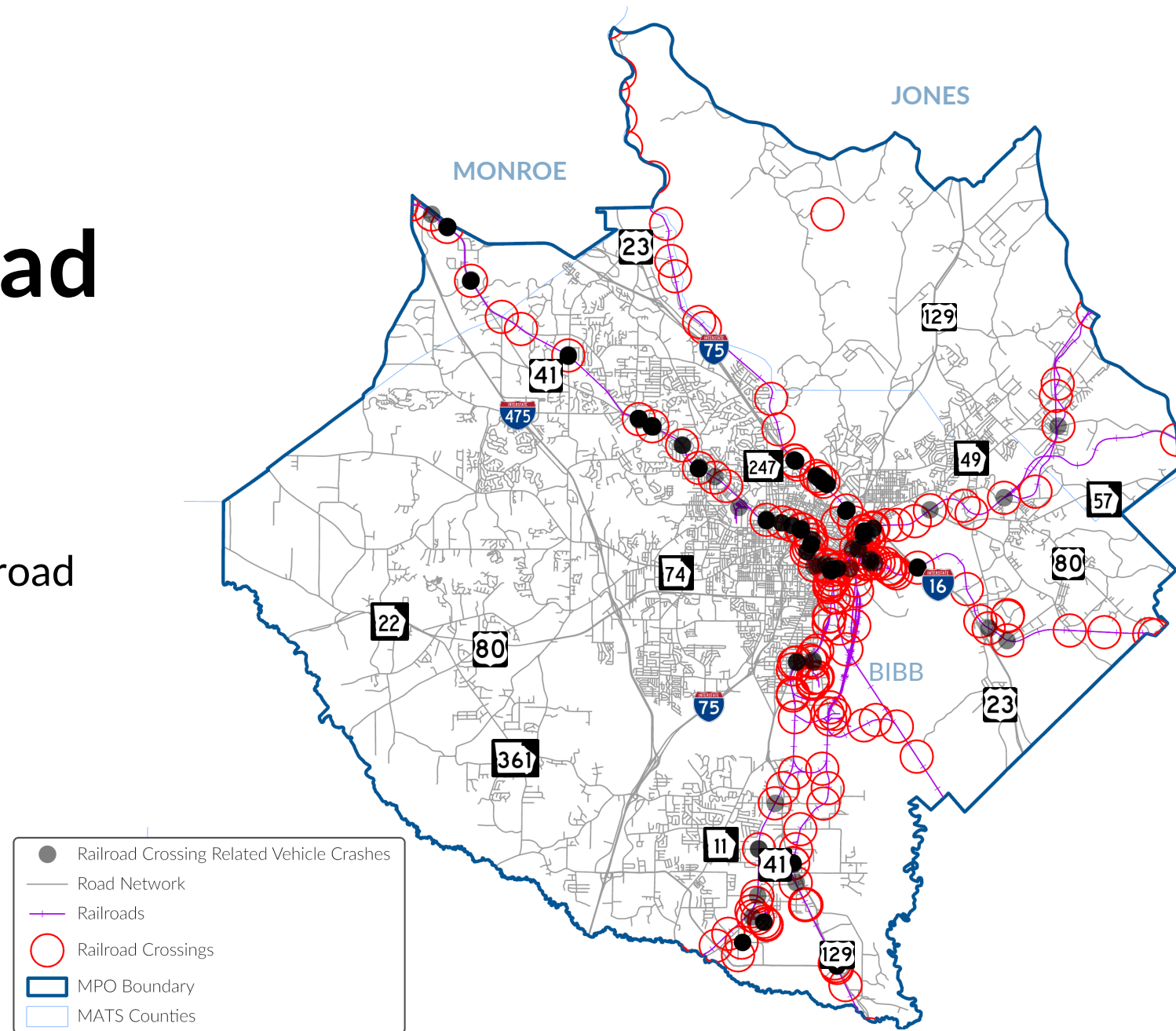
Safety

- 38,386 crashes total within the MATS MPO (2018-2022)
- Includes 208 (0.54%) fatal crashes, and 713 (1.86%) serious injury crashes
- Also includes 2,211 (5.76%) visible injury crashes, and 7,824 (20.38%) complaint injury crashes

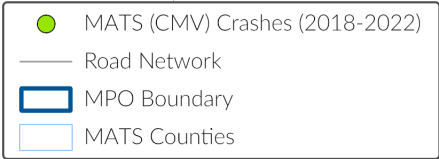


Crashes at Railroad Crossings

- In total, 483 crashes occurred at railroad crossings (~1.25% of all crashes)
- Of those, 46 involved commercial vehicles

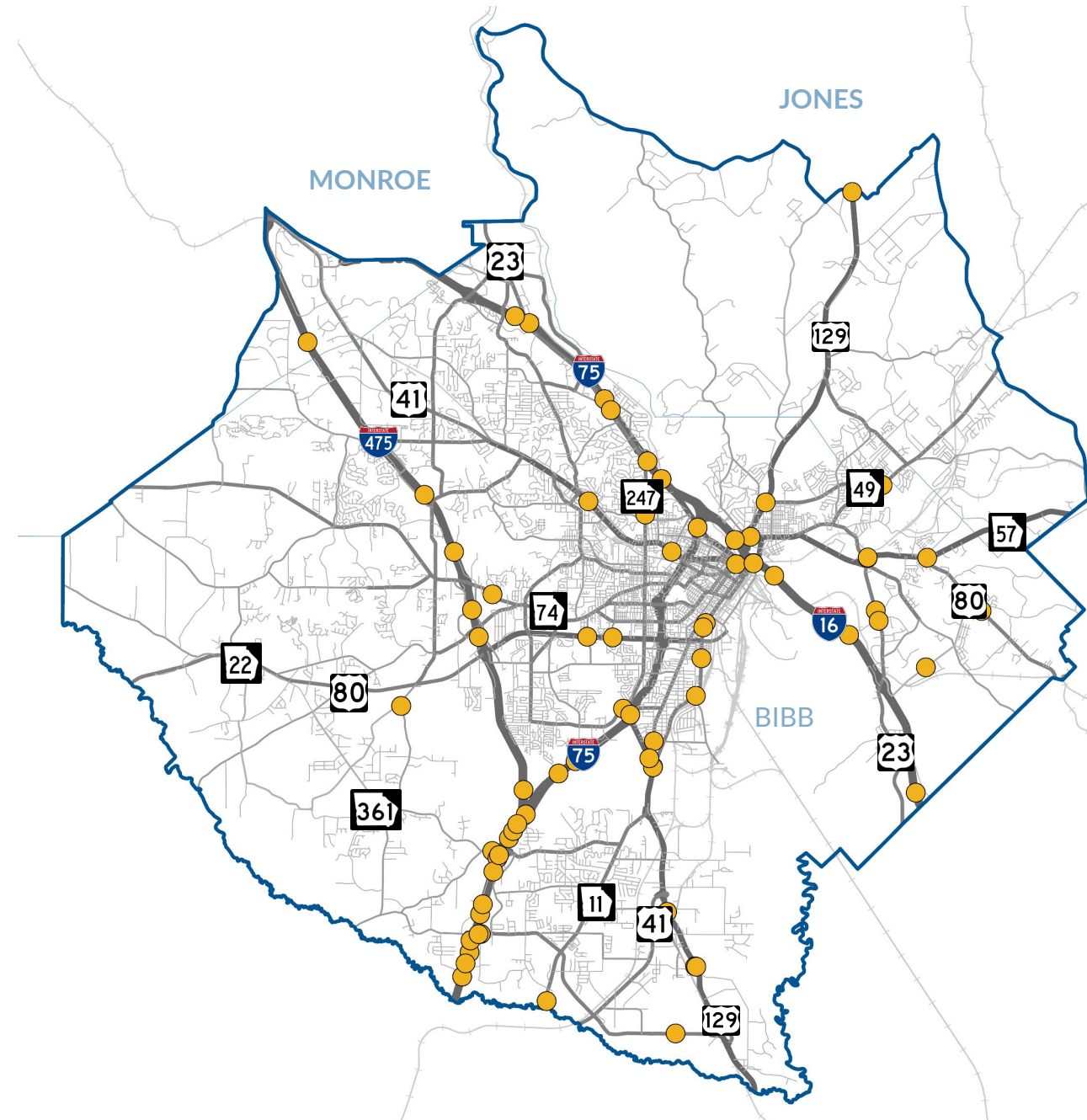


- DOT (Numetric/AASHTOWare), Consultant Team Analysis



Fatal & Severe Injury Commercial Vehicle Crashes

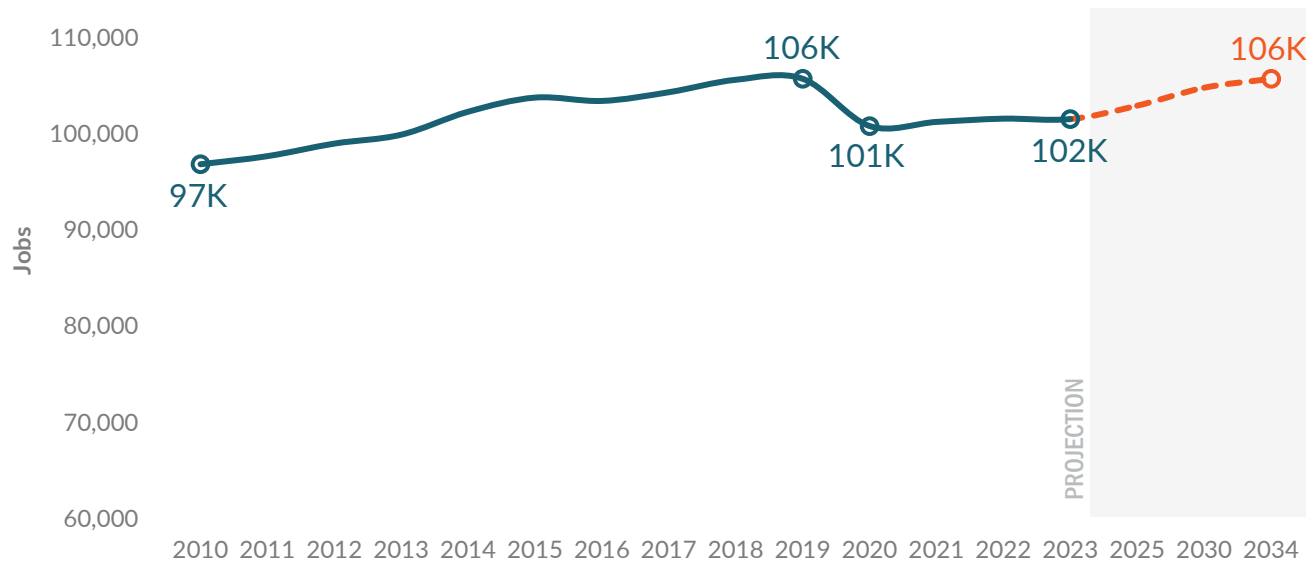
- A total of 93 fatal (K) and severe injury (A) crashes involved a commercial motor vehicle (4% of CMV crashes, 10% of all KA crashes)
- Seven (7) crashes involved a pedestrian, 4 involved a motorcycle, and 1 involved a cyclist
- Most KA crashes involving CMVs occurred on interstates (34.41%), minor arterials (24.73%), or principal arterials (21.51%)





Economic Development Market Assessment

Overall Employment Trends & Forecast



Source: Lightcast

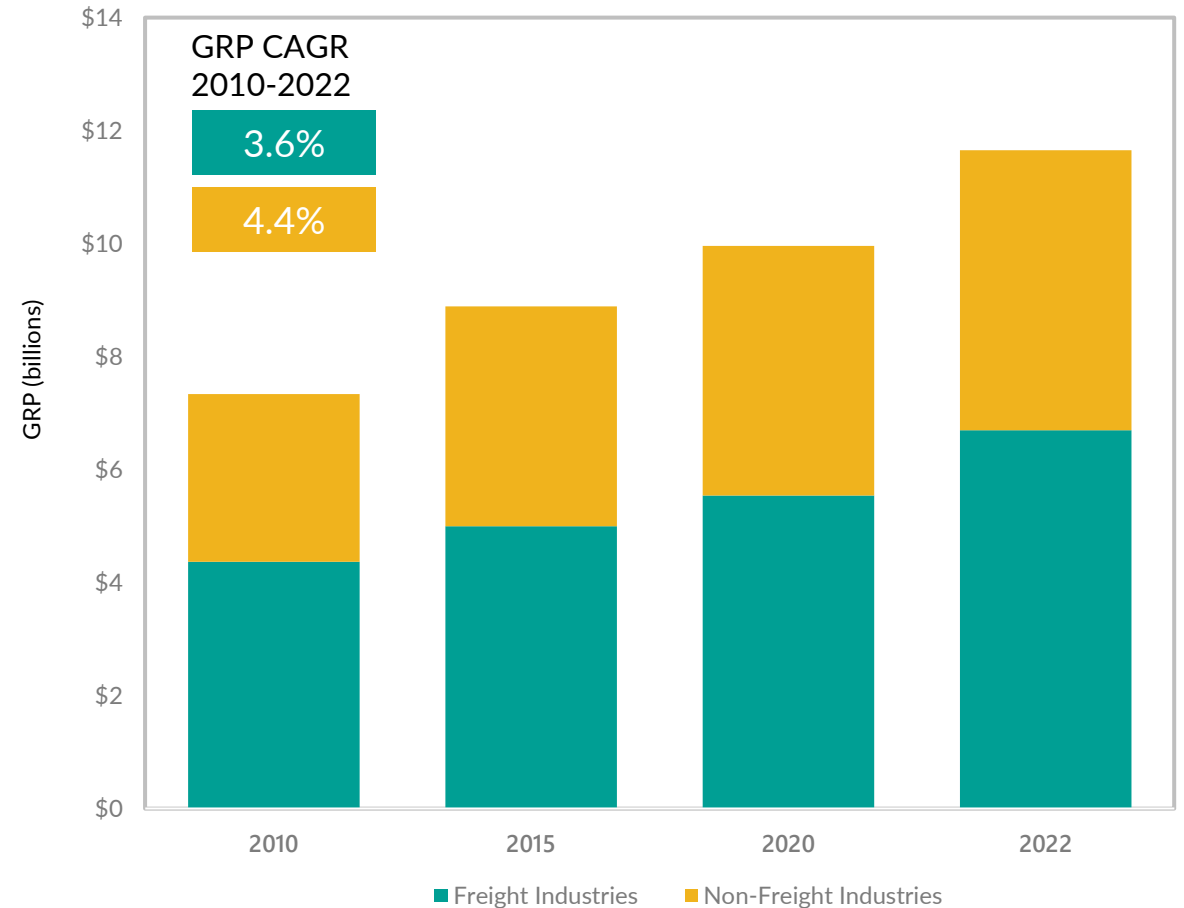
- Macon-Bibb County Metropolitan Statistical Area (MSA)^[1] added approximately 8,900 jobs from 2010-2019
- Impacts of the COVID-19 pandemic reduced total employment by 5% in 2020
- Employment has stabilized since 2020 but has not yet recovered to pre-pandemic levels
 - Projections indicate employment will recover by 2034
- Employment Compound Annual Growth Rates (CAGR):
 - **Historic (2010-2019): 0.98%**
 - **Projected (2025-2034): 0.30%**

[1] Includes Macon-Bibb, Jones, Monroe, Twiggs, and Crawford Counties

Gross Regional Product

- Gross domestic product has increased since 2010 by 3.9% annually
- Freight-related industries account for 57% of total GRP in 2022- slightly less than the share in 2010 (60%)
- Key freight-related growth industries include **Mining, Quarrying, and Oil and Gas Extraction; Manufacturing; and Construction**
- Non-freight GRP growth is primarily attributed to **Finance and Insurance and Information** industries
- **Manufacturing** is the largest single industry, accounting for 18% of GRP

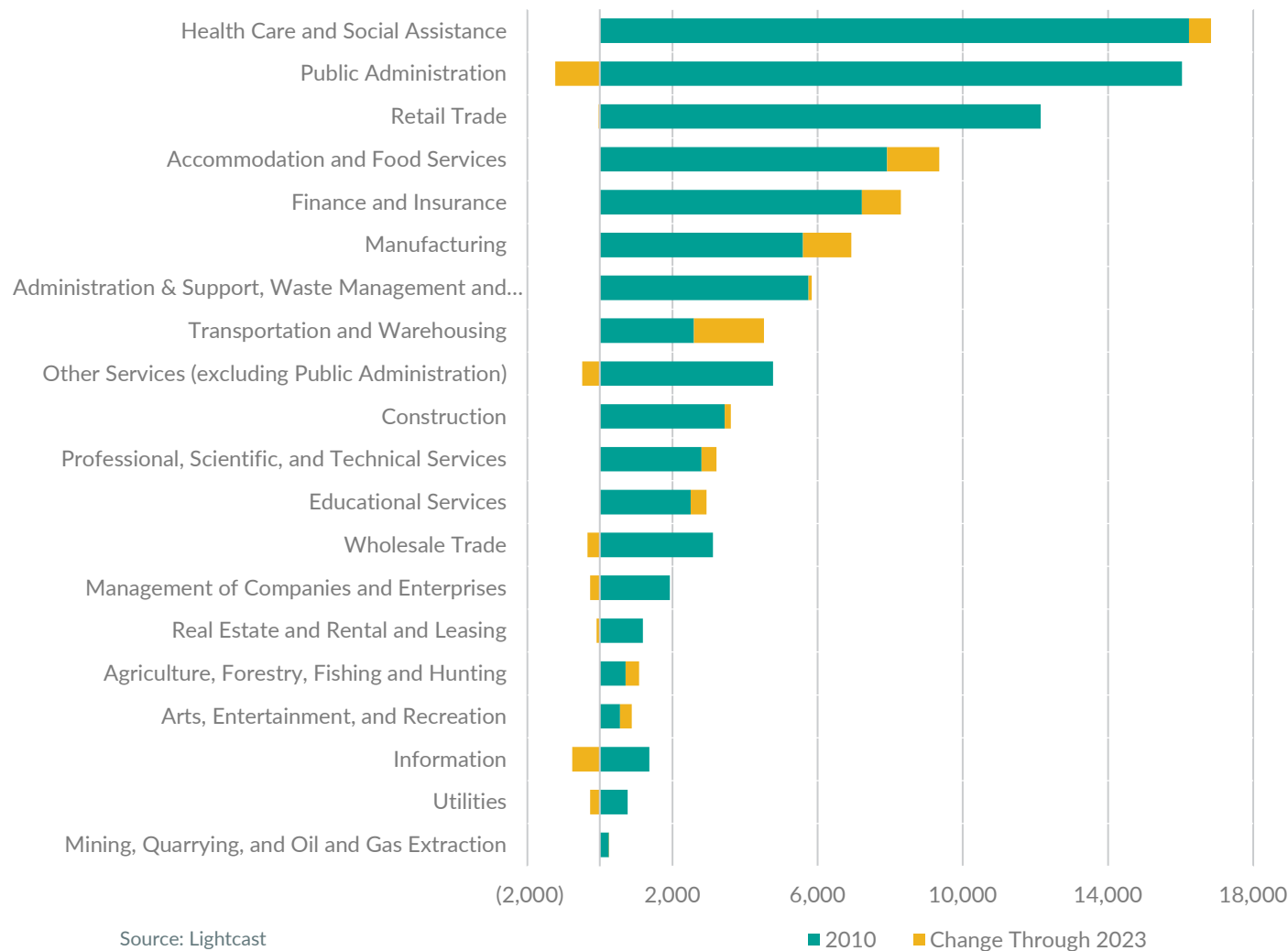
GROSS REGIONAL PRODUCT (GRP), 2010-2022



Source: Lightcast

Regional Industry Trends

- The three top industries in the MATS region based on employment are **Health Care and Social Assistance, Public Administration, and Retail Trade**
 - **Public Administration** lost 1,232 jobs and **Retail Trade** remained stable (-33) from 2010-2023
- Employment in freight-related industries is primarily driven by **Retail Trade, Manufacturing, and Transportation and Warehousing**
- Employment growth in the region from 2010 to 2023 was largely driven by **Transportation & Warehousing (+1,930 jobs), Accommodation & Food Services (+1,437), Manufacturing (+1,335) and Finance and Insurance (+1,076)**
 - Since 2010, employment in **Transportation and Warehousing** has nearly doubled



Top Clusters in MATS Region

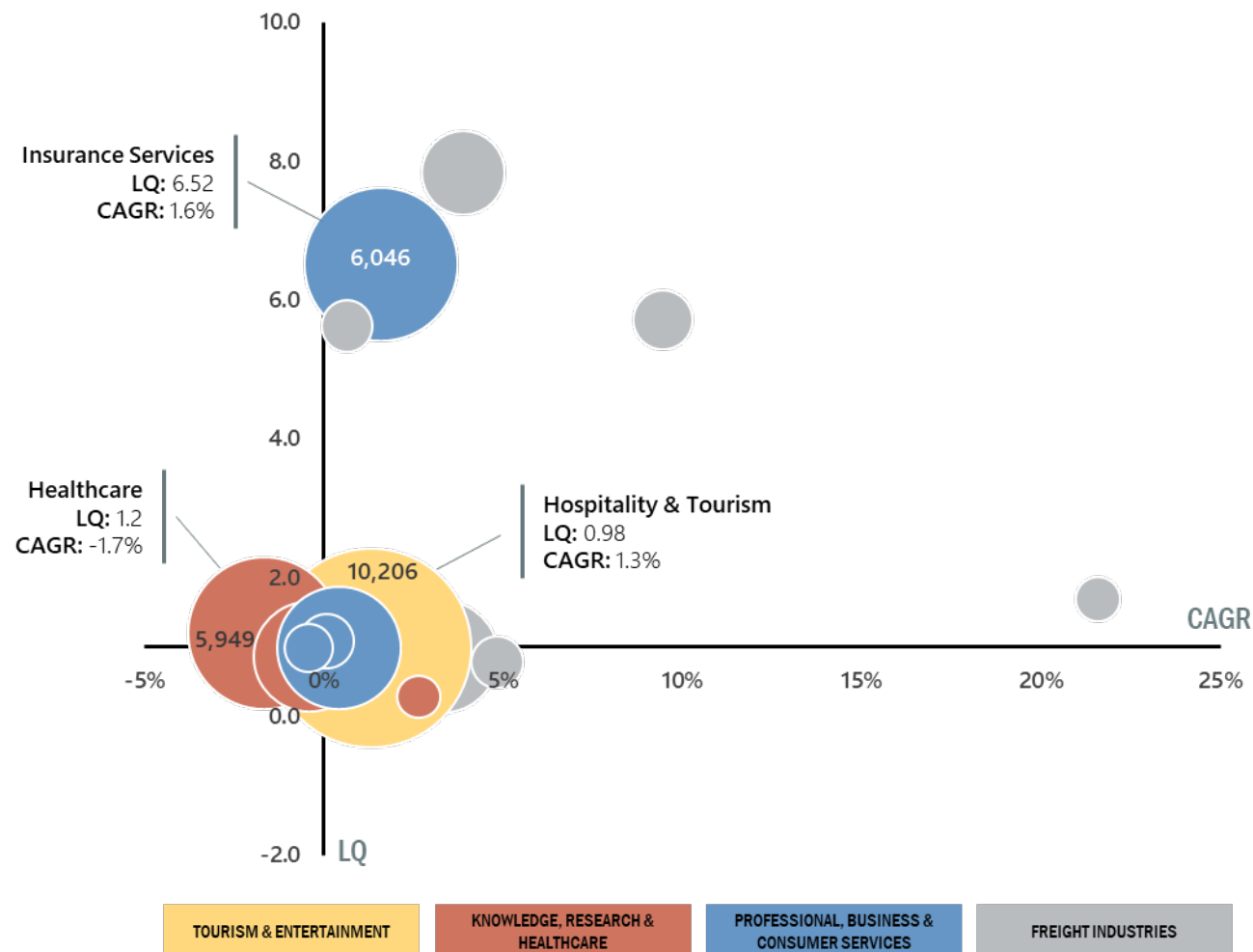
Location Quotient (LQ) is a measure of a region's concentration of employment in a particular industry (or cluster) as compared to the nation.

LQ < 1: fewer regional jobs than expected based on national data

LQ = 1: exact number of jobs to meet regional demand

LQ > 1: concentration of regional jobs; indicates an export good or service

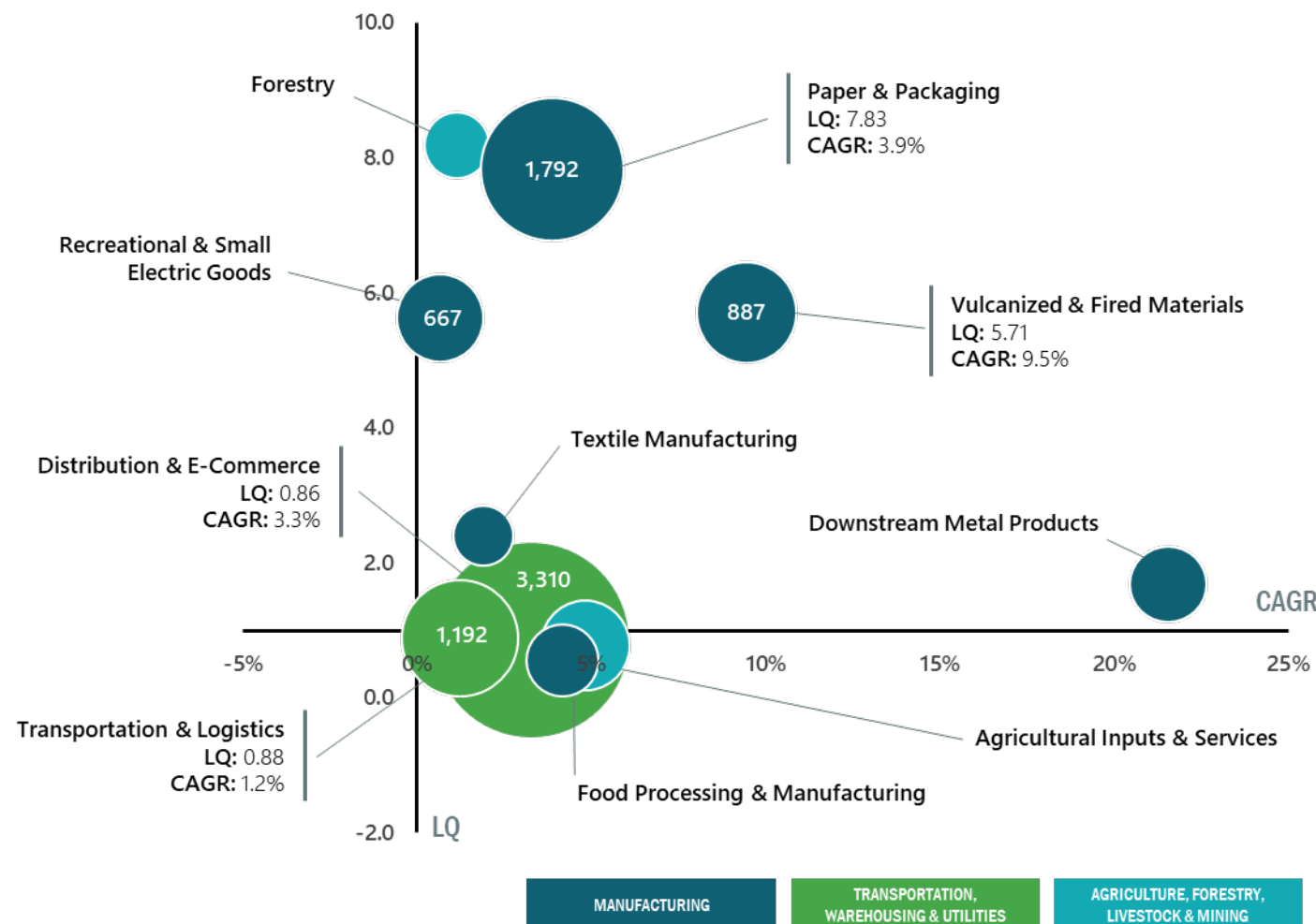
- The largest cluster in the MATS region is **Hospitality and Tourism**, which employs more than 10,000 people. Annual growth between 2010 and 2024 was modest at 1.3%.
- **Insurance Services** provides about 6,000 jobs, has experienced growth of 1.6% annually, and is a cluster with a high LQ, indicating the MATS Region is specialized in this cluster.
- **Healthcare** employs nearly 6,000 people but employment has declined by 20% since 2010.



Source: Lightcast

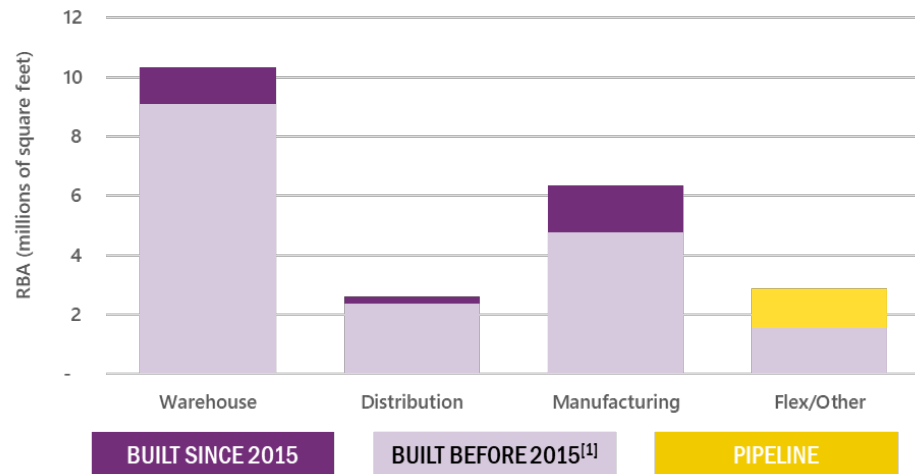
Top Clusters in MATS Region

- **Distribution & E-Commerce** is the largest freight-related cluster in the region, employing more than 3,300 people
 - Despite being a large employer, the cluster has a Location Quotient (LQ) less than 1, indicating fewer jobs than expected based on national employment
- High LQs for **Paper & Packaging**, **Vulcanized & Fired Materials**, **Recreational & Small Electric Goods**, and **Downstream Metal Products** indicate regional specialization
 - These clusters export goods and services and contribute significantly to the Gross Regional Product
 - Manufacturing accounts for around 18% of total GRP, which is the largest share of any single industry. This is driven primarily by the Paper and Packaging cluster.

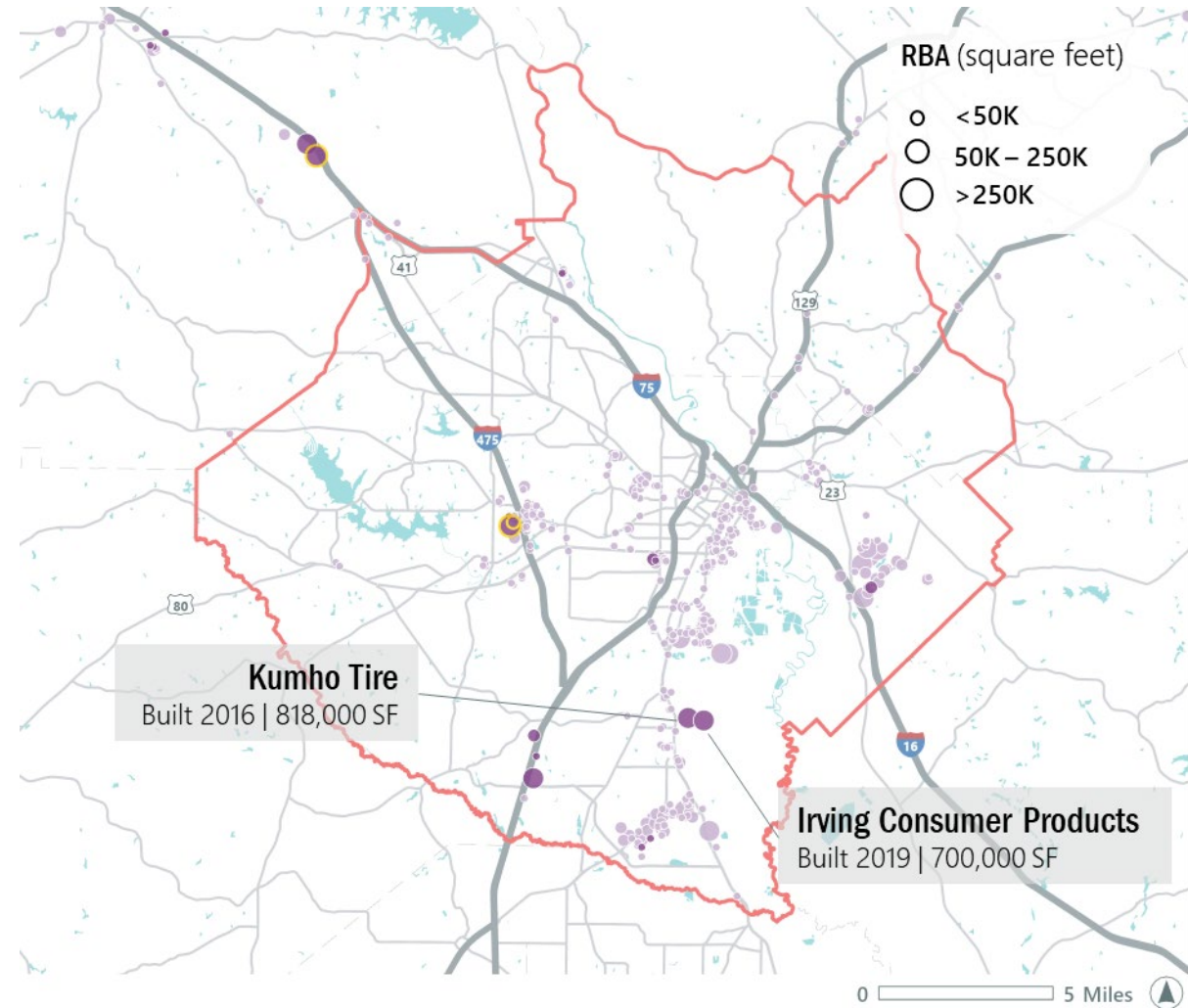


Industry Real Estate Summary

- 13 industrial buildings have been constructed since 2015, totaling more than 3M square feet
- Product built since 2015 is much larger than the existing stock, averaging 237K square feet compared to 40K square feet
- Investments by manufacturers Irving Consumer Products and Kumho Tire account for nearly 50% of the industrial space built since 2015



[1] Includes 1.7M SF of buildings with no year built date
Source: CoStar, SB Friedman

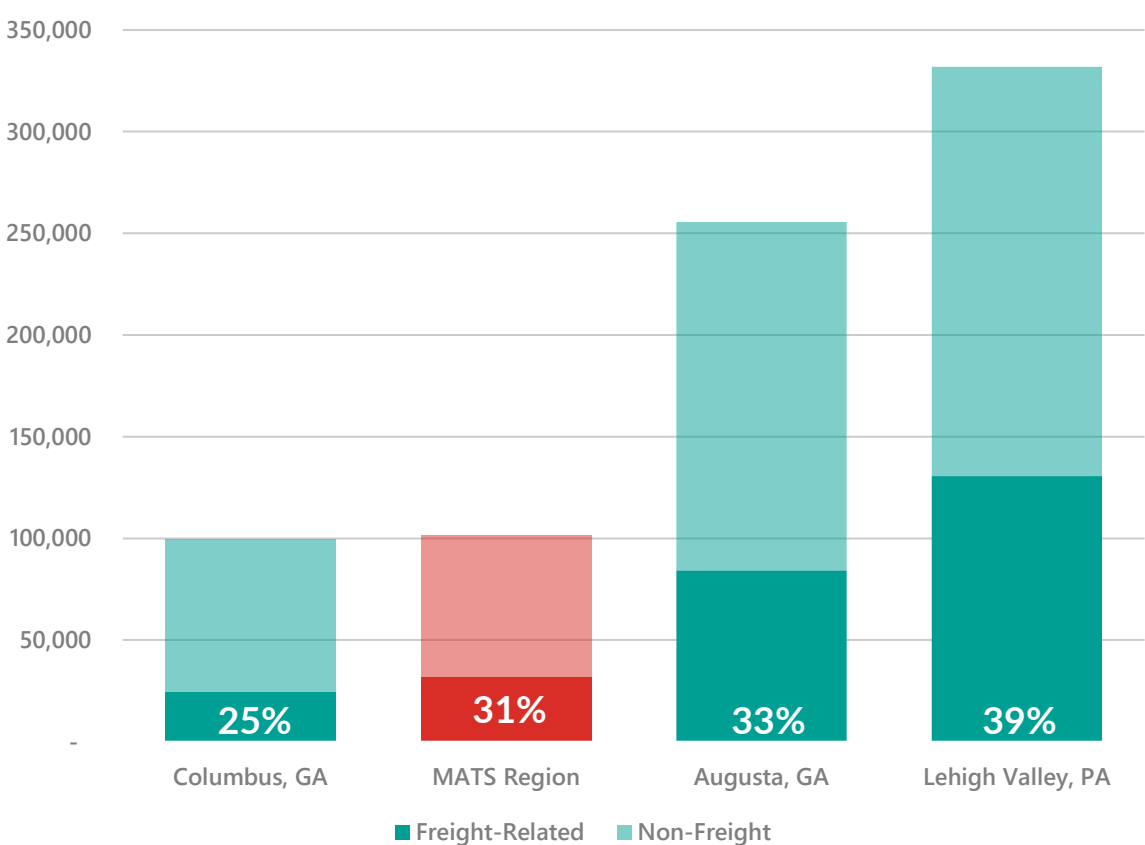


Comparable Regions

- The MATS Region has a similar proportion of freight-related employment to selected peers within Georgia and nationwide
- Employment growth overall and in freight-related industries has outpaced Columbus, GA but lagged behind aspirational peers in Augusta, GA and Lehigh Valley, PA

REGION	CAGR 2010-2023	
	ALL INDUSTRIES	FREIGHT INDUSTRIES
Columbus, GA	-0.25%	-0.04%
MATS	0.37%	0.81%
Augusta, GA	0.84%	1.60%
Lehigh Valley, PA	1.23%	2.54%

EMPLOYMENT IN FREIGHT-RELATED INDUSTRIES, 2023



Key Takeaways

- Freight-related industries make up a significant portion of MATS Region GRP (57%) and employment (31%)
- The region is highly specialized in several freight-related clusters, primarily in the Manufacturing industry
- Employment in freight-related industries, particularly Transportation and Warehousing and Manufacturing, has grown substantially since 2010
- Existing freight-related real estate inventory is dominated by Warehouse buildings, but most new investment in recent years has been related to custom facilities for large manufacturers



Stakeholder Engagement

Stakeholder Advisory Committee

- Anticipate five (5) meetings in total
- Align with key project milestones
- Opportunity to supplement team analysis and findings, provide input and feedback
- Combination of in-person and online



Project Website

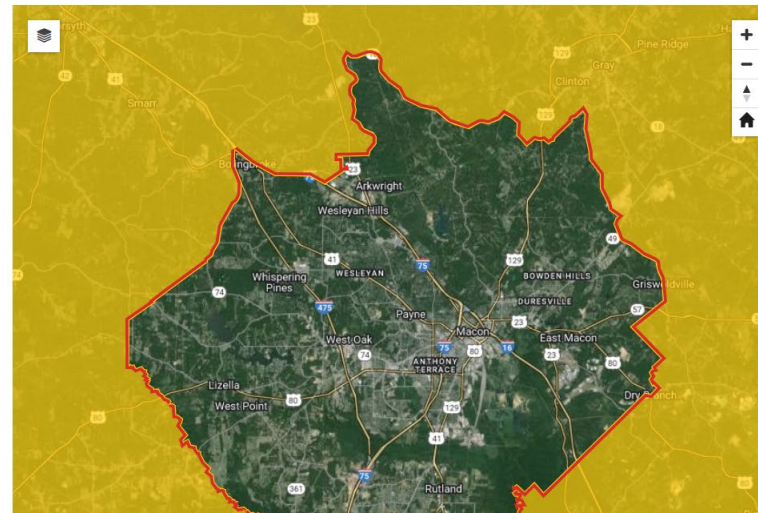
- Feedback solicited via [Social Pinpoint](#)
- Provides information on the planning effort, a general project schedule and scope, as well as an interactive map of the study area
- To be updated periodically throughout project timeline
- Can be accessed via MATS website as well
- Will link to GIS StoryMap

Project Introduction

The Macon-Bibb Planning & Zoning Commission is in the process of completing a Regional Freight Network Plan for the Macon Area Transportation Study Metropolitan Planning Organization (MATS MPO). A map outlining the plan's study area (the MATS MPO) can be found below. The timeline to the right lists key tasks involved in the study. Each of the tasks will help MATS and the project team assess regional freight needs, strengths, challenges and opportunities through the year 2050.

Please check back here regularly for updates on the study as well as opportunities to provide input! Or to submit a comment to the project team, please see the "Leave a Comment" page in located in the website menu.

Project Study Area



[Visit the MATS Homepage Here!](#)

Project Home

[Leave a Comment](#)

[Study Materials](#)

[MATS Stakeholder Survey](#)

Project Timeline

★ Stakeholder Group Establishment/Engagement

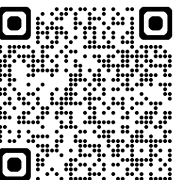
A project-specific stakeholder committee will be formed to help inform the study with on-the-ground perspectives. The stakeholder committee is to include (but is not limited to) local governments within the MATS MPO, the GDOT Offices of Planning and Intermodal, the Middle Georgia Regional Commission, the Middle Georgia Regional Airport, 21st Century Partnership, and the FHWA.

★ Freight Needs Assessment & Analysis

During this stage the project team will examine and analyze trends in freight data around the Macon MPO. Including existing bottlenecks and barriers for future growth.

★ Land Use Assessment

During this phase of the project, the team will analyze existing concentrations of freight intensive land uses - and the role that it plays in successful freight movement.



Online Survey

- Accessible via project website:
greshamsmithplanning.com/mats-2050-freight-plan
- [Click here](#) to take the survey and distribute to your employees and others in your networks!
- Questions are specific by role – truck and delivery drivers, business and property owners, freight operators, policymakers and public officials

Open

Stakeholder Survey

General Questions

What freight industry trends are you noticing/tracking? (Select all that apply.)

- ☐ Technology/automation
- ☐ Investments in intermodal facilities
- ☐ Continued economic growth in Georgia
- ☐ New investments in existing infrastructure
- ☐ Other (Please specify)

What do you see as the biggest challenges facing freight and goods movement in the area? (Select all that apply.)

- ☐ Workforce challenges
- ☐ Lack of funding
- ☐ Supply chain challenges
- ☐ Meeting increased demand
- ☐ Other (Please specify)

What do you see as the biggest opportunities facing freight and goods movement in the area? (Select all that apply.)

- ☐ New investments in existing infrastructure
- ☐ Investments in intermodal facilities
- ☐ Continued economic growth in Georgia
- ☐ Technology/automation
- ☐ Other (Please specify)



Stakeholder Interviews

- Project team is interviewing stakeholders on current and future freight needs and solutions
 - Macon Bibb County Industrial Authority
 - Greater Macon Chamber of Commerce
- Others in progress!
- Will help to inform the freight needs assessment and economic market analysis

Who else should we be talking to?



Additional Discussion & Next Steps



Next Steps

- Continue freight needs assessment
 - Regional freight profiles
 - Commodity flow analysis
- Continue land use assessment
- Continue economic development market assessment
- Proceed with stakeholder interviews
- Survey ongoing – will analyze feedback to inform assessments

**Next advisory committee meeting
tentatively end of August**



Thank you

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